

Town of Oro Valley Apartment Study

Fall 2020



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Executive Summary

Purpose

The purpose of this study is to provide information to assist the governing body in evaluating Oro Valley's housing mix and upcoming apartment proposals. The study is the first step in conducting a housing inventory (Action item 135) to meet the goals and policies of the Town's voter-approved General Plan, *Your Voice, Our Future*. An independent consulting firm, the Real Estate Consulting Group (RECG) was commissioned by the Town to conduct the study.

RECG specializes in market research, analysis and projections. To assist both the public and private sector, the firm publishes a monthly report highlighting different trends in office, commercial, residential and multi-family development. With over a decade of experience, RECG collected pertinent data to identify the demand and supply for apartments in Oro Valley and objectively analyze some of the common concerns.

Methodology

RECG used both quantitative and qualitative data to complete the study. Data was collected from both national and local sources (e.g. US Census and OVPD). Town staff provided RECG with the current and anticipated amount of apartment proposals. Recurring concerns previously raised by residents during public meetings recently and over the years were also provided by Town staff to identify the scope of the study.

Research questions

The Town is currently processing five requests for new apartment communities and at least two more are anticipated. According to Town staff, several concerns have been voiced by residents during the public meeting process for these and previous applications for apartments. These concerns include the following:

- Perception that the market for apartments is minimal.
- Perception that existing apartment communities in Oro Valley struggle with high vacancy rates.
- Concern that apartment communities deteriorate to problematic levels over time.
- Concerns regarding impacts of perceived young and low-income tenants to the community.
- Concerns that local schools do not have the capacity to support apartment communities in Oro Valley.
- Perception that apartments significantly increase an area's crime rates.
- Perception that more crimes are reported in apartment communities than in single-family subdivisions.

The study aims to evaluate these common perceptions and concerns by objectively analyzing data to answer the following research questions as they relate to Oro Valley:

Section 1: What is the demand for and supply of apartments?

Section 2: Do apartments command significantly lower rents over time due to deterioration?

Section 3: What are the ages and income of renters in comparison to homeowners?

Section 4: Do local schools have the capacity to support more apartments?

Section 5: Do apartments significantly contribute to overall crime?

Section 6: Is crime higher in apartment communities than single-family residential subdivisions?

Key findings

Section 1: What is the demand for and supply of apartments?	
FINDINGS	<ul style="list-style-type: none"> Oro Valley apartment demand is high and experiencing the strongest rent growth in the region. Oro Valley’s current apartment supply is limited (15.3% of all housing units) yet performing well.
SUPPORTING DATA (pg. 9-10)	<ul style="list-style-type: none"> The average monthly rent is \$1,123, a 29% growth in the last five years during the same time as the inventory grew by 27%. Oro Valley is projected to add 200 - 250 new households a year along with 175 – 200 new jobs. An estimated annual housing demand of 200 – 400 new housing units (single-family and multifamily combined) is projected through 2050. Oro Valley is roughly 85% built-out with a limited supply of vacant land. Oro Valley currently has 12 apartment communities totaling 2,961 units. The vacancy rate is 5.4% implying that properties are generally fully occupied. In the last decade, the Town of Oro Valley has grown to a population of 45,184. Downsizing empty nesters and early career professionals are increasing demand for apartments, which provide affordable, flexible and low-maintenance options for both groups.
Section 2: Do apartments command significantly lower rents over time due to deterioration?	
FINDINGS	<ul style="list-style-type: none"> Oro Valley’s older properties (20-36 years old) continue to report low vacancy rates and rising rent. This indicates that age of a property does not necessarily mean decline in quality, appearance, safety or performance.
SUPPORTING DATA (pg. 11-12)	<ul style="list-style-type: none"> The vacancy rates for older apartments (1984-1999) have historically been low or declining even as new apartment communities open. The average rent of older communities (1984-1999) is roughly 23% lower than the average rent reported for newer communities. However, three of the older communities are still designated Class A properties and the other five are designated Class B properties (older yet well maintained). Class B apartment communities reported an average rent growth of 34%. The average rent for the oldest apartment complex (36 year old), Sundown Village, is \$1,228. This is slightly higher than the Town’s average apartment rent of \$1,123. For comparison, the average rent for the Sunrise Ridge Apartments, located in the Catalina Foothills and built in 1980 (40 years old) is \$1,623. This indicates apartment communities in desirable locations maintain a high performance.
Section 3: What are the income levels and age of renters in comparison to homeowners?	
FINDINGS	Oro Valley renters (living in all housing types) have higher incomes than renters in the region and are generally either young professionals or empty nesters.
SUPPORTING DATA	<ul style="list-style-type: none"> Combined, the 55+ age groups represent 42% of the renter population compared to the 25-44 age groups, which represents 37% of the renter population.

(pg. 13-14)	<ul style="list-style-type: none"> Oro Valley renter households have a median income of \$51,092 (higher than the median income for teachers, police officers, librarians and other administrative professionals). This is lower than Oro Valley’s median household income of \$76,046 yet comparable to the Tucson region’s median household income of \$51,037. The average monthly rent of \$1,123 in Oro Valley is substantially higher than the average rent in Tucson of \$846. Although apartments in Oro Valley are more expensive than others in the region, they provide a more affordable alternative to homeownership for empty nesters and young professionals. Apartments are roughly \$1,057 less per month than the average monthly mortgage, which in 2019 was \$2,180.
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Section 4: Do local schools have the capacity to support more apartments?

FINDING	Renter household sizes tend to be smaller, with fewer children, resulting in less of an impact on schools than new single-family homes.
SUPPORTING DATA (pg. 15)	<ul style="list-style-type: none"> Renter households in Oro Valley have an average household size of 2.2 people per household, compared to 2.3 people per owner occupied households. 90% of Oro Valley’s apartments are 1- 2 bedroom units. School capacity is verified through all rezoning applications. Per Town staff, this is the typical process for most apartment requests.

Section 5: Do apartments significantly contribute to overall crime?

FINDING	Crimes from apartment communities do not significantly contribute to overall crime.
SUPPORTING DATA (pg. 16)	<ul style="list-style-type: none"> Over the past five years, apartments have accounted for 13% of all Part I (more serious offenses) residential and non-residential crimes in Oro Valley.

Section 6: Is crime higher in apartment communities compared to single-family residential subdivisions?

FINDING	Crimes in apartment communities are proportionate to crimes occurring in single-family residential subdivisions.
SUPPORTING DATA (pg. 17)	<ul style="list-style-type: none"> Per unit, apartment communities had less crimes reported than single-family homes when compared over a 6 month period.

Conclusion

Based on the projected population growth, limited amount of vacant land and performance of existing apartment communities (for specifics, see key findings above), the market for apartments is high in Oro Valley. It is expected to remain high as long as these three factors are prevalent.

This report finds the common concerns surrounding apartment communities are not substantiated by the data in Oro Valley. In general, apartments provide more compact housing and also contribute density needed to support existing and future retail development. Additionally, apartments help to diversify housing opportunity to meet the demands of a diverse population, ranging from young professionals to empty nesters. Based on the income and age of renters in Oro Valley, it is reasonable to surmise that residents are renting by choice. Overall high-density housing could contribute to broadened housing options able to contribute to viability of commercial nodes, support projected employment growth and accommodate current and future residents in Oro Valley.

Introduction

The purpose of this study is to provide information to assist the governing body in evaluating Oro Valley’s housing mix and upcoming apartment proposals. An independent consulting firm, the Real Estate Consulting Group (RECG) was commissioned by the Town to conduct the study. With over a decade of experience, RECG collected pertinent data to identify the demand and supply for apartments in Oro Valley and objectively analyze some of the common concerns.

The study is the first step in conducting a housing inventory to meet the goals and policies of the General Plan. The *Your Voice, Our Future* General Plan (ratified by the voters in 2016) envisions a *community with a wide range of services, amenities, shopping and dining opportunities and housing types that meet the needs of current and future residents* (Community Goal D) by *supporting the development of diverse housing types* (Policy CC.7). To meet this goal and policy, the General Plan specifies the conducting of a housing inventory to *plan for the present and future housing needs of the community, while considering changes in demographics and overall growth* (Action 135).

Background information

In the last decade, the Town of Oro Valley has grown to a population of 45,184 and evolved from a predominantly snowbird/retiree destination to a maturing community for all ages. In 2017, Real Estate Consulting Group projected annual housing demand of 200 – 400 new housing units (single-family and multifamily combined), based on projected population growth through 2050. Oro Valley is also roughly 85% built out within its current town limits.

Oro Valley has 12 apartment communities totaling 2,961 units. Multi-family realtor investors created a nationally recognized scale to classify apartment communities (see descriptions on next page). Seven of the communities in Oro Valley are designated Class A, or properties of the highest quality that are well-located, new or recently renovated. The balance of the communities are Class B, or properties that are older (some over 30 years old), renovated yet in good locations (see chart below).

Oro Valley Apartment Inventory				
Property Name	Address	Year Built	Units	Class
The Canyons at Linda Vista	9750 North Oracle Road	2016	228	A
Encantada at Steam Pump	11177 North Oracle Road	2014	288	A
Villas at San Dorado	10730 North Oracle Road	2014	274	A
Oro Vista	1301 West Lambert Lane	2006	138	A
Golf Villas	10950 North La Canada Drive	1999	231	A
The Place at Rock Ridge	10333 North Oracle Road	1995	319	A
La Reserve Villas	10700 North La Reserve Drive	1988	240	A
Pusch Ridge	9901 North Oracle Road	1998	144	B
Overlook at Pusch Ridge	8851 North Oracle Road	1986	424	B
Saddle Ridge	450 West Cool Drive	1985	248	B
Catalina Crossing	9095 North Oracle Road	1985	97	B
Sundown Village	8215 North Oracle Road	1984	330	B

Class	Characteristics			
A	Luxury and less than 10 years old	Desirable locations	High rents and low vacancy rates	Professionally managed
B	Older yet renovated	Good locations	Medium-high rents and normal vacancy rates	May or may not be professionally managed
C	Over 20 years old and in need of renovations	Less desirable locations	Low rents and low-income renters	May or may not be professionally managed

Apartment developments are permitted in the Multi-family (R-6), Residential-Service (R-S) and Commercial-Neighborhood (C-N) zoning districts as well as various Planned Area Developments (PADs). The Town currently has roughly 95.5 acres of vacant land zoned for apartments. The sites range in sizes with an average size of 5 acres. For comparison and context, the average size of the existing apartment communities is 12 acres.

Vacant land zoned for apartments	
Zoning district	Acres
Multi-family (R-6)	28.9
Residential-service (r-s)	14.7
Commercial- neighborhood (c-n)	18.8
Capella PAD	33.0
La reserve pad	6.6
Rancho vistoso pad	3.5
Total	95.5

The Town is currently processing five apartment proposals and anticipates more due to the lack of available vacant land and the projected population growth. Since many of the remaining parcels zoned for apartments are small, most of these proposals require a rezoning request.

Apartment requests currently under review		
Project name or location	Acres	Units
Oro Vista Apartments- Lambert and La Cañada*	.9	19
Linda Vista Luxury Rentals- northwest corner of Linda Vista and Oracle*	10	64
1 ST and Tangerine	13	167
Oro Valley Village Center (previously known as the Oro Valley Marketplace)	19	602
Westward Look- Ina and Westward Look Drive	13	184
Anticipated requests		
Project location /name	Acres	Units
HSL on Oracle and El Conquistador	18	304
Property on the southwest corner of Linda Vista and Oracle	20	408
* Existing zoning allows apartments		

Methodology

RECG used quantitative and qualitative data to complete the study. Data was collected from both national and local sources. Sources include:

- U.S. Census – American Factfinder 2013-2018 projections
- National Multi-Family Housing Council
- Real Data (Real Estate Analysis)
- Economic and Business Research Center (EBRC - Eller College of Management, University of Arizona)
- Pima Association of Governments
- Oro Valley Police Department
- CityProtects.com
- Apartments.com

Town staff provided RECG with the applicable General Plan policies, zoning information and the current and anticipated amount of apartment proposals. Recurring concerns previously raised by residents during public meetings recently and over the years were also provided by Town staff to identify the scope of the study.

Data limitations

To identify the age and income levels of apartment dwellers, the U.S Census American Community Survey (ACS) was the only source available. The U.S. Census defines renters as *occupied units which are not owner occupied, whether they are rented for cash rent or occupied without payment of cash rent*. Based on this definition, the data includes renters of all housing types (single-family, duplexes, apartments, etc.).

For comparing crime incidents reported in single-family residential subdivisions, CityProtects.com was the only source available. The crime incidents collected are limited to a 6-month timeframe and the subdivisions chosen were based on size and location.

Structure of the report

The data analysis portion of the report is divided into sections to answer the six research questions:

- Section 1: What is the demand for and supply of apartments?
- Section 2: Do apartments command significantly lower rents over time due to deterioration?
- Section 3: What are the ages and income of renters in comparison to homeowners?
- Section 4: Do local schools have the capacity to support more apartments?
- Section 5: Do apartments significantly contribute to overall crime?
- Section 6: Is crime higher in apartment communities than single-family residential subdivisions?

Each section includes the applicable data, a detailed analysis and the sources of information.

Data Analysis

Section 1: What is the current demand and supply of apartments?

Demand analysis

Apartment demand is driven by population and employment growth, changes in effective income, housing affordability, and home ownership patterns. The most recent population and economic forecasts for the Tucson Metropolitan Statistical Area (MSA) obtained from the Economic and Business Research Center (EBRC - Eller College of Management, University of Arizona) are included in the Appendix (Exhibit 1) to provide insight into market conditions over the next several years. An analysis of Oro Valley’s population and employment growth, housing affordability and home ownership patterns follows below.

Population growth

The region’s population growth is fueled by job growth and retirees. EBRC is forecasting population growth at .7-.8% per year between 2020 and 2022 (see Exhibit 1 in Appendix). This represents an additional 23,300 new residents in Pima County. At 2.48 people per household, this equates to 9,395 new households over three years, 2,349 new households a year. **Oro Valley’s population is forecasted to grow faster than the County as a whole, by 1.4% per year between 2020 and 2022, resulting in 200 – 250 new households per year.**

Employment growth

EBRC is forecasting employment growth at 1 - 1.3% per year from 2020 to 2022, which represents an additional 13,100 jobs in the region. **Oro Valley is forecasted to add 528 jobs during that same time period (see following chart). Most of these new jobs are being filled by young professionals aged 23 – 38 (millennials) who have a higher propensity to rent vs. buy, therefore there is an anticipated increased demand for more rental options.** Apartments provide an affordable, flexible and low-maintenance housing option attractive to this age group and those new to an area.

Figure A7: Oro Valley Employment Projections

	Multi Year Increments>>>							10-Year Increase
	Base 2018	1 2019	2 2020	3 2021	4 2022	5 2023	10 2028	
Industrial	1,008	1,024	1,040	1,057	1,074	1,091	1,181	173
Commercial / Retail	3,296	3,349	3,403	3,457	3,513	3,569	3,864	568
Institutional	507	515	523	531	540	549	594	87
Office & Other Services	5,831	5,924	6,019	6,115	6,213	6,313	6,834	1,003
Total Jobs	10,642	10,812	10,985	11,160	11,340	11,522	12,473	1,831

Source: Town of Oro Valley Economic Development

According to Oro Valley’s Comprehensive Economic Development Strategy, the Town has a primary goal to attract or expand a minimum of 20-30 primary employers, with a corresponding addition of 3,000-4,500 new primary job opportunities, over the next 10 years. Oro Valley’s job growth will be stimulated by the opening of an Arizona State University campus set for the next two to three years and the University Of Arizona School Of Veterinary Medicine. In addition, Roche Tissue Diagnostics purchased an additional 54 acres to expand their 147,000 square foot facility. In general, the young professionals that

staff these companies need affordable housing options close to work and walkable centers, with restaurants, entertainment and gathering spaces. As a result, employers report that many of their employees are living south of Oro Valley and commuting daily--there are around 8,000 commuters, according to Pima Association of Governments (PAG).

Home ownership patterns

Demographic shifts are driving demand for apartment living throughout the US and Pima County. Specifically, millennials who are moving into their first home, and empty nesters who are downsizing. The increase in Tucson MSA renter households is consistent with demographic shifts reported since the housing crisis. The percentage of renter households has increased from 35.8% to 39.7%. According to the U.S. Census, 25% of households in Oro Valley are renter households (includes all housing types). A low supply of existing home inventory (less than two months) is further driving demand for apartments.

Housing affordability

Apartments provide an affordable alternative to home buying. The total monthly payment for the average priced home sold in Oro Valley in 2019 was \$2,180, whereas the average market rent for an apartment in Oro Valley was \$1,123. Therefore, apartments provide an affordable housing option for young professionals/early career employees as well as down-sizing empty nesters and retirees.

Supply analysis

A review of the apartment fundamentals, such as occupancy and rent rates, indicates how well apartment properties are performing. Oro Valley currently has 12 apartment communities with a total of 2,961 units, 790 of which were completed in the last five years. This represents a 4.3% market share of the Tucson market apartment units. Oro Valley has 19,295 housing units and apartments represent a 15.3% share of all Oro Valley housing units.

Oro Valley's existing apartment properties are performing well with both an increase in occupancy and rents. As new Class A luxury apartments have come to market, existing apartment properties have been renovated in order to continue to attract tenants. **Rents have increased 29% over the past five years and occupancy has increased from 93% to 96%.**

Section 2: Do apartments command significantly lower rents over time due to deterioration?

Oro Valley apartment properties' performance

Performance indicators among Oro Valley's apartment properties are very strong. Vacancy is low--the vacancy rate has dropped from 7.33% to 5.42% over the last five years (see Exhibit 3 and 4 in Appendix), and rents are up—average apartment rents have increased from \$872 (\$0.93 per square foot) to \$1,123 (\$1.15 per square foot), an increase of \$251 per month (see Exhibit 2 in Appendix). This is higher than the average rent in Tucson of \$846. Additionally, as the new properties have opened up at higher rents, owners of older properties have made improvements to their properties and increased rents accordingly.

Oro Valley Apartment Performance - Average Rents							
Property Name	Year Built	Units	2015	2016	2017	2018	2019
The Canyons at Linda Vista	2016	228		\$1,130	\$1,214	\$1,219	\$1,357
Encantada at Steam Pump	2014	288	\$1,229	\$1,209	\$1,287	\$1,355	\$1,342
Villas at San Dorado	2014	274	\$1,264	\$1,337	\$1,222	\$1,279	\$1,385
Oro Vista	2006	138	\$923	\$1,047	\$1,038	\$1,214	\$1,215
Golf Villas	1999	231	\$929	\$998	\$1,190	\$1,172	\$1,364
Pusch Ridge	1998	144	\$828	\$846	\$856	\$882	\$916
The Place at Rock Ridge	1995	319	\$833	\$896	\$961	\$1,042	\$1,065
La Reserve Villas	1988	240	\$847	\$998	\$923	\$1,279	\$1,147
Overlook at Pusch Ridge	1986	424	\$648	\$700	\$730	\$810	\$861
Saddle Ridge	1985	248	\$613	\$671	\$730	\$791	\$822
Catalina Crossing	1985	97	\$661	\$718	\$735	\$735	\$773
Sundown Village	1984	330	\$818	\$728	\$750	\$947	\$1,228
Average Market Rent			\$872.09	\$939.83	\$969.67	\$1,060.42	\$1,122.92

Source: Real Data

The average rent of older apartment communities (1984-1999) is roughly 23% lower than the average rent reported for newer apartment communities. However, three of the older apartment communities are still designated Class A and the other five are designated Class B (older yet well maintained).

Oro Valley's oldest apartment community, Sundown Village reports an average rent of \$1,228. This is slightly higher than the average rent for the Town of \$1,123. Older apartment communities in the Catalina Foothills (36-40 years old) also report high average rents. Sunrise Ridge Apartments, built in 1980, have an average rent of \$1,623. This shows apartment communities in desirable locations maintain a high performance over time. Rising rents and low vacancy rates indicate that age of a property does not necessarily mean decline in quality, appearance, safety or performance.

Catalina Foothills (Swan and Sunrise intersection) Average Rents			
Property Name	Address	Year Built	Average Rent
Elevation Apartments	4500 E. Sunrise Drive	1975	\$920
Sunrise Ridge Apartments	4901 E. Sunrise Drive	1980	\$1,623
Foothills Apartments	5441 N. Swan	1984	\$921

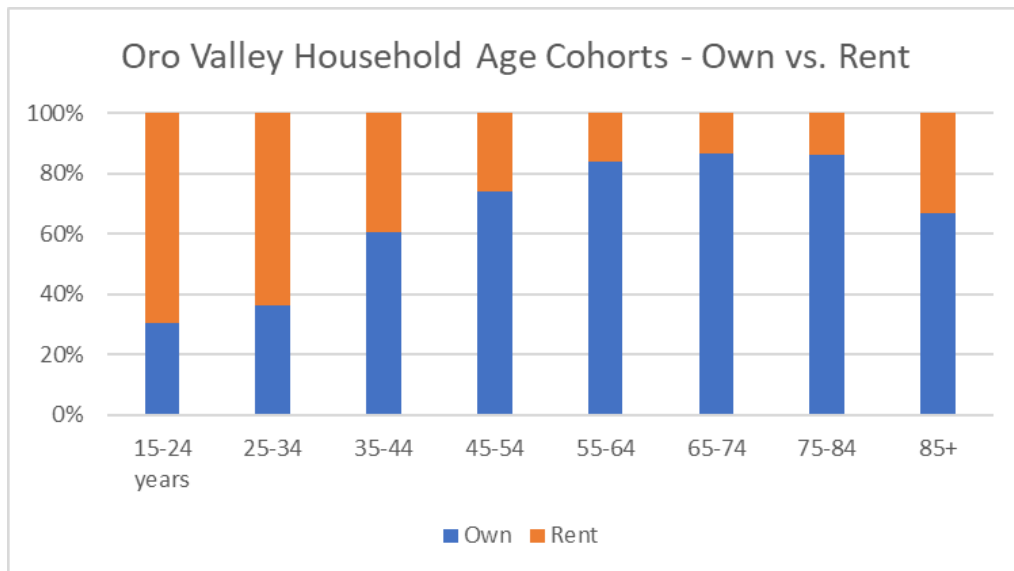
Compared with the Tucson market, the vacancy rate is similar (4.3% vs. 5.4%), however, average rents in Oro Valley are 35% higher than the market as a whole. Based on the low vacancy rates and increasing rent, Oro Valley's apartment properties performance is strong. This indicates that the new properties have been properly absorbed and demand exists for additional new units.

Section 3: What are the ages and income of renters in comparison to homeowners?

Renter demographics and housing characteristics

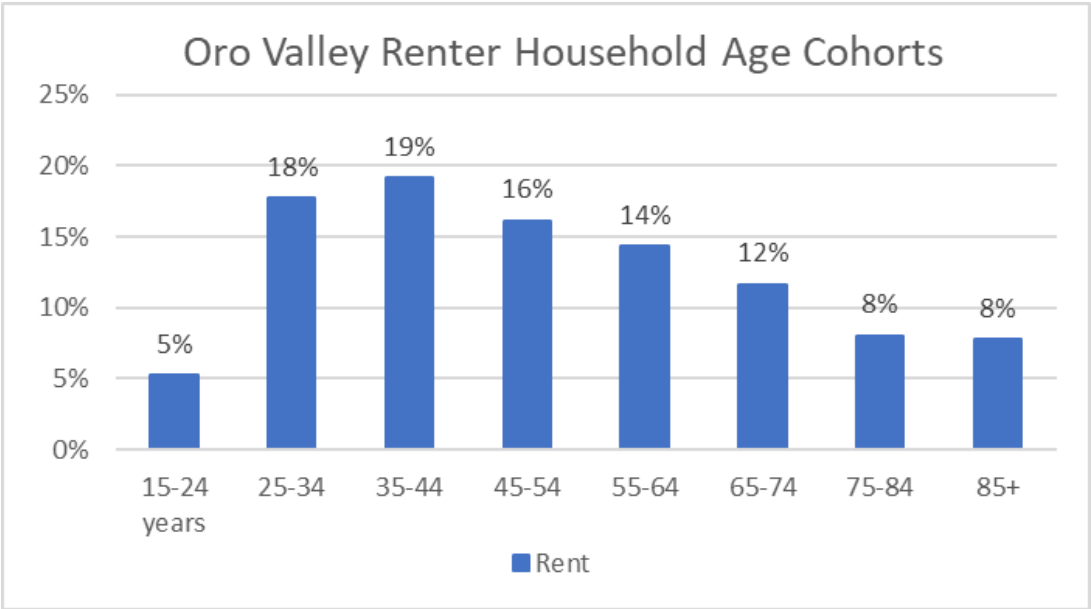
A review of demographic data will provide insights regarding the make-up and household characteristics of the renter (of all housing types) population in Oro Valley. As a whole, Oro Valley residents are older—with a median age of 53, due to a larger number of snowbird/retiree residents—than Pima County with a median age of 39. Oro Valley’s renter households, which make up 25% of the total households, have above average household incomes. They have a median household income of \$51,092, which is more than the median salary for teachers, police officers librarians and other administrative professionals. Although it is lower than the Oro Valley median household income of \$76, 484, it is comparable to the Tucson region’s median household income of \$51,037.

In comparing renter and homeowner households by age cohort in the following chart, renters account for a larger percentage of households in the younger age groups. Renters represent an average of 67% of households under 34 years of age vs. homeowners at 33%. In the 35-44 age cohort, homeownership increases and renters drop to 39% of the total households. Renter households decline further within the 45-84 age cohorts, then increase to 33% in the 85+ age cohort, due to elderly residents moving into assisted living facilities. It is anticipated that in the coming years, the percentage of renter households will continue to increase as rising home prices make homeownership less attainable to first time homebuyers.



Source: ACS 5-year Estimates, 2013-2018

The following chart illustrates the percentage of renter households by age group. As expected, more renter households are in the younger age groups, with the 25-34 age cohort at 18% and the 35-44 age cohort at 19%, then the percentage tapers off in the older age groups. However, the 55+ age groups still account for 42% of renter households in Oro Valley.



Source - ACS 5-year Estimates, 2013-2018

Section 4: Do local schools have the capacity to support more apartments?

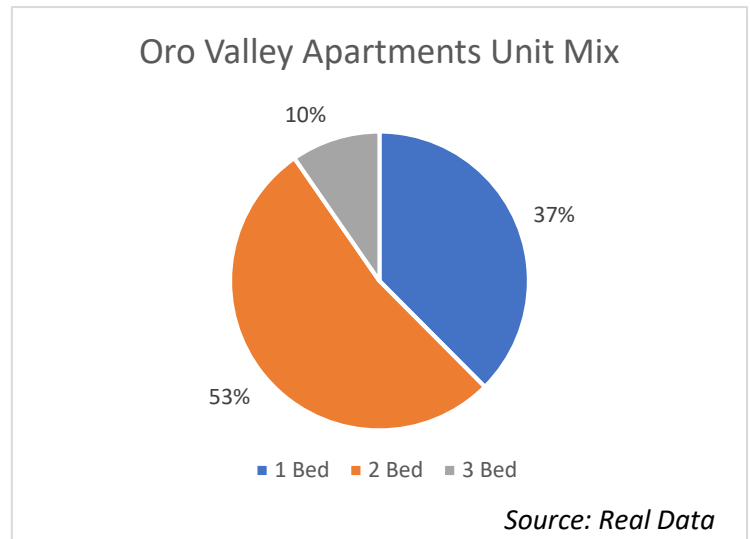
Household and apartment unit size

According to the National Multifamily Housing Council's tabulations of 2018 American Community Survey microdata, nationally, renter households are made up of singles at 62%, married couples at 20% and roommates at 18%. Only 22% of renter households have children in the home vs. 37% of all U.S. households that have children in the home.

When looking at the number of members in renter households, 77% of households have two people or less in the home (see Exhibits 5 and 6 in Appendix). On average, 100 single-family owner-occupied houses include 51 school-age children. By contrast, apartments are attractive to single people, couples without children, and empty nesters, which is why 100 apartment units average just 31 children.

The disparity is even greater when considering only new construction: 64 children per 100 new single-family houses vs. 29 children per 100 new apartment units. More affluent apartment renters have even fewer children (12 children per 100 households for residents earning more than 120 percent of the area median income, AMI), while less wealthy residents earning less than 80 percent of AMI still have fewer children (37 per household) than single-family homes.

This holds true in Oro Valley, where in renter occupied housing units, the average household size is 2.2, compared with the average household size for owner occupied housing units at 2.3 people per household. **The implication is that renter households tend to be smaller with fewer children. For that reason, 90% of apartment units built in Oro Valley are either one bedroom or two bedroom units.** (See Unit Mix chart below and Exhibit 7 in the Appendix). With fewer children in the household, new renter households will have less of an impact on local schools than new single family development.



School capacity

Per Town staff, rezoning applications (typical process for apartment proposals) must show surrounding schools' ability to accommodate the anticipated amount of future students. Applicants are required to provide a letter from the respective public school district (Amphitheatre) to verify this requirement is met.

Section 5: Do apartments significantly contribute to overall crime in Oro Valley?

Higher-density development and total crime

Oro Valley has a reputation for being one of the safest cities in Arizona, a reputation earned by the Oro Valley Police Department’s commitment to excellence. According to Safewise’s Safest Cities report, Oro Valley ranked #1 in safety in their 2019 Top 20 Safest Cities in Arizona report.

According to an analysis of Oro Valley Police Department Part I (more serious crimes) crime data from 2015 to 2019 in the following chart, crimes that occurred within apartment communities represented an average of 13% of all residential and non-residential Part I crimes in Oro Valley. As apartment units represent 15.3% of the total housing units, the data indicates that less crime occurs within apartment properties than within the community as a whole. Additionally, the Oro Valley Police Department provides crime prevention to apartment complexes by educating tenants and managers. See Exhibits 8-12 in the Appendix for the detailed data by apartment community by year.

Oro Valley Part One Crime 2015 - 2019													
		Homicide	Sexual Assault	Robbery	Aggravated Assault	Residential Burglary	Non-Residential Burglary	All Burglary Attempts	Larceny/ Theft	Motor Vehicle Theft	Stolen Motor Vehicle Recovered	Arson	Totals
2019	Apartment Totals	0	2	0	0	4	2	1	57	4	1	0	71
	Oro Valley	1	8	3	10	26	10	12	289	27	4	0	390
2018	Apartment Totals	0	1	0	3	3	0	1	40	8	1	0	57
	Oro Valley	0	6	3	11	33	20	11	335	18	6	0	443
2017	Apartment Totals	0	0	1	3	2	4	0	38	3	0	0	51
	Oro Valley	0	2	4	12	47	27	7	366	15	4	1	485
2016	Apartment Totals	0	0	1	3	6	1	2	40	2	1	0	56
	Oro Valley	0	4	7	23	40	23	9	369	28	4	1	508
2015	Apartment Totals	0	1	0	2	9	1	2	37	3	0	0	55
	Oro Valley	0	6	8	16	49	18	14	327	23	8	0	469

Section 6: Is crime higher in apartment communities compared to single-family residential subdivisions?

Higher-density development and single-family residential crime

In efforts to compare crime from apartments with single-family homes, data was also collected from Cityprotect.com over a 6 month (9/1/19-2/29/20) period. As shown in the chart below, there were 10 incidents of crime within the 12 apartment communities totaling 2,961 units compared with 59 incidents of crime within 16 single-family home communities totaling 2,958 units. These subdivisions were chosen to capture a similar amount of units and account for different areas of Town. As shown in the chart below, crime incidents in apartments accounted for 15% of the total incidents reported.

The assertion that apartments in Oro Valley are hot spots for crime was not substantiated through this exercise.

Comparison of Crime (9/1/2019-2/29/2020)			
Type	Property Name	Units	Total Crime*
Apartment	The Canyons at Linda Vista	228	1
Apartment	Encantada at Steam Pump Ranch	288	0
Apartment	Villas at San Dorado	274	0
Apartment	Oro Vista	138	1
Apartment	Golf Villas	231	1
Apartment	The Place at Rock Ridge	319	1
Apartment	La Reserve Villas	240	1
Apartment	Pusch Ridge	144	1
Apartment	Overlook at Pusch Ridge	424	1
Apartment	Saddle Ridge	248	1
Apartment	Catalina Crossing	97	0
Apartment	Sundown Village	330	2
	TOTAL	2,961	10
Single-family	The Villages at La Canada	500	2
Single-family	Honeybee Canyon Estates	44	0
Single-family	Copper Ridge I	49	4
Single-family	Mira Vista	60	4
Single-family	Coyote Ridge	109	0
Single-family	Rancho Del Oro	43	3
Single-family	Monterra Knolls	169	3
Single-family	Sun City Vistoso	277	3
Single-family	Canada Ridge	126	4
Single-family	Canada Hills	57	4
Single-family	Maracay at Vistoso (Center Pointe)	343	4
Single-family	The Overlook at Rancho Vistoso	179	5
Single-family	Rancho Catalina	221	7
Single-family	Copper Creek I	511	11
Single-family	Lambert Lane	120	2
Single-family	Shadow Mountain Estates	150	3
	TOTAL	2,958	59

* Crime includes property crimes, assault, sexual offenses and violent crimes.

Appendix

Exhibit 1 – Economic Forecast vs. Apartment Forecast

Tucson MSA Forecast*	2018	2019	2020	2021	2022
Personal Income (\$ mil)	44,665.7	47,073.4	49,262.6	51,618.8	54,070.6
% Chg from Year Ago	4.9%	5.4%	4.7%	4.8%	4.7%
Retail Sales (\$ mil)	14,443.6	15,202.3	15,807.1	16,347.8	17,001.9
% Chg from Year Ago	5.4%	5.3%	4.0%	3.4%	4.0%
Total Nonfarm Employment (000s)	381.5	387.2	392.3	396.5	400.3
% Chg from Year Ago	1.2%	1.5%	1.3%	1.1%	1.0%
Population (000s), July 1st estimates	1,034.2	1,042.1	1,050.1	1,057.8	1,065.4
% Chg from Year Ago	0.8%	0.8%	0.8%	0.7%	0.7%
Residential Permits (units)	4,404	4,342	4,301	4,086	3,966
% Chg from Year Ago	-2.0%	-1.4%	-0.9%	-3.0%	-1.0%


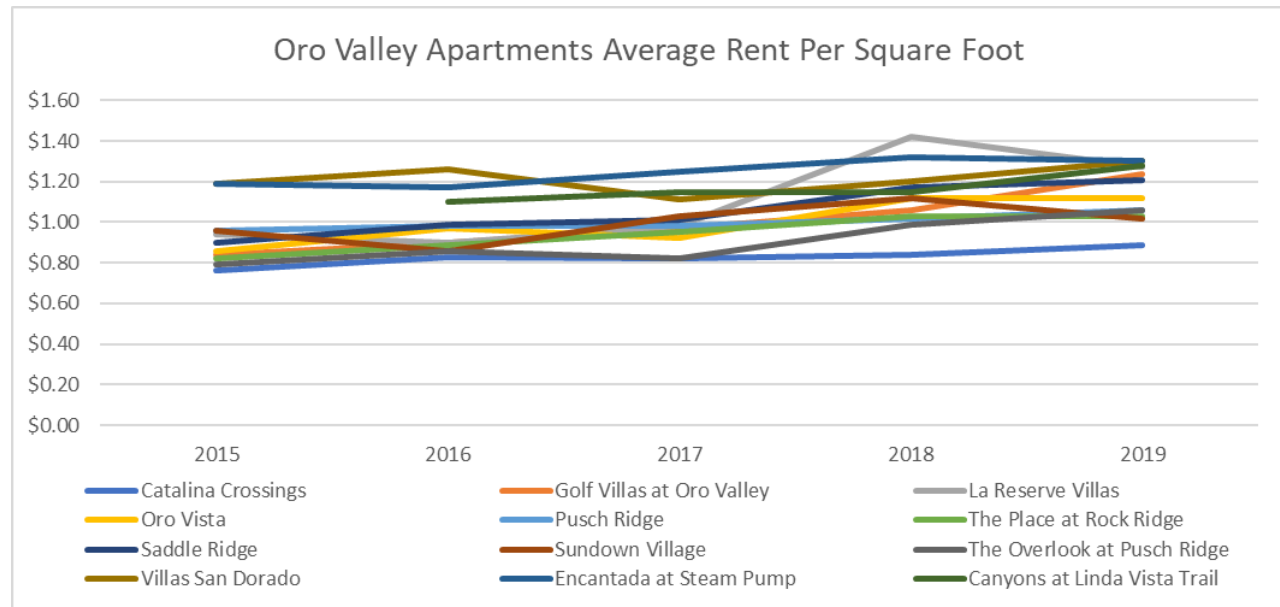
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Exhibit 2- Apartments Average Rent Per Square Foot



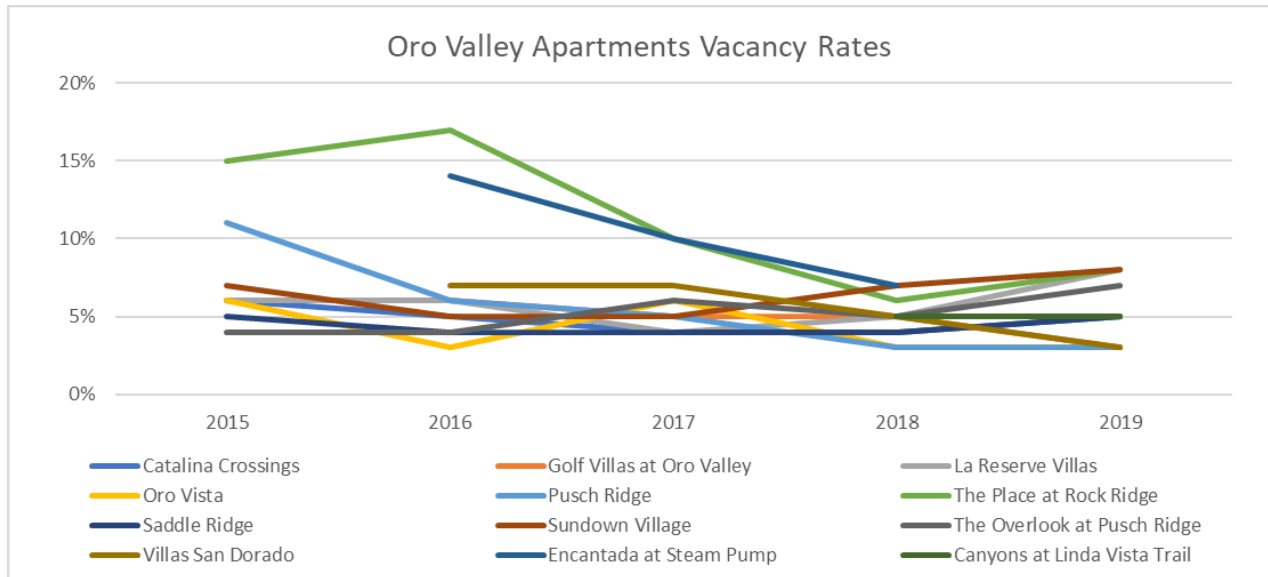
Source: Real Data

Exhibit 3-Apartment Vacancy Rates

Oro Valley Apartment Performance - Vacancy							
Property Name	Year Built	Units	2015	2016	2017	2018	2019
The Canyons at Linda Vista	2016	228	n/a	84%	26%	5%	5%
Encantada at Steam Pump	2014	288	61%	36%	14%	10%	7%
Villas at San Dorado	2014	274	23%	7%	7%	5%	3%
Oro Vista	2006	138	6%	3%	6%	3%	3%
Golf Villas	1999	231	6%	6%	5%	5%	3%
Pusch Ridge	1998	144	11%	6%	5%	3%	3%
The Place at Rock Ridge	1995	319	15%	17%	10%	6%	8%
La Reserve Villas	1988	240	6%	6%	4%	5%	8%
Overlook at Pusch Ridge	1986	424	4%	4%	6%	5%	7%
Saddle Ridge	1985	248	5%	4%	4%	4%	5%
Catalina Crossing	1985	97	6%	5%	4%	4%	5%
Sundown Village	1984	330	7%	5%	5%	7%	8%
Average Annual Vacancy		2,961	7%	6%	6%	5%	5%

Source: Real Data

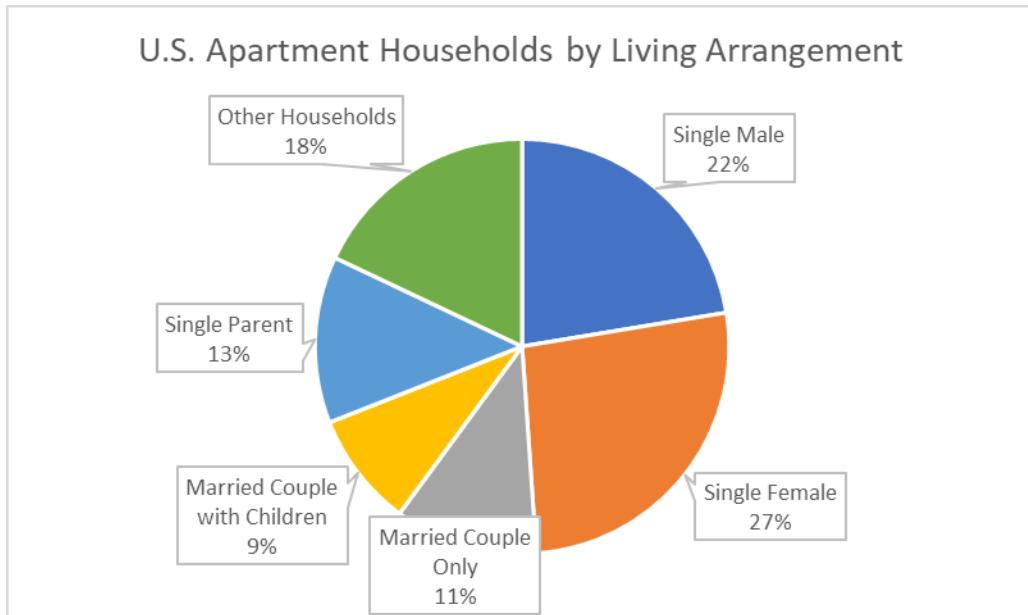
Note: The average annual vacancy does not include properties in lease up period (the time period for a newly available property to attract tenants and reach stabilized occupancy).



Source: Real Data

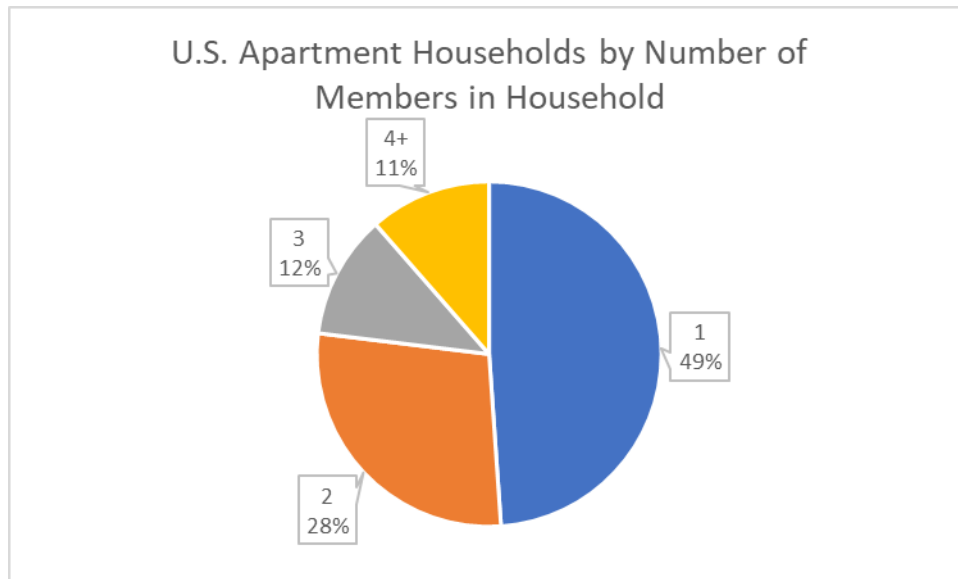
Note: The average annual vacancy does not include properties in lease up period (the time period for a newly available property to attract tenants and reach stabilized occupancy).

Exhibit 4- Living Arrangements



Source: NMHC tabulations of 2018 American Community Survey microdata, US Census Bureau

Exhibit 5- Number of Members in a Household



Source: NMHC tabulations of 2018 American Community Survey microdata, US Census Bureau

Exhibit 6- Apartment Unit Mix

Oro Valley Apartments Unit Mix				
Property Name	Units	1 Bed	2 Bed	3 Bed
The Canyons at Linda Vista	228	76	124	28
Encantada at Steam Pump	288	114	144	30
Villas at San Dorado	274	88	136	36
Oro Vista	138	32	82	24
Golf Villas	231	50	140	41
The Place at Rock Ridge	319	96	192	31
La Reserve Villas	240	64	148	28
Pusch Ridge	144	48	68	28
Overlook at Pusch Ridge	424	192	231	0
Saddle Ridge	248	136	112	0
Catalina Crossing	97	66	19	12
Sundown Village	330	144	160	26
Totals	2961	1106	1556	284

Source: Real Data

Exhibit 7- Part I Crime 2019

Oro Valley Apartment-Wide Part One Crime - 2019												
Apartment Complexes	Homicide	Sexual Assault	Robbery	Aggravated Assault	Residential Burglary	Non-Residential Burglary	All Burglary Attempts	Larceny/ Theft	Motor Vehicle Theft	Stolen Motor Vehicle Recovered	Arson	Totals
Canyons at Linda Vista Trail	0	0	0	0	1	0	0	4	0	0	0	5
Catalina Crossing	0	0	0	0	0	0	0	2	0	0	0	2
Encantada at Steam Pump	0	0	0	0	0	0	0	4	1	0	0	5
Golf Villas	0	0	0	0	0	0	0	0	0	1	0	1
La Reserve Villas	0	0	0	0	0	0	0	1	0	0	0	1
Oro Vista	0	0	0	0	0	0	0	1	0	0	0	1
Overlook at Pusch Ridge	0	1	0	0	1	0	0	11	1	0	0	14
Pusch Ridge	0	0	0	0	1	0	0	2	0	0	0	3
Rock Ridge	0	0	0	0	1	2	0	7	2	0	0	12
Saddle Ridge	0	0	0	0	0	0	0	4	0	0	0	4
Sundown Village	0	1	0	0	0	0	1	21	0	0	0	23
Villas at San Dorado	0	0	0	0	0	0	0	0	0	0	0	0
Apartment Totals	0	2	0	0	4	2	1	57	4	1	0	71
Oro Valley	1	8	3	10	26	10	12	289	27	4	0	390

Source: Town of Oro Valley Police Department

Exhibit 8- Part I Crime 2018

Oro Valley Apartment-Wide Part One Crime - 2018												
Apartment Complexes	Homicide	Sexual Assault	Robbery	Aggravated Assault	Residential Burglary	Non-Residential Burglary	All Burglary Attempts	Larceny/ Theft	Motor Vehicle Theft	Stolen Motor Vehicle Recovered	Arson	Totals
Canyons at Linda Vista Trail	0	0	0	0	0	0	0	4	0	0	0	4
Catalina Crossing	0	0	0	1	0	0	0	4	0	0	0	5
Encantada at Steam Pump	0	0	0	0	0	0	0	5	1	0	0	6
Golf Villas	0	0	0	0	0	0	0	3	0	0	0	3
La Reserve Villas	0	0	0	0	0	0	0	1	2	0	0	3
Oro Vista	0	0	0	0	0	0	0	2	0	0	0	2
Overlook at Pusch Ridge	0	1	0	0	1	0	1	7	1	0	0	11
Pusch Ridge	0	0	0	0	0	0	0	2	0	0	0	2
Rock Ridge	0	0	0	0	0	0	0	0	1	0	0	1
Saddle Ridge	0	0	0	0	0	0	0	5	1	0	0	6
Sundown Village	0	0	0	2	2	0	0	7	2	1	0	14
Villas at San Dorado	0	0	0	0	0	0	0	0	0	0	0	0
Apartment Totals	0	1	0	3	3	0	1	40	8	1	0	57
Oro Valley	0	6	3	11	33	20	11	335	18	6	0	443

Source: Town of Oro Valley Police Department

Exhibit 9- Part I Crime 2017

Oro Valley Apartment-Wide Part One Crime - 2017												
Apartment Complexes	Homicide	Sexual Assault	Robbery	Aggravated Assault	Residential Burglary	Non-Residential Burglary	All Burglary Attempts	Larceny/ Theft	Motor Vehicle Theft	Stolen Motor Vehicle Recovered	Arson	Totals
Canyons at Linda Vista Trail	0	0	0	0	0	0	0	1	0	0	0	1
Catalina Crossing	0	0	0	0	1	0	0	2	0	0	0	3
Encantada at Steam Pump	0	0	0	1	0	0	0	1	0	0	0	2
Golf Villas	0	0	0	0	0	0	0	2	0	0	0	2
La Reserve Villas	0	0	0	0	0	0	0	4	0	0	0	4
Oro Vista	0	0	0	0	0	0	0	0	0	0	0	0
Overlook at Pusch Ridge	0	0	1	1	0	1	0	12	1	0	0	16
Pusch Ridge	0	0	0	0	0	0	0	1	1	0	0	2
Rock Ridge	0	0	0	1	0	3	0	3	0	0	0	7
Saddle Ridge	0	0	0	0	0	0	0	6	0	0	0	6
Sundown Village	0	0	0	0	0	0	0	6	1	0	0	7
Villas at San Dorado	0	0	0	0	1	0	0	0	0	0	0	1
Apartment Totals	0	0	1	3	2	4	0	38	3	0	0	51
Oro Valley	0	2	4	12	47	27	7	366	15	4	1	485

Source: Town of Oro Valley Police Department

Exhibit 10- Part I Crime 2016

Oro Valley Apartment-Wide Part One Crime - 2016												
Apartment Complexes	Homicide	Sexual Assault	Robbery	Aggravated Assault	Residential Burglary	Non-Residential Burglary	All Burglary Attempts	Larceny/ Theft	Motor Vehicle Theft	Stolen Motor Vehicle Recovered	Arson	Totals
Canyons at Linda Vista Trail	0	0	0	0	0	0	0	0	0	0	0	0
Catalina Crossing	0	0	0	0	0	0	0	4	0	0	0	4
Encantada at Steam Pump	0	0	0	1	1	0	1	5	0	0	0	8
Golf Villas	0	0	0	0	0	0	0	8	2	0	0	10
La Reserve Villas	0	0	0	0	1	0	0	3	0	0	0	4
Oro Vista	0	0	0	0	0	0	0	1	0	0	0	1
Overlook at Pusch Ridge	0	0	0	0	2	0	1	10	0	0	0	13
Pusch Ridge	0	0	0	0	0	0	0	1	0	0	0	1
Rock Ridge	0	0	0	1	1	1	0	3	0	0	0	6
Saddle Ridge	0	0	0	0	1	0	0	1	0	1	0	3
Sundown Village	0	0	1	1	0	0	0	2	0	0	0	4
Villas at San Dorado	0	0	0	0	0	0	0	2	0	0	0	2
Apartment Totals	0	0	1	3	6	1	2	40	2	1	0	56
Oro Valley	0	4	7	23	40	23	9	369	28	4	1	508

Source: Town of Oro Valley Police Department

Exhibit 11- Part I Crime 2015

Oro Valley Apartment-Wide Part One Crime - 2015												
Apartment Complexes	Homicide	Sexual Assault	Robbery	Aggravated Assault	Residential Burglary	Non-Residential Burglary	All Burglary Attempts	Larceny/ Theft	Motor Vehicle Theft	Stolen Motor Vehicle Recovered	Arson	Totals
Canyons at Linda Vista Trail	0	0	0	0	0	0	1	1	0	0	0	2
Catalina Crossing	0	0	0	0	2	0	0	3	0	0	0	5
Encantada at Steam Pump	0	0	0	0	0	0	0	6	0	0	0	6
Golf Villas	0	0	0	0	0	0	0	0	0	0	0	0
La Reserve Villas	0	0	0	0	0	0	0	2	0	0	0	2
Oro Vista	0	0	0	0	0	1	0	0	0	0	0	1
Overlook at Pusch Ridge	0	0	0	2	1	0	1	7	0	0	0	11
Pusch Ridge	0	0	0	0	1	0	0	0	1	0	0	2
Rock Ridge	0	0	0	0	0	0	0	0	0	0	0	0
Saddle Ridge	0	1	0	0	0	0	0	7	0	0	0	8
Sundown Village	0	0	0	0	4	0	0	8	2	0	0	14
Villas at San Dorado	0	0	0	0	1	0	0	3	0	0	0	4
Apartment Totals	0	1	0	2	9	1	2	37	3	0	0	55
Oro Valley	0	6	8	16	49	18	14	327	23	8	0	469

Source: Town of Oro Valley Police Department