



Metro

Duplex

Internal conversion

ADU: Addition

ADU: Detached

Skinny houses

Cottage cluster

Regional housing demand analysis

December 2023



Technical work and analysis: Developing the urban growth report

- Buildable land inventory (BLI)
- Regional forecast
- Capacity analysis
- Employment trends and site characteristics
- Housing needs analysis
- Residential readiness analyses
- Draft urban growth report (UGR)

City expansion proposals

- Letters of interest
- Expansion proposals

2040 planning and development grants available

Metro Council decision

- Consider Metro staff and advisory group recommendations
- Public hearings
- Policy direction
- Final decision

Nov 2022 - July 2024

Dec 2023 - April 2024

Aug 2024 - Dec 2024



Engagement

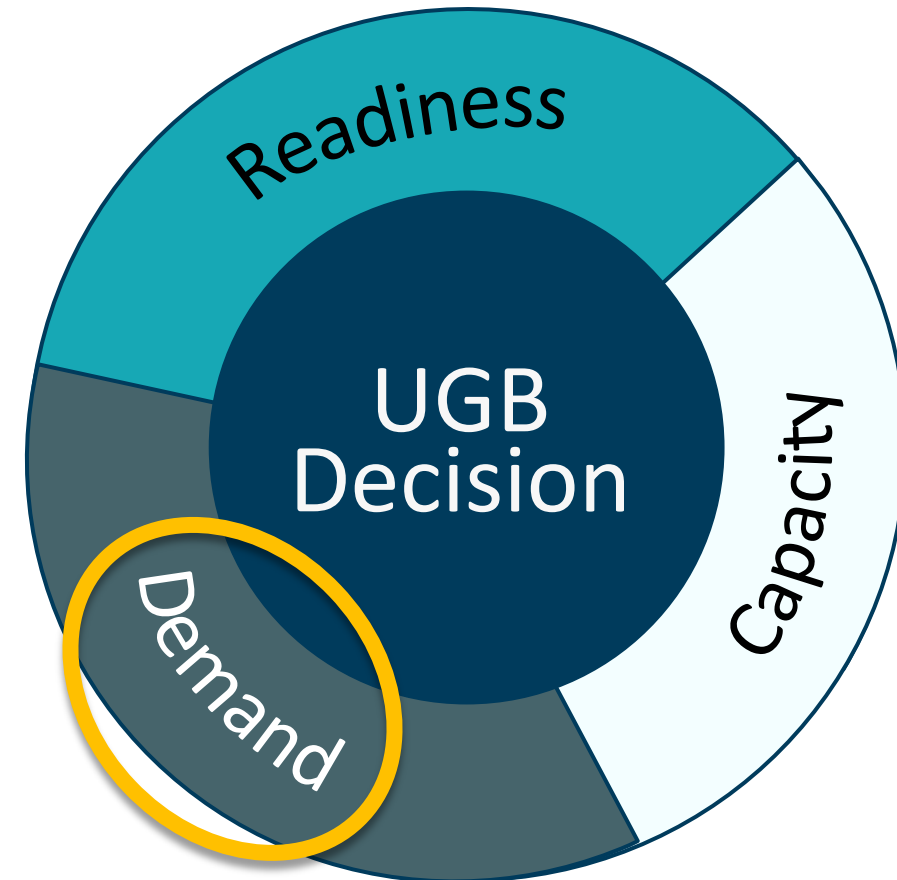
- MTAC
- MPAC
- CORE
- Land Use Technical Advisory Group
- Jurisdictional outreach
- Urban growth report roundtable
- Youth cohort
- Interest group presentations

2024 urban growth management decision timeline

Housing demand in the UGR

The Urban Growth Report (UGR) is a decision-making tool for the Metro Council

Demand is one of the three main components of the analysis in the UGR



DEMAND

How much space is in demand inside the UGB?

-

BUILDABLE LAND

How much room for growth is there inside the UGB?

=

UGB
EXPANSION

Is more land is needed because of household and employment growth?

Mentimeter Quiz: What do you know about housing in the region?

Go to [menti.com](https://www.menti.com) and
use code: 8943 1281

Activity: Where have you lived?

- The sticky notes in front of you represent broad categories of homes
- Think about the types of homes you have lived in throughout your life
- On individual sticky notes, **write down your approximate age** when you lived in those homes (for example, if you lived in a single-family home with roommates from ages 20-27, take a pink sticky note and write “20-27” or “20s”)
- Add a **star** to your sticky note if you were a renter during that time
- Add a **plus sign** to your sticky note if your household size, including yourself, was 3 people or more

The housing needs analysis will include assessments of existing and future needs



EXISTING

Housing needs for those experiencing houselessness & Historic underproduction - what is the backlog of housing units to date?



FUTURE

20-year forecast

Regional population forecast & Household forecast



Housing need (by type) estimated by:



household likelihood to rent vs. own



income



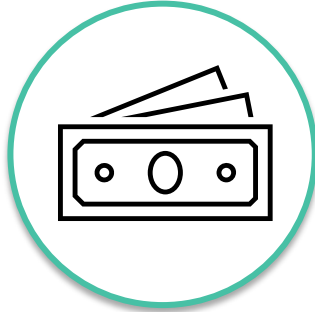
household life stage

A variety of housing types can meet a variety of housing needs

Household size



Income



Accessibility



Desire to rent or own



Life stage



Townhouses

Apartment

Duplex

Quadplex

ADU

Existing housing needs

- For those experiencing homelessness
- From historic underproduction (the backlog)
- Second homes



Existing housing needs

Current underproduction

- **What it is:** the units that have not been produced to date but are needed to accommodate current population.
- **How it's measured:** Ratio of housing units needed for each household, based on Census data

Units for people experiencing homelessness

- **What it is:** the units needed to house those who are currently experiencing homelessness and are otherwise unaccounted for in the data.
- **How it's measured:** local data on individuals experiencing homelessness reported to OHCS and HUD

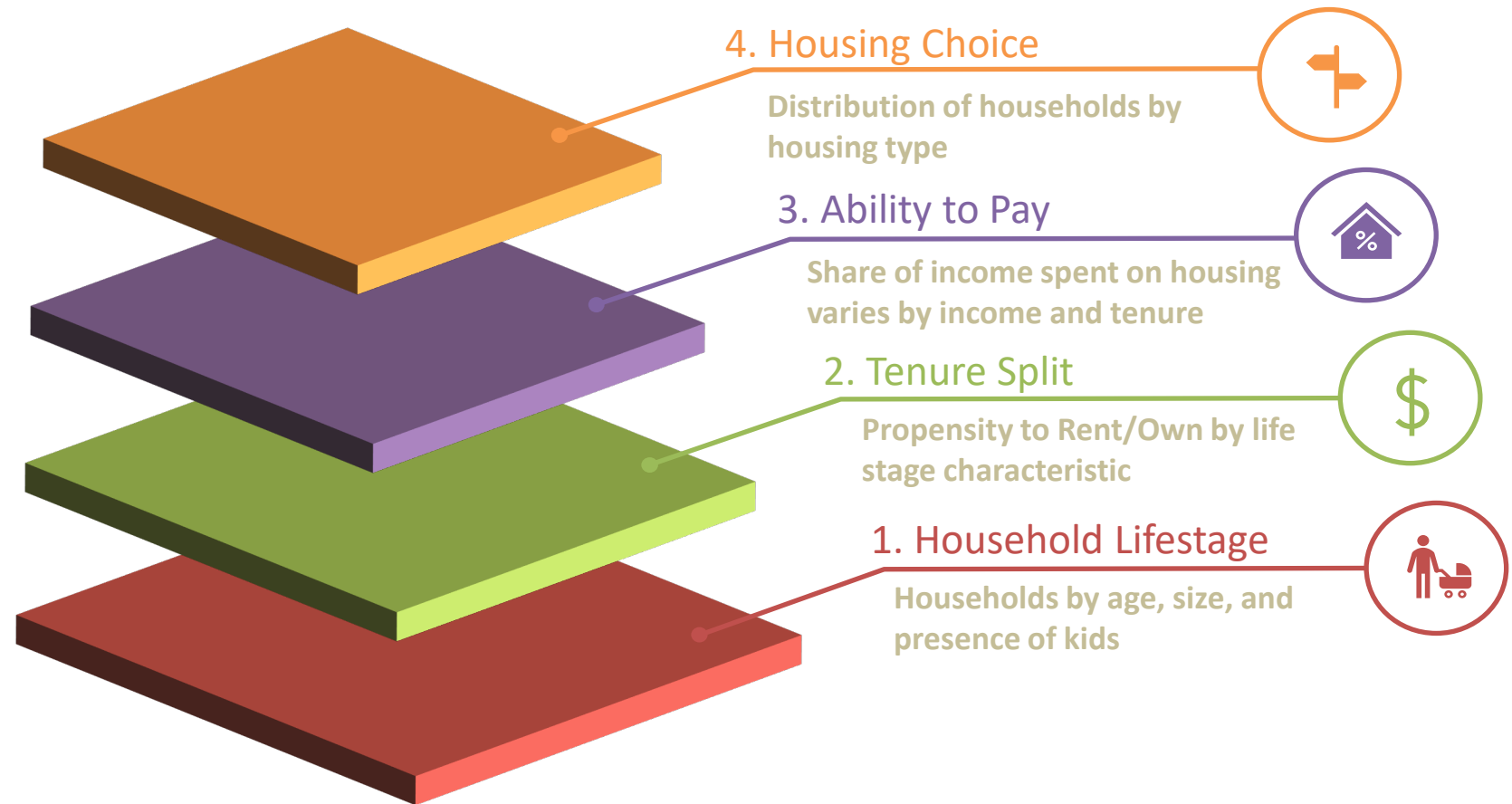
Future housing needs

Uses Metro regional household forecast as an input:

- Age (of householder)
- Household Size (number of people)
- Presence of Kids (<18)
- Income

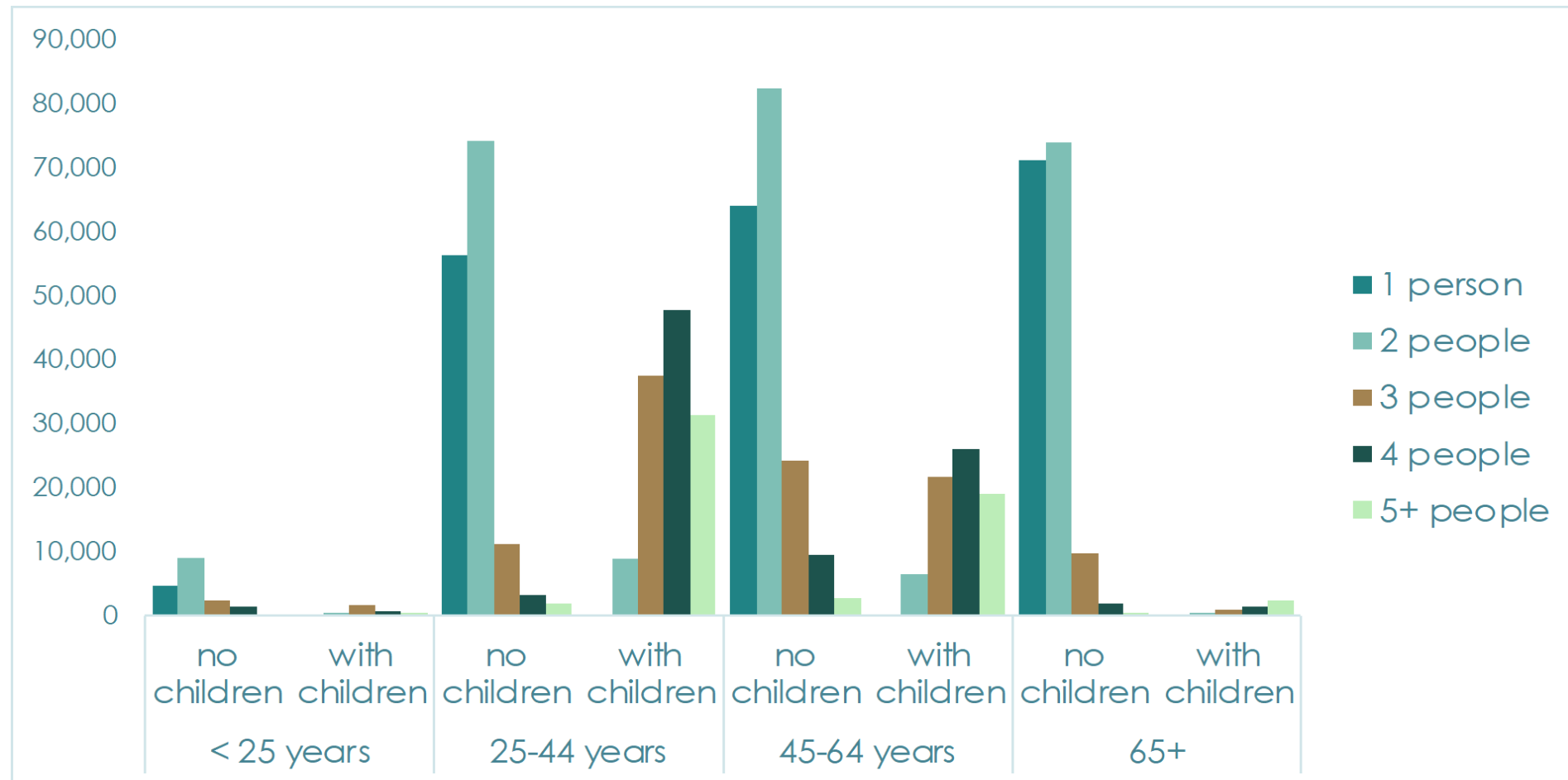
Housing demand model overview

The demand methodology combines forecasts of households by socioeconomic characteristics (from Metro) with factors impacting housing choice to estimate housing need by housing typology.



Household life stages

Household characteristics vary with age



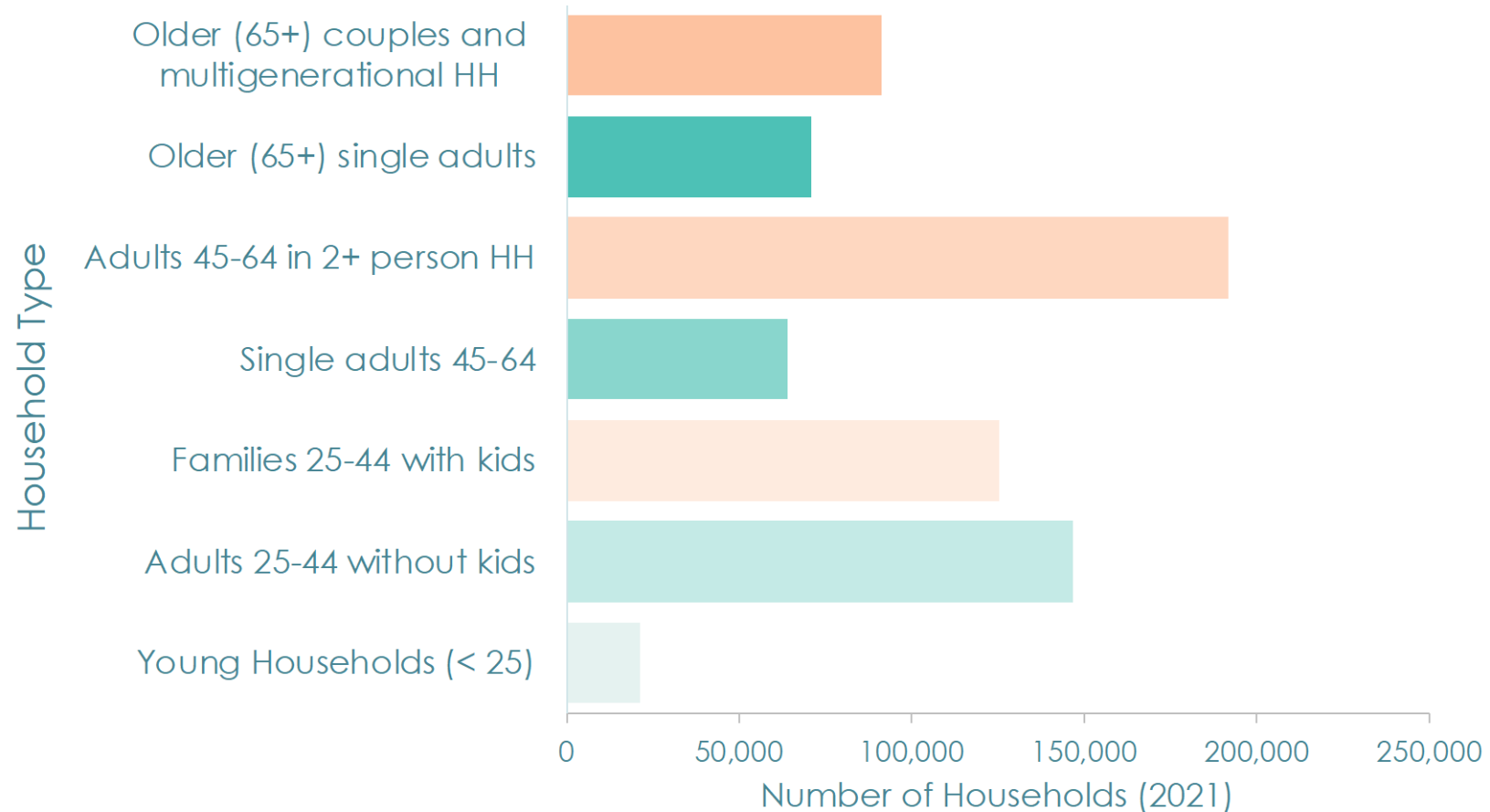
Household life stages

Example grouping of households to life stage categories

Household size & Presence of Children	Household Lifestage			
	< 25 years	25-44 years	45-64 years	65+
1 person, no children	Young households	Adults without kids (couples, singles/divorced, roommates)	Single adults	Older single adults
2+ people, no children			Couples, families with older kids, multigenerational HH, older roommates	Older couples, multigenerational households
2+ people with child(ren)		Families with kids		

Household Life stages: Current Distribution

We group households based on life stage to create larger groups that tend to make similar housing choices



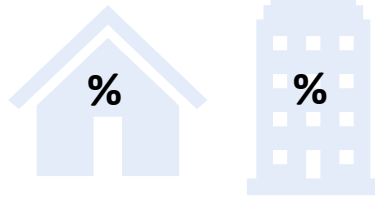
Housing demand modeling: Methodology

HOUSEHOLD
CHARACTERISTICS
(AGE, SIZE, KIDS)

Age 25-44
**2+ person HH
with children**
\$100k - \$150k

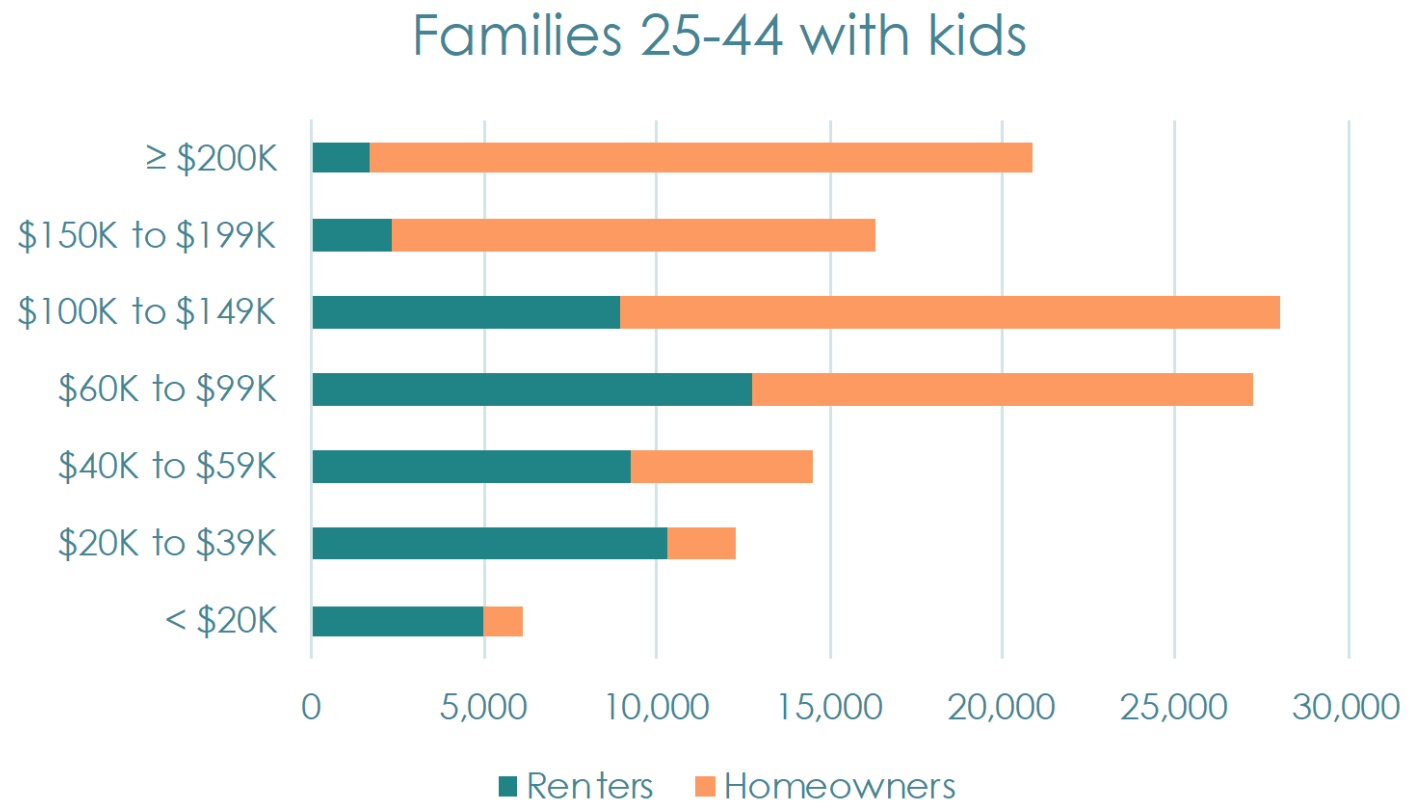


TENURE SPLIT
(RENT VS. OWN)



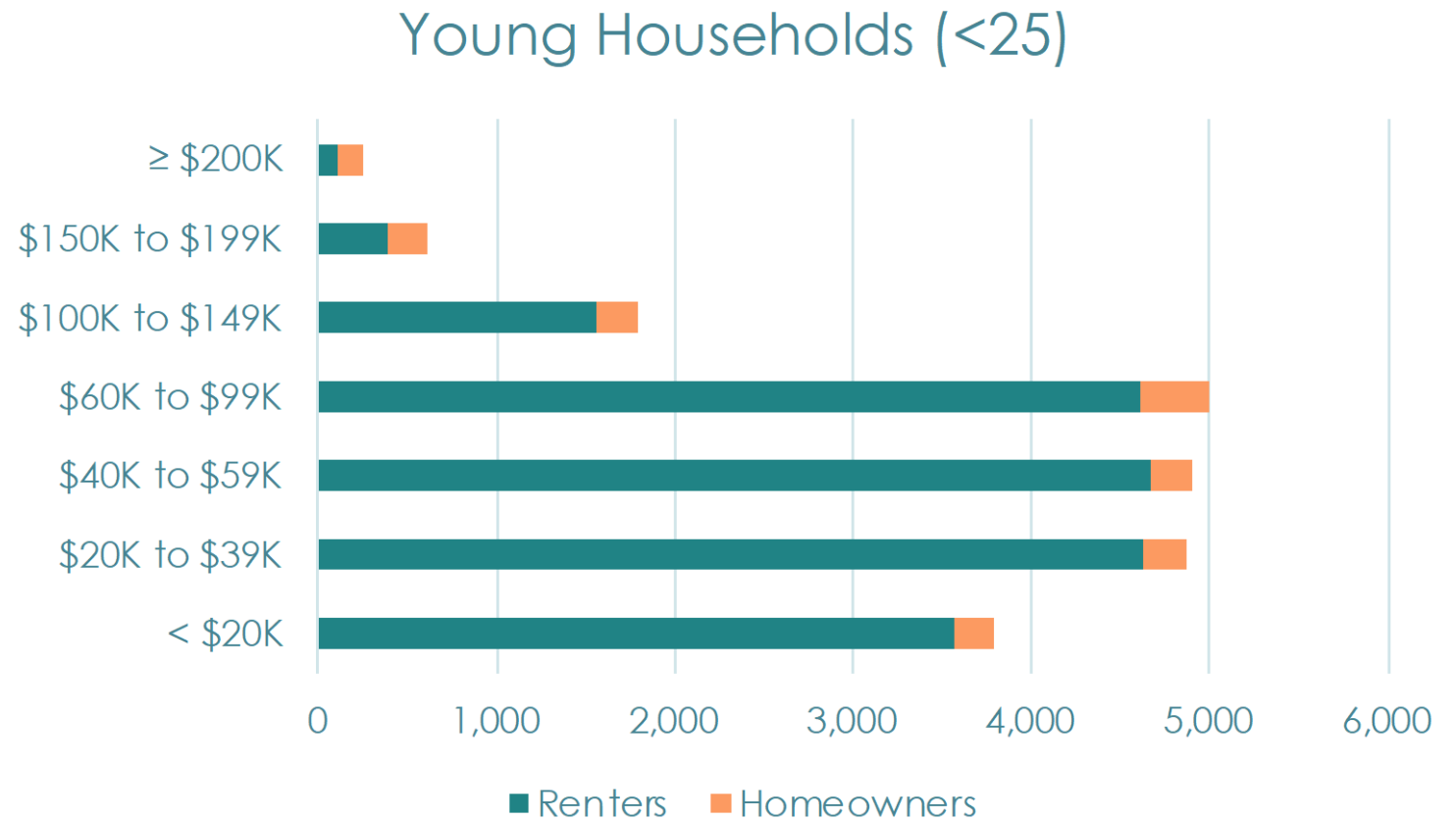
Housing Demand Model Methodology

Example: For families 25-44 with kids, income makes a big difference in renting vs. owning



Housing Demand Model Methodology

However, most Young Households rent, except for a few high-income households



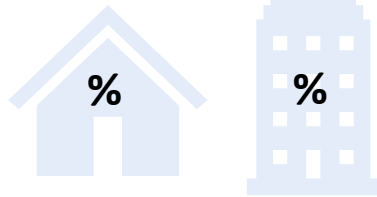
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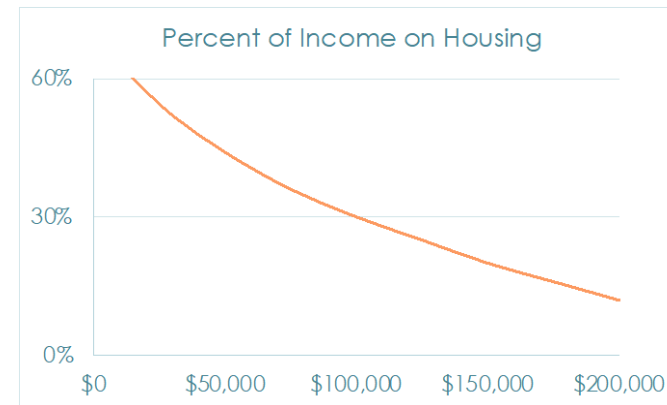
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TENURE SPLIT
(RENT VS. OWN)



WILLINGNESS /
ABILITY TO PAY

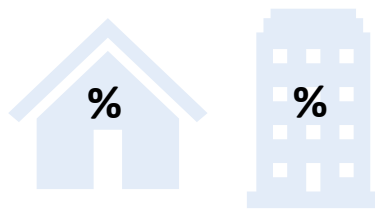


Housing demand modeling: Methodology

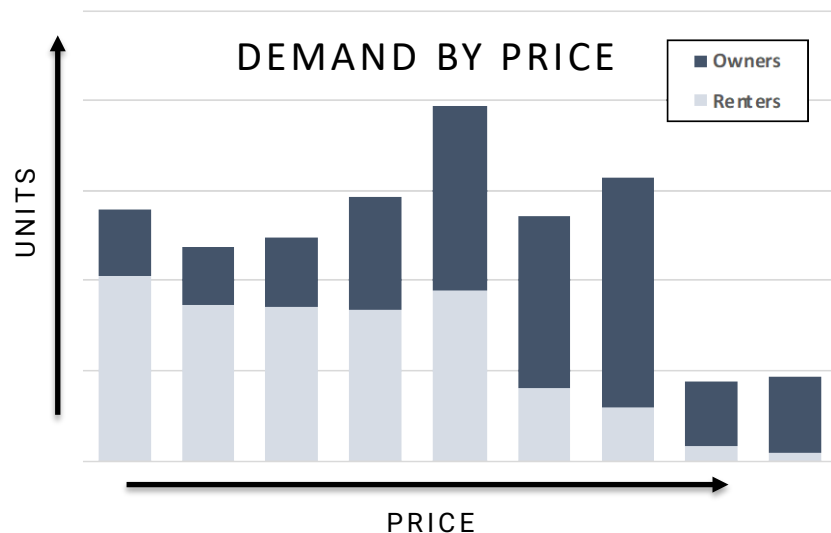
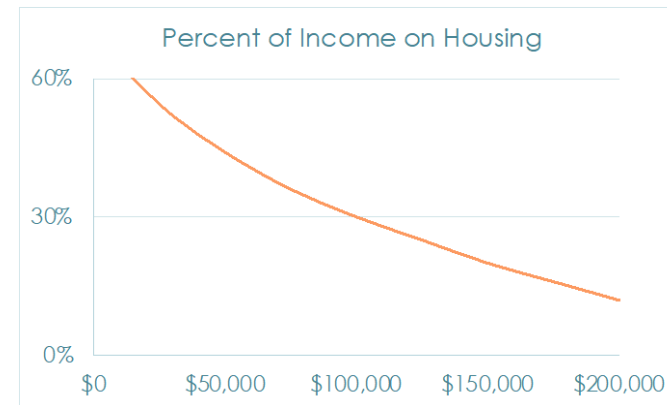
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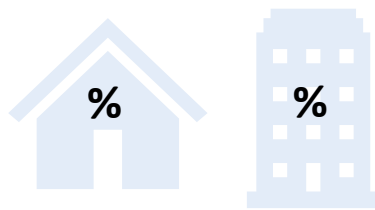


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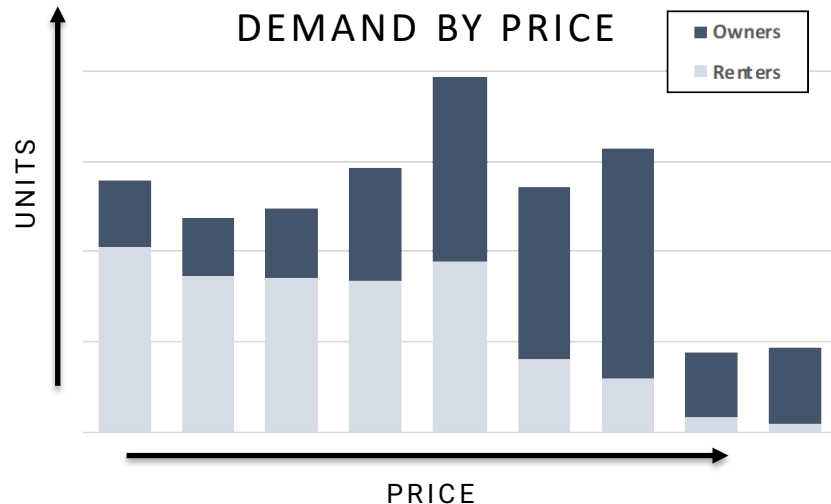
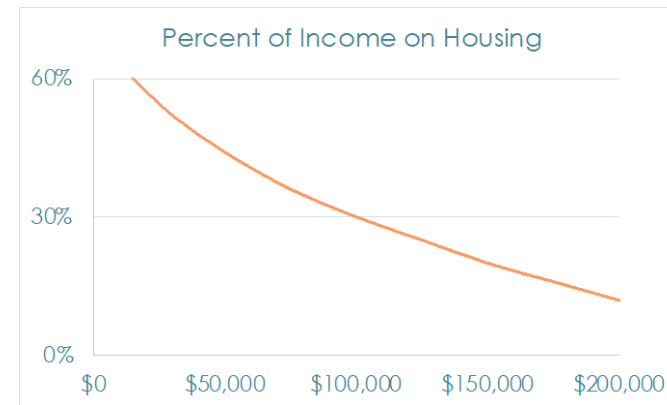
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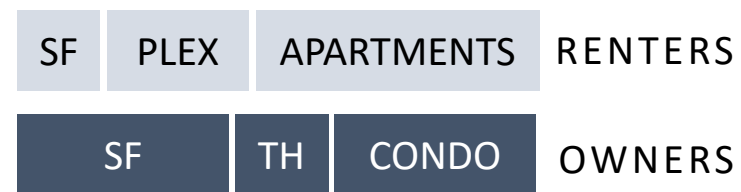
TENURE SPLIT
(RENT VS. OWN)








WILLINGNESS /
ABILITY TO PAY



CHOICE



Levers and scenario testing

-  Growth Scenarios
-  Migration Leakage
-  Tenure Split
-  Cost Burdening
-  Housing choice



Questions?

Wrap up: What's one word to describe how you're feeling about the roundtable so far?

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