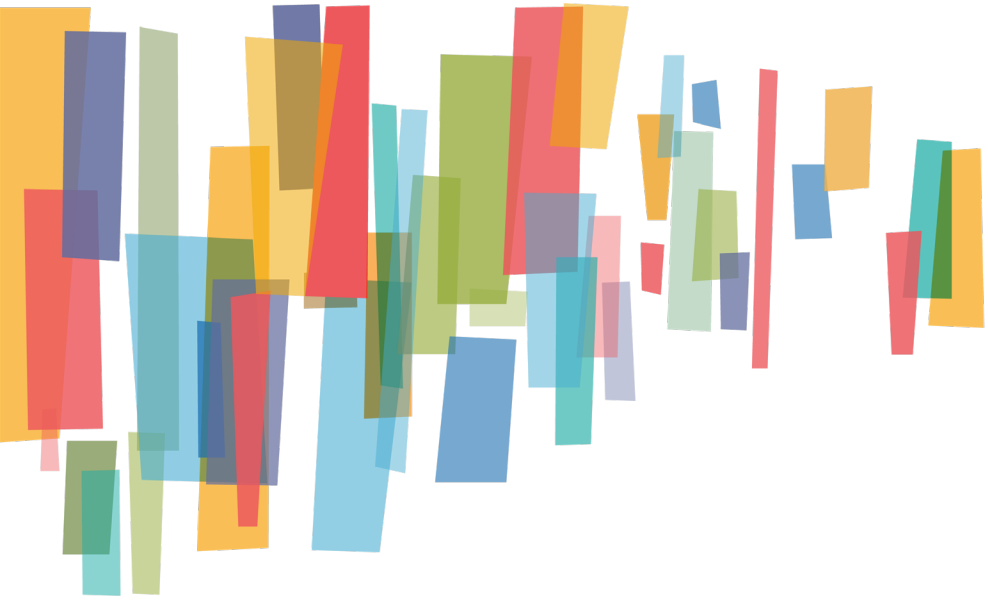




ONE **great** REGION

# Housing Strategy for the Atlanta Region

Housing Summit  
April 30, 2026



# Project Overview

## Objectives for Housing Strategy

The Housing Strategy for the Atlanta Region will establish a shared vision, define actionable steps, and strengthen regional capacity to meet housing goals.



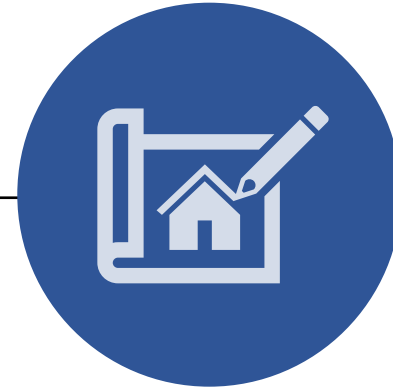
### SET A VISION

And **jurisdiction goals** for housing for the next 10 years



### OUTLINE STEPS

Needed to reach goals & **responsible parties**



### IDENTIFY NEW TOOLS

To **track progress & results** and increase impact

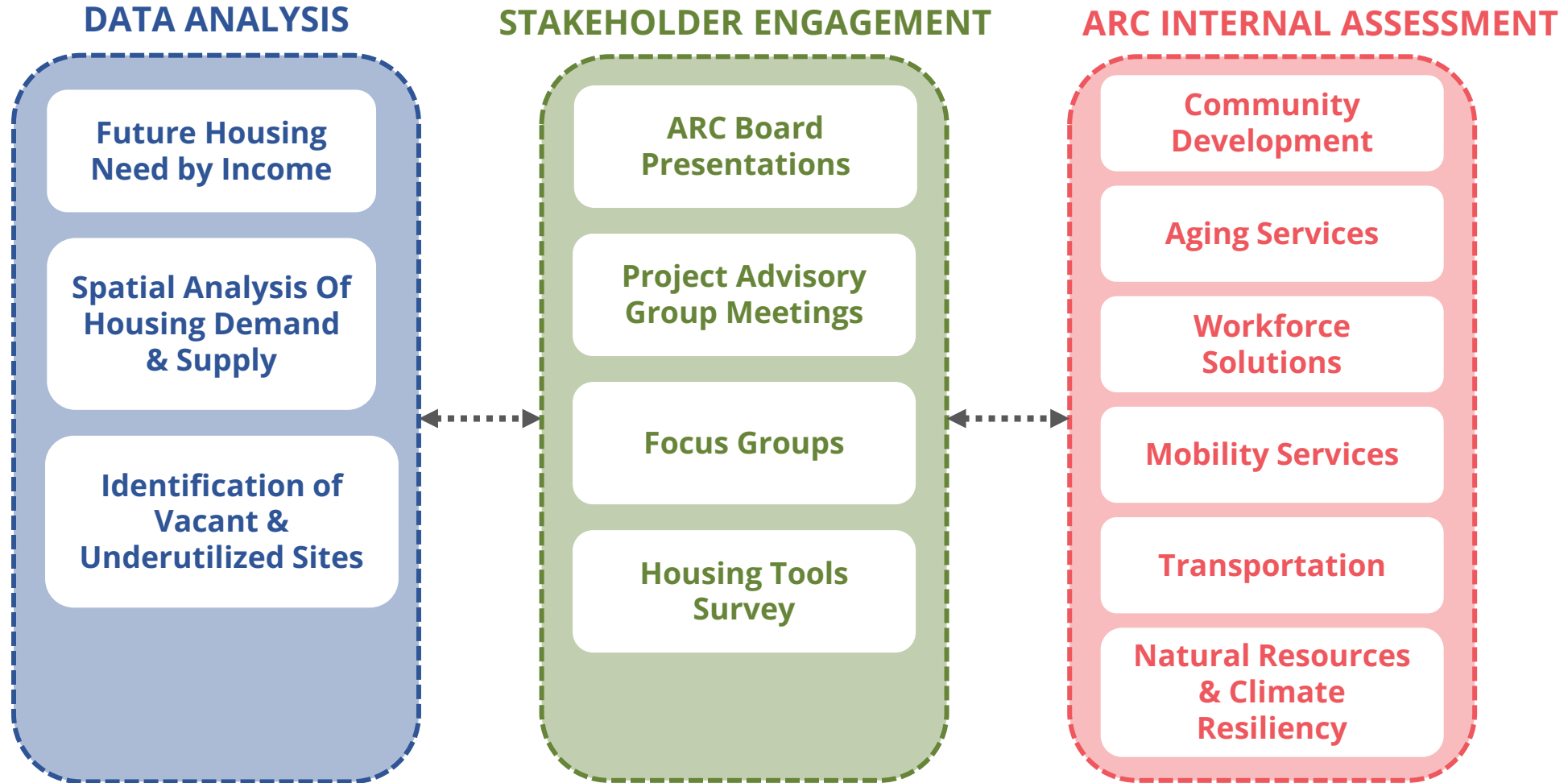


### ENHANCE ARC'S ROLE

In **supporting regional progress** towards housing goals

# Housing Strategy Inputs

Our approach to creating the Housing Strategy includes multiple inputs, including stakeholder expertise, analysis, and assessment of ARC capacity.



## Housing Strategy Outputs

The Housing Strategy will deliver valuable outputs for ARC and regional partners in addition to outlining a plan of action.

### INPUTS



### OUTPUTS

1. Clear, measurable **housing production and preservation goals**
2. Prioritized set of **underutilized parcels** to consider for housing production
3. Coordinated **plan of action** with accountable leaders and partners
4. Framework for **monitoring progress** toward housing goals and targeting investment and actions
5. Alignment of **internal ARC capacities** and tools to address housing goals and technical assistance to support local governments



# Housing Production Needs

## Developing Regional Housing Goals

To create a regional housing vision and goals for production and preservation, it is important to understand housing needs and trends.



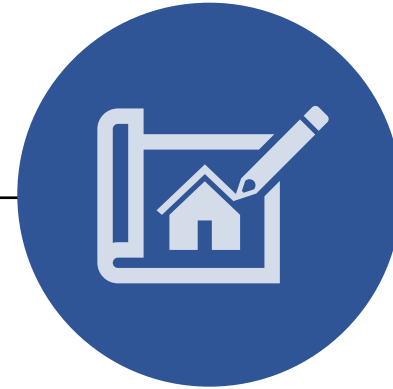
### SET A VISION

For housing in the region and **jurisdiction goals** for net new housing for next 10 years



### OUTLINE STEPS

Needed to reach goals & **responsible parties**



### DEVELOP NEW TOOLS

To fill existing gaps and establish a system to **track progress & results**



### ENHANCE ARC'S ROLE

In **supporting** regional progress towards housing goals

## 2035 Future Needs and Opportunities

To inform goal setting, we explored three questions to understand how forecasted population growth and policy decisions could shape the location and price point of future homes.



**1. How many homes are needed and at what prices?**



**2. Where should growth occur based on ARC's policy goals?**



**3. How can vacant and underutilized land be leveraged to meet future needs?**



# How many homes are needed and what prices?

## Two components drive the region's future housing needs

Population growth and affordability needs define what housing the region must produce and preserve by 2035 to sustain existing affordability.



### 1. Homes to Build

The Region Needs 367,000 New Homes  
by 2035

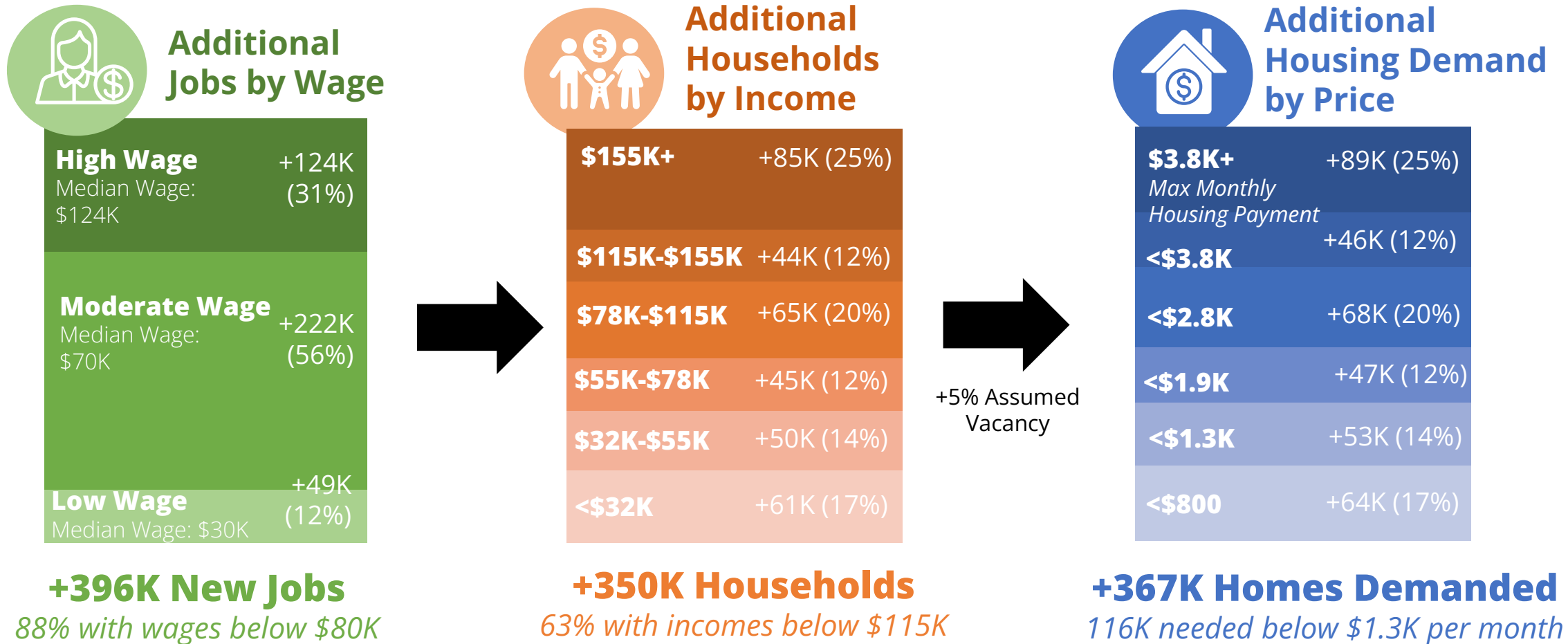


### 2. Affordability Alignment

The Region Must Build *and Preserve* in  
Alignment with Future Incomes

# Regional job growth will drive demand for 367,000 new homes by 2035.

The region is forecasted to gain 396K new jobs, bringing 350K additional households and driving demand for approximately 367K additional homes (assuming a healthy 5% vacancy).



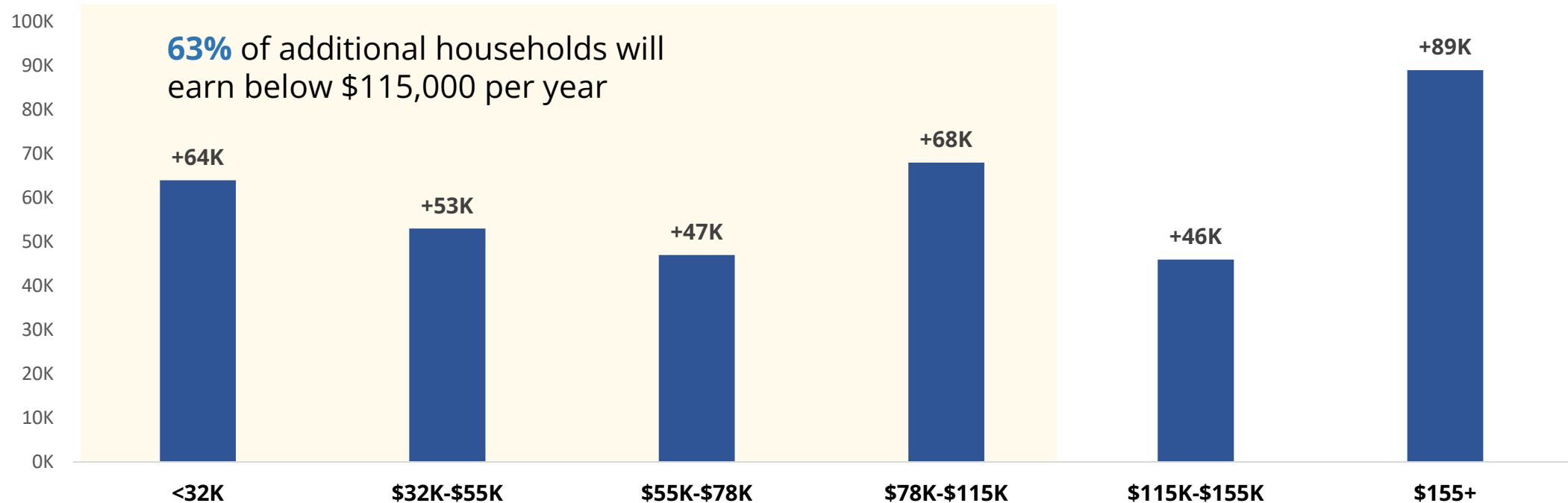
Source: ARC Series 17 Forecasts 2020-2035; to arrive at 2035 forecasts. Income ranges have been inflation adjusted to 2024 income levels.

## Most new demand will come from households earning under \$115K.

What people earn determines what they can afford, and therefore what the market needs to deliver. Job and population growth and demographic changes within the existing population will lead to net new demand largely driven by households earning <\$115K per year.

### Net Change in Homes Demanded by Household Income

11-County Region (2020-2035)

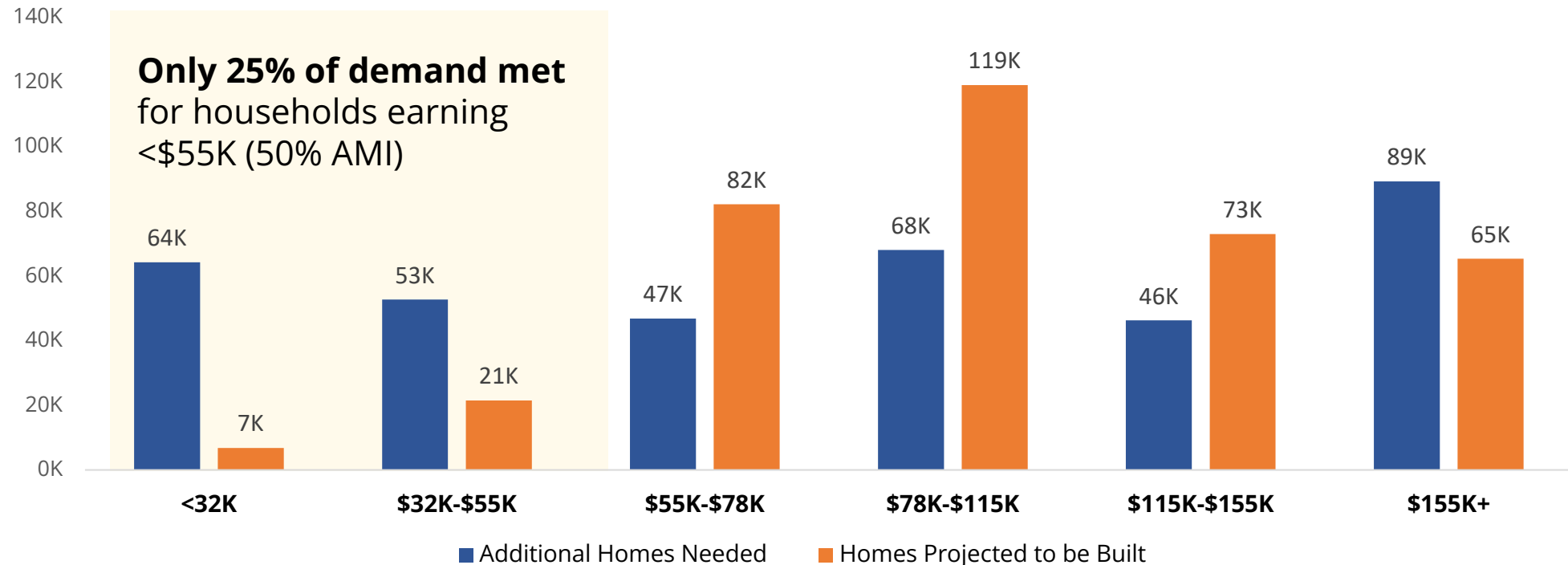


## The region is building homes — just not at the prices households need.

If current market production trends continue, the region is on track to meet demand for households earning between \$55K and \$155K. **But the market would meet only 25% of demand from households earning below \$55K.**

### Additional Homes Needed vs. Projected to be Built by Affordability

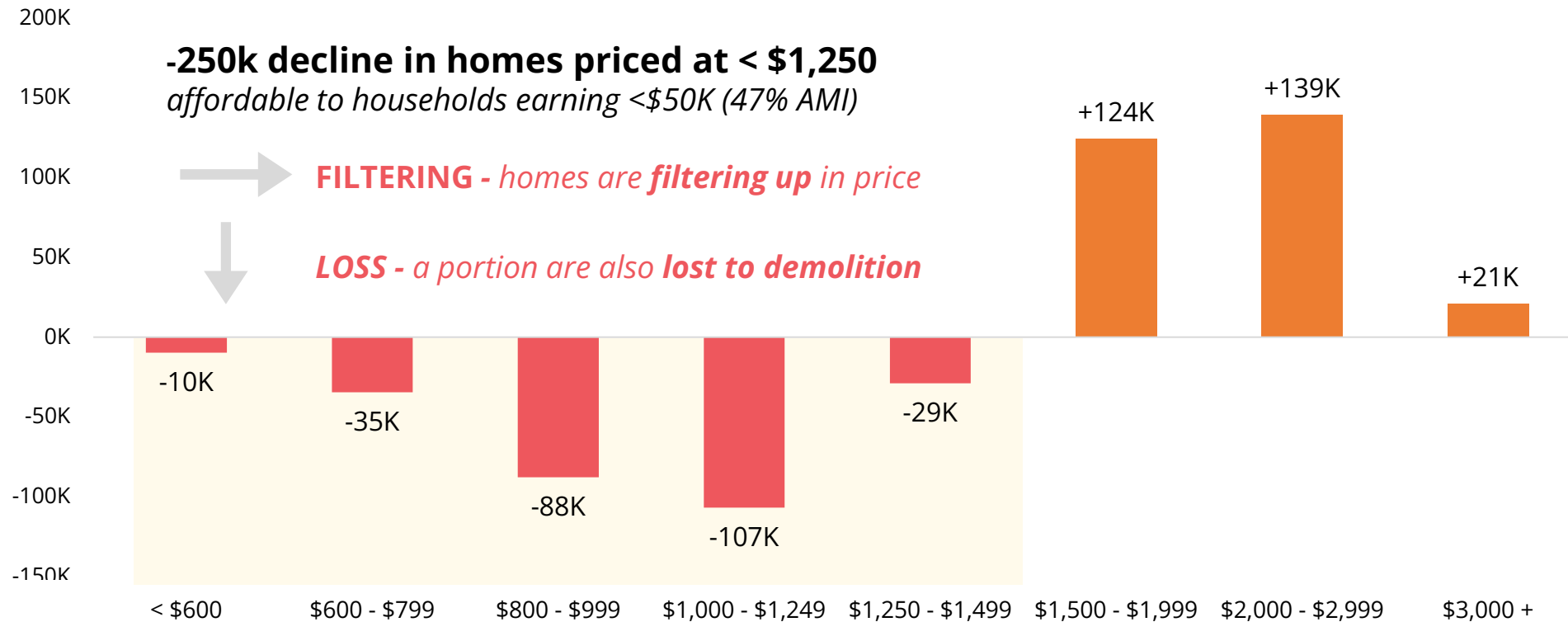
11-County Region (2020-2035)



# At the same time, the region's existing supply of lower cost homes is decreasing.

As supply pressures increase, existing homes are filtering up the price ladder. Between 2019 and 2024, the region lost 250K homes renting below \$1,250, while homes renting above \$1,500 grew.

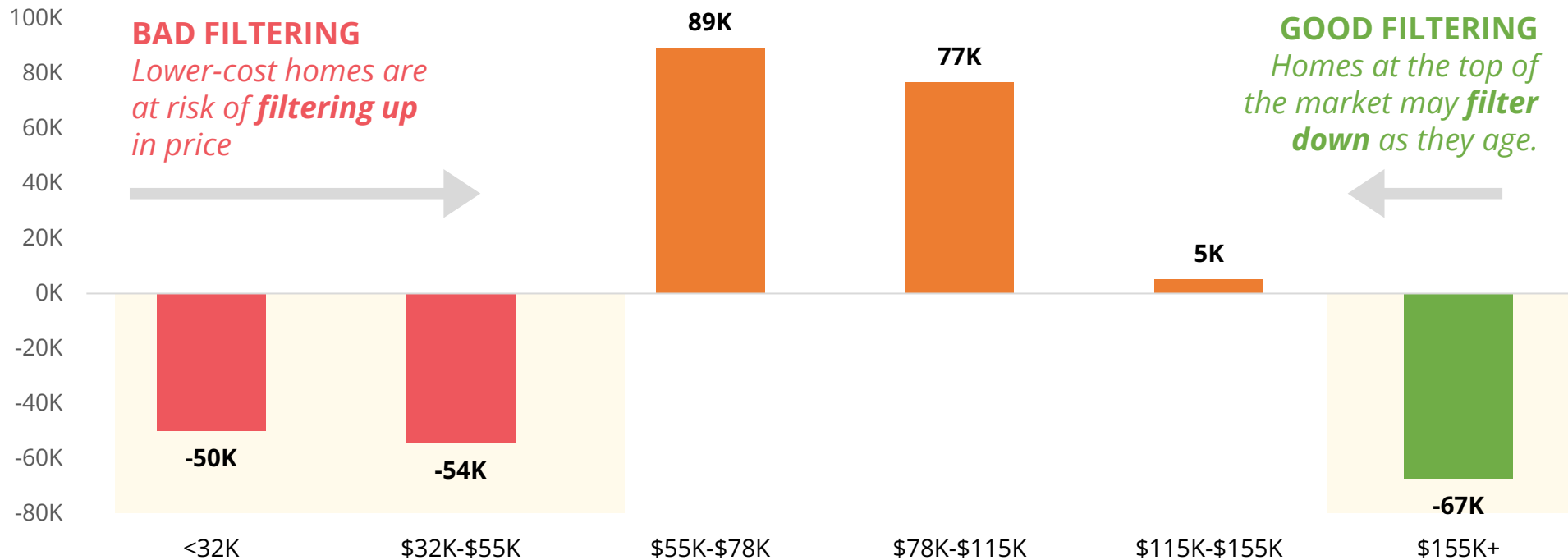
**Change in Homes by Rent**  
11-County Region (2019-2024)



# Without preservation, the region risks losing existing affordability.

By 2035, the region could lose over 100,000 more homes currently affordable to households earning under \$55K (~50% AMI), as naturally occurring affordable housing (NOAH) filters up in price or deed-restricted homes lose affordability restrictions.

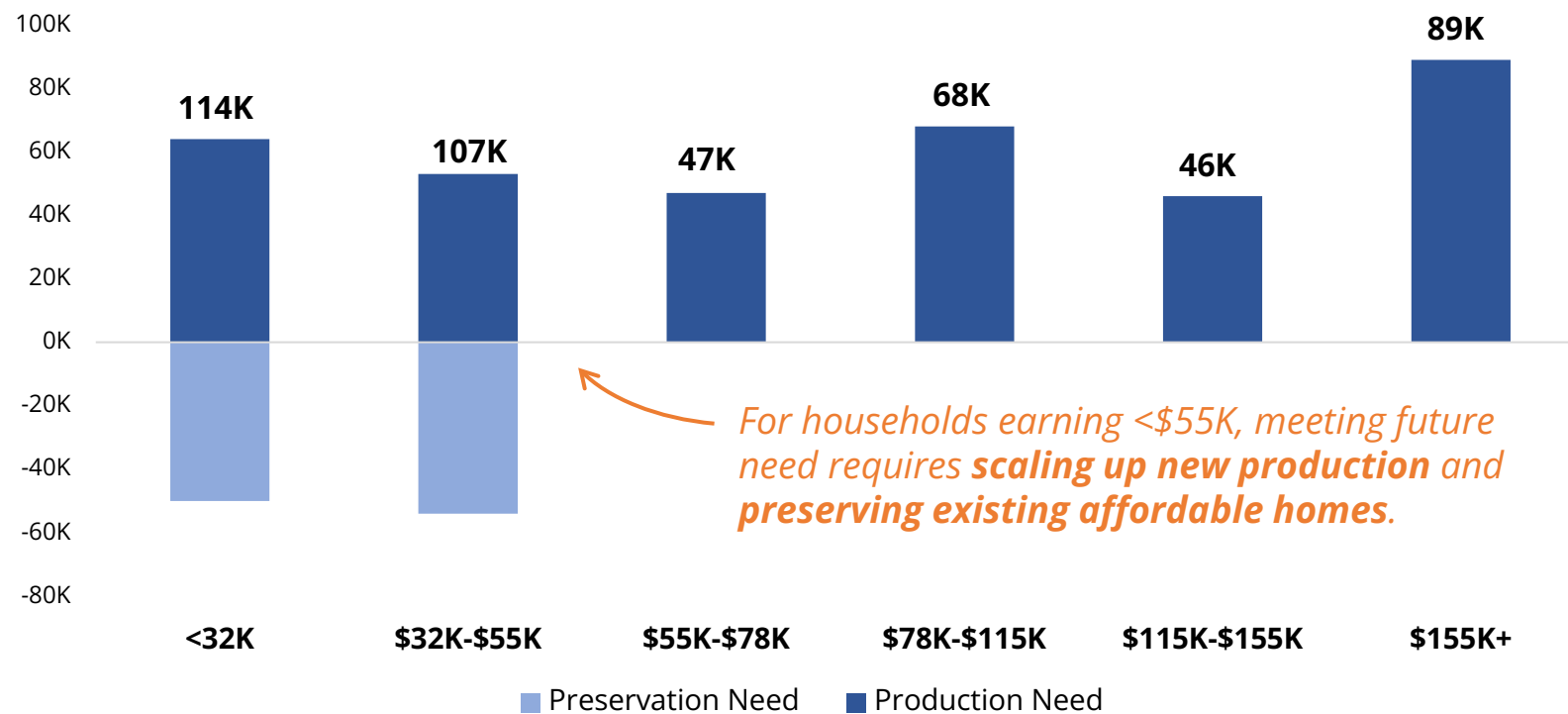
## Change in Homes by Affordability 11-County Region (2024-2035, Projected)



# Meeting future demand requires both new production and preservation.

By 2035, the region must build 367K new homes to accommodate growth while preserving at least 100K existing homes affordable to households earning <\$55K that are at risk of filtering out of reach.

**Total Future Housing Need by Income**  
11-County Region (2020-2035, Projected)



**1 in 3** new homes

needed for households earning \$55K-\$115K, **and the market is on track to deliver.**

**-100K** existing homes

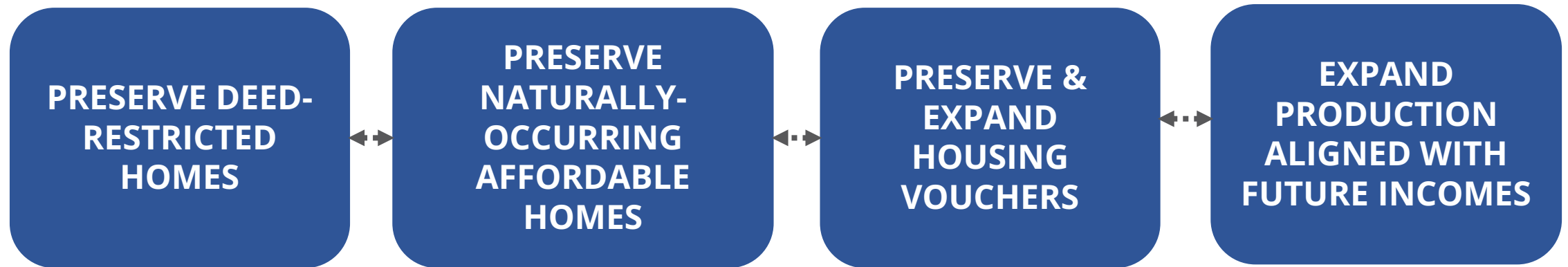
affordable to households earning <\$55K are **at risk of filtering up in price by 2035.**

**4x** production increase

needed for new homes **affordable to households earning <\$55K.**

## Meeting the region's future housing need requires a coordinated approach.

The region needs a coordinated approach that preserves existing affordability, sustains market-rate production, and scales up new supply affordable for the incomes the market isn't serving.



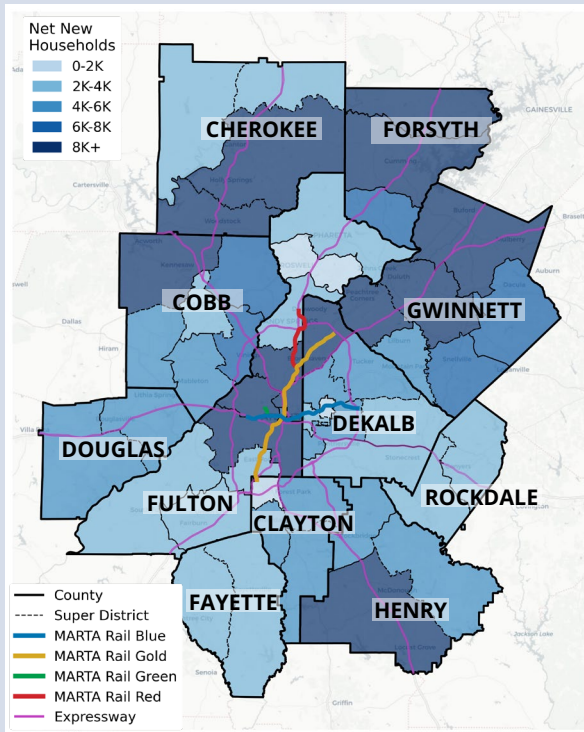


# Where should new housing production occur?

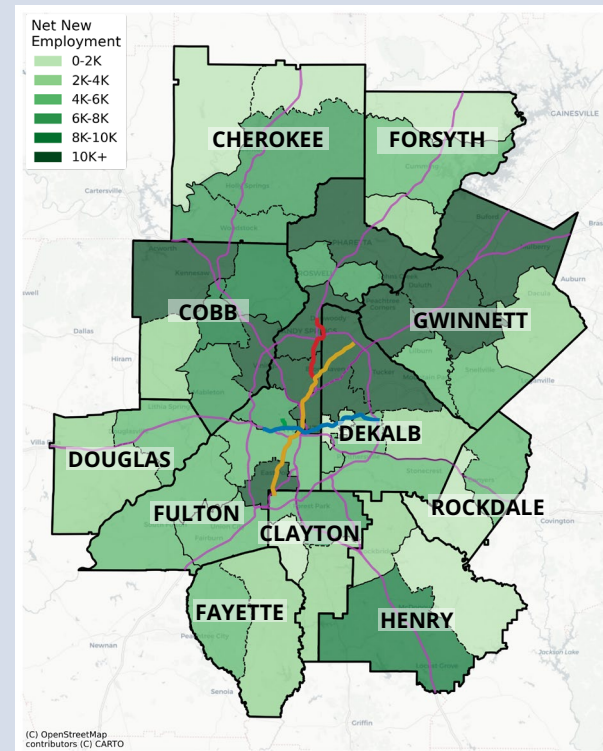
# Current growth patterns push homes away from jobs, transit, and opportunity.

Under current ARC forecasts, the region will grow outward, pushing new households farther from jobs, limiting transit access, and concentrating growth away from high-opportunity areas.

## Household Change 2020-2035



## Employment Change 2020-2035



80%

The majority of new households will face commutes over 30 minutes, compared to 75% of households today.

1 in 3

Only 1 in 3 new households will live within ½ mile of high-capacity transit.

6%

Only 6% of new households will live in the region's highest opportunity census tracts.\*

# A policy-aligned growth pattern could deliver a different outcome.

Aligning growth with ARC's policy objectives creates the following growth outcome across the region.

## 1. Align Housing with Job Growth

What if new households could afford to live within a **30-min commute of new jobs**?

## 2. Lower Housing + Transportation Costs

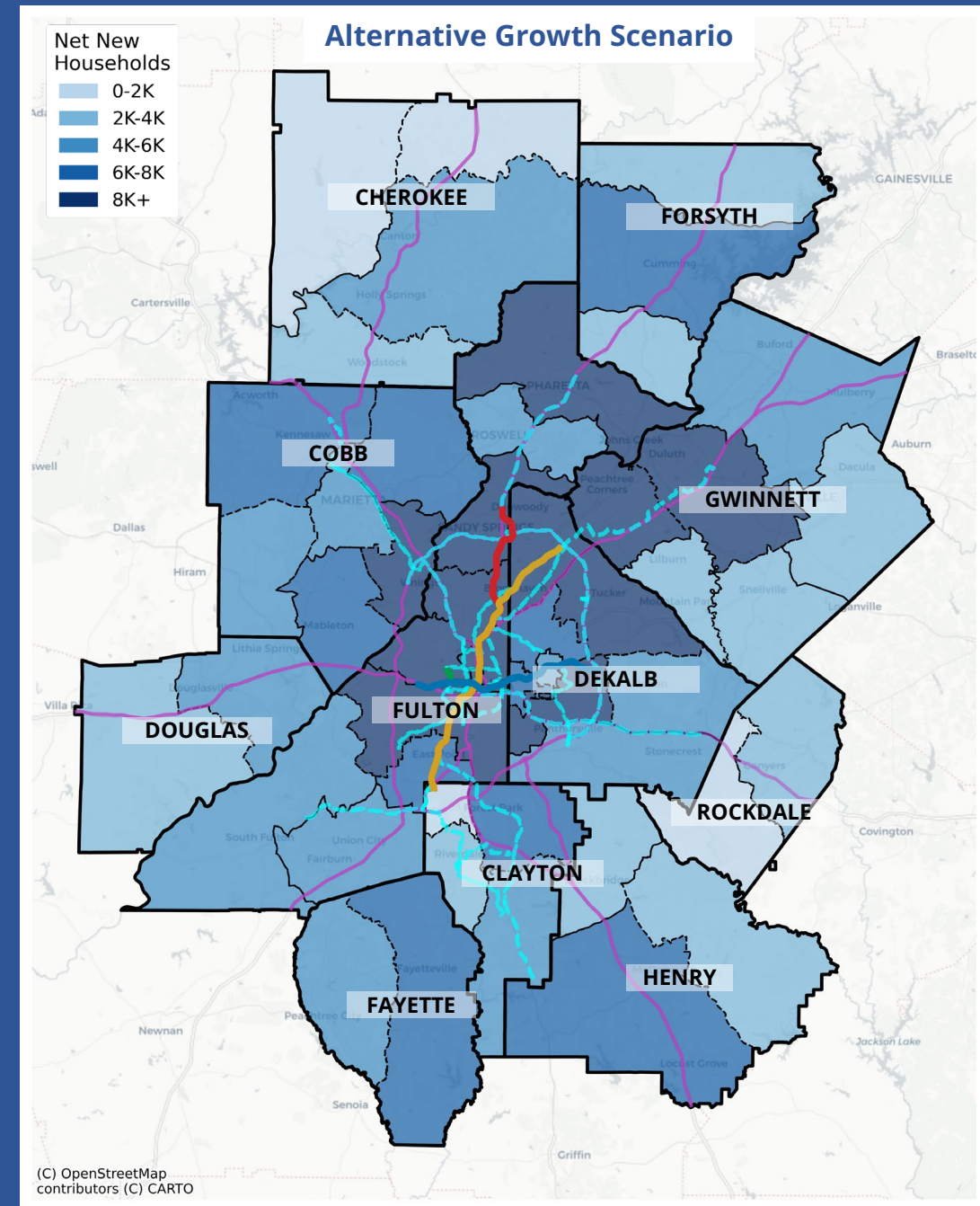
What would the region look like if **new households lived within a ½-mile of transit**?

## 3. Increase Equitable Access to Opportunity

What if net new **low-income households could find housing in high-opportunity tracts**?

## 4. Promote Climate Resilience

What would the region look like in 2035 if **growth was limited in areas with high climate risk**?



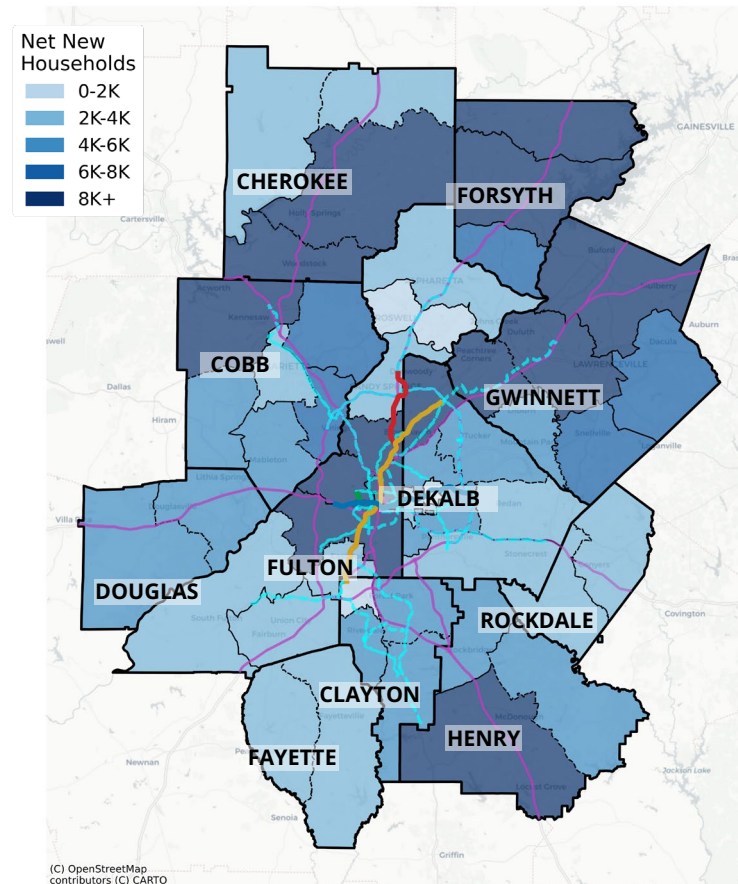
# Meeting policy objectives requires a significant shift in where homes are built.

Policy-aligned growth should shift new homes toward job centers and transit-served areas, moving housing production inward and away from suburban and exurban edges.

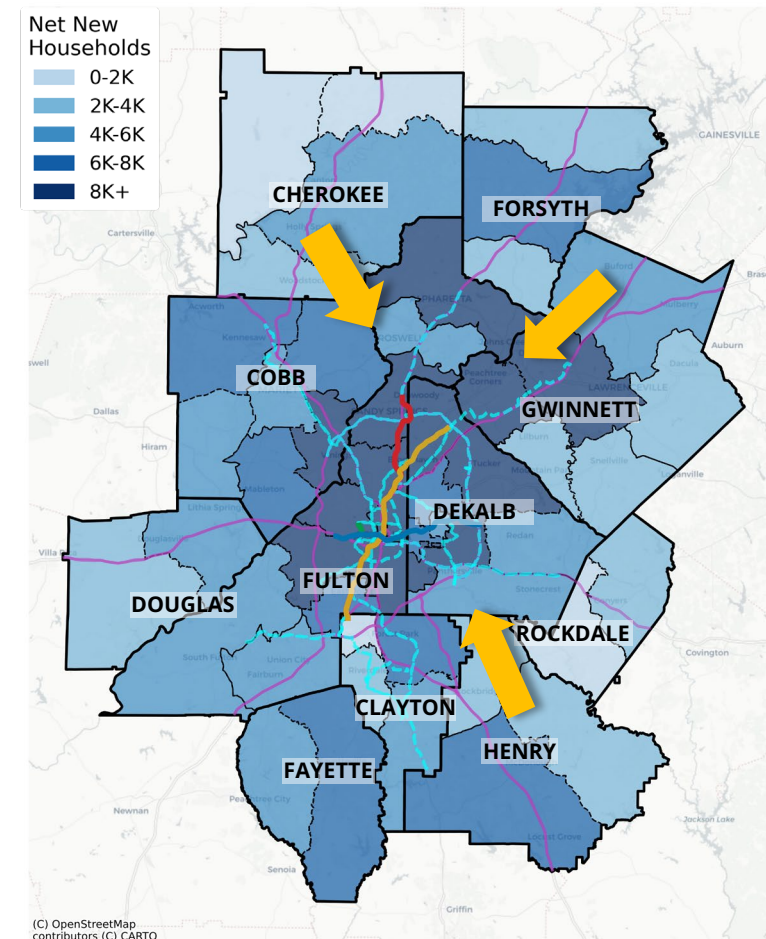
**Growth will move inward** to North Fulton and DeKalb counties and away from suburban and exurban areas.

**Every county will still need new homes**, the shift is in how much growth occurs where.

Status Quo Growth Scenario



Alternative Growth Scenario





# Where are underutilized parcels that could become housing?

# Opportunities for New Housing Production

HR&A created an **inventory of public- and privately-owned parcels** that meet baseline physical suitability for housing and are in locations aligned with ARC policy priorities.

## SITE EVALUATION PROCESS:



# Parcels Positioned for Housing

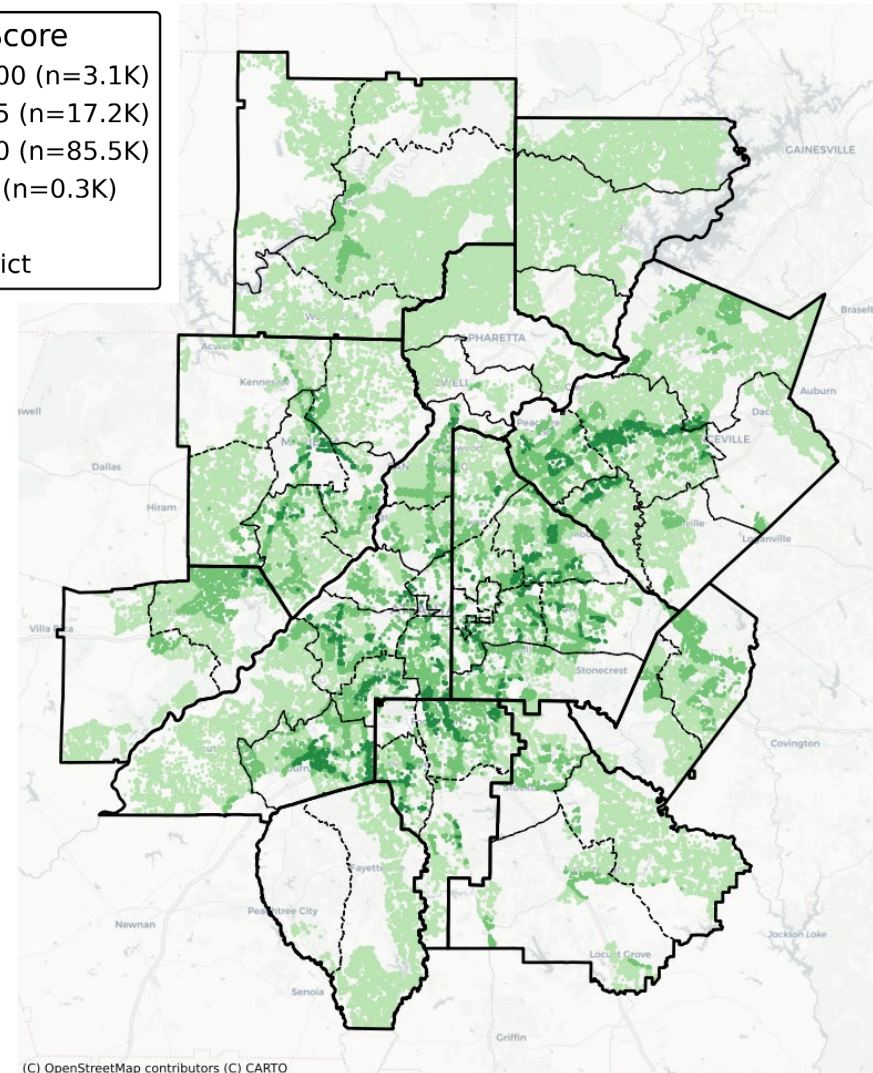
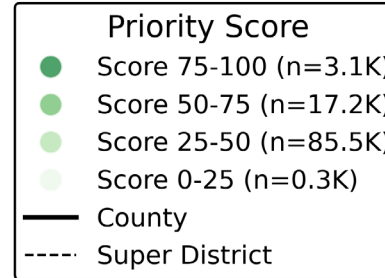
Initial screening of parcels for physical readiness revealed **106,100 parcels**, of 1.7M, that that are suitable for development and either vacant, publicly-owned or underutilized.

▶ **106,100 Parcels**  
Meet threshold criteria

**1,530**  
Publicly-Owned

**18,960**  
Assumed Vacant

**85,610**  
Underutilized



\*Note: Ownership and vacancy are based on standardized property use code in ATTOM

# The 11 counties and 88 municipalities each have a role to play in meeting future housing needs.

A regional approach is critical to shaping who can move here, who can stay, and who benefits from the region's growth.

The region's growing economy is driving demand for housing.

**+367K**

Additional homes needed to meet growing demand

Existing affordability is at risk of loss without intervention.

**-104K**

Existing homes affordable to households earning <\$55K at risk of filtering out of reach.

Current growth patterns limit access to jobs, transit and opportunity.

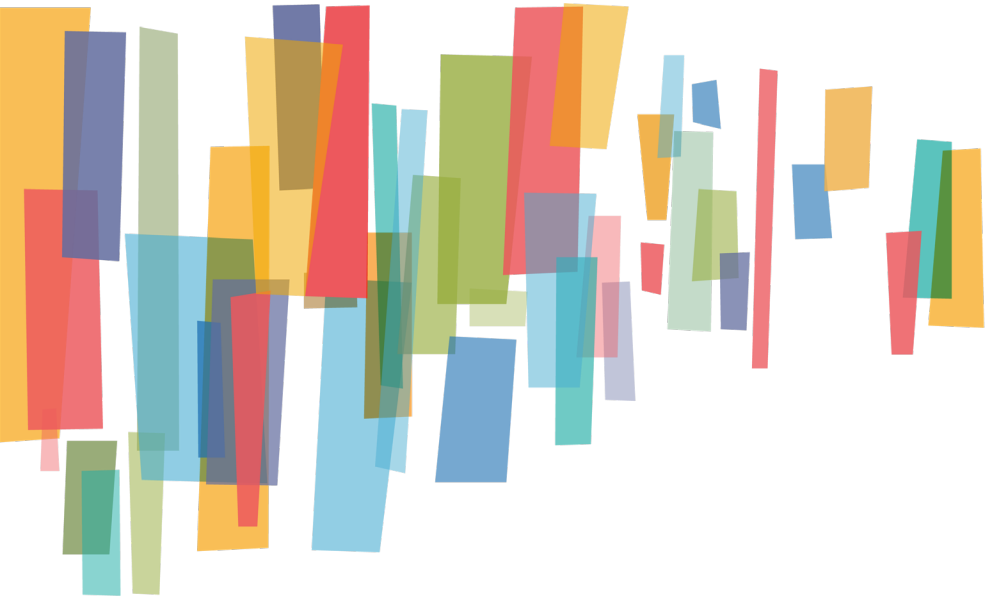
**80%**

Of new households by 2035 are expected to live 30+ minutes from new job centers.

Publicly owned and underutilized land presents an opportunity.

**106K**

Publicly owned, vacant or underutilized parcels with potential for housing.



# Housing Strategy Framework

## Translating Data into Action

To meet forecasted future housing need, the region will need to take collective action and work collaboratively to reach production, preservation and stability goals.



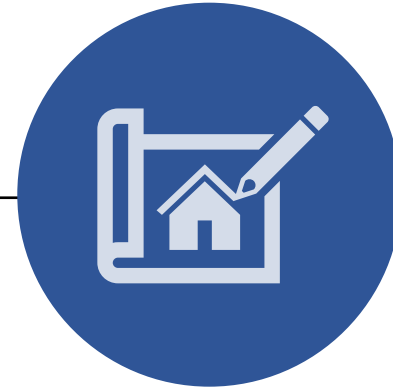
### SET A VISION

For housing in the region and **jurisdiction goals** for net new housing for next 10 years



### OUTLINE STEPS

Needed to reach goals & **responsible parties**



### DEVELOP NEW TOOLS

To fill existing gaps and establish a system to **track progress & results**

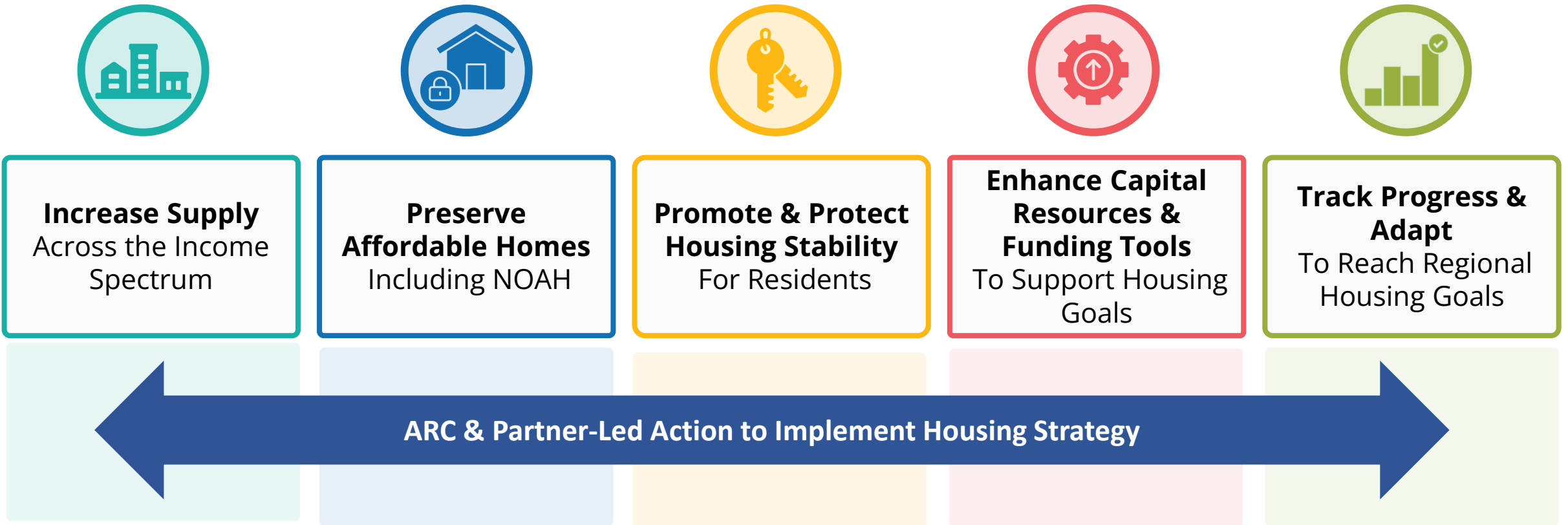


### ENHANCE ARC'S ROLE

In supporting regional progress towards housing goals

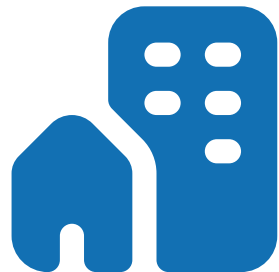
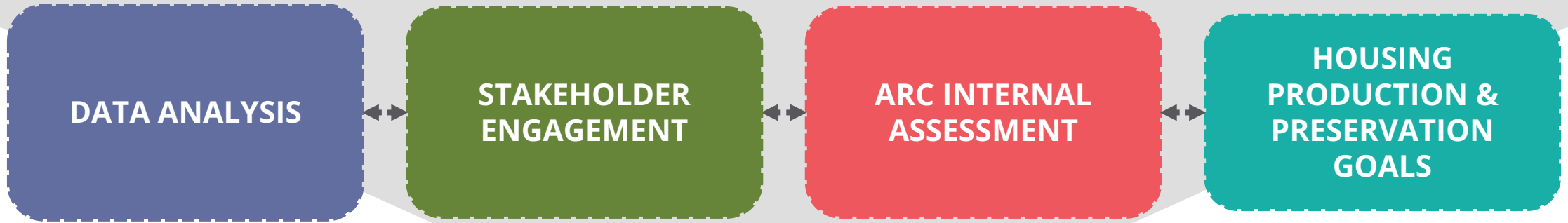
# Action Framework

The Housing Strategy will include five action pillars. Each action pillar will include implementation steps for ARC and a variety of actors whose contributions are necessary to address housing needs.



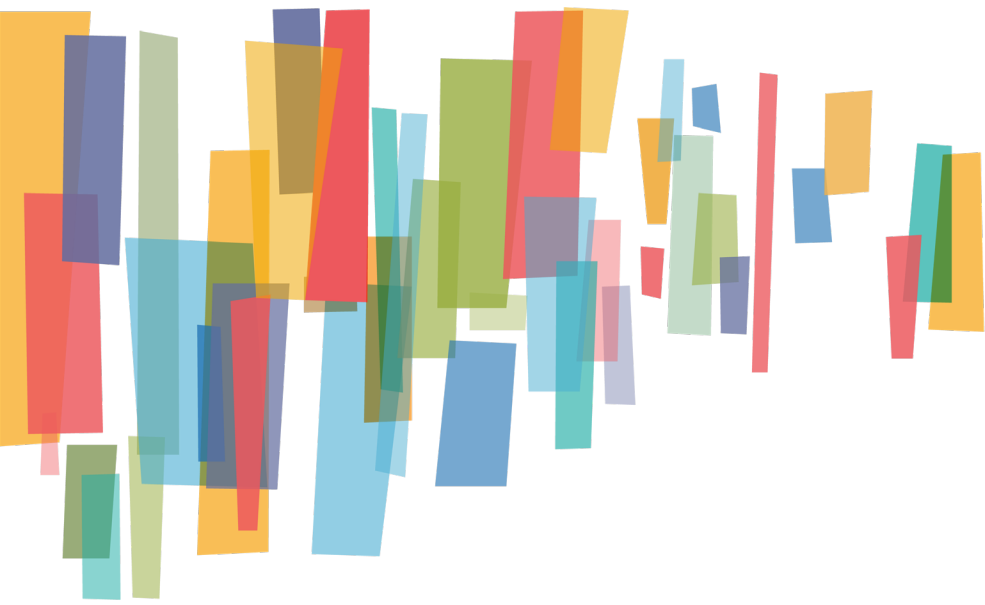
## Next Steps

The Housing Strategy will synthesize findings from the existing conditions analysis, stakeholder engagement and identify action to move the region towards its housing goals.



## Housing Strategy for the Atlanta Region

Atlanta Regional  
Housing Forum  
9/2/26



# Q&A