

# Regional Housing Strategy Update

ARC Board Meeting

March 11, 2026



## Vision

ONE **great** REGION

## Mission

*Foster thriving communities for all within the Atlanta region through collaborative, data-informed planning and investments.*

## Values

**Excellence** | **Integrity** | **Equity**

## Goals



**Healthy, safe, livable communities** in the Atlanta Metro area.



**Strategic investments** in people, infrastructure, mobility, and preserving natural resources.



Regional services delivered with **operational excellence** and **efficiency**.



**Diverse stakeholders engage** and take a regional approach to solve local issues.



**A competitive economy** that is inclusive, innovative, and resilient.

# Agenda

---

- Introduction
- Project Overview
- Future Housing Needs
- What's Next
- Discussion

### QUESTIONS TO CONSIDER

- Does the weighting of access to jobs, transit and high-opportunity areas for low-income households seem right to you?
- Is this how we should strive to distribute housing across the region?



# Project Overview

## DESIRED OUTCOMES

The ARC Regional Housing Strategy (RHS) will establish a shared vision, define actionable steps, and strengthen regional capacity to meet housing goals.



Set a **vision** for housing in the region and **jurisdictional goals** for net new housing for next 10 years



Outline the **steps** needed to get there and **responsible parties**



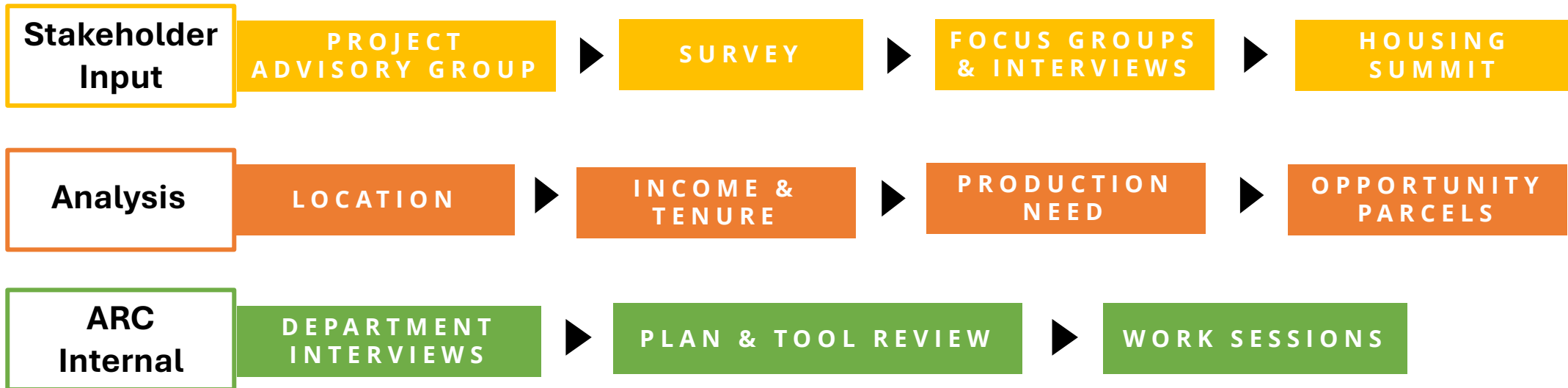
Develop **new regional tools** and establish a system to **track progress and results**



Enhance **ARC's role** in supporting regional progress toward housing goals

## STRATEGY DEVELOPMENT

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



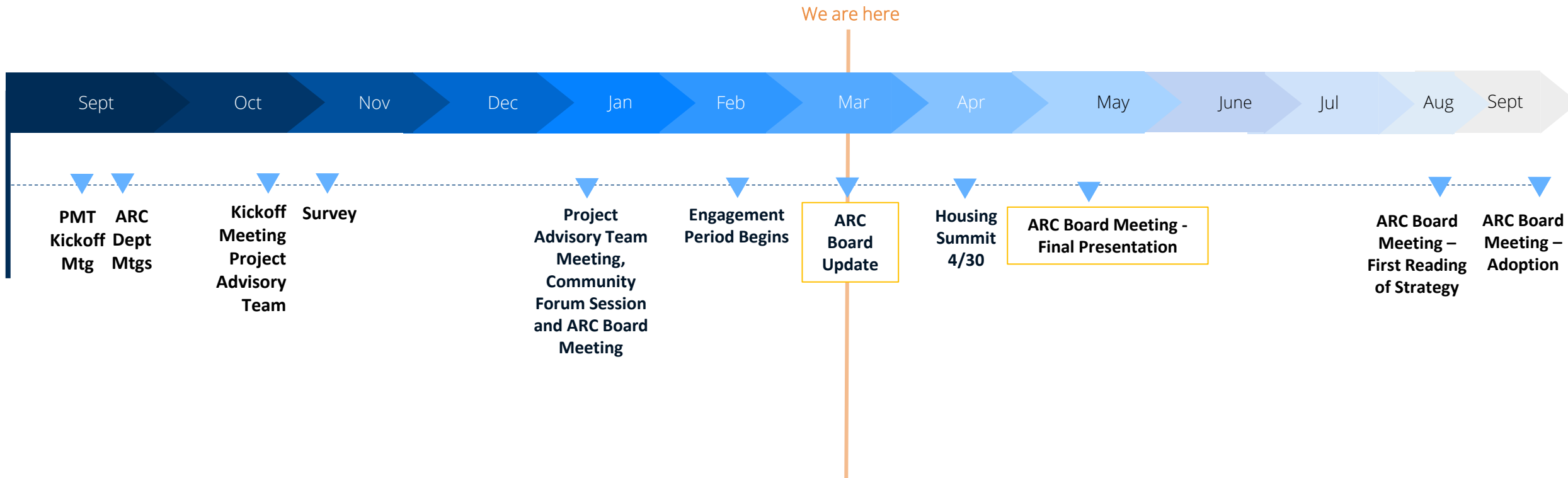
## PROJECT ADVISORY TEAM

The Project Advisory Group has provided critical guidance since on strategy development since its kickoff in October.

ARC Board Members		Subject Matter Experts & Regional Contributors			
Chairwoman Carlotta Harrell	Henry County Board of Commissioners	Dr. Christie Cade	Enterprise Community Partners	Bill Bolling	Housing Advocacy
Chairwoman Nicole Love Hendrickson	Gwinnett County Board of Commissioners	Michael Carnathan	Neighborhood Nexus	Colin DeLargy	City of Atlanta
Mayor Patti Garrett (former)	City of Decatur	Lorraine Collins	Zillow	Natallie Kaiser	HouseATL
		Marshall Guest	Metro Atlanta Chamber	Protip Biswas, Milton Little, Jr.	United Way
		Sara Haas	ANDP	Janinne Miller, Megan Weiss	GDOT
		Betsy McGriff	GA Tech Enterprise Innovation Institute	Amanda Rhein	City of Atlanta and ULI Atlanta Board Chair
		Richard Porter	GA Tech College of Design	Jennifer Zeller	Georgia Power
		Beth Stephens	Enterprise Community Partners	Sarah Kirsch, Kaela Hammond	Community Foundation

## LOOK AHEAD

In April, the Board is invited to participate in the Housing Summit, and May, HR&A will present final Housing Strategy recommendations, including jurisdictional housing goals.

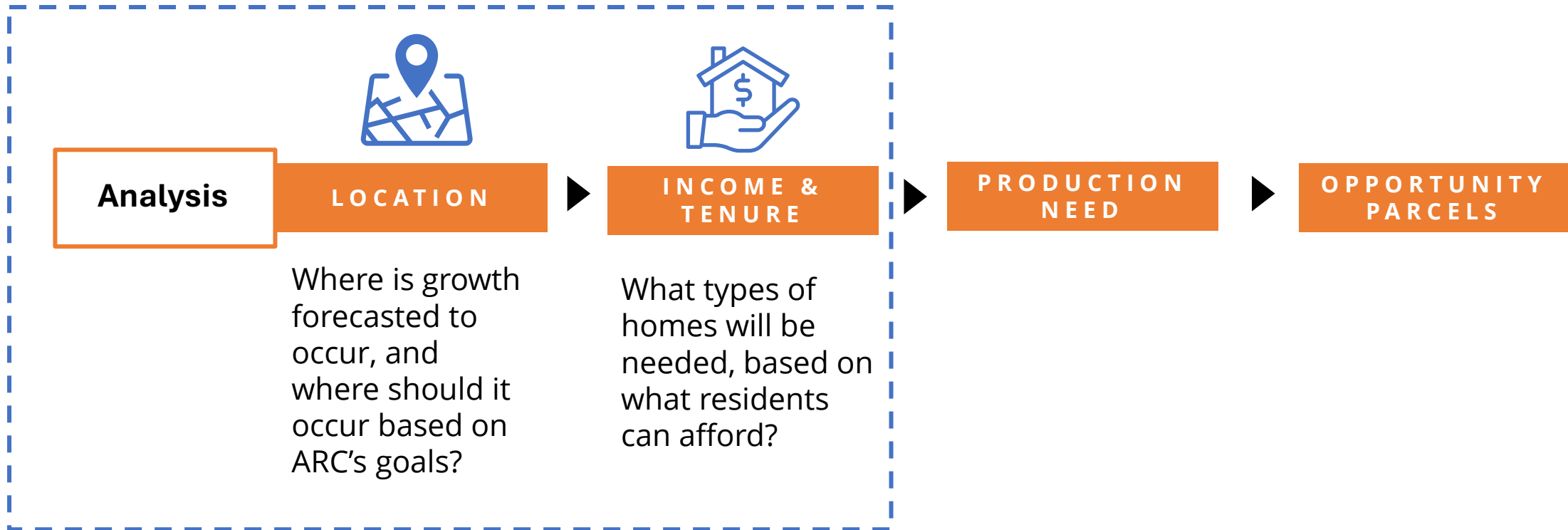




# Future Housing Needs

## FUTURE HOUSING NEEDS | RESEARCH QUESTIONS

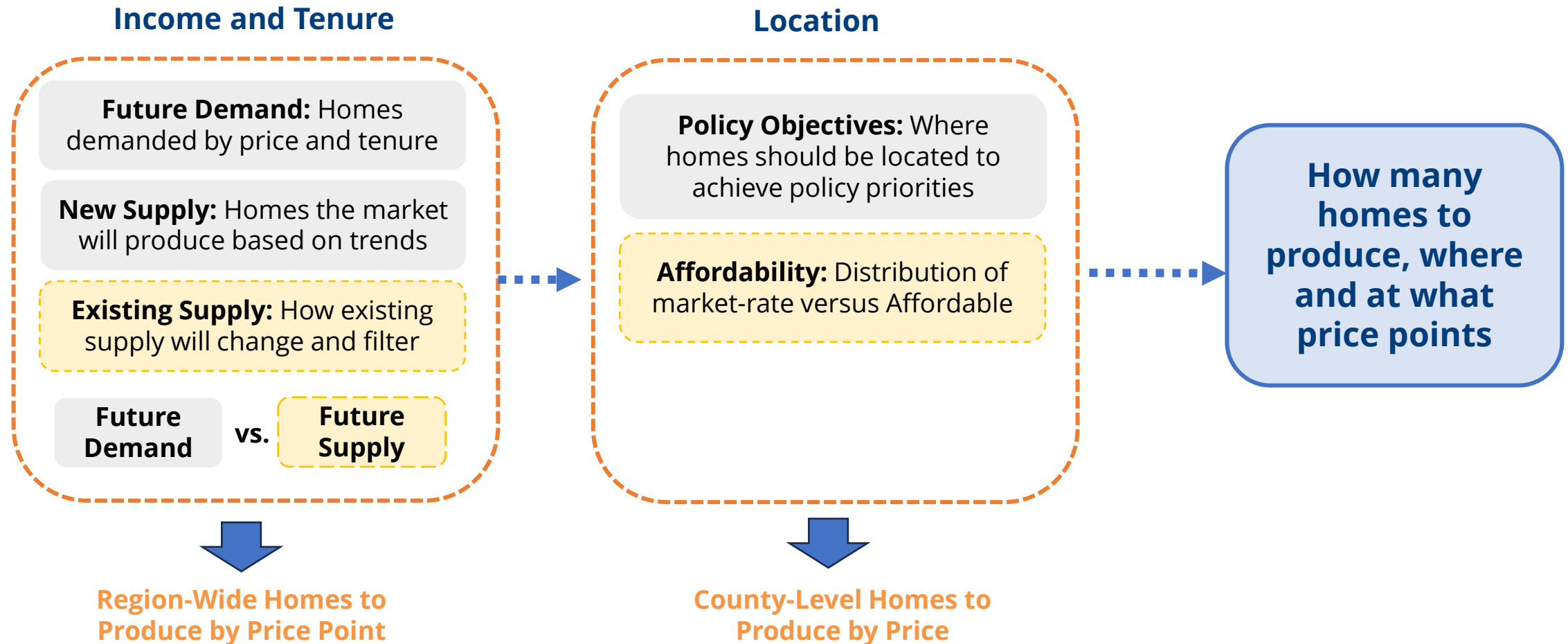
HR&A is conducting analysis to address the question: **What types of homes are needed and where to accommodate forecasted growth over the next ten years?**



 **Focus of today's presentation**

## FUTURE HOUSING NEEDS | METHODOLOGY

In May, we will share findings of the next phases of analysis to determine jurisdictional production goals.



## FUTURE HOUSING NEEDS | RESEARCH QUESTIONS

We will also share findings from the land analysis, identifying opportunities to leverage underutilized parcels to support ARC's regional housing goals.



### 1. Location:

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

Where is growth forecasted to occur and where should it occur based on ARC's goals?



### 2. Income & Tenure:

*What will future households be able to afford?*

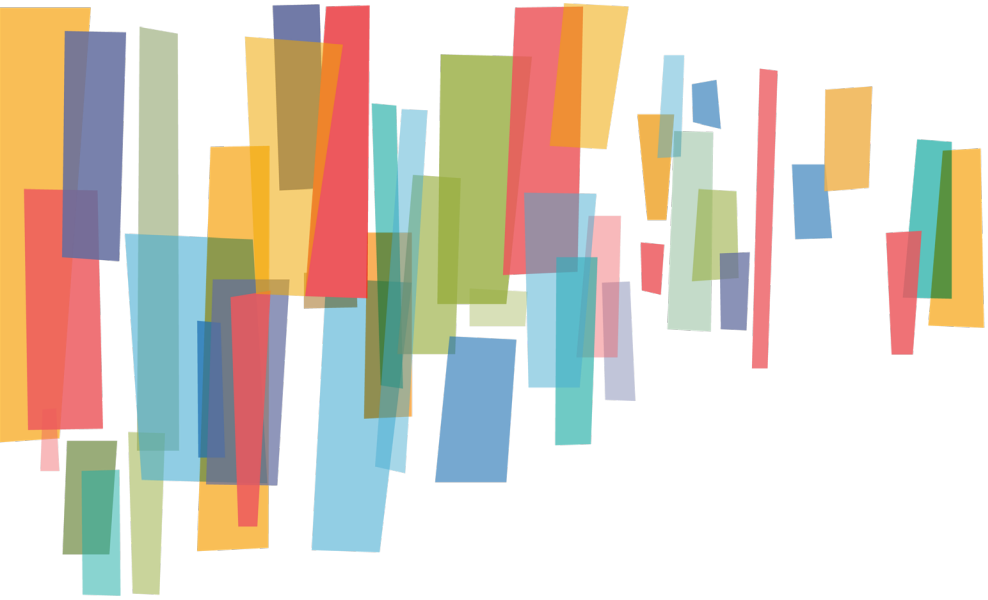
What types of homes by tenure and price point will be needed to meet net new future demand?



### 3. Vacant & Underutilized Land:

*How can assets be leveraged to meet future needs?*

Where are the key opportunities to leverage underutilized parcels to support these housing goals?

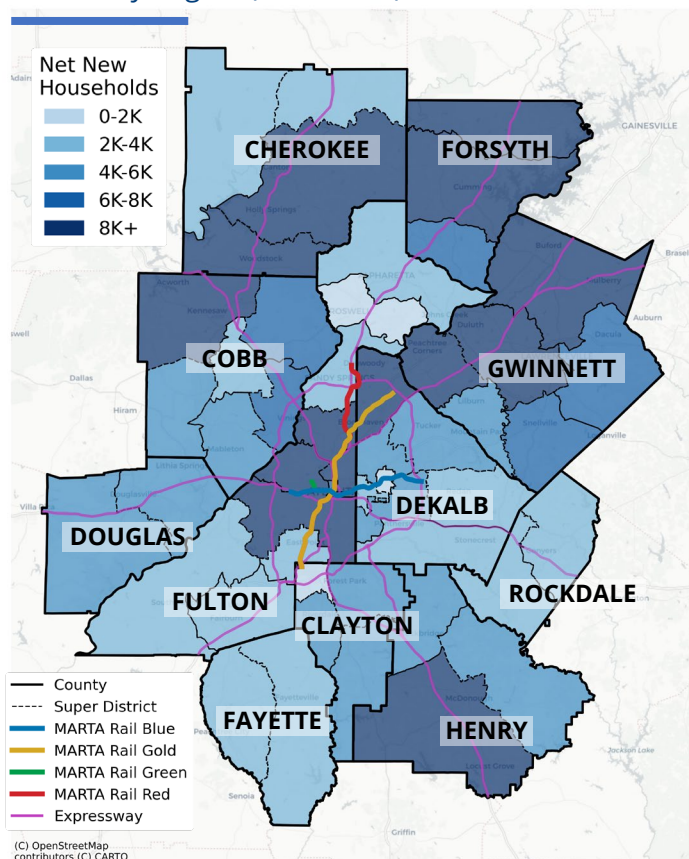


# Where should growth occur?

## BASE CASE | 2035 REGIONAL FORECAST

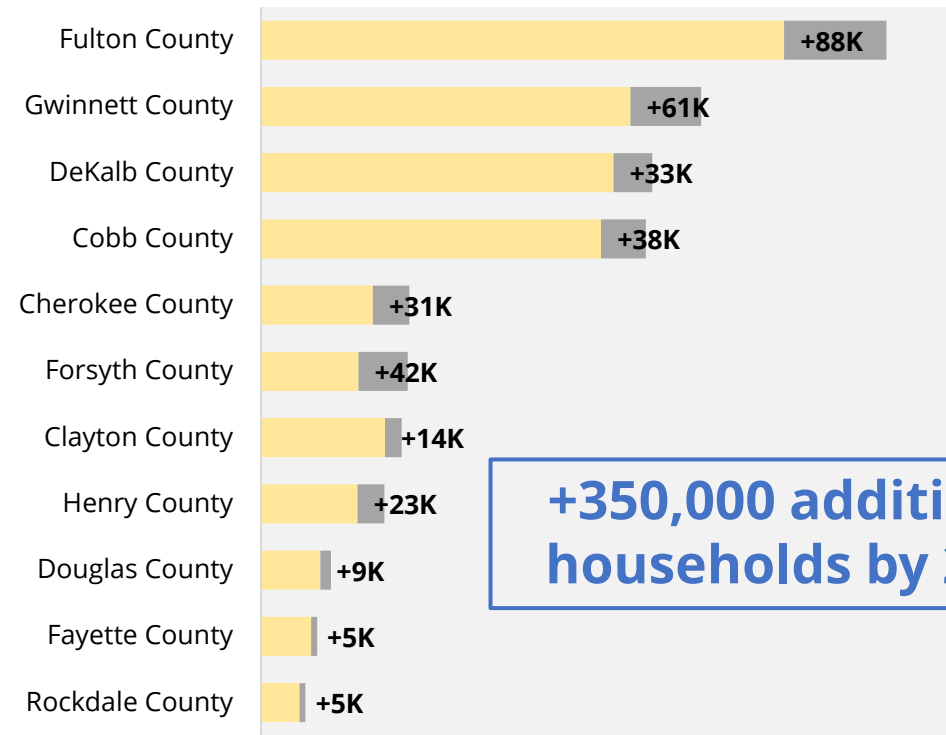
ARC's forecasts that the 11-county region will grow by approximately **350,000 new households by 2035**, bringing the regional to a total of 2.2 million households.

### ARC 2035 Household Growth Forecast 11-County Region (2020-2035)



The region is forecasted to see significant new households in the urban core, Gwinnett and outer suburban counties like Cherokee, Forsyth, Henry and Cobb.

### ARC 2035 Household Growth Forecast by County 11-County Region (2020-2035)



**+350,000 additional households by 2035**

■ 2020 Households   ■ Change 2020-2035

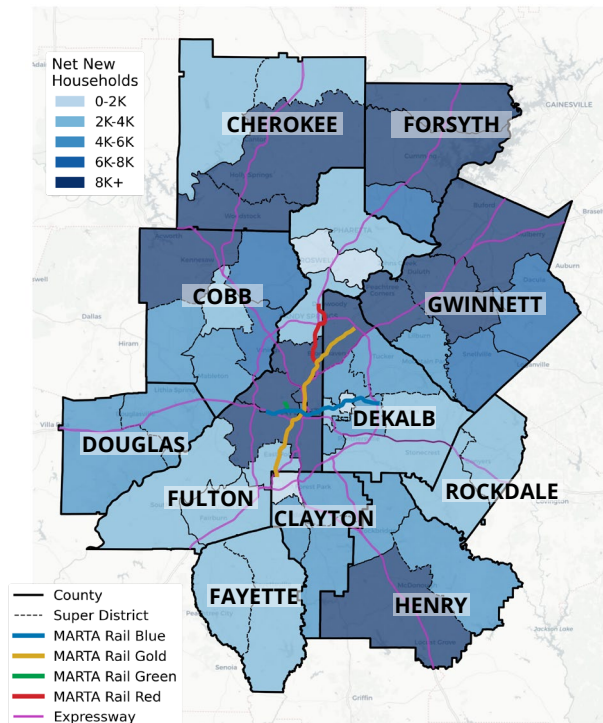
### DISCUSSION QUESTIONS TO CONSIDER

- How should we strive to distribute housing across the region, based on ARC policy objectives?
- Does the recommended weighting of access to jobs, transit and high-opportunity areas for low-income households seem right to you?

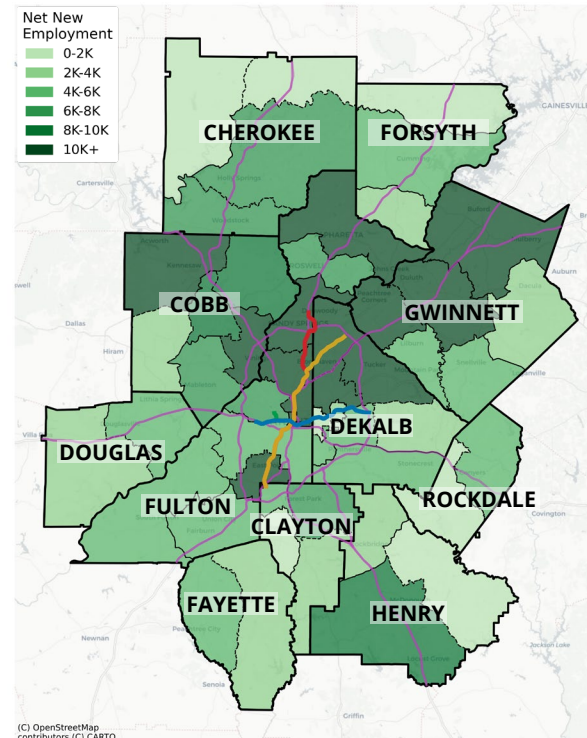
## BASE CASE | 2035 REGIONAL FORECAST

Under current ARC forecasts, the region is expected to grow outward, increasing commute burdens, limiting transit access for new households, and reinforcing regional inequities.

### Household Change 2020-2035



### Employment Change 2020-2035



### Under current forecasted growth patterns:

#### → Increasing Commute Burdens

In 2035, 80% of new households would face commutes over 30 minutes to new jobs, compared to 75% of today's households.

#### → Limited Transit Access

In 2035, over half of new households will not live within a half mile of high-capacity transit, taking into account both existing and planned future transit.

#### → Limited Growth in Many High Opportunity Areas

Many high opportunity communities will add relatively few new households despite strong job access, schools, and amenities. For example, Alpharetta (North Fulton) is forecasted to receive 5% of new regional jobs but only 1% of the region's new households.

## FUTURE HOUSING NEEDS | POLICY OBJECTIVES

The following policy objectives were identified in collaboration with the Project Advisory Group to guide analysis to create ARC's recommended regional growth scenario.

### 1. Align Housing + 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

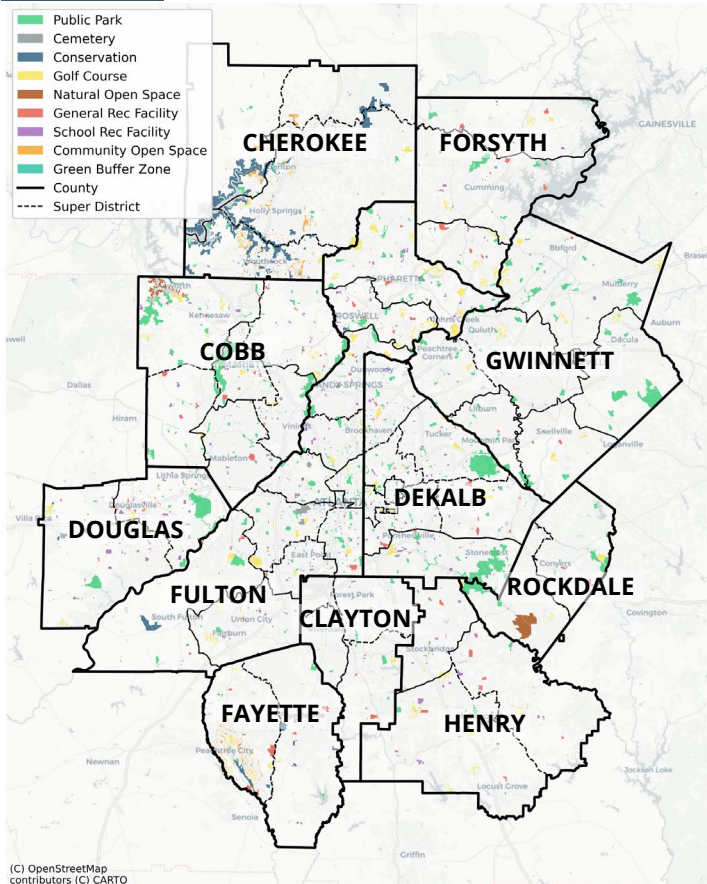
What would the region look like in 2035 if **growth was limited in areas with high climate risk**?

# METHODOLOGY | CLIMATE RISK, NATURAL RESOURCES, & CULTURAL ASSET

Growth was constrained in areas with high flood risk, protected natural resources (e.g., parks, river corridor) or regional/cultural assets (e.g., airport, hospitals, historic sites).

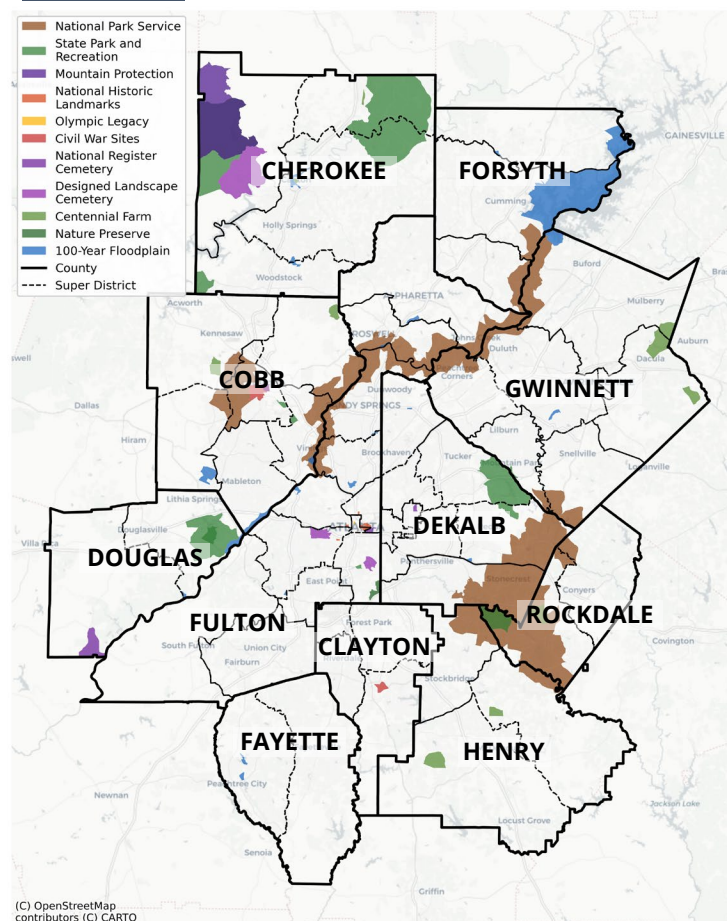
## Green Space & Parks

ARC



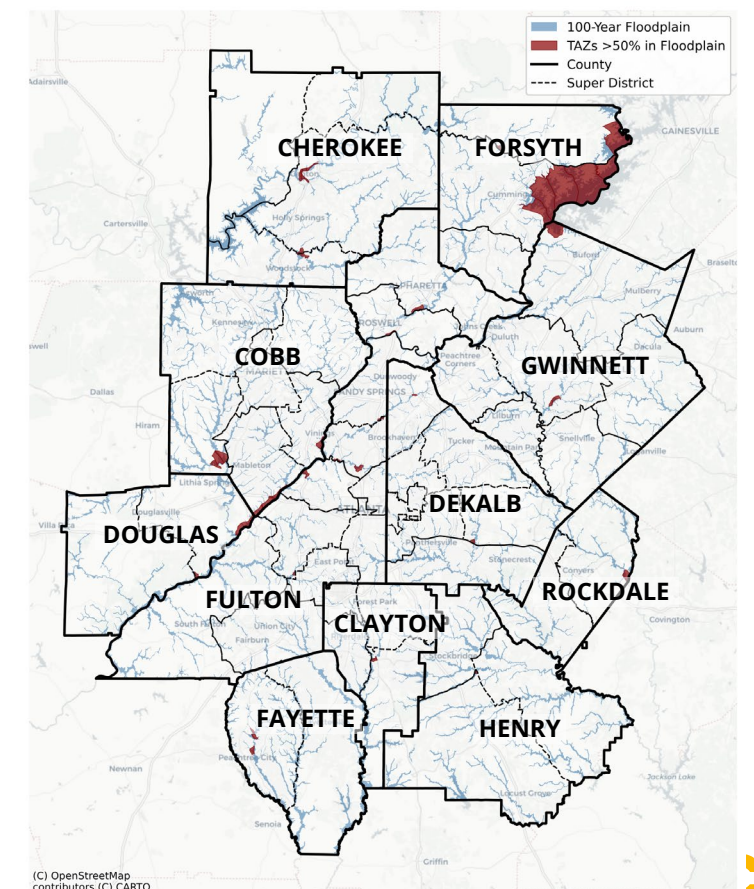
## Regionally Important Resources

ARC Regional Resource Plan



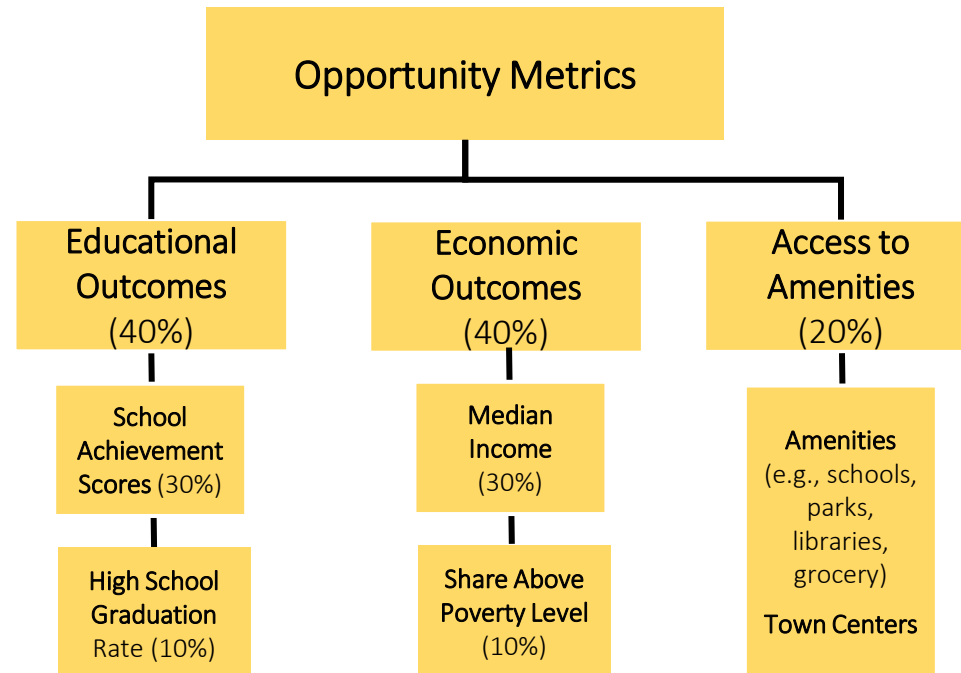
## High Flood-Risk (100-Year Floodplain)

ARC



## METHODOLOGY | OPORTUNITY INDEX

Access to opportunity is evaluated based on an index that considers educational outcomes, economic outcomes, and access to amenities, including proximity to town centers.

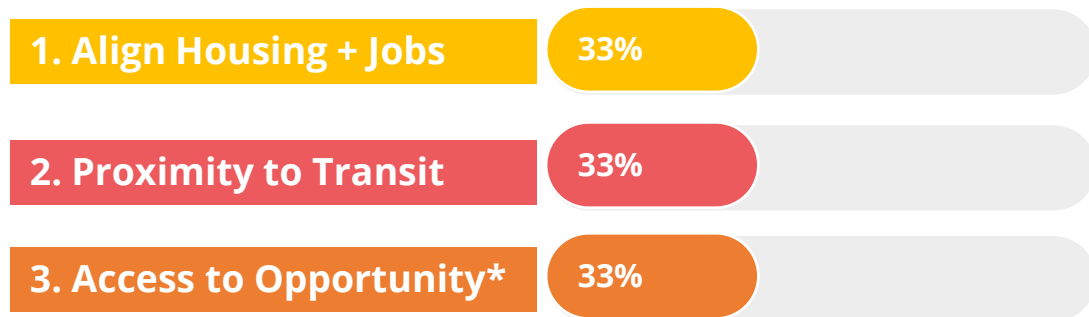


For each tract, each indicator is converted to an index ranking it relative to the region. Indicator scores are then averaged using the weights above to produce a final composite score.

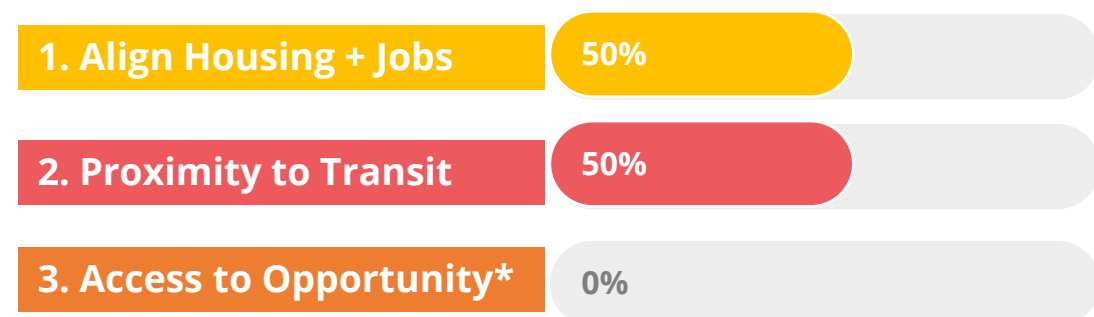
## METHODOLOGY | WEIGHTING ARC PRIORITIES

The alternative future growth scenario allocates new housing development in alignment with ARC priorities – weighting the goals of building new **housing near jobs, proximity to transit,** and new affordable housing in **areas of high opportunity equally.**

### Priorities Guiding Allocation of Affordable Homes (<80% AMI)



### ARC Priorities Guiding Allocation of Workforce/Market-Rate Homes (>80% AMI)

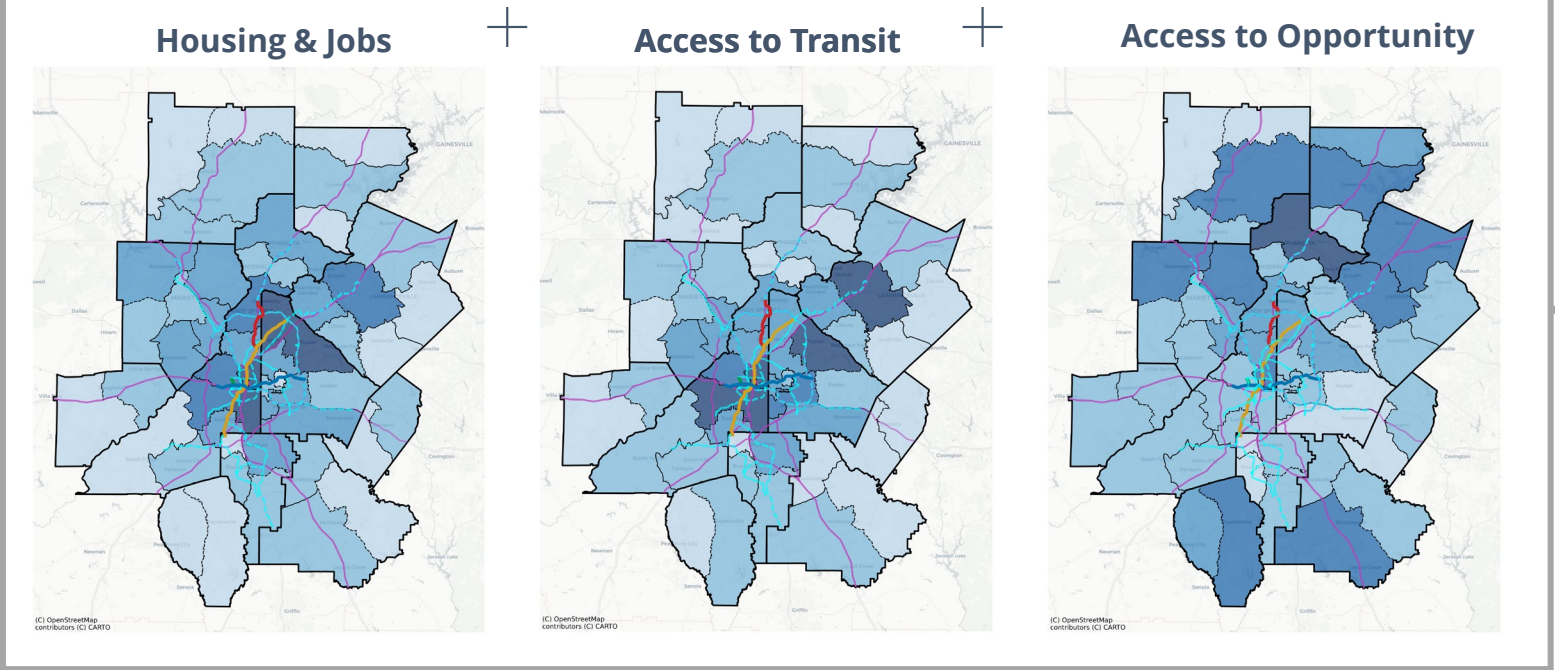


*\*Only homes affordable to low-income households (<80% AMI) are allocated based on access to opportunity. This reflects ARC's goal of expanding opportunity for low-income households while also supporting investment and growth more broadly across the region.*

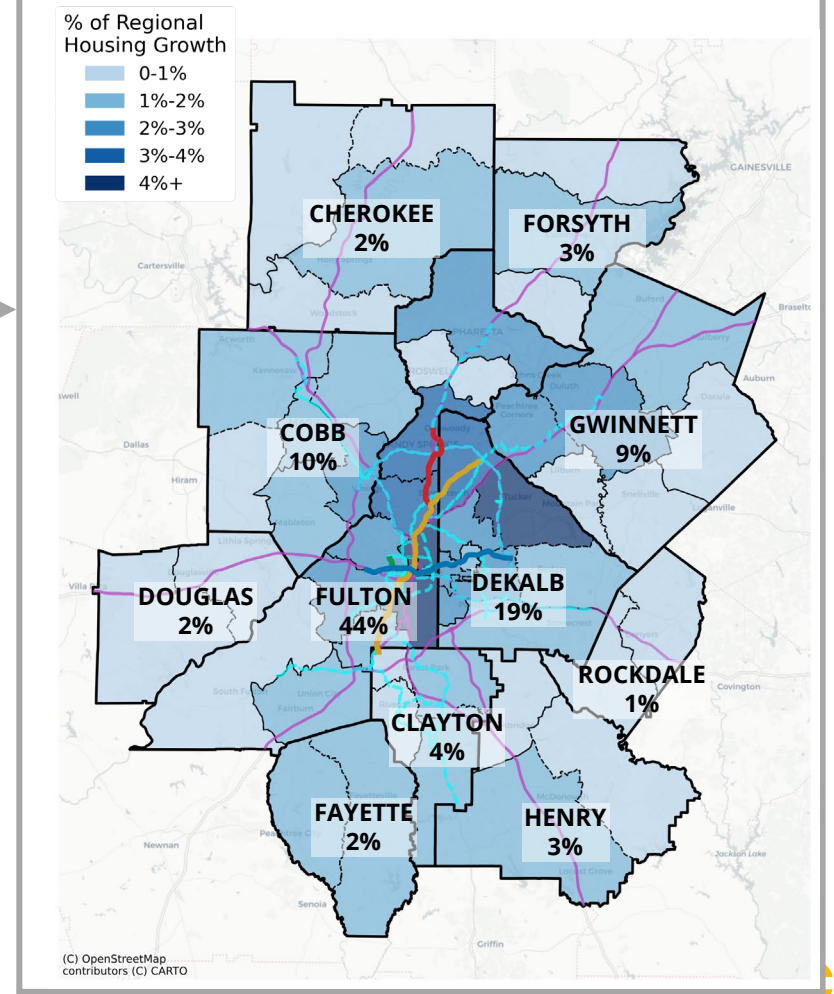
# FUTURE GROWTH OUTCOMES BASED ON ARC POLICY OBJECTIVES

Distributing growth **to achieve ARC's policy objectives** results in the following future growth outcome across the region.

## Growth based on Individual ARC Policy Objectives



## Combined Growth Scenario



## Growth allocated based on even weighting of policy priorities:

Homes Affordable to Incomes <80% AMI

33%

33%

33%

Homes Affordable to Incomes >80% AMI

50%

50%

*Given ARC's economic mobility objectives, only affordable homes are weighted by access to opportunity.*

### DISCUSSION QUESTIONS

- Does the weighting of access to jobs, transit and high-opportunity areas for low-income households seem right to you?
- Is this how we should strive to distribute housing across the region?



# What will future households be able to afford?

## 2035 REGIONAL FORECAST

Using ARC's forecasted 350,000 new households, we take a deeper look at who these households are likely to be and what they will be able to afford. This sets the foundation for identifying the types of homes needed to support regional affordability in 2035.

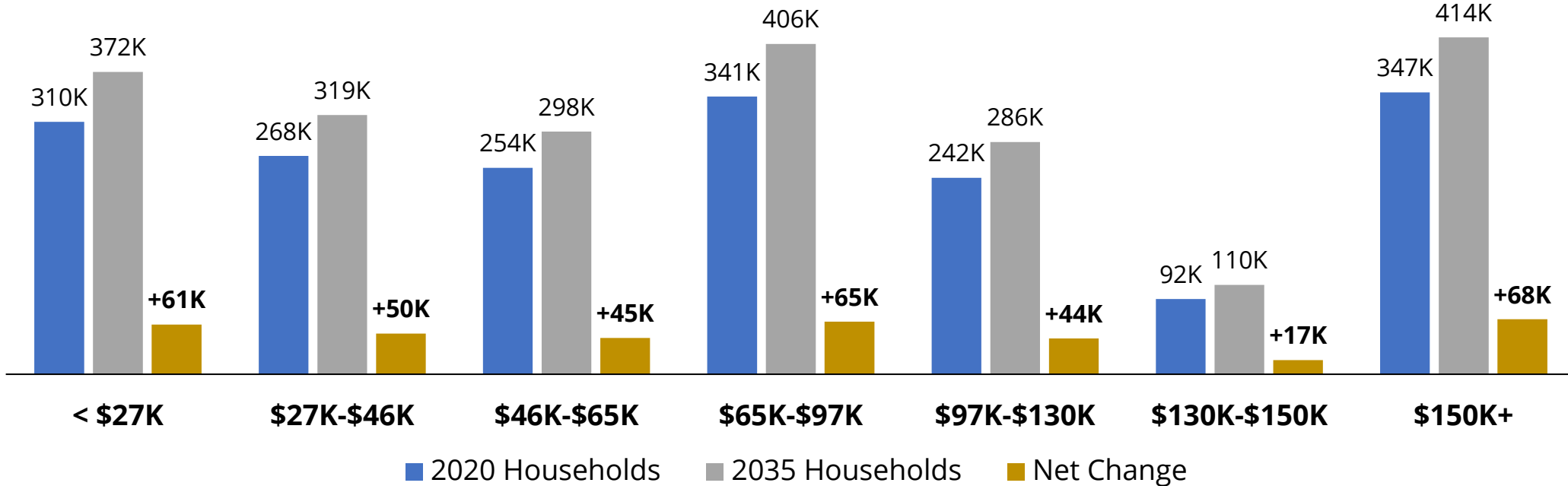
**+350,000  
additional  
households by  
2035**

- **What will their incomes be?**
- **What can they afford to pay for housing?**
- **Will they be renters or owners?**
- **What types and price points of homes will be needed?**

## FUTURE HOUSING NEEDS | NET CHANGE IN DEMAND

As the County grows over the next 10 years, it will gain new households across the income spectrum. The price of future homes need to align with how much future households can afford at these income levels.

**Future Households by Income**  
11-County Region (2020-2035)





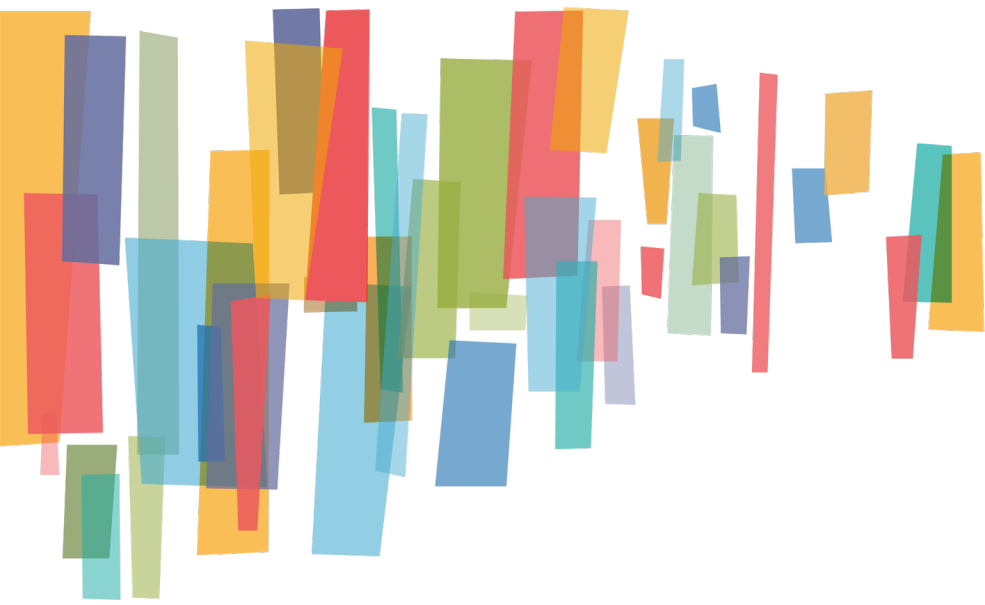
# What's Next

## HOUSING SUMMIT

The Summit will build trust across sectors to support a lasting, equity-focused coalition, and facilitate alignment on solutions to shared regional housing challenges.

### Housing Summit Overview

- **Date:** April 30<sup>th</sup>, 2026
- **Time:** 8:45am-2pm
- **Location:** Gas South District Convention Center
- **Description:** The Housing Summit serves as the capstone to a series of targeted focus groups that engaged stakeholders across the housing ecosystem to identify challenges and solutions. This working Summit will **bring together participants from across the region to refine the final housing strategy and provide input on priorities, roles, and next steps to move from plan to action.**

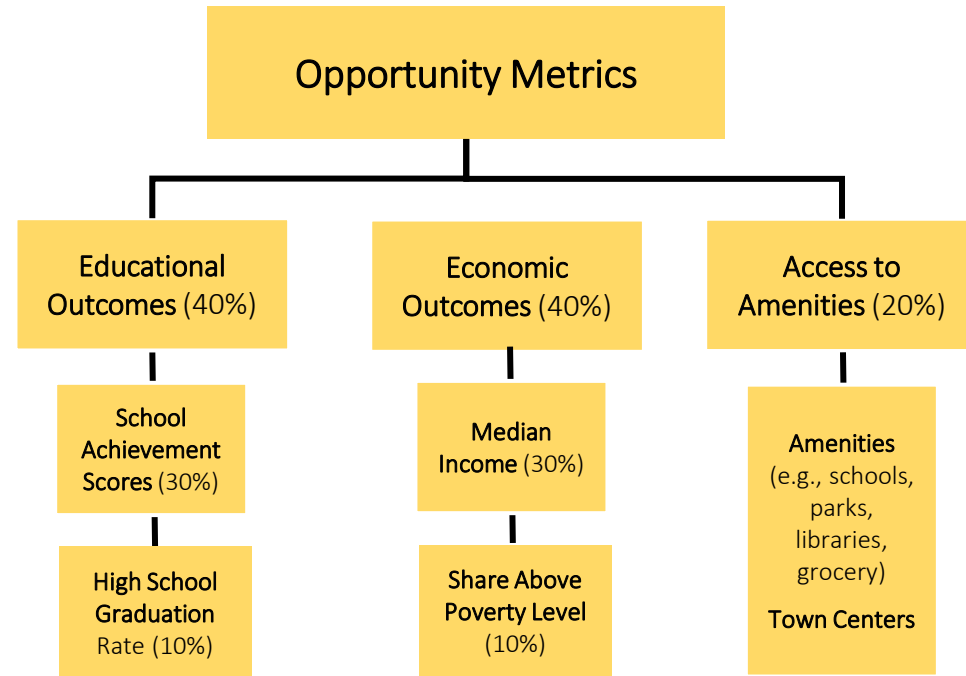
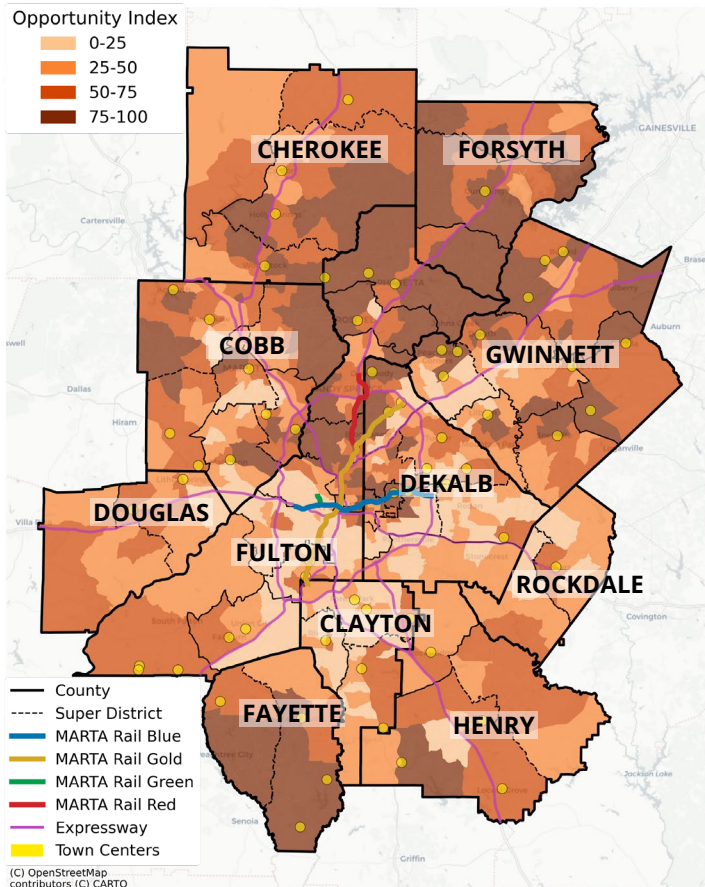


# Appendix

## FUTURE HOUSING NEEDS | METHODOLOGY

Access to opportunity is evaluated based on an index that considers educational outcomes, economic outcomes, and access to amenities, including proximity to town centers.

### Regional Opportunity Index



For each tract, each indicator is converted to an index ranking it relative to the region. Indicator scores are then averaged using the weights above to produce a final composite score.