



HOUSING NEEDS ANALYSIS (HNA)

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THE BUREAU OF
**PLANNING &
SUSTAINABILITY**

Today we'll cover...

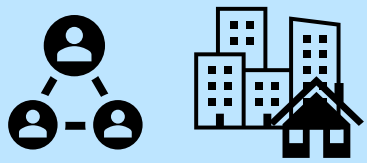
1. Introduction to HNA
2. Housing Forecast
3. Housing Capacity Analysis
4. Housing Production Strategy
5. Next Steps

Housing Needs Analysis

Existing Conditions

Housing Capacity Analysis

Housing Production Strategy



Population & Housing



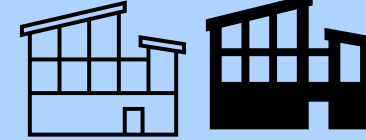
Project Housing Need



Inventory Buildable Land



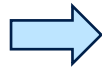
Evaluate Needed Housing



Promote Needed Housing



Reflect, Measure & Report



2023



Late 2023 & 2024



2045 Housing Forecast

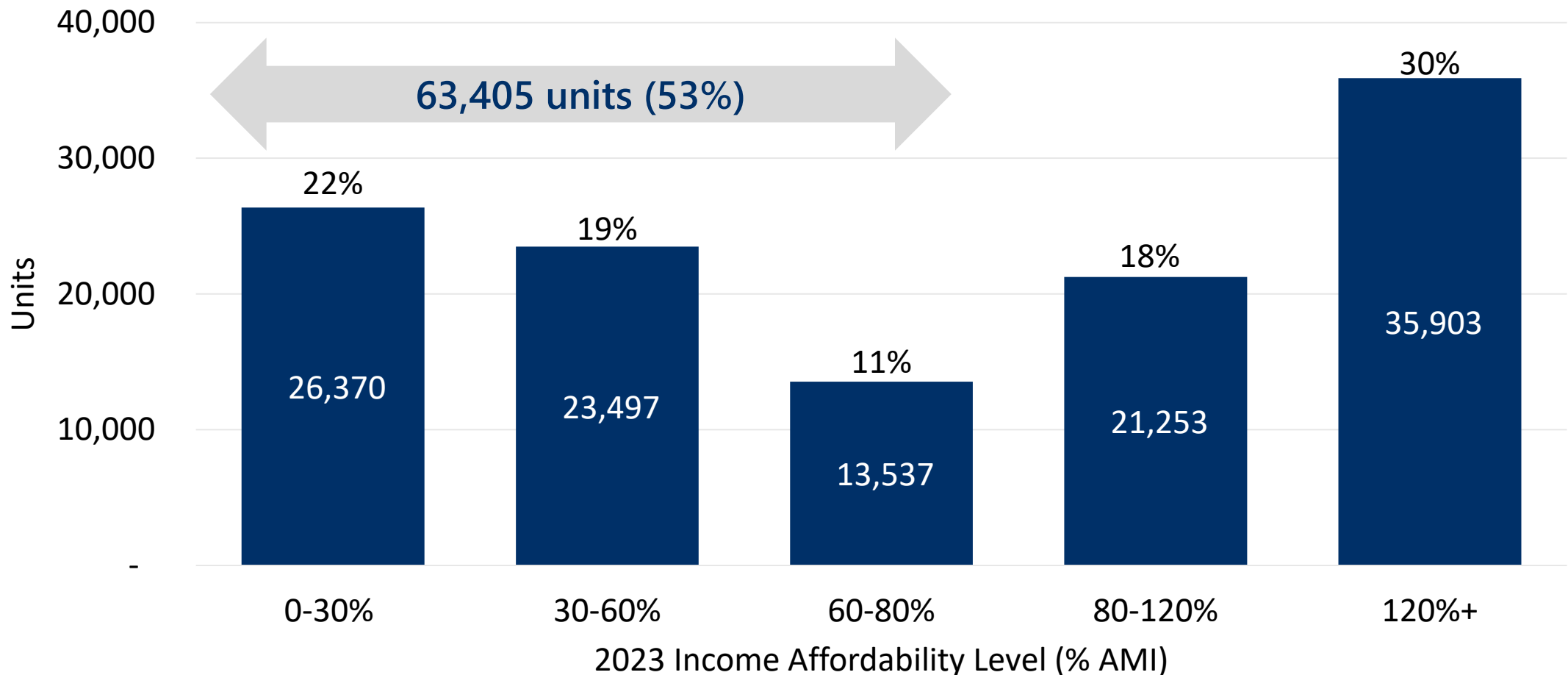
New OHNA methodology:

- Forecasted Households
- National Ratio of Housing Units to Households (vacancy factor)
- Expected 2nd or vacation home loss (Based on existing second home ratio)
- Historical Underproduction
- Housing for the Houseless

2021-2045 New Households	97,471
Unit to Household Factor	+ 8,287
2 nd Home Replacement Factor	+ 813
Needed New Housing Units	106,571
Historical Underproduction	+ 9,385
Houseless Households	+ 4,604
Total Needed Housing Units	120,560
Annual Production Target	5,242
2032 Catch-up Target	55,000

New Housing Units by Income Level

We need 63,000 units of affordable housing and over 20,000 units of moderate-income housing





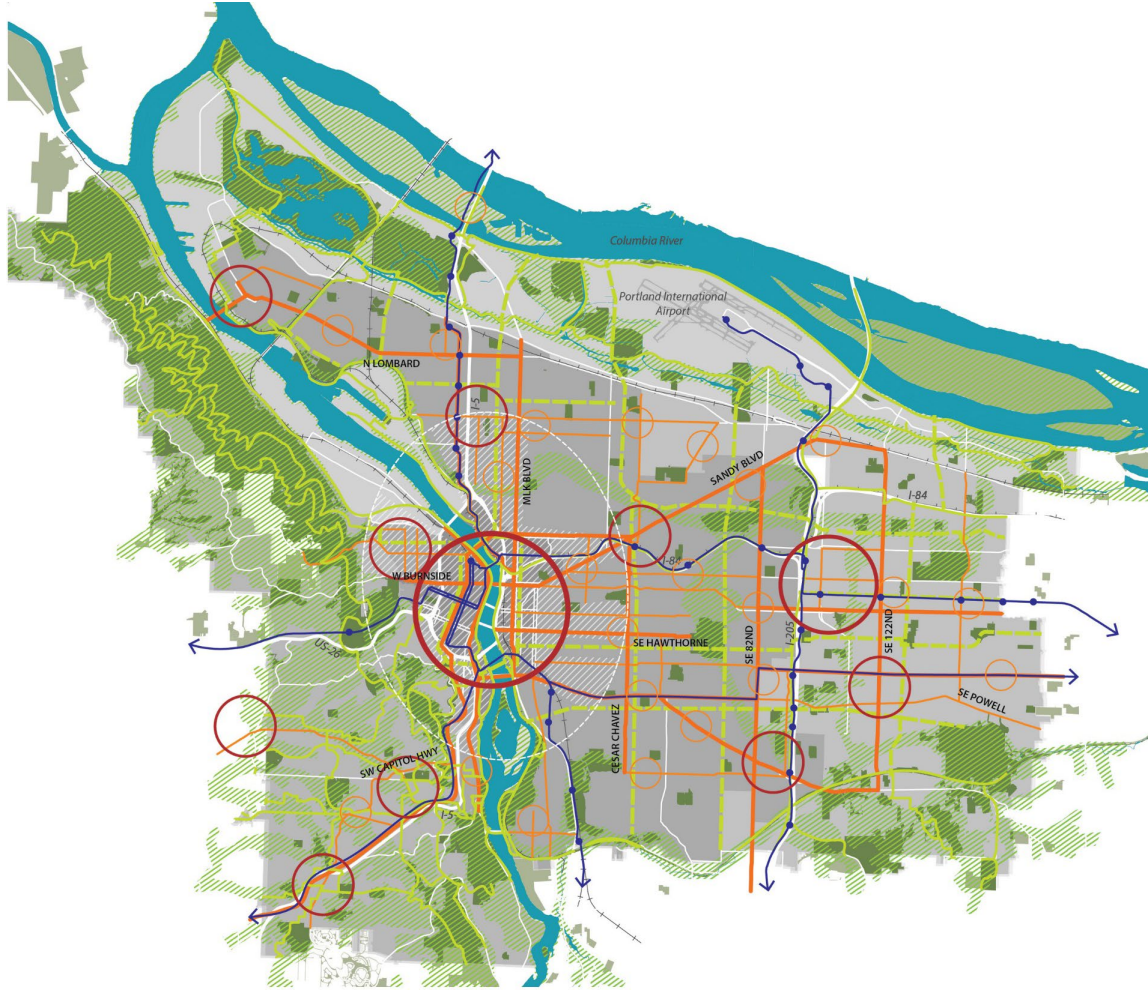
2045 Needed Housing

We need different types of housing

Lower Income	53%	63,000 units
Families (2+BD)	23%	28,000 units
Elders	23%	27,000 units
Accessible	22%	26,000 units
Homeownership		

*Numbers rounded to nearest thousand

Our Growth Strategy



Residential Capacity

Residential Units per Acre

- 0 - 1.7
- 1.8 - 4.7

4.8 - 8.9

9.0 - 15.6

15.7 - 26.1

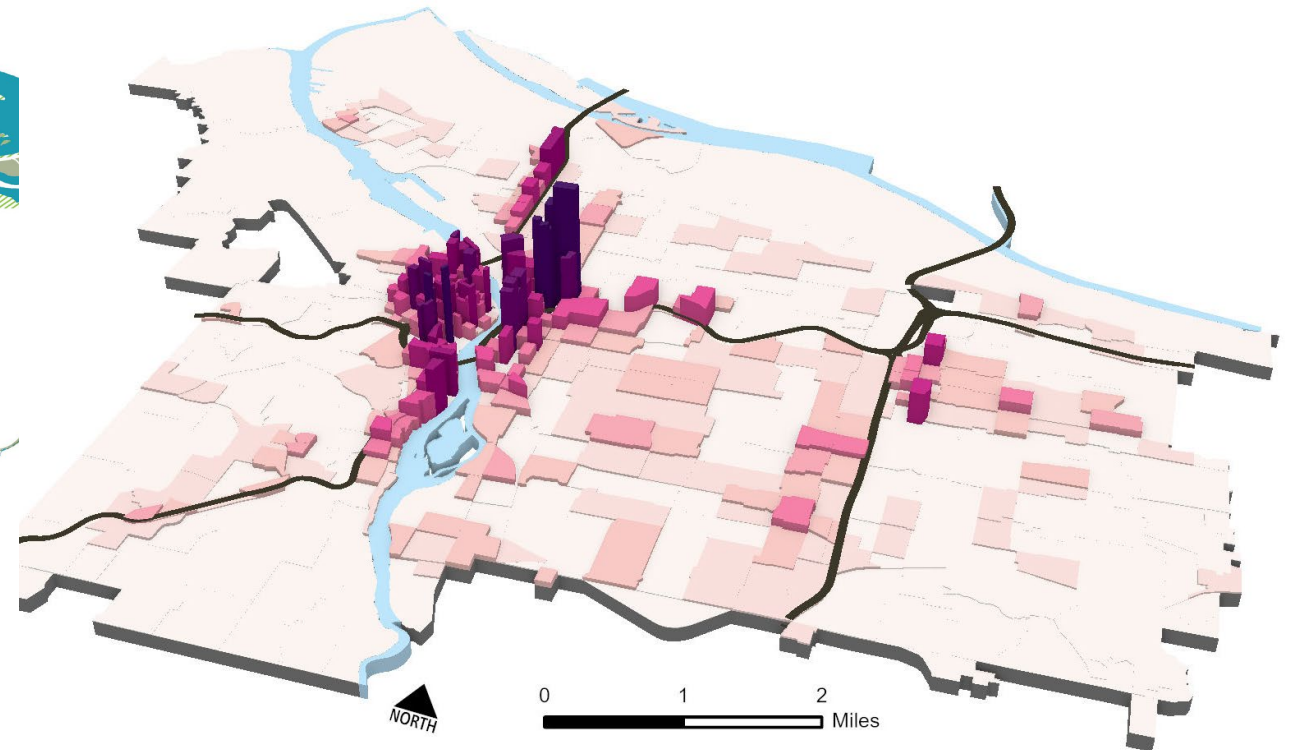
26.2 - 37.9

38.0 - 53.7

53.8 - 76.5

76.6 - 106.9

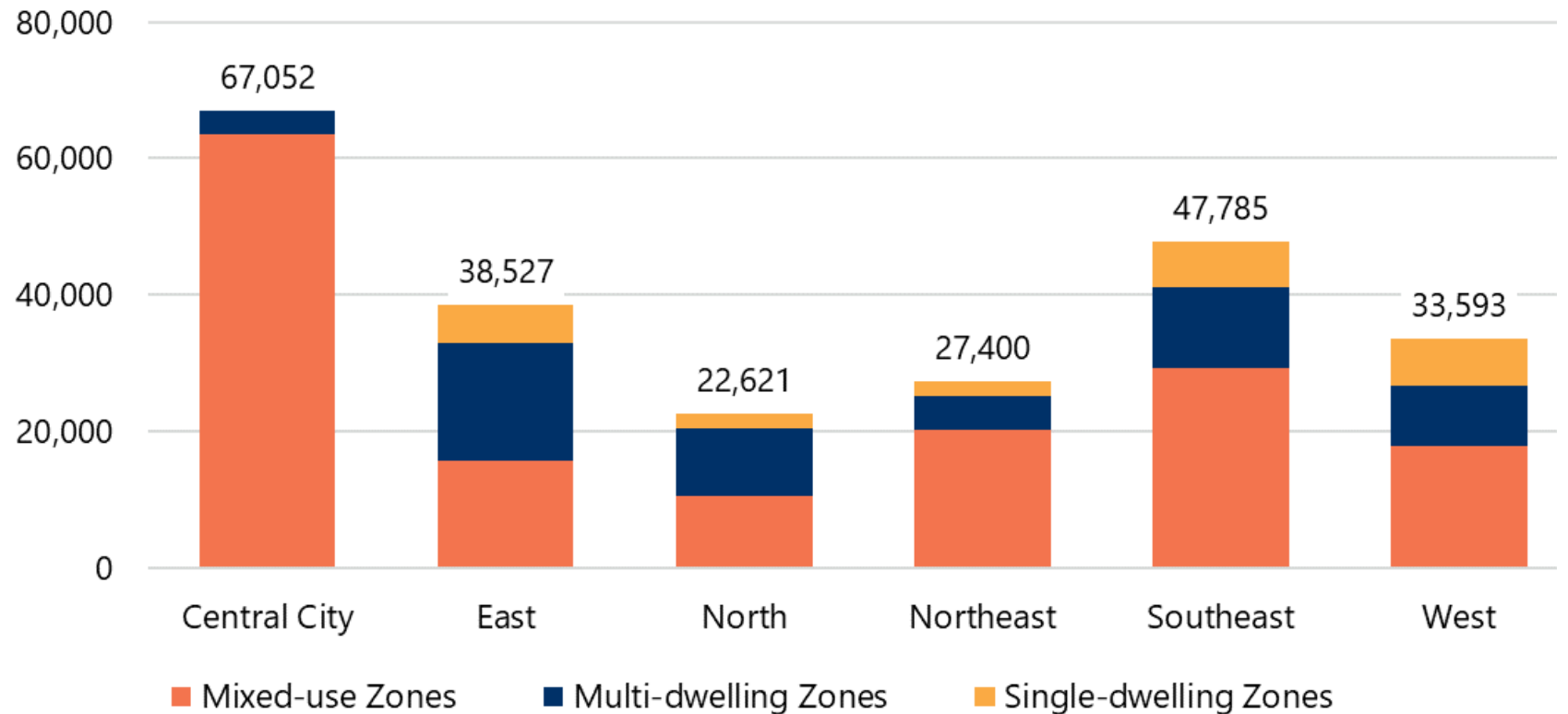
107.0 - 187.1



Residential Capacity for 237,000 Housing Units

Citywide, there is ample land for our future growth under our current zoning

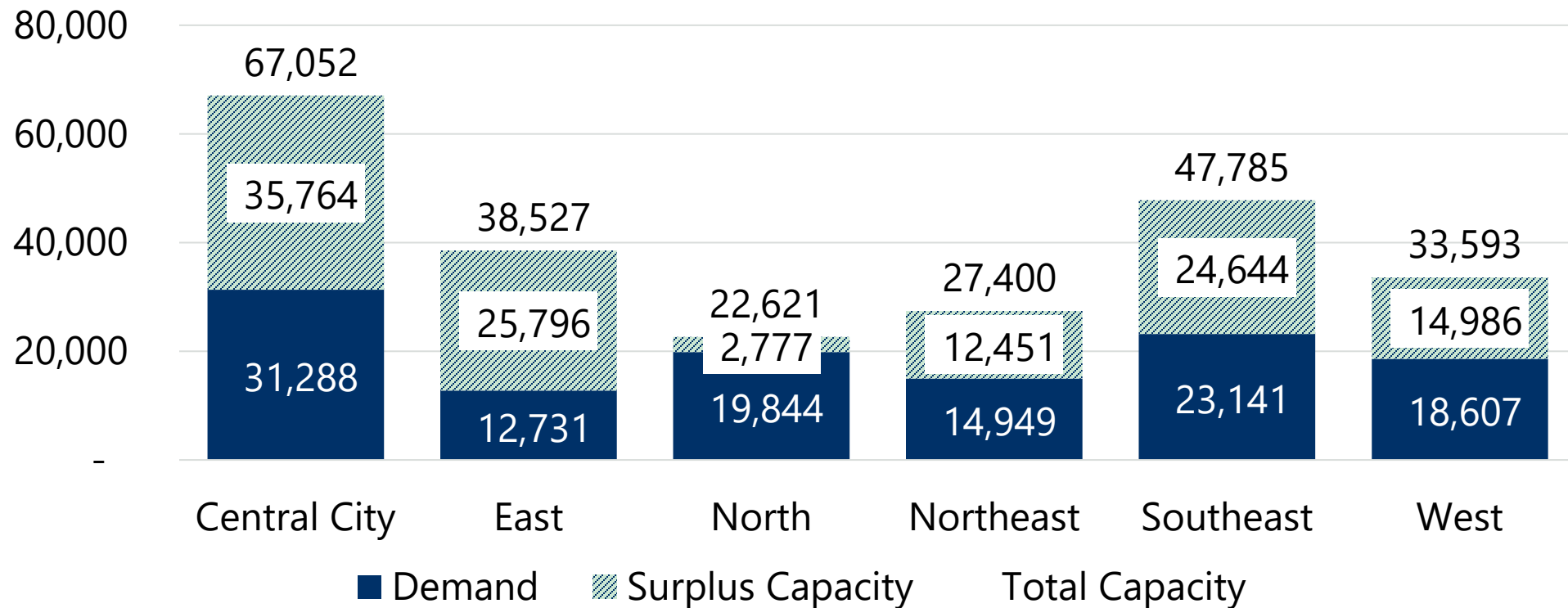
- More than 2x our need
- Mixed-use and multi-dwelling zones account for 90% of capacity.
- 33,000 units of middle housing capacity



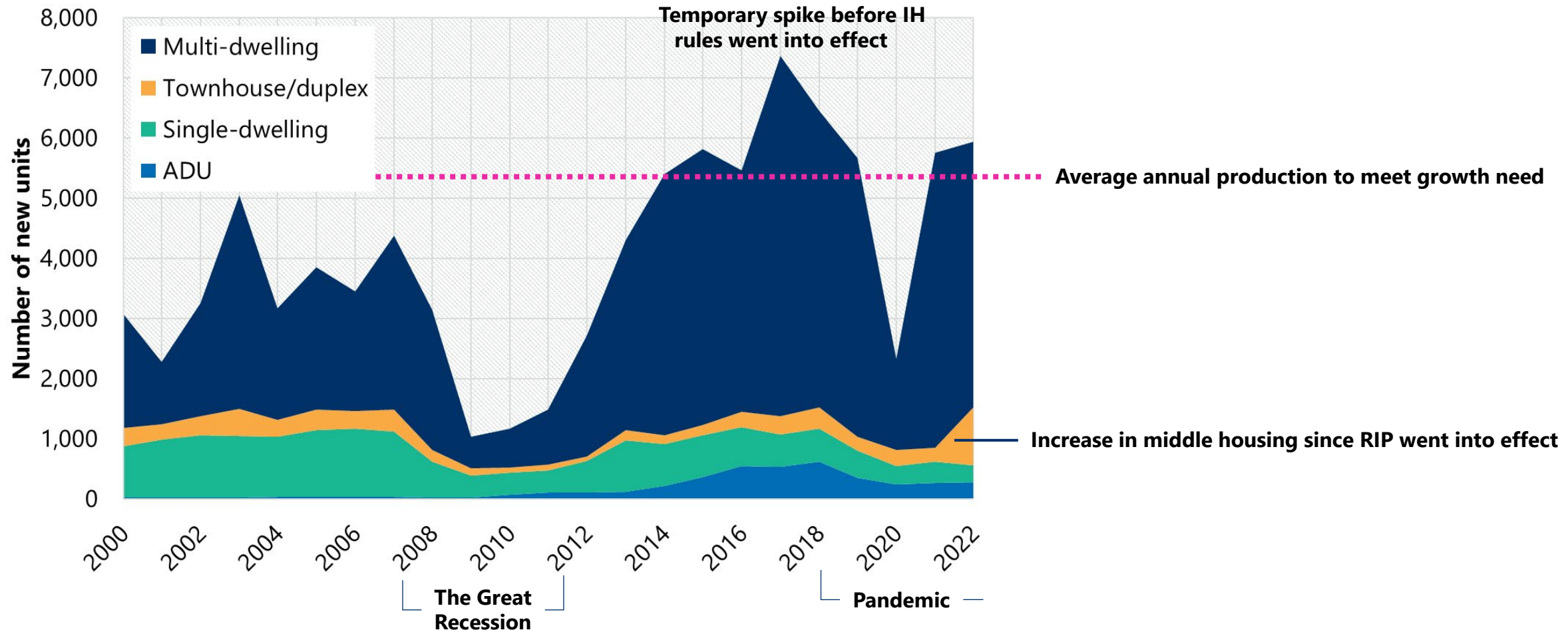
All Districts Have Excess Capacity

Citywide capacity: **237,000 housing units**

Citywide demand: **120,560 housing units**



How does this compare to recent production?



What is the Housing Production Strategy?

- Specific actions, measures and policies needed to address housing needs.
- Under state law, must be adopted by Council by December 2024
- Action categories:
 - Identifying funding
 - Creating financial incentives
 - Acquiring Land
 - Preserving housing and creating partnerships
 - Changing the Zoning Code and Map
 - Reducing regulatory burdens

How does the City influence housing development?



Housing Production Strategy - Example

	Affordable Housing	Zoning/Dev. Regs	Permitting	TIF Districts	State Legislation
Existing Programs	<ul style="list-style-type: none"> • City Bonds • Metro Bonds • Preservation • IH Program • MULTE <ul style="list-style-type: none"> • MULTE Extension • HOLTE • SDC Waivers 	<ul style="list-style-type: none"> • Residential Infill • Affordability Bonus 	<ul style="list-style-type: none"> • Affordable Housing Priority • Early Assistance Fee Reduction • System Development Charges – Deferral • Office-to-Housing Conversion fee deferral 	<ul style="list-style-type: none"> • Old Town/ Broadway Corridor, • Gateway, • Interstate, • N Macadam • Cully 	
Ongoing Projects	<ul style="list-style-type: none"> • IH Calibration Study • BAE Construction Cost Driver Study • Public Land Inventory • HOLTE Expansion • Land Acquisition ARPA Funds 	<ul style="list-style-type: none"> • Housing Regulatory Survey Response Code Changes • RICAP • Land Division Code Update 	<ul style="list-style-type: none"> • Permit Task Force • Regulatory Development Workgroup • Residential Permitting Single Point of Contact • Multi-Dwelling Housing Pilot 	<ul style="list-style-type: none"> • TIF District exploration <ul style="list-style-type: none"> • East Portland • Central City • West Portland Town Center • Advance Portland 	<ul style="list-style-type: none"> • Governor’s Housing Production Advisory Committee
Future Strategies & Actions	<ul style="list-style-type: none"> • TBD 				



Next Steps

- August 2023 Publish HNA Proposed Draft
- Sept/Oct 2023 Planning Commission
- Nov/Dec 2023 Council adoption of HNA
Develop Framework for HPS
- Mid 2024 Council adoption of HPS

Questions

Discussion

What issues are you most concerned with?

- Homeownership
- Rent increases
- Housing types or choices
- Discrimination
- ?

What should be the City's housing priorities?

- Development of all housing types
- Development of regulated affordable housing
- Stabilization and rent assistance
- Increase homeownership
- ?