

# Housing Capacity, Infrastructure, and Market Analysis



# PARTNERS



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# Project Overview

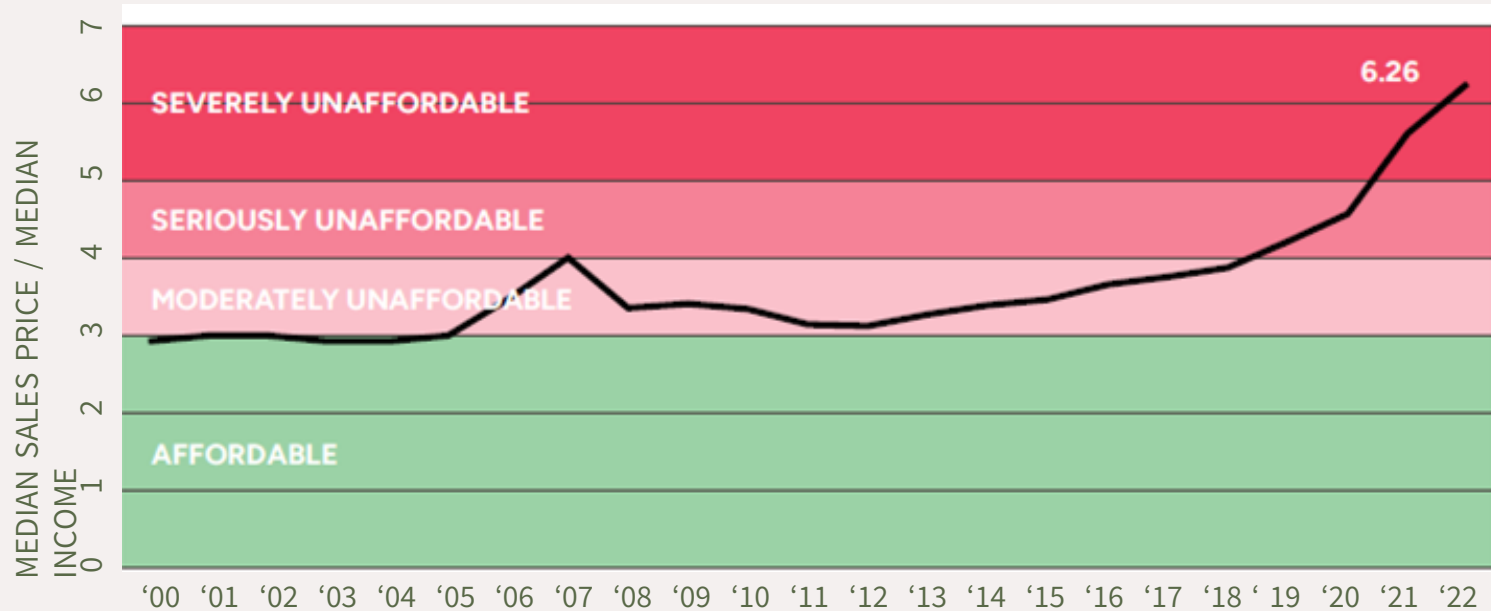
Utah faces an inflection point as **housing affordability reaches unprecedented levels**. Strong demand, from both internal sources and in-migration, is running into substantial supply constraints, including a lack of suitable land for development in the most sought-after locations.

This effort seeks to understand how **constraints and existing policies shape growth**.



# Utah's Most Unaffordable Market in History

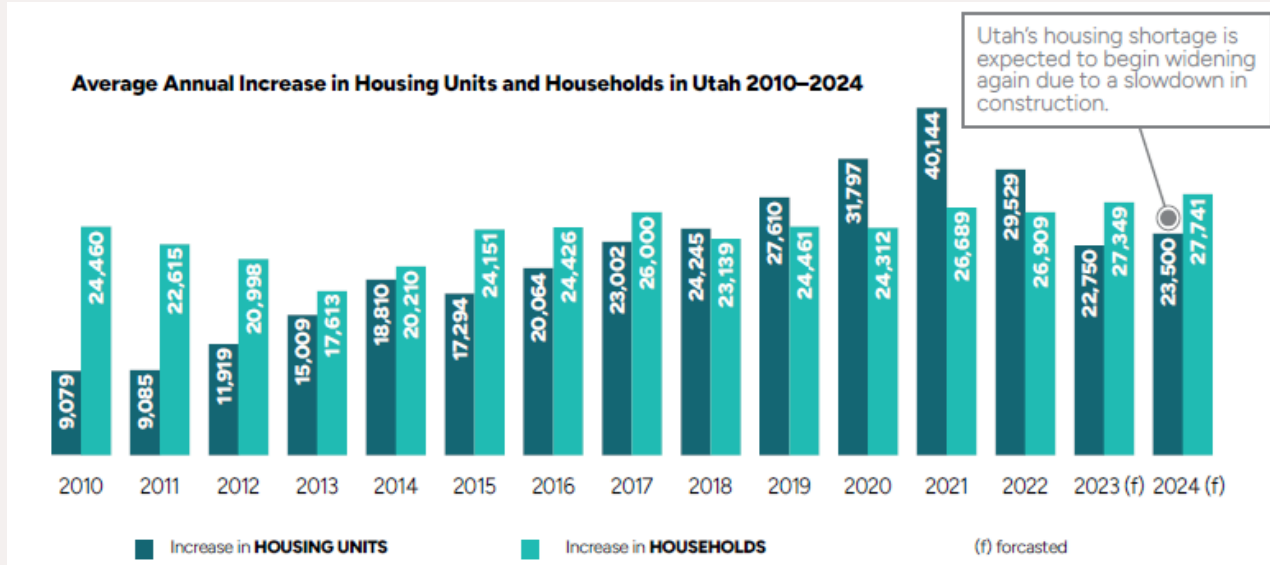
## Utah Median Multiple Affordability Rating, 2000-2022



Source: Kem C. Gardner Policy Institute

# A Widening Housing Shortage

Average Annual Increase in Housing Units and Household 2010–2024



# The Process



We are here

# Phase 1: Potential Development Supply



## STAKEHOLDER CONVENING MEETING

Gather valuable stakeholder views and potential dataset, and to launch the project



## MAP DEVELOPMENT CONSTRAINTS

Using current datasets and information from stakeholders, create a map of relevant constraint factors to determine areas with development capacity



## IDENTIFY REDEVELOPMENT AREAS

Using the constraints map, identify areas with development capacity over the next several decades, categorizing by development type (greenfield, infill, redevelopment)



## IDENTIFY DATA / ANALYSIS NEEDS

Point towards additional data needs or tools that would be useful for future analysis and tracking, and suggest cost-efficient methods for their procurement

# Phase 2: Market Demand Forecast



## DEVELOP MARKET FORECAST MODEL

Using Kem C. Gardner Policy Institute growth projections, create a growth and housing demand model for each forecast area, dividing projections by factors including land values, destination accessibility, and the availability of water and infrastructure, among others.



## PROJECT GROWTH FORECAST

The team will project growth and housing demand to the preferred multiple-decade horizon year, projecting housing based on product type, tenure, and price/rent point based on detailed demographics and housing preferences.



# Phase 3: Growth/Development Scenarios



## CREATE POTENTIAL GROWTH SCENARIOS

Based on the baseline scenario, the team will create 3–4 potential growth scenarios, which could include growth without changes to current constraints, growth consistent with adopted government plans or visions, or scenarios where certain constraints are modified (e.g., zoning changes to accommodate greater building density).



## MODEL THE GROWTH SCENARIOS

The team will utilize the newly developed parcel-based capacity tool to create and model the growth scenarios to understand development potential under each scenario.

# Phase 4: Recommendations



## FINAL REPORT

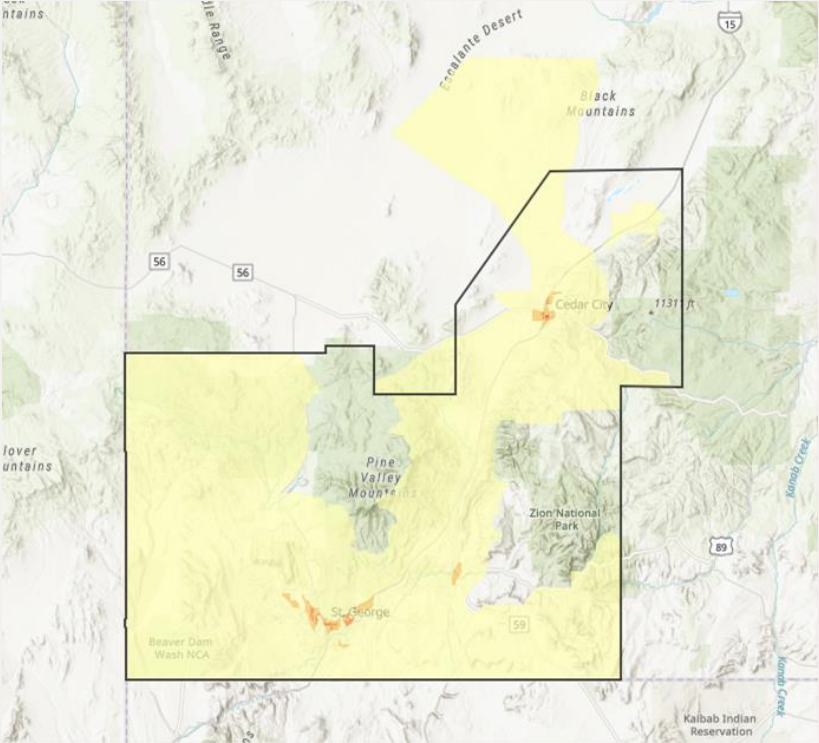
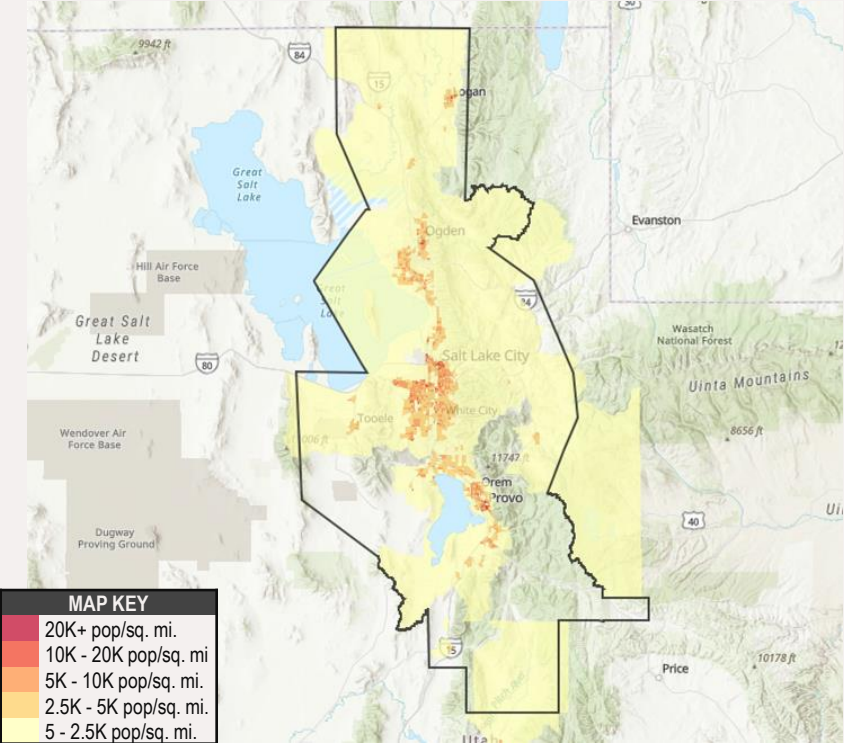
Envision Utah will draw conclusions and recommendations, which will be delivered to GOEO in a final report. The report will include a general framework for future growth. To develop this report, the original group of stakeholders from Phase 1 will be reconvened to share the scenarios, elicit reactions, and discuss ways to better accommodate growth.



## INTERACTIVE MAP

An interactive map will be developed to accommodate the final report. The interactive map will be simple to operate and easy to understand, and will supplement viewers' understanding of the report's geographic findings.

# PROJECT AREAS GENERALLY ALIGN WITH POPULATION DENSITY



Census Blocks with Minimum Population Density of 5/Sq. Mi; Greater Wasatch Project Area & Southern Utah Project Area

# THANKS!



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