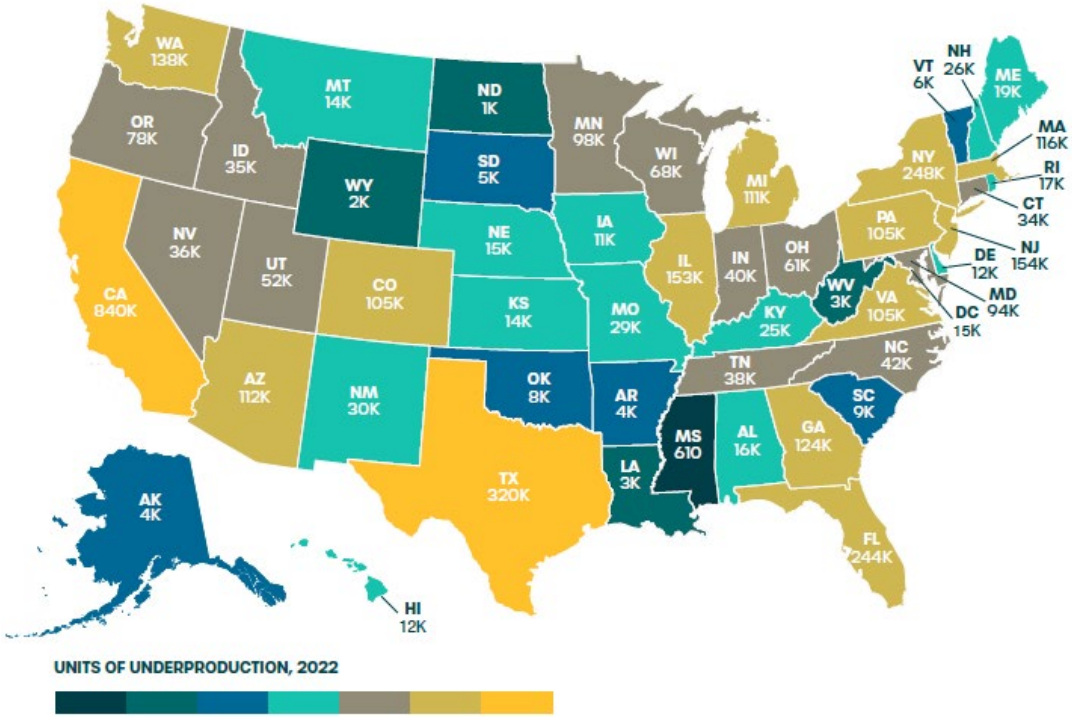
There’s no place like home

April 9, 2025

Coastal Region Housing Coalition
Housing Savannah

transport STUDIO

2021-2023 Trends



- Underproduction remained flat nationwide.
- Housing starts declining, especially multifamily
- 3.85 million unit shortfall in 2022
  - 124,000 unit shortfall in Georgia in 2022

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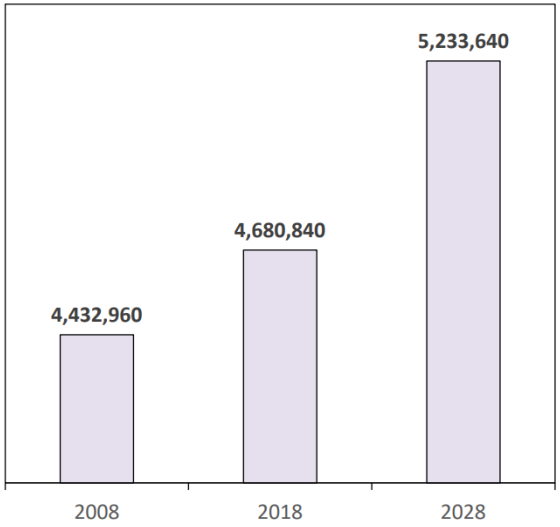
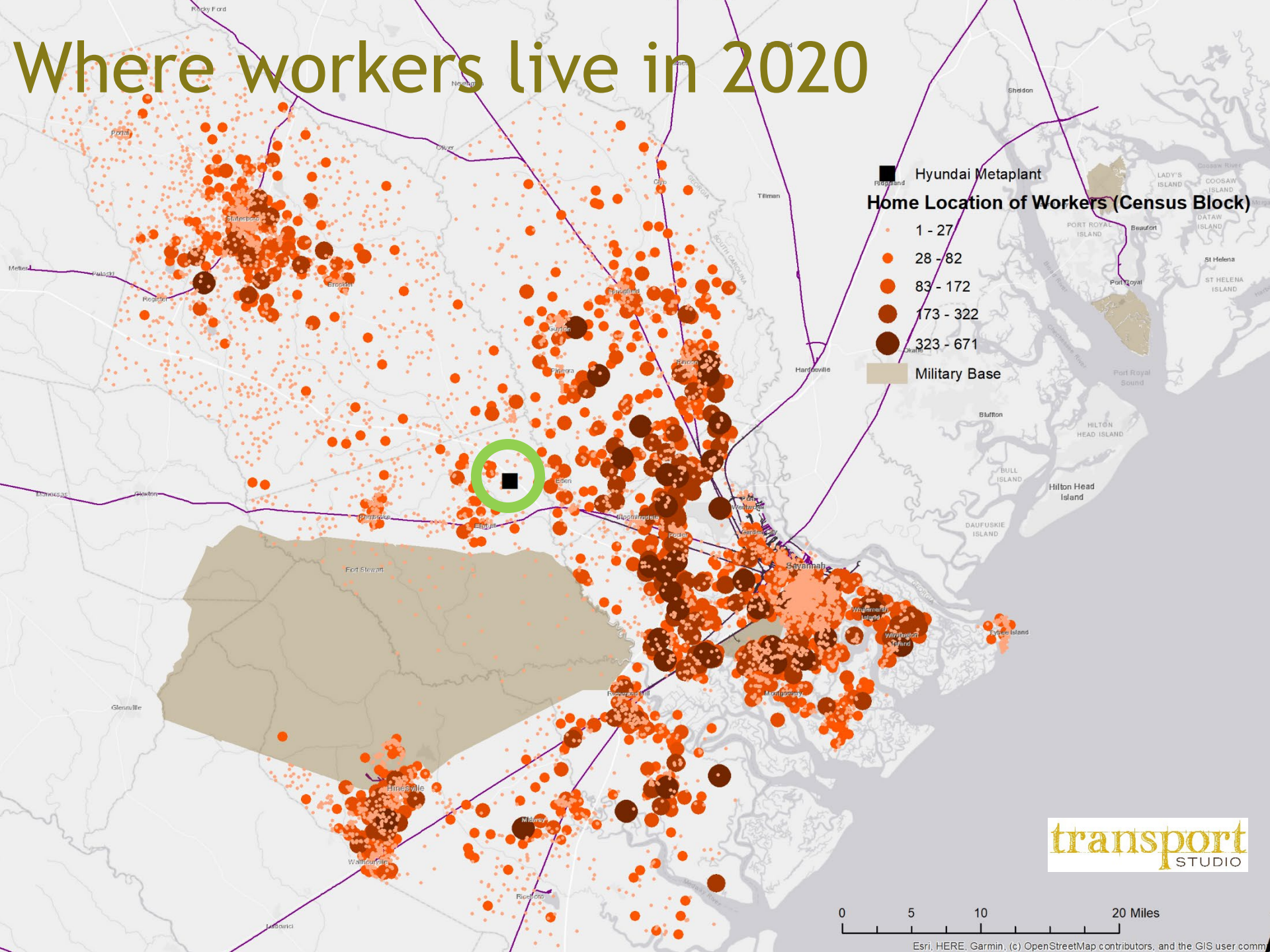
Growth is Here

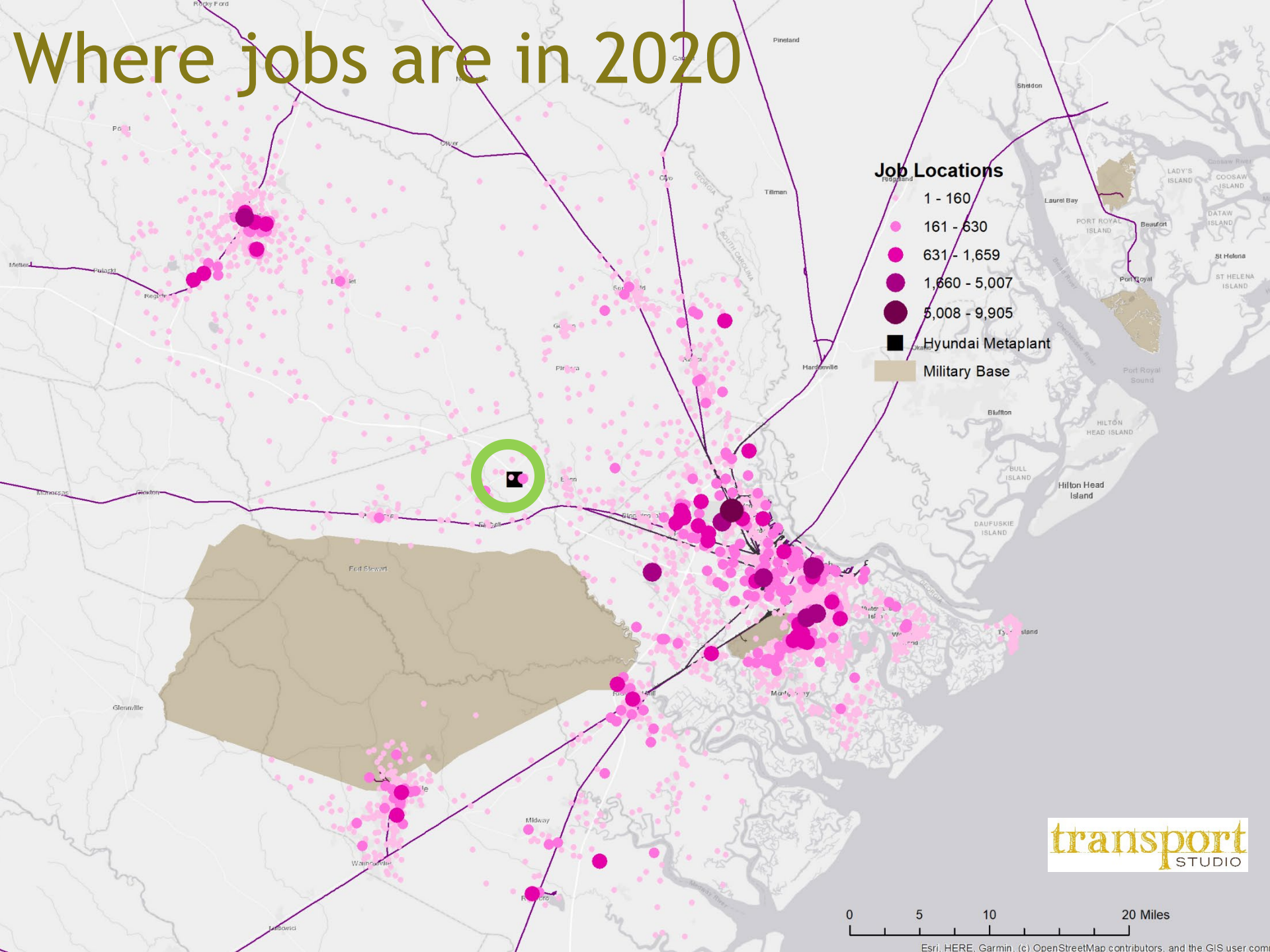


- 4 million increase in population
  - 1990 to 2022
  - 2022 to 2050
- GDOL projects > Half a Million new jobs by 2028
  - 2018 projection
- 3.4% statewide unemployment today
- 3.2% Coastal Region unemployment today
- JDA Counties population +40% by 2060 (OPB)

Where workers live in 2020



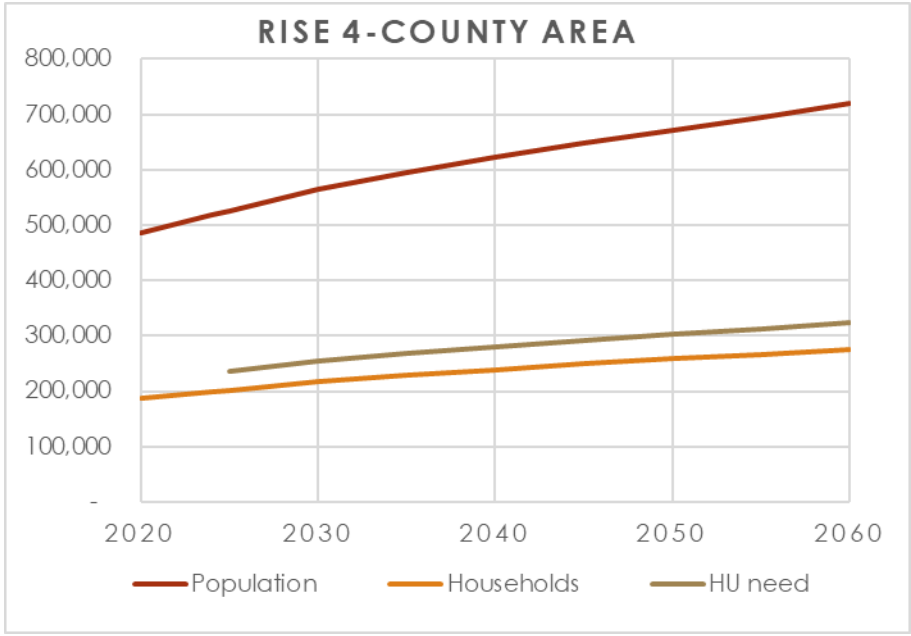
Where jobs are in 2020



Regional Growth Projections

- OPB Projections – Four County
  - 719,000 people in 2060
  - 40% growth 2024-2060
  - >320,000 housing units by 2060

- Housing Deficit Pre-Hyundai
  - Chatham 10,000 units (2019)
  - MSA: Chatham, Bryan, Effingham 12,275 units (HUD)



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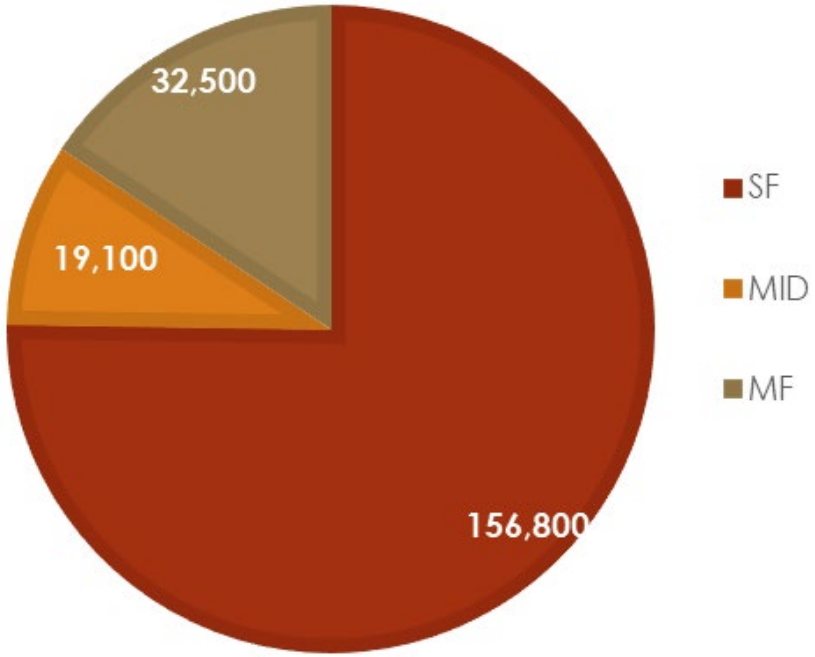
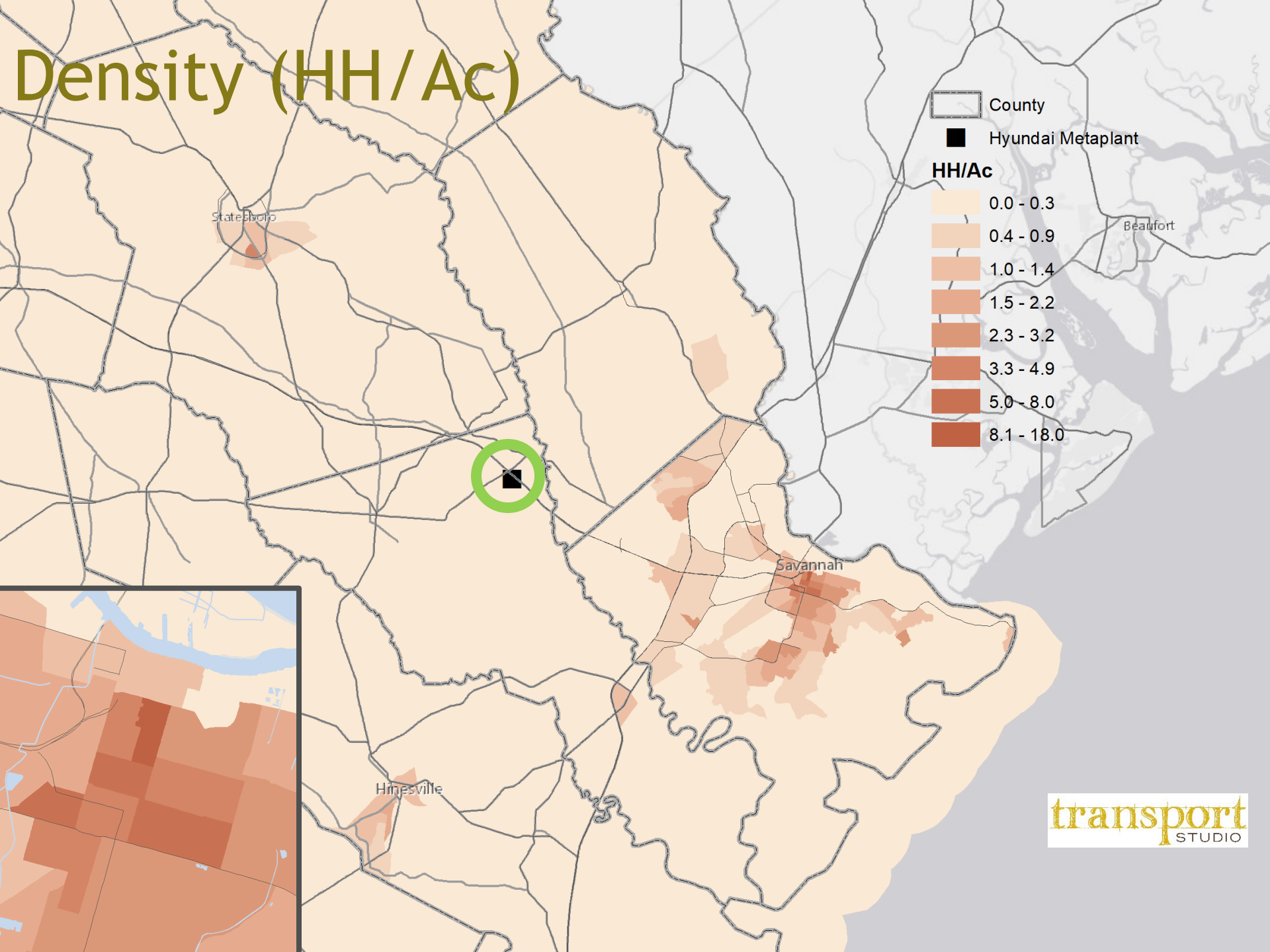
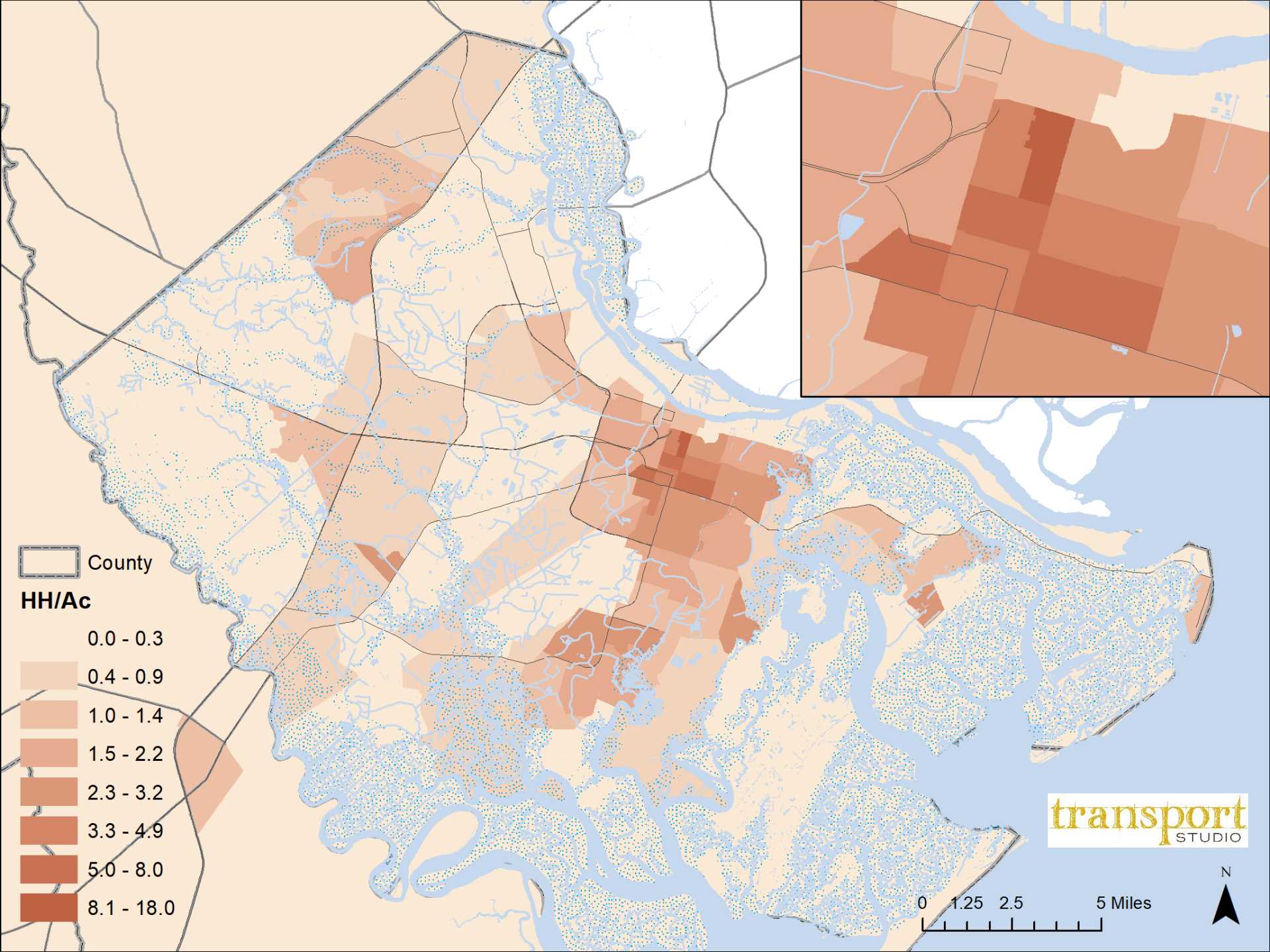
Existing Housing Types



- Four County Region
  - 75% single family
  - 9% 2-4 units
  - 16% >5 units/structure
  - 10% >9 units/structure

Density (HH/Ac)




County
HH/Ac
0.0 - 0.3
0.4 - 0.9
1.0 - 1.4
1.5 - 2.2
2.3 - 3.2
3.3 - 4.9
5.0 - 8.0
8.1 - 18.0
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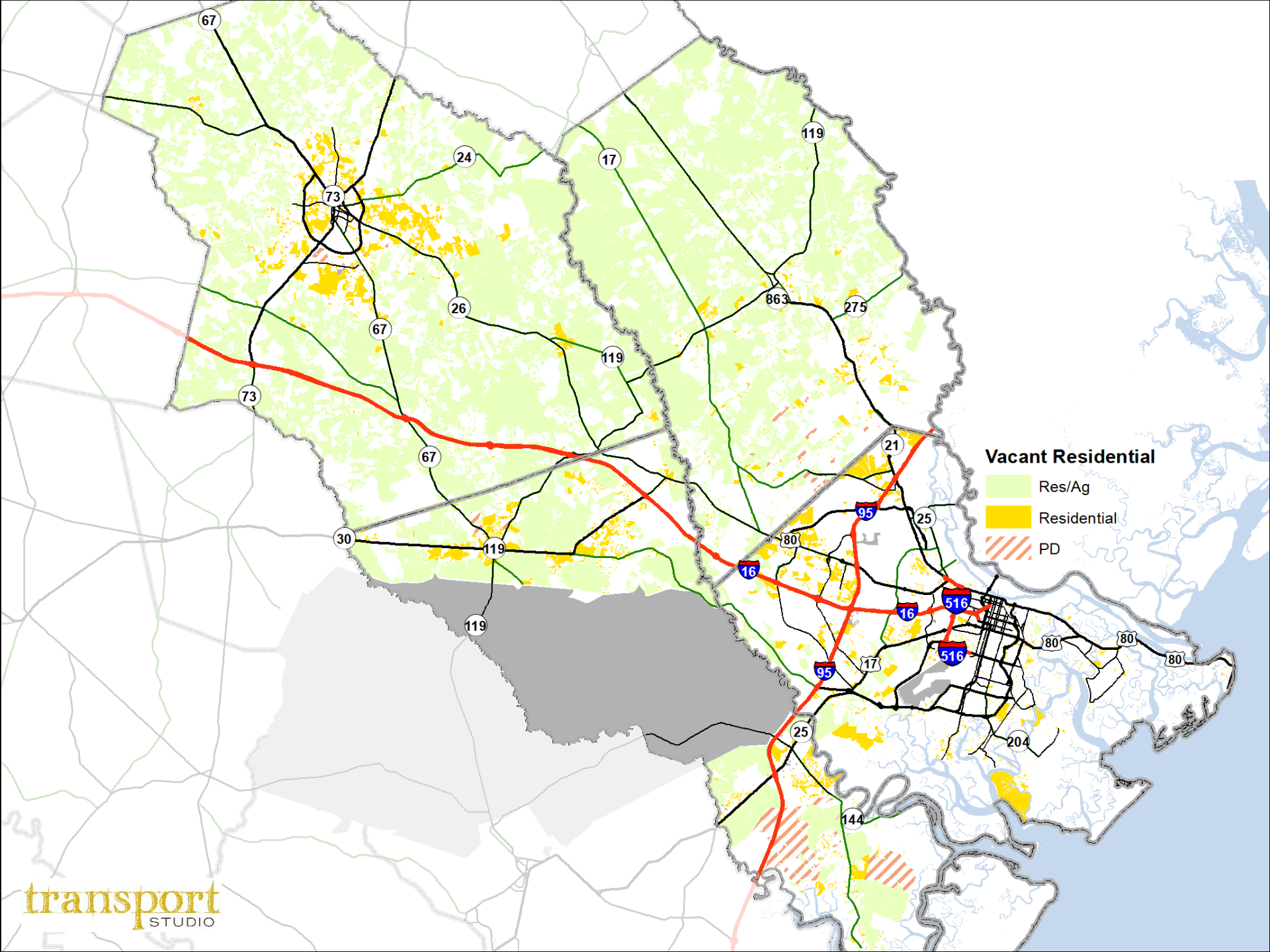
N
0
1.25
2.5
5 Miles

How much housing capacity do we have?

- Existing zoning
- High level assessment
- Assumes MF will be built if possible
  - Lot size main criteria
- Max developable land
  - Hydrology and infrastructure allowances
  - No constraint on water and sewer service
  - No constraint on flood plains alone


Vacant Residential
Res/Ag
Residential
PD
transport
STUDIO
67
24
17
119
73
26
863
275
67
119
73
21
67
95
25
30
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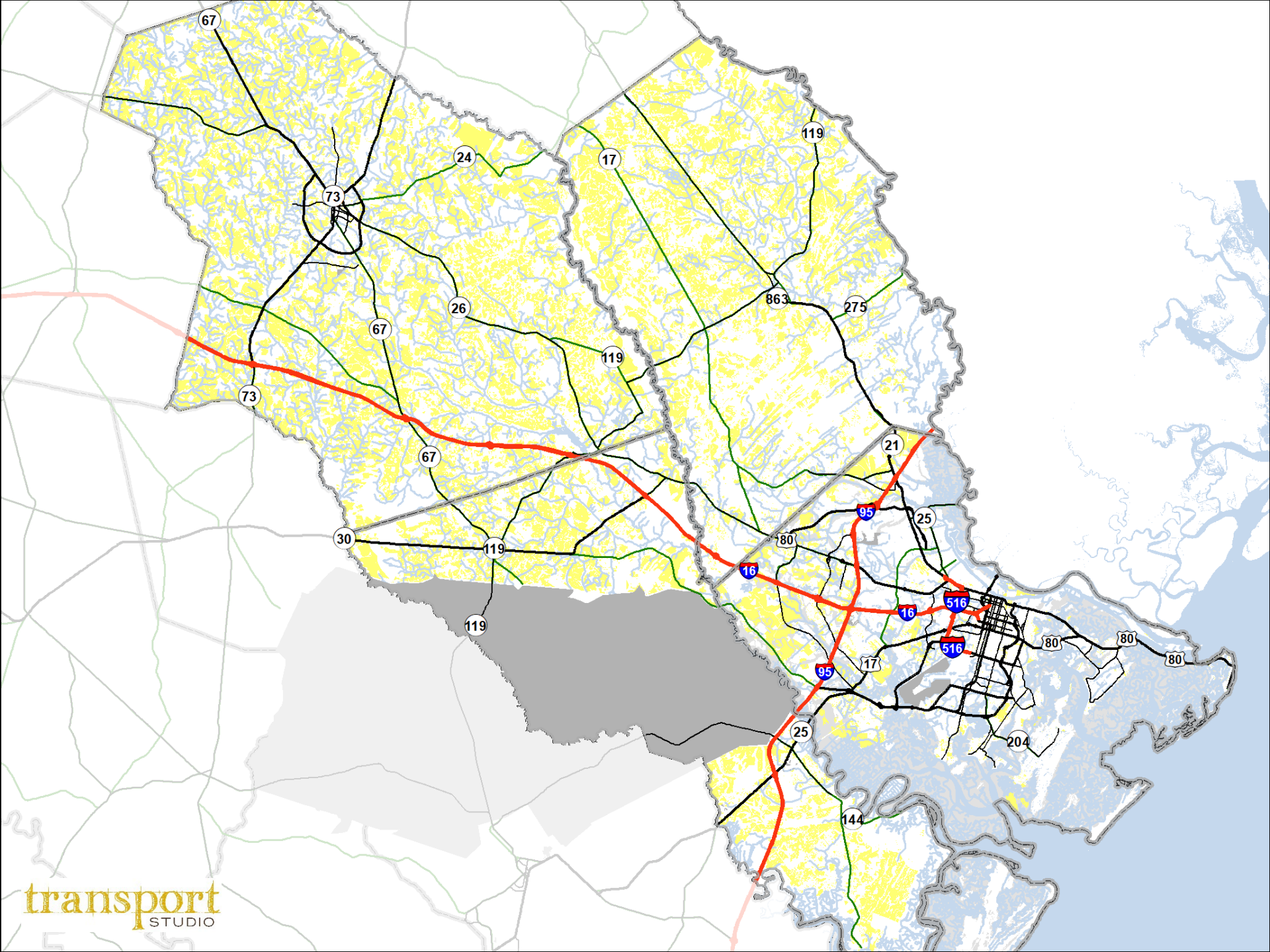
17
95
25
204
144


67
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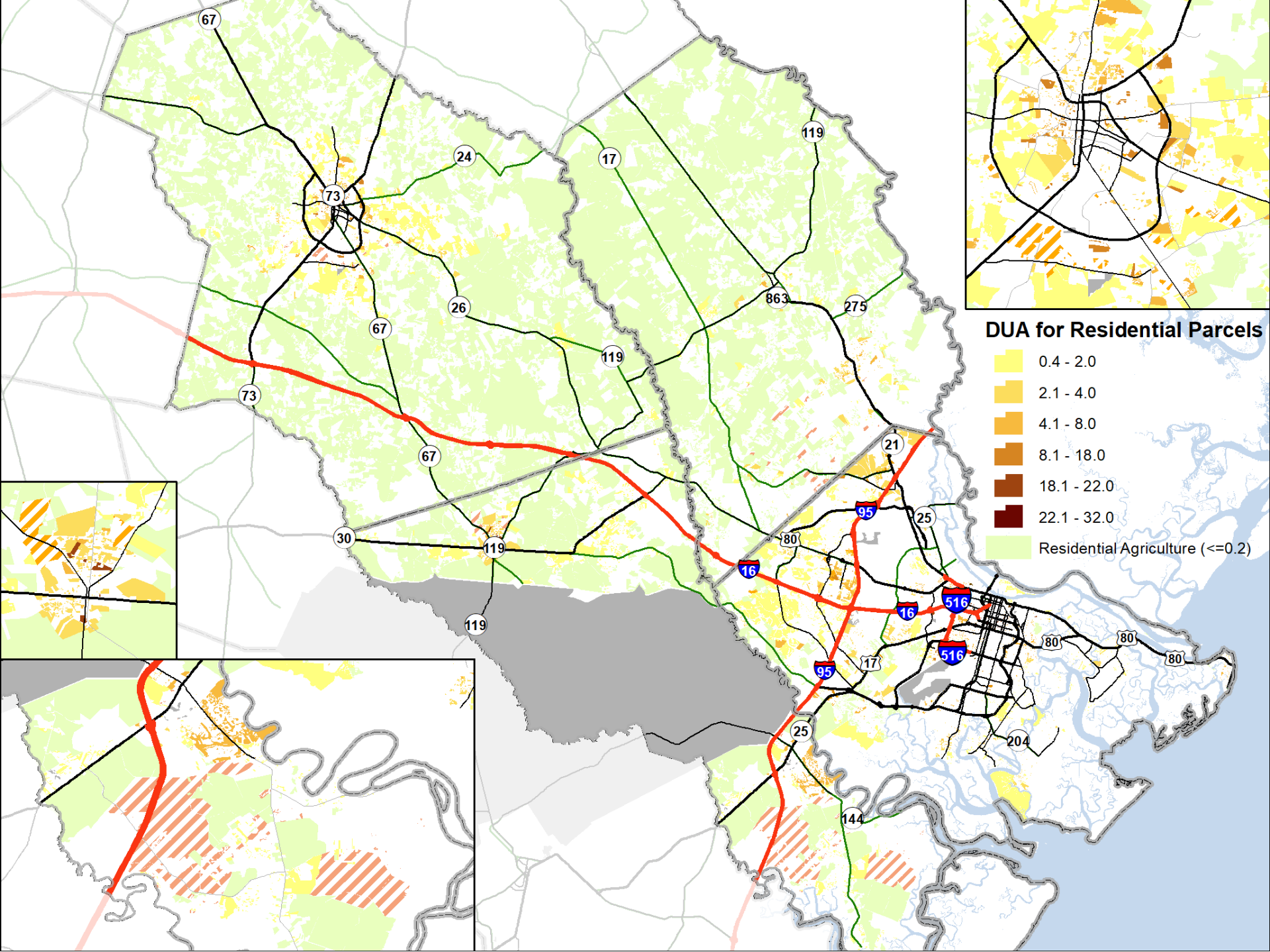
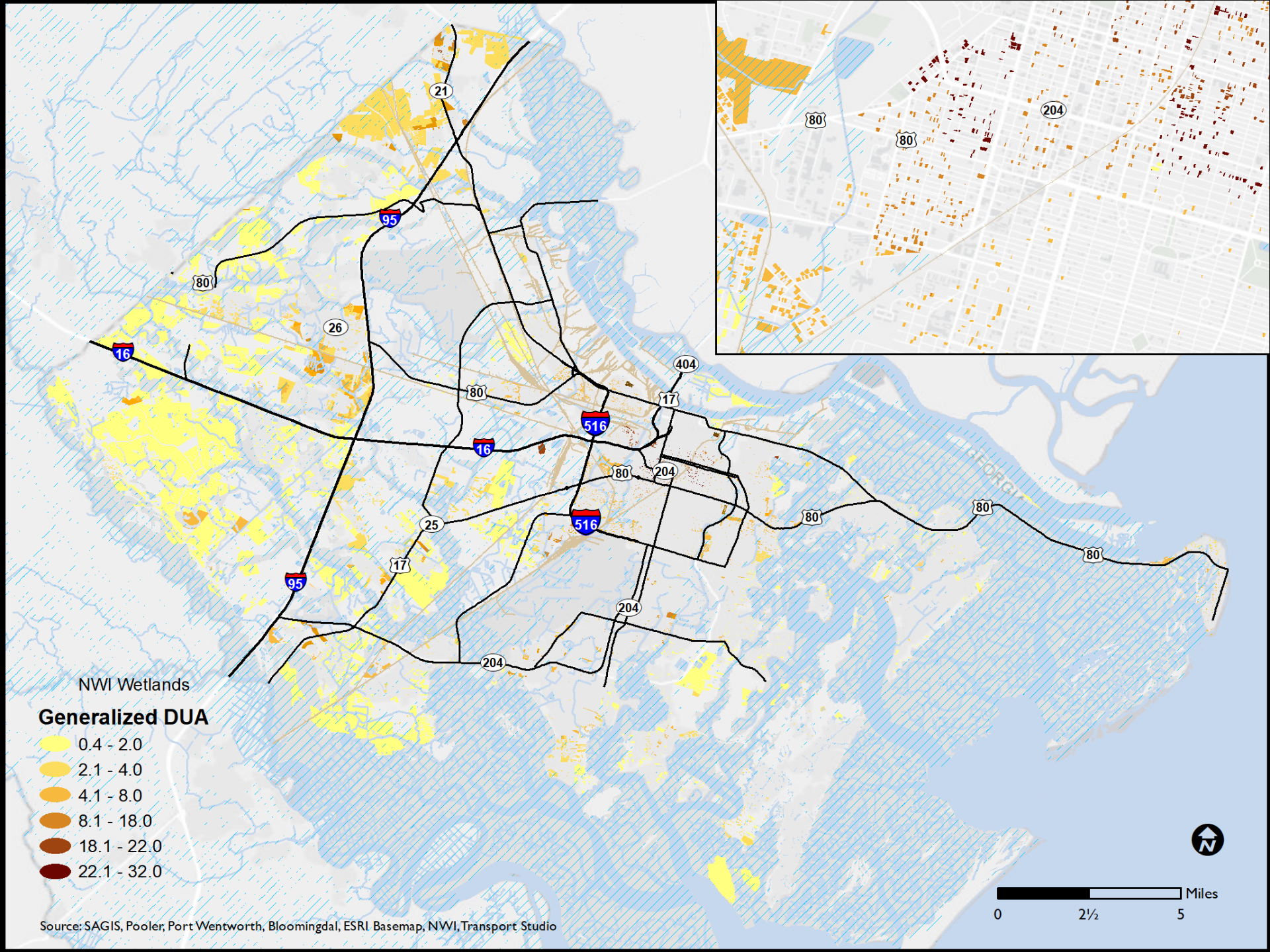
204
144
transport
STUDIO

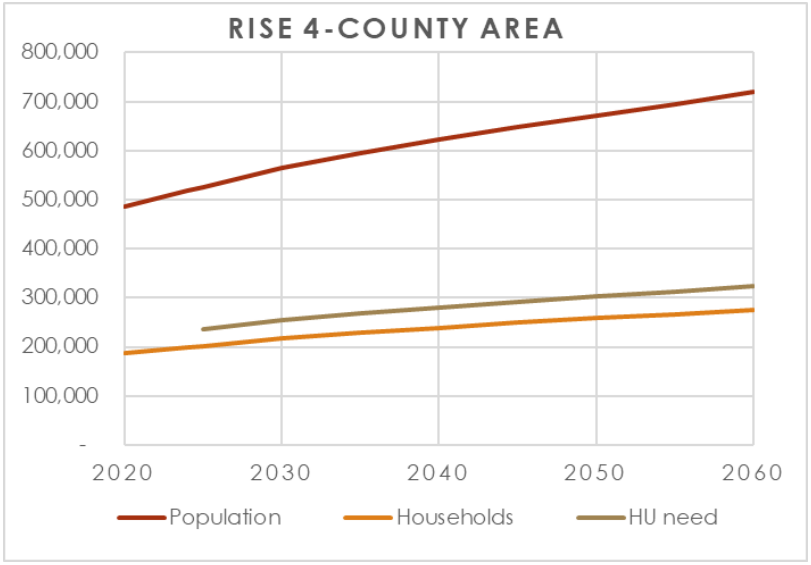

DUA for Residential Parcels
0.4 - 2.0
2.1 - 4.0
4.1 - 8.0
8.1 - 18.0
18.1 - 22.0
22.1 - 32.0
Residential Agriculture (<=0.2)
67
24
17
119
73
26
863
275
21
25
95
80
16
516
30
204
144


NWI Wetlands
Generalized DUA
0.4 - 2.0
2.1 - 4.0
4.1 - 8.0
8.1 - 18.0
18.1 - 22.0
22.1 - 32.0
Miles
0
2½
5
Source: SAGIS, Pooler, Port Wentworth, Bloomingdal, ESRI Basemap, NWI, Transport Studio

Regional Growth Projections

- OPB Projections – Four County
  - 719,000 people in 2060
  - >320,000 housing units by 2060
- Production Deficit
  - Housing need >100,000 units by 2060
  - 30,000-40,000 unit ongoing deficit

  ** assuming average development pace **
- Four-county housing capacity
  - **Buildout** +/- 58,000 new units
  - Relies on PUD development (20-40%)
- Without land use reform, we cannot balance jobs with housing



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What does this mean?

- By 2050 ***at the latest*** we will build out existing residential land
- Without land use reform, we could reach buildout at 2040 – maybe sooner

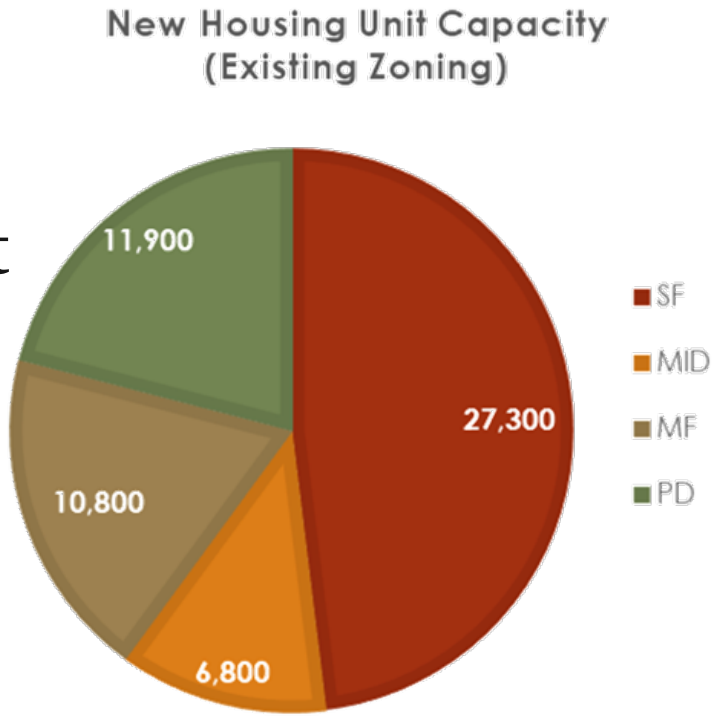
- At what cost?
  - Infrastructure costs
  - Congestion
  - Greenspace loss
  - Quality of life

Regional Capacity

vacant MF parcels < # vacant SF parcels

+/- 58,000 **new** units at buildout

- All residential land developed
- 50% Single Family
- 10% Two Family
- 20% Three Family – Multi Family



Based on existing zoning and analysis assumptions

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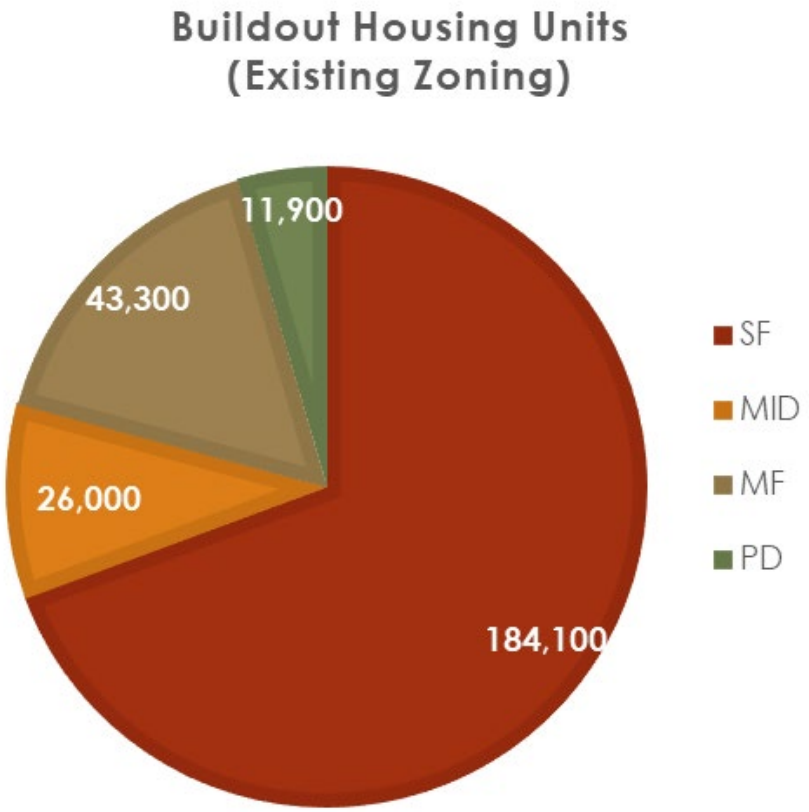
Buildout Housing Mix



- Estimated distribution

- 70% single family
- 10% 2-4 units/structure
- 16% >5 units/structure
- 4% PD

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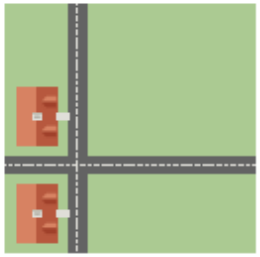
What can we do about it?

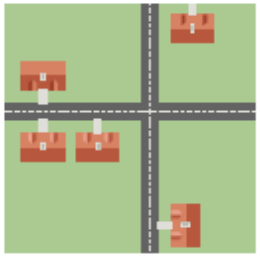
If the existing community contains

High Opportunity
+ >0.5 homes per acre

0.5 – 2 homes per acre



2 – 5 homes per acre

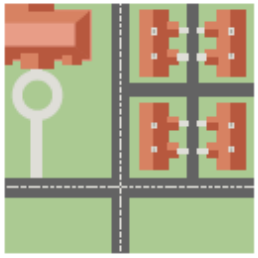


5 – 12 homes per acre

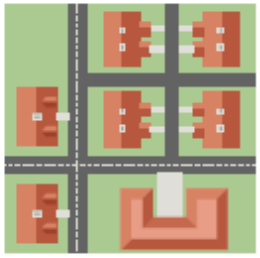
>12 homes per acre

A Better Foundation™ recommends

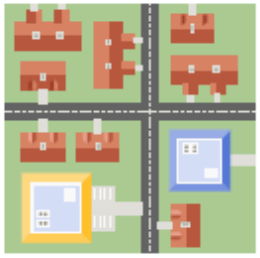
100% Missing Middle



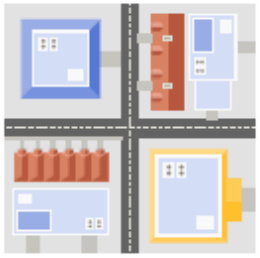
25% Medium Density
75% Missing Middle



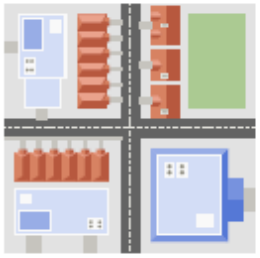
50% Medium Density
50% Missing Middle



100% Medium Density



100% High Density



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Yesterday
Cafe

What can we do about it?

Growth is regional. Plans should be regional too.

Housing Strategies

- Village Centers with diverse housing types for
  - Aging in place
  - Workforce
  - Growing families
- Density to promote greenspace preservation
- Infill residential to promote
  - Downtown revitalization
  - Suburban office park or commercial strip redevelopment
  - Walkability and livability = marketability

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Housing AND

- Transportation
- Water
- Sewer
- Stormwater
- Schools

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Thriving Communities

- Mixed use neighborhoods
  - Residential density to support services
    - Neighborhood grocers
    - Gathering places like cafes
    - Pharmacies
- Diverse housing types = Diverse lifestyles
  - Families, single occupant, elderly, young professionals
  - Mixed income to promote access to services for all
  - Accessory dwelling units (ADUs) should be encouraged, not made infeasible

Thriving Communities

- Destinations and connectivity
  - Can errands be accomplished on foot, bike, or transit?
  - Or are we increasing congestion?
- Access
  - Jobs
  - Services
  - Schools

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Zoning Reform

- Lot size requirements
- Housing size requirements
- Housing choice
- Missing middle housing
- Accessory Dwelling Units (ADUs)
- Parking requirements
- Streamline permitting
- Promote neighborhood stability
- Respond to changing market

Why mixed use?

- Promotes different types of uses within walking distance of residents
- Promotes choice and quality of life
- Supports economic vitality of services like food stores, coffee shops, pharmacies
- Can add jobs to an area

Created by Laurène Smith
from Noun Project

Created by Dániel Aczél
from Noun Project

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Why density?

- Density helps create walkable communities
  - *22 DUA minimum*
- Density promotes housing choice and affordability
  - Housing for families, empty-nesters, young professionals, etc.
  - A single person benefits from service attracted by families

Charleston Houses
Density of 18 to 25 DUA

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Why density?

- Density creates a viable market for the services we all want
  - Without a critical mass of people nearby, business won't survive

Density of 40 DUA

Density of 24 DUA

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Make complete streets our standard. And more.

- Block size
- Bus stops
- Amenities
- Buildings close to the street
- Pedestrian connections through parking lots
- Off-street network

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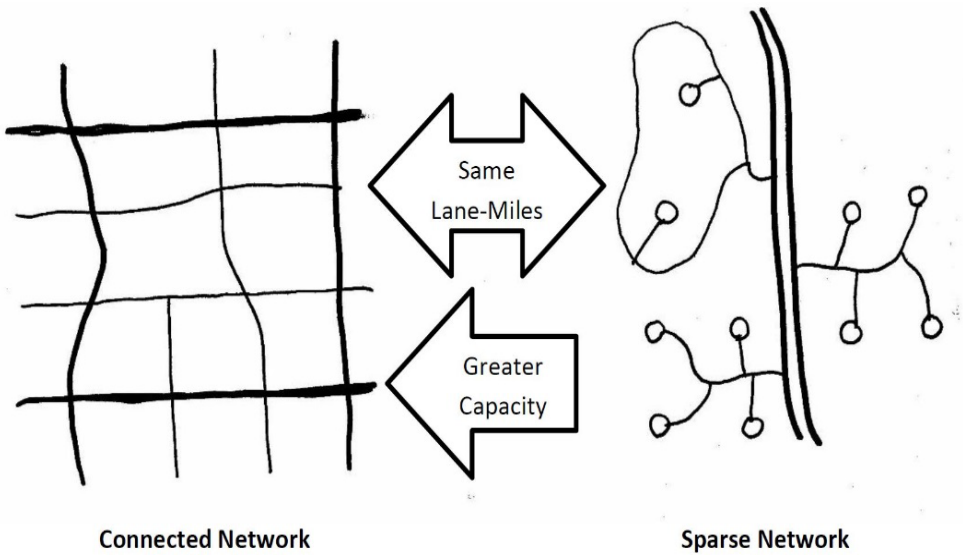
And more.

- Interconnected streets
- Access management
- Efficient networks mean
  - Better incident response
  - Better air quality
  - It's easier to walk



What about parking?

≠

What about parking?

- As density increases,
  - More destinations are within biking and walking distance
  - People can park once
  - More people take transit
  - Transit is more efficient and effective
- With mixed use
  - Sharing parking spaces makes sense
- Parking requirements are too high

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Why? Thriving Community

- Promote community goals
  - Accessible services and jobs
  - Greenspace
  - Character
  - Neighborhood stability
  - Walkable connected street network
  - Housing choice
- Minimize growth impacts
  - Congestion
  - Taxpayer cost
  - Environment and health

Created by Jonathan Li
from Noun Project

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Why? Economic Development

- Lack of affordable housing and mobility for workers is limiting our labor pool
- Workers are being pushed further away from jobs, healthy food retail, parks and greenspace, services of all kinds

We've got work to do

- Comprehensive plans
- Development codes
  - Zoning ordinances
  - Subdivision standards
  - Street standards
  - PUD/PD an opportunity
- Efficient service delivery
  - Housing near jobs and services
  - Supporting infrastructure

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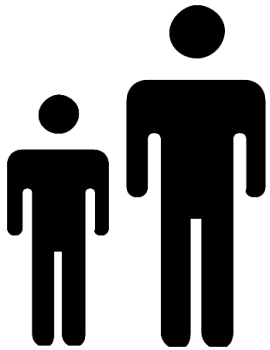


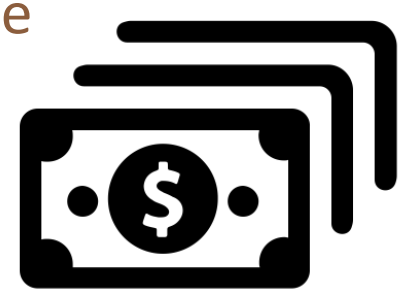
Population and job growth

- Quality of life

Property value

- Housing
- Commercial

Revenue



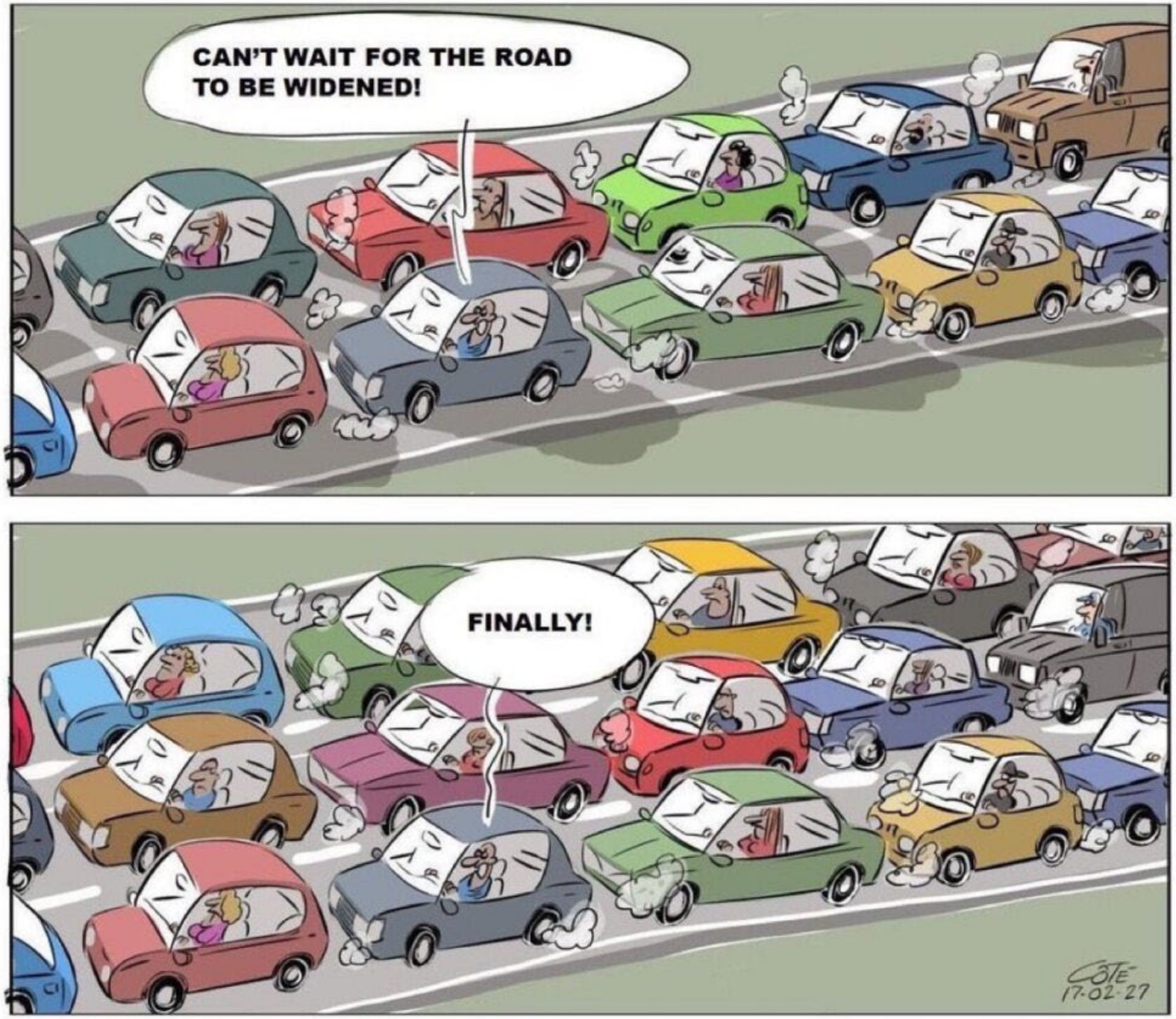
Public services

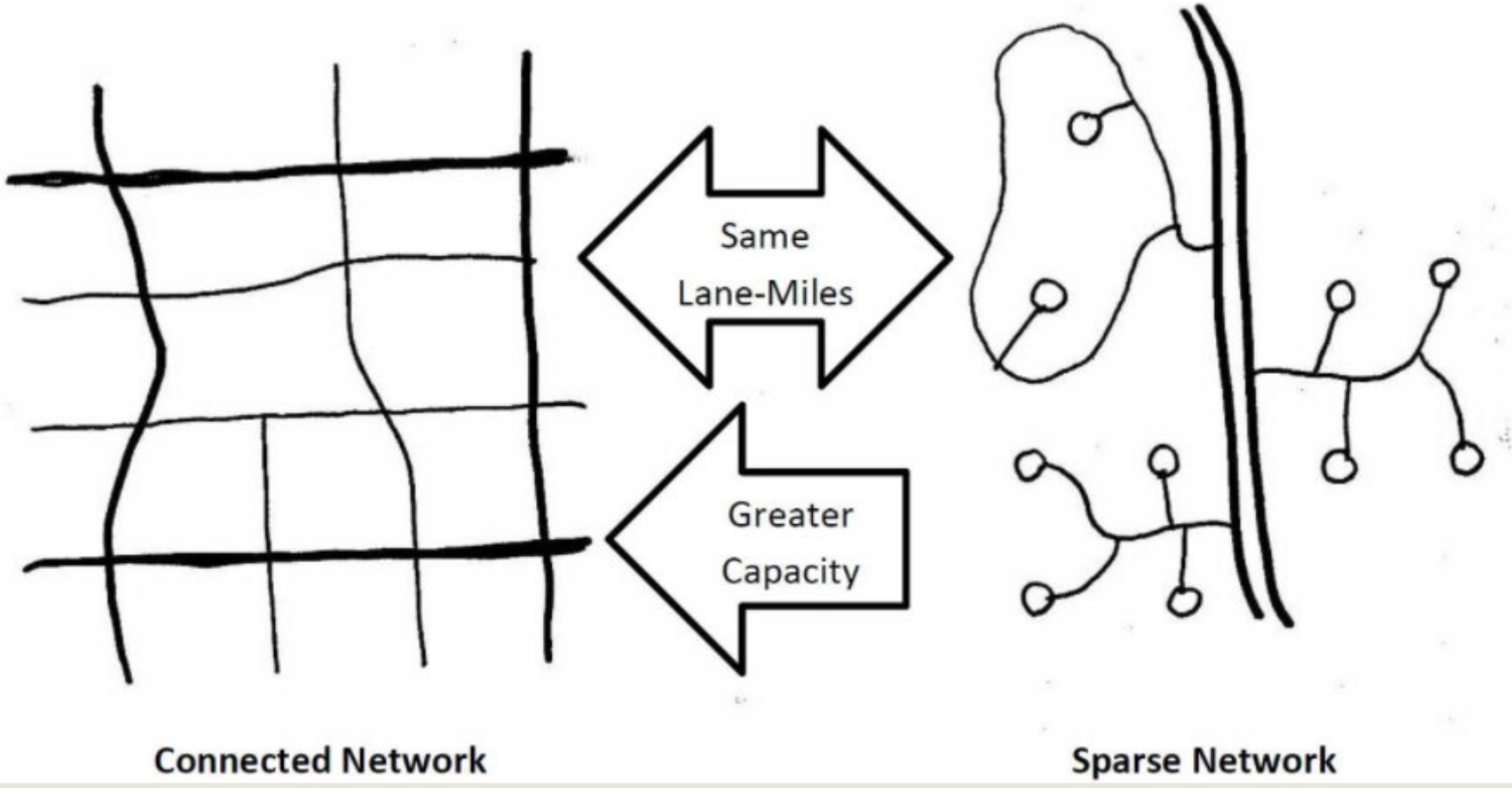
- Infrastructure
- Utilities
- Safe neighborhoods
- Great schools
- Economic development

Images sourced from: Noun Project

Our travel choices depend upon the options available to us.

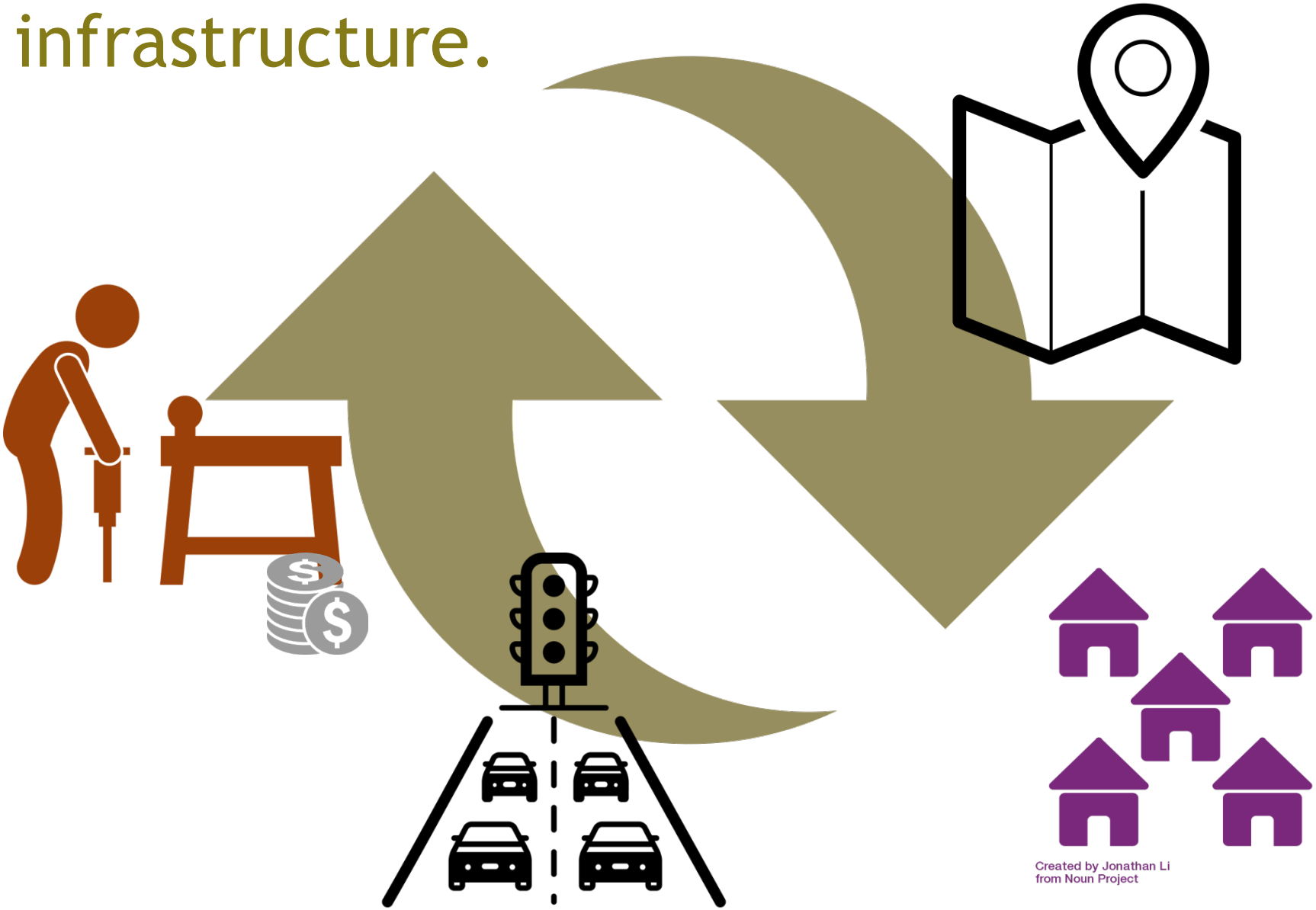
Created by Jonathan Li
from Noun Project


CAN'T WAIT FOR THE ROAD TO BE WIDENED!
FINALLY!
CÔTÉ 17-02-27



- Well-connected street network
- Disperses traffic so each street carries less
- Efficient incident management and response
- Mobility for all road users, alternate routes, more direct routes

How we develop drives the need for infrastructure.



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from Noun Project

We've got work to do

- Comprehensive plans
- Development codes
  - Zoning ordinances
  - Subdivision standards
  - Street standards
  - PUD/PD an opportunity
- Efficient service delivery
  - Housing near jobs and services
  - Supporting infrastructure

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Whitney Shephard, PE
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Past President and Policy Chair, Georgia Planning Association
Legislative and Policy Committee, American Planning Association

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912-677-0430

https://bit.ly/cchousingcoalition

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Recommendations

- Continued coordination with residents and employers
- Evaluate impact on revenue - value per acre of your character areas
  - Clustered development can preserve rural areas while providing land for activity centers
  - With increasing density, small businesses have a viable market; Residents can choose shorter trips, and options to walk or bike
- Evaluate Growth Areas during plan update(s)
  - Evaluate land use scenarios with MPO travel demand model
  - Evaluate policies and development patterns through comprehensive planning process
- Land use scenarios - assess growth patterns that accommodate population and employment growth

75 DUA

103 W Broughton St
Savannah, Georgia
Google, Inc.
Street View - Aug 2017
L'OCCITANE
EN PROVENCE
Old Savannah Tours
City Market
W Broughton St
Johnson Square
Academy
Google
Image capture: Aug 2017
© 2018 Google
United States
Terms
Report a problem

29 DUA

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24 DUA

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Healthy Neighborhoods

- Walkable connected communities
- Neighborhood services like healthy food retail
- Housing choice and affordability
- Neighborhood stability through small scale development that preserves neighborhood character

quality of life
and
sustainability

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- We've been very good at recruiting jobs to the state. We need plans to make that growth sustainable
- **Coastal Georgia no capacity for new housing for workforce moving to the area. We're so busy cutting ribbons that we're not planning for infrastructure, services, and housing for our families. We need community development and planning to match the economic development incentives.**