



# Regional Housing Needs Assessment

January 21, 2025



# Introduction and context

# What is DRCOG?

The Denver Regional Council of Governments is a planning organization where local governments collaborate to establish guidelines, set policy and allocate funding in the areas of **transportation** and **personal mobility, growth and development**, and **aging and disability resources**.

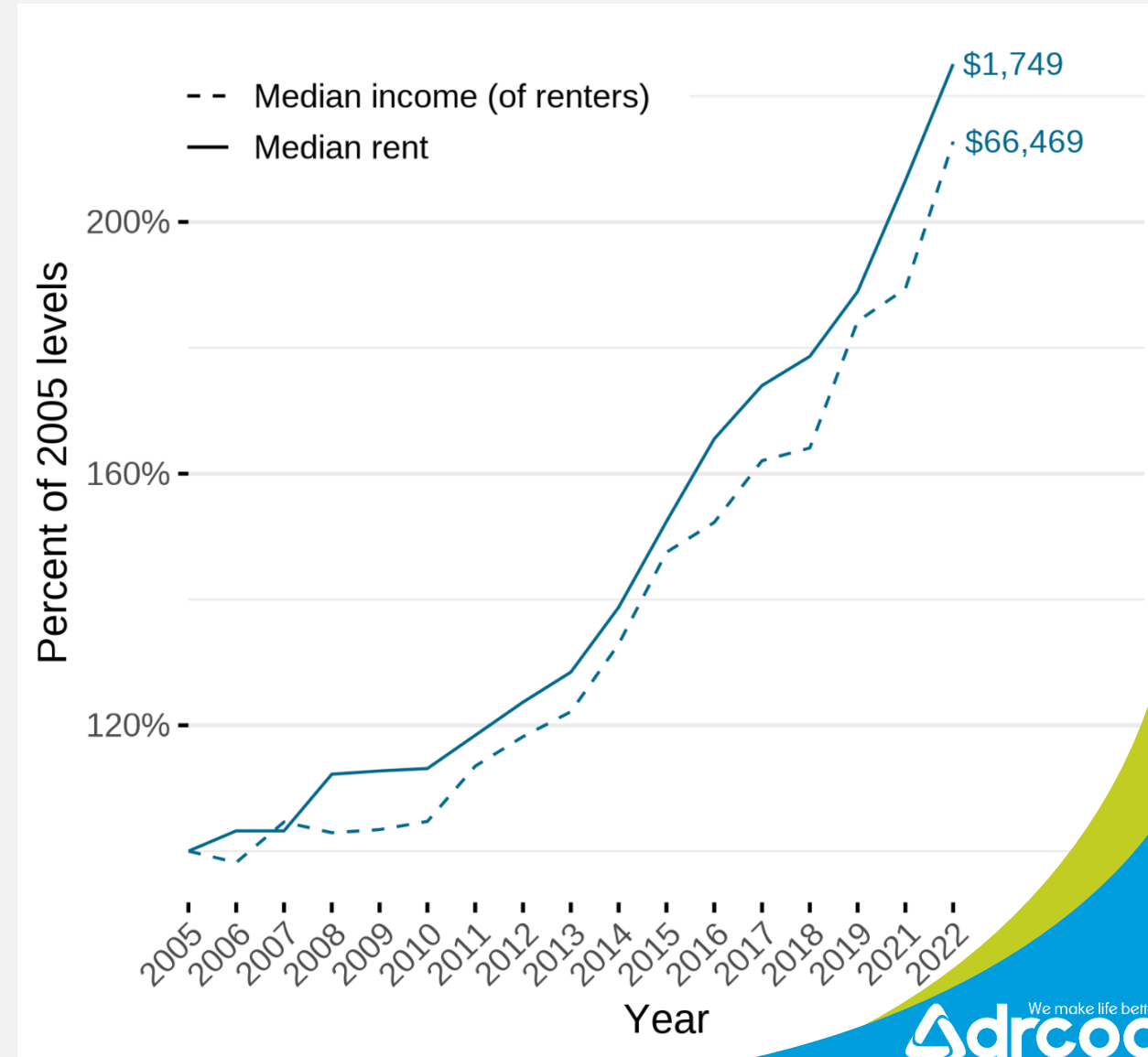
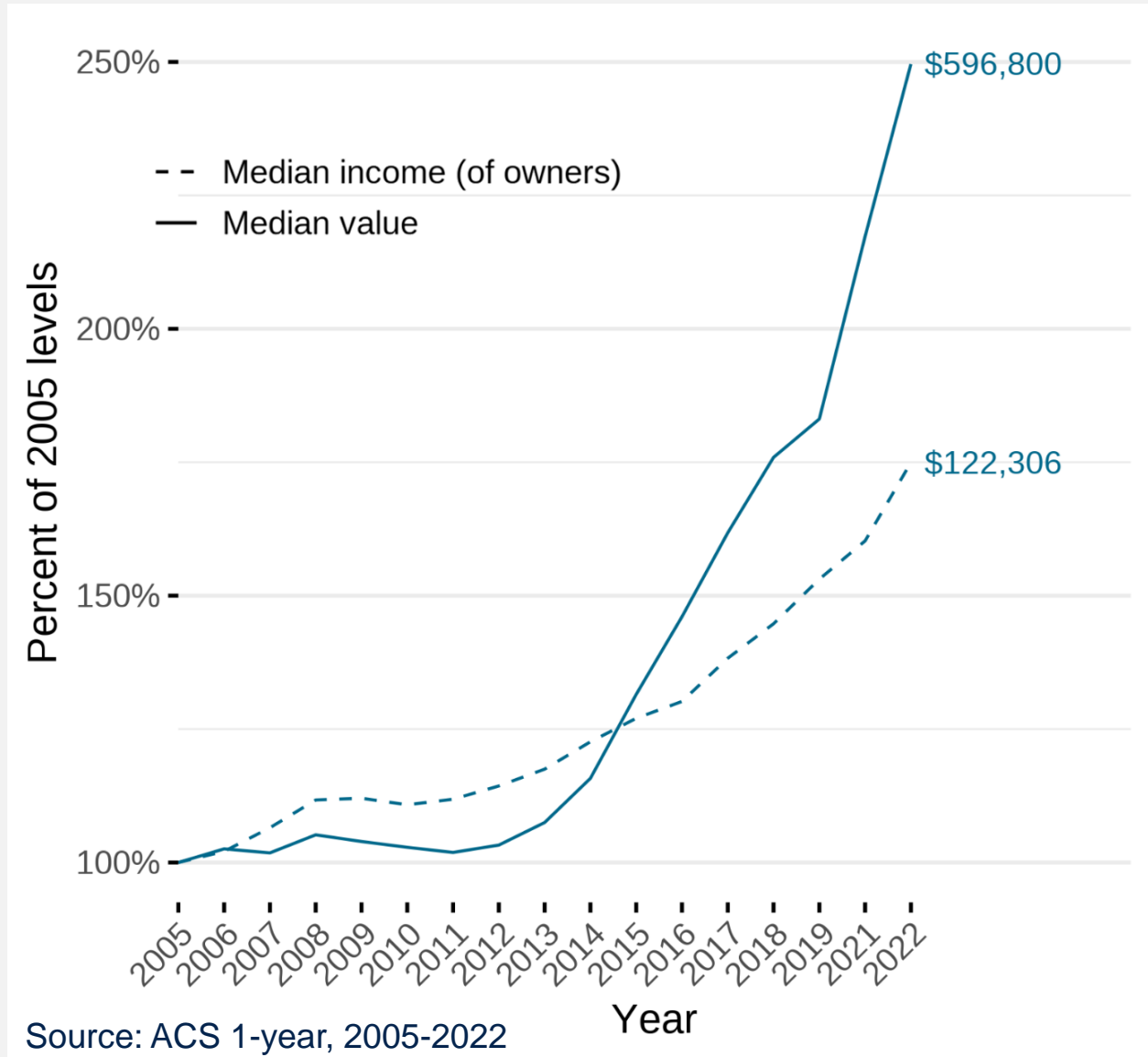




# Housing in Metro Vision

- Diverse **housing options** meet the needs of residents of all ages, incomes and abilities.
  - Diversify the region's **housing stock**.
  - Increase the regional supply of **housing attainable** for a **variety of households**.
  - Increase opportunities for **diverse housing accessible by multimodal transportation**.

# Housing challenges – cost and income

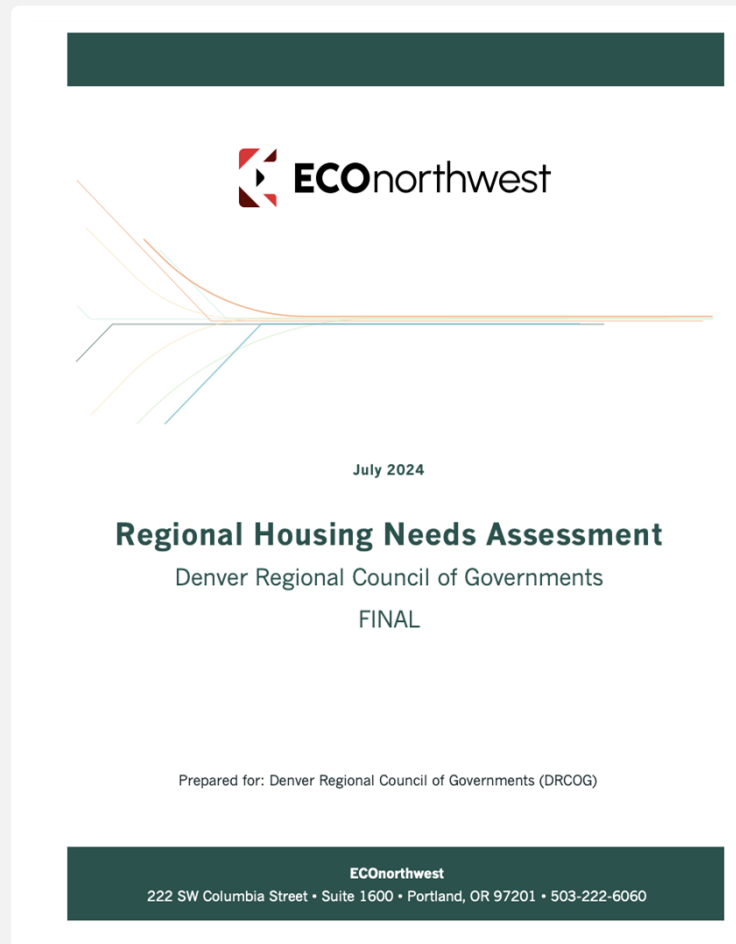


# Need for regional coordination

- **Housing markets are regional.**
- People make choices about where to live based on factors that cross jurisdictional boundaries.
  - Jobs.
  - Affordability.
  - Schools.
  - Amenities.
  - Childcare.
  - More.



# Regional Housing Needs Assessment report



## 1. Data analysis:

Identified gaps in housing supply and affordability across income levels and household types.

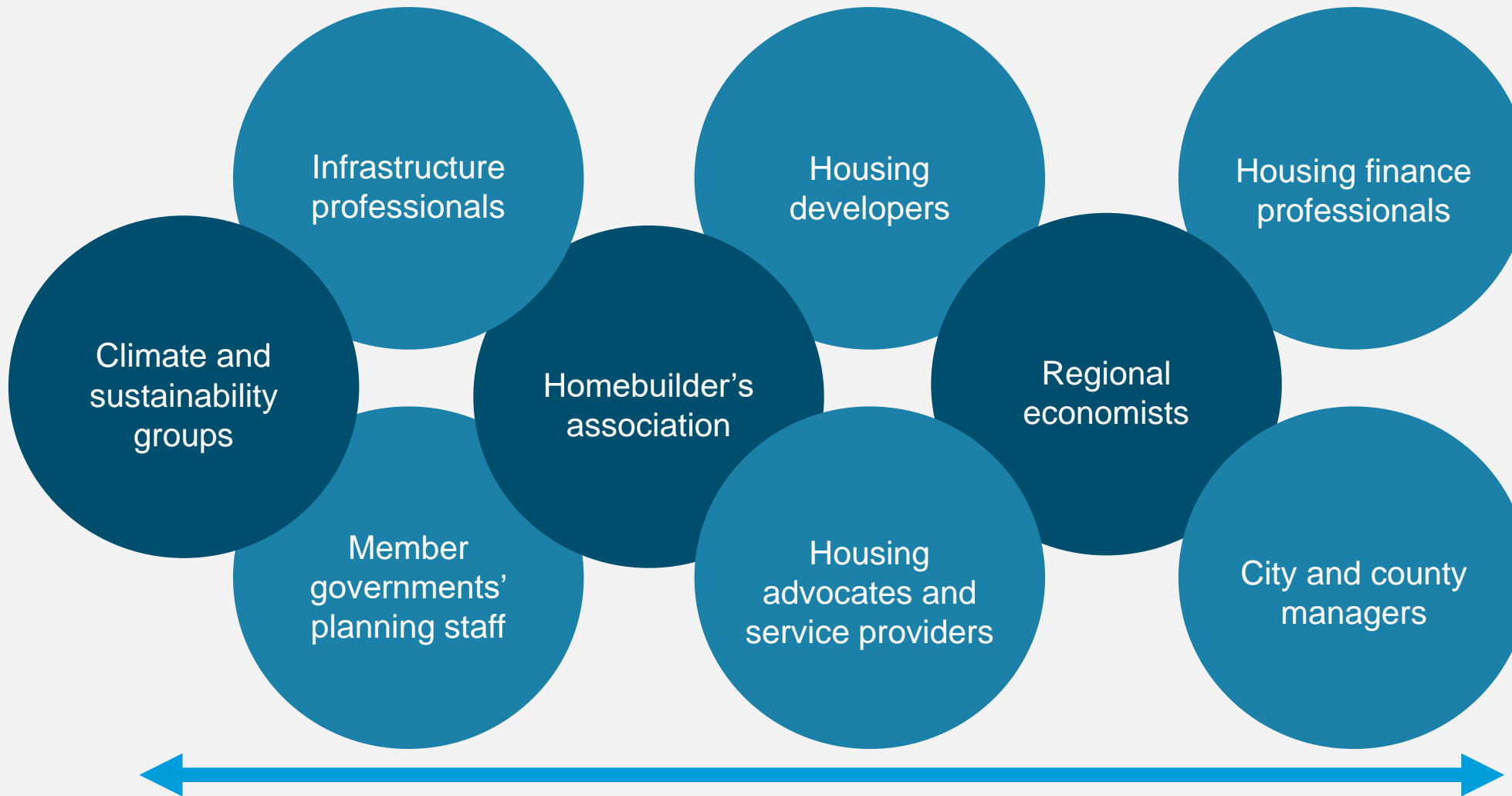
## 2. Barriers analysis:

Collaborated to identify barriers to housing development.

## 3. Strategy framework:

Outlined direction to move toward a regional strategy.

# Stakeholder engagement



**Advisory group**





# Data analysis

# Summary of key findings

- Despite periodic building booms, the **region has not produced enough housing to keep pace** with population and job growth.
- **Low-income households** (below 60% Area Median Income) represent the greatest need for additional housing.
- **Aging population and smaller household** trends will require more diverse housing types.
- Housing types and affordability are **unevenly distributed across the region**.

# Total regional need

To address current and future needs across the income spectrum, the Denver region needs to build 511,000 units by 2050. To stay on track to reach that goal, the region should work toward building 216,000 new units through 2032.



Includes all units to address current shortages

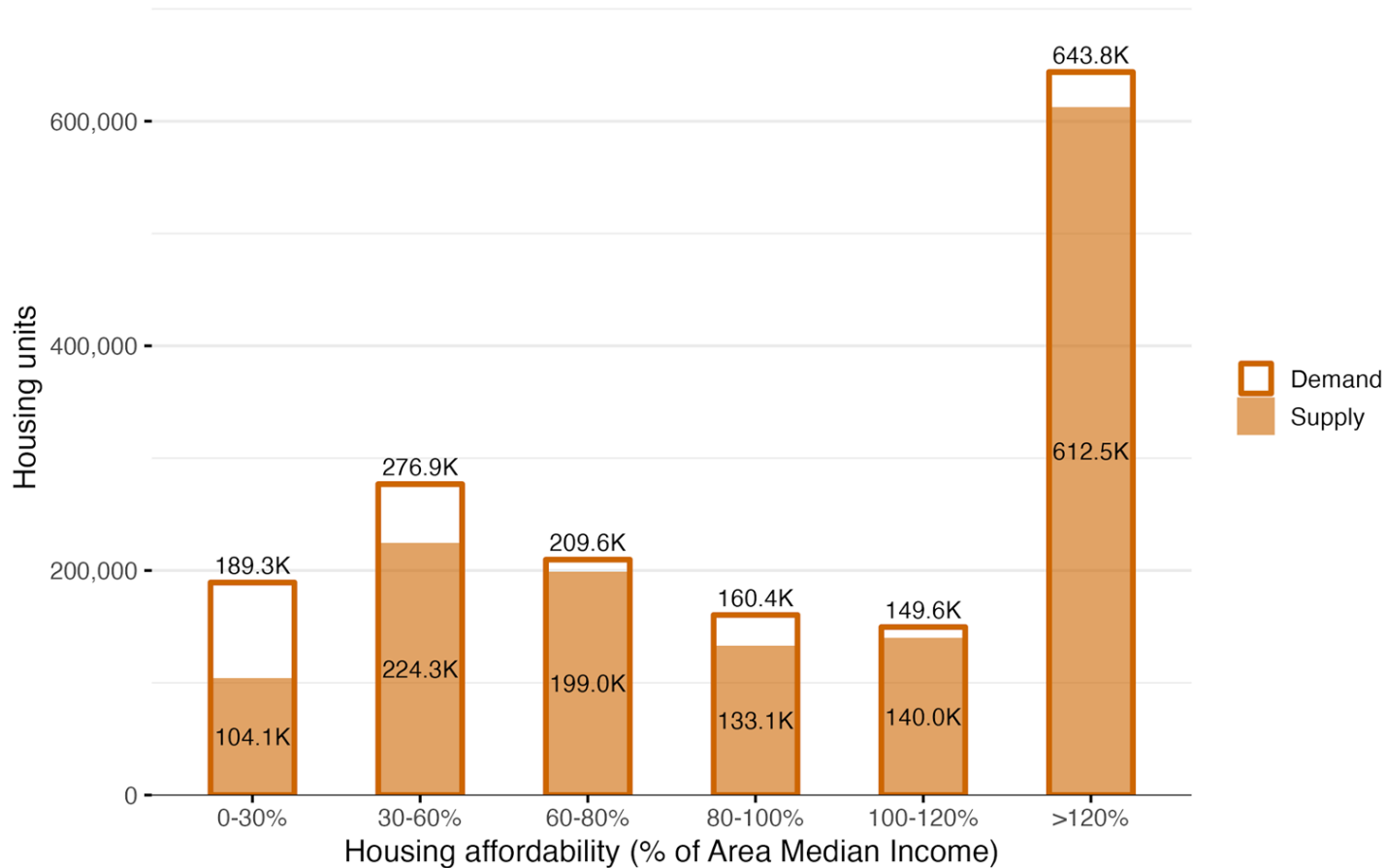
# 10-year regional housing needs

Component	Housing units
Current need	52,000
Future need	164,000
<b>Total units</b>	<b>216,000</b>

- The Denver region will need to produce about **216,000 new housing units between 2023-2032** to meet current and future regional housing needs.

Source: ECONorthwest analysis; DRCOG synthesis of State Demography Office 2022 Household Forecast and U.S. Census Bureau, American Community Survey 5-year 2013 Public Use Microdata Sample estimates; Metro Denver Homeless Initiative State of Homelessness Report, 2022–2023

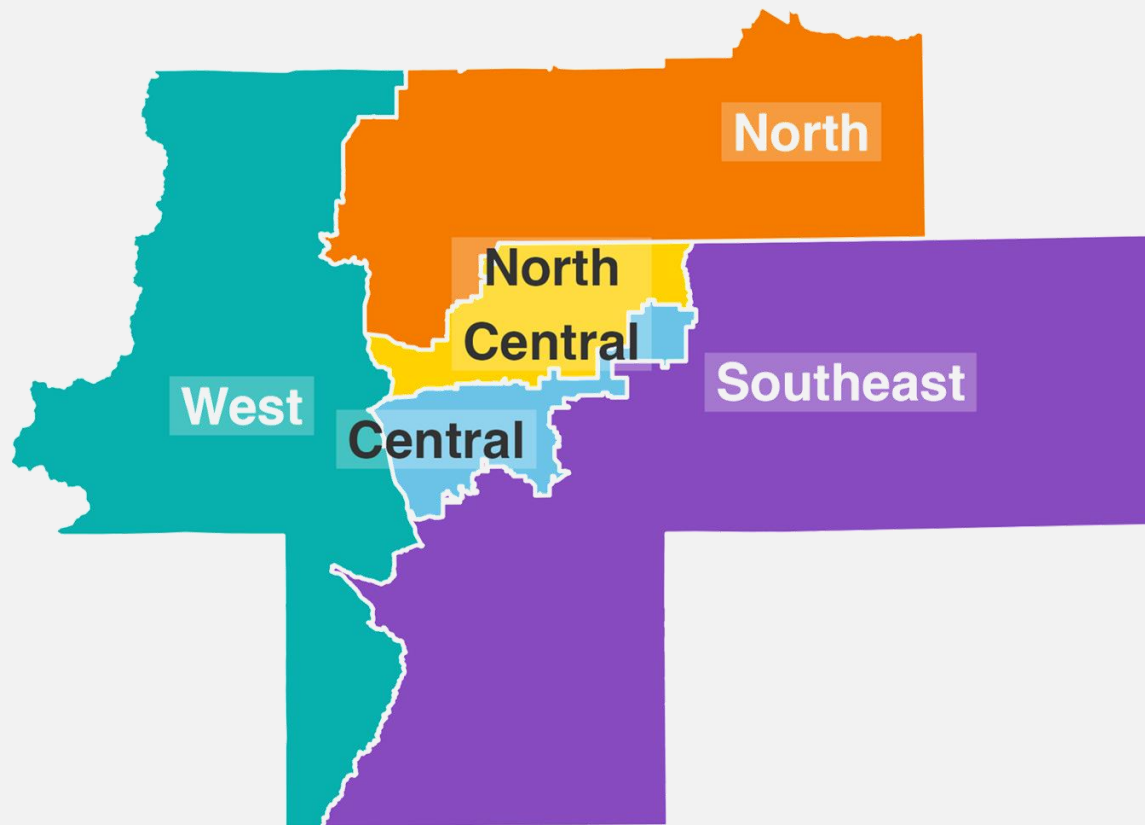
# Distribution of need – 2032



- **Over 137,000 units for households earning 0-60% area median income are needed to meet current and future demand through 2032.**

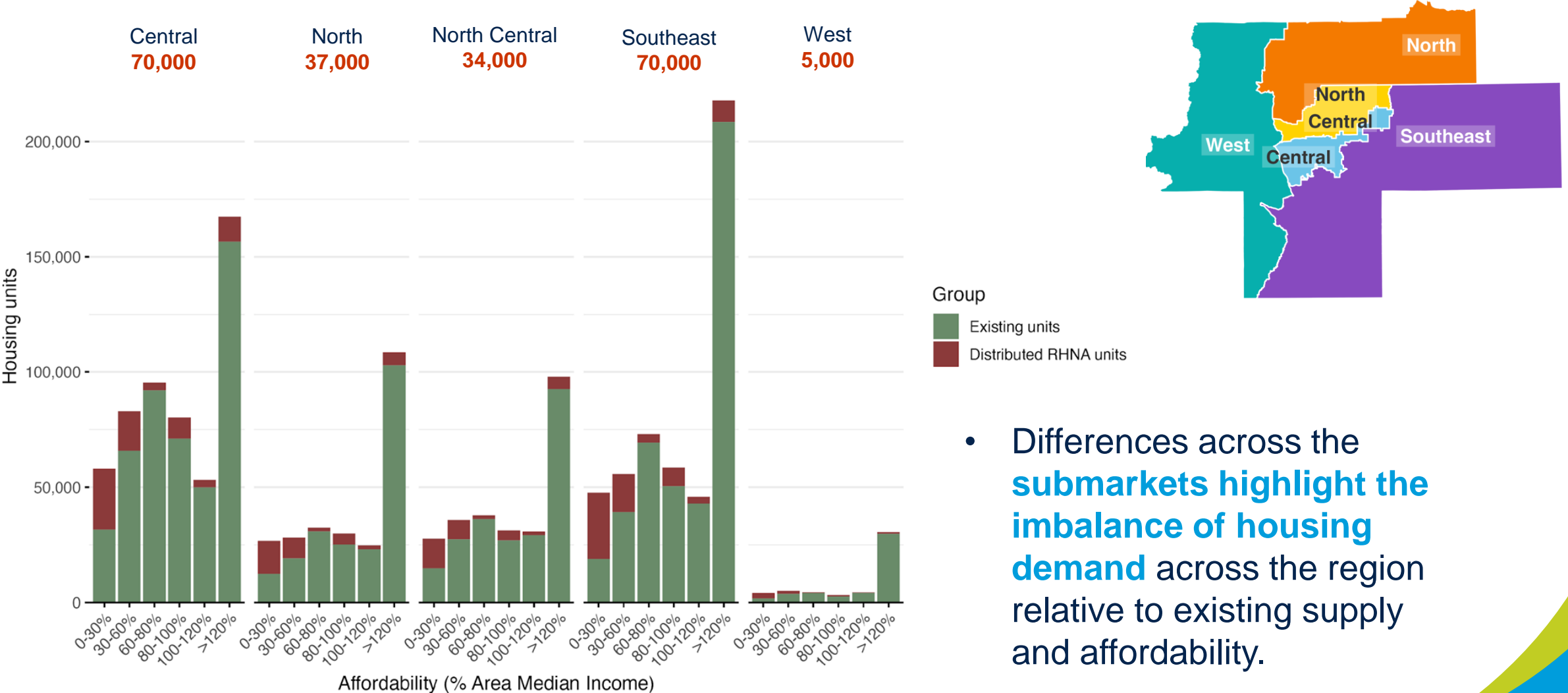
Source: ECONorthwest analysis; DRCOG synthesis of State Demography Office 2022 Household Forecast and U.S. Census Bureau, American Community Survey 5-year 2013 Public Use Microdata Sample estimates; Metro Denver Homeless Initiative State of Homelessness Report, 2022–2023

# Regional submarket geographies



- Contiguous geographies.
- Linked by Census Bureau data and commute patterns.

# Housing needs by submarket, 2023–2032



- Differences across the submarkets highlight the imbalance of housing demand across the region relative to existing supply and affordability.

Source: ECONorthwest analysis; DRCOG synthesis of State Demography Office 2022 Household Forecast and U.S. Census Bureau, American Community Survey 5-year 2013 Public Use Microdata Sample estimates; Metro Denver Homeless Initiative State of Homelessness Report, 2022–2023; DRCOG 2020 Small-Area Forecast

## Select municipalities:

5 options selected



Use the selector above to select your desired jurisdictions. Click the button below to download the filtered dataset.

 DOWNLOAD DATA

 DOWNLOAD POWERPOINT

### Overview

#### About the Regional Housing Needs Assessment

Housing in the Denver region isn't just about shelter—it's about opportunity, equity, and community. As housing affordability challenges affect quality of life in our region, our housing landscape must evolve to meet the needs of our residents.

In response to our region's pressing housing challenges, the DRCOG Board initiated the development of a Regional Housing Needs Assessment in 2023. The purpose was to understand the scale and scope of housing need as a foundation for future discussions about strategies to address the need. The assessment began with an analysis of regional housing data to identify gaps in housing supply and affordability across income levels and household types. This dashboard shares the results of the analysis at a subregional and local level. For more on the regional analysis, [please visit the Regional Housing Needs Assessment webpage on the DRCOG website](#).

Please note that this analysis was conducted prior to the legislation enacted through Colorado Senate Bill 24-174. DRCOG will continue to monitor the state's efforts to develop methods and guidance for housing needs assessments.

#### About this dashboard and the RHNA results

We are committed to transparency and accessibility, ensuring stakeholders can readily engage with the outcomes of this effort. An objective, data-driven understanding of total housing need and affordability gaps will





# Barriers analysis

# Categorizing barriers

Land use and  
process

Infrastructure

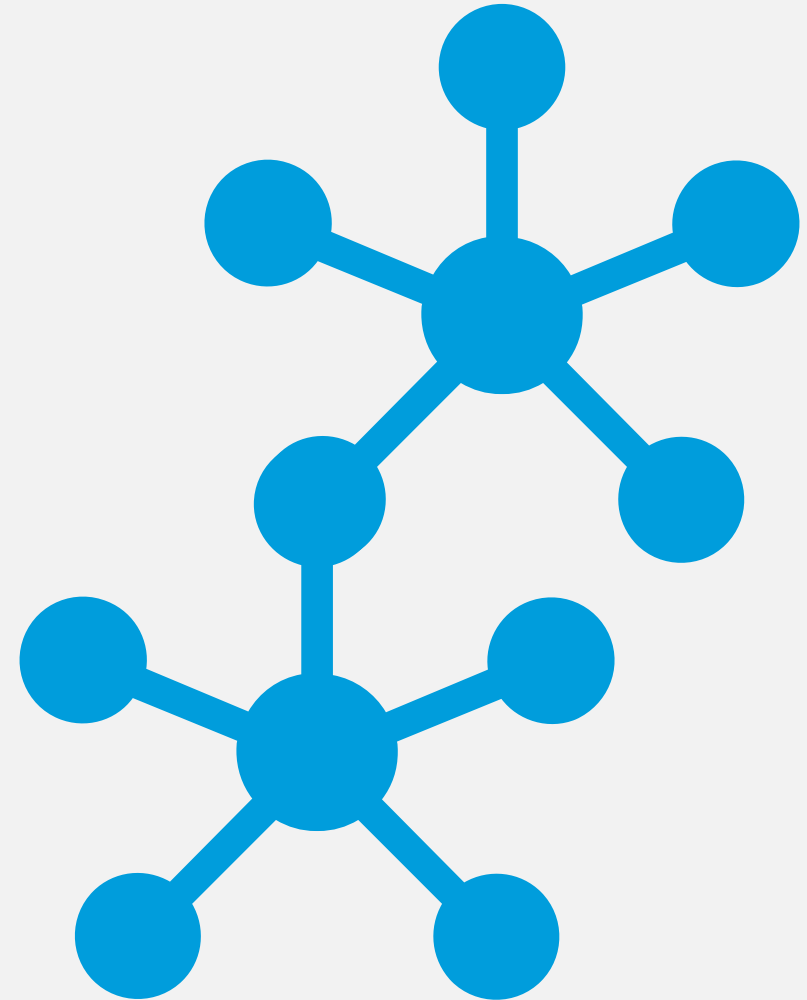
Development  
costs and  
market factors

Funding and  
finance

Community will  
and collective  
action

# Interplay of barriers

- Complex and interconnected.
- Collectively limit opportunities to feasibly:
  - Produce more housing.
  - Preserve affordable housing options.
  - Create more housing types in more places.





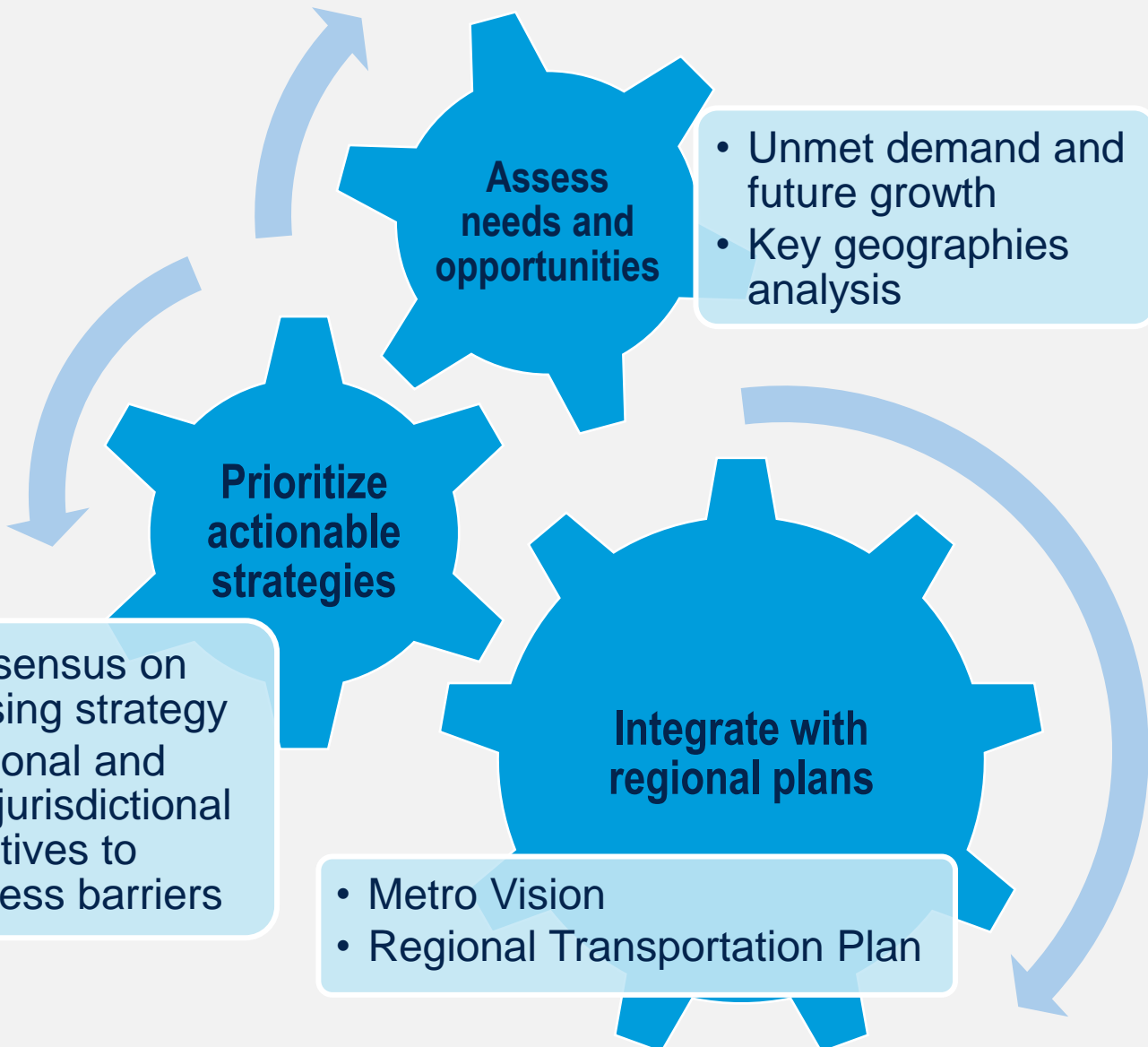
# Framing a Regional Housing Strategy

# Guiding principles

*A regional housing strategy should...*

- 1) **Align with the region's equity vision** for communities that offer access to opportunity and meet the needs of all races, ages, incomes, and abilities.
- 2) **Be data-informed**, grounded in a shared understanding of the region's diverse housing needs.
- 3) **Ensure flexibility** in responding to the contexts of communities across the region.
- 4) **Be comprehensive** in addressing the barriers to more housing and more diverse types.
- 5) **Reflect the unique roles and authorities of each sector** while facilitating collaboration and shared accountability.
- 6) **Identify resource requirements** to ensure actionable plans and deliver desired outcomes.
- 7) **Balance near-term results with long-term resilience** to meet housing needs under varied economic conditions.

# Continuing path to a regional housing strategy



## Regional Housing Needs Assessment

October 2023–July 2024

- Data analysis.
- Understand barriers.
- Framework for strategy.

## Regional Housing Strategy

January 2025–January 2026

- Regional implementation structure.

## Regional plan updates

2025–2026

- Guide Metro Vision and regional transportation plan updates.

# Thank you!

[Regional Housing Needs Assessment | Denver Regional Council of Governments \(drcog.org\)](#)

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