

# MISSING MIDDLE HOUSING

## DEMAND AND BENEFITS

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# DEFINITION

- ✘ Not conventional detached
- ✘ Missing Middle housing is up to **3** floors attached
- ✘ Cottage/micro/tiny homes



# NOT TOO TALL



<http://citywallpaper.org/var/albums/Top-25-Cities-Skylines/Tokyo-Skyline/Tokyo-City-Skyline-Wallpaper-1920x1200.jpg>



# NOT TOO SPRAWL



Photo: Arthur C. Nelson



# JUST-RIGHT DENSITY

## FOR AMERICA'S EMERGING MARKETS

- ✘ Demographics
- ✘ Preferences
- ✘ Accessibility
- ✘ Economic Benefits
- ✘ Resiliency



# DEMOGRAPHICS

Metric	Nation
<b>Household Growth by Type, 2010-2040</b>	
HHs with Children Growth	6,754
<i>HHs with Children Share of Growth</i>	<i>19%</i>
2+ Person HHs Without Children Growth	12,834
<i>2+ Person HHs W/o Children Growth Share</i>	<i>36%</i>
Single-Person HHs Growth	15,638
<i>Single-Person HHs Share of Growth</i>	<i>44%</i>

Source: Arthur C. Nelson, University of Arizona



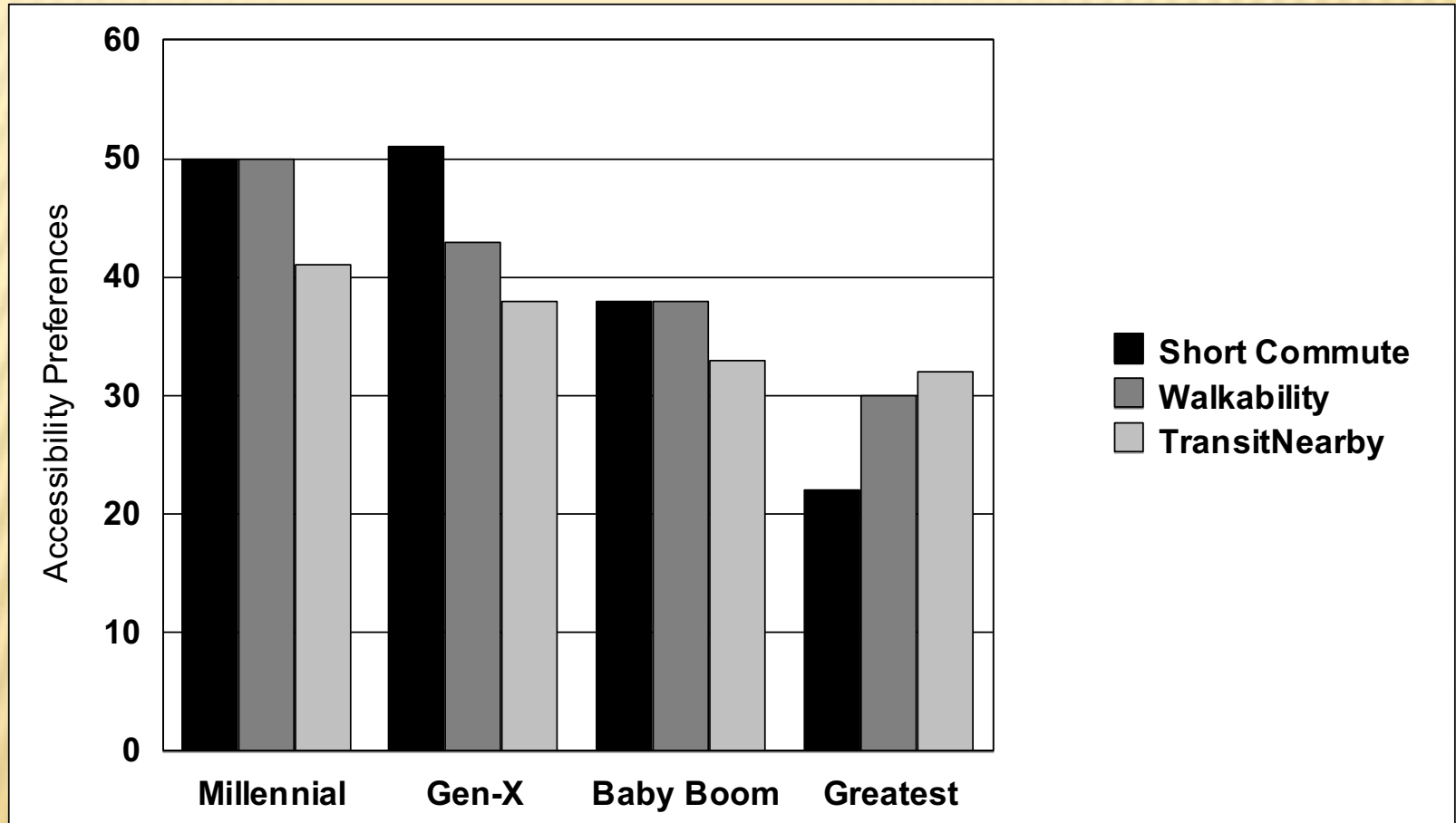
# WALKABLE DEMAND BY GENERATION

## 50 LARGEST METRO AREAS

Generation	Attached/ Walkable
Millennial (1981-1997)	51%
Gen-X (1965-1980)	44%
Baby Boom (1946-1964)	43%
Greatest (1928-1945)	41%
All	45%

Source: Adapted from National Association of Realtors and Portland State University (2015)

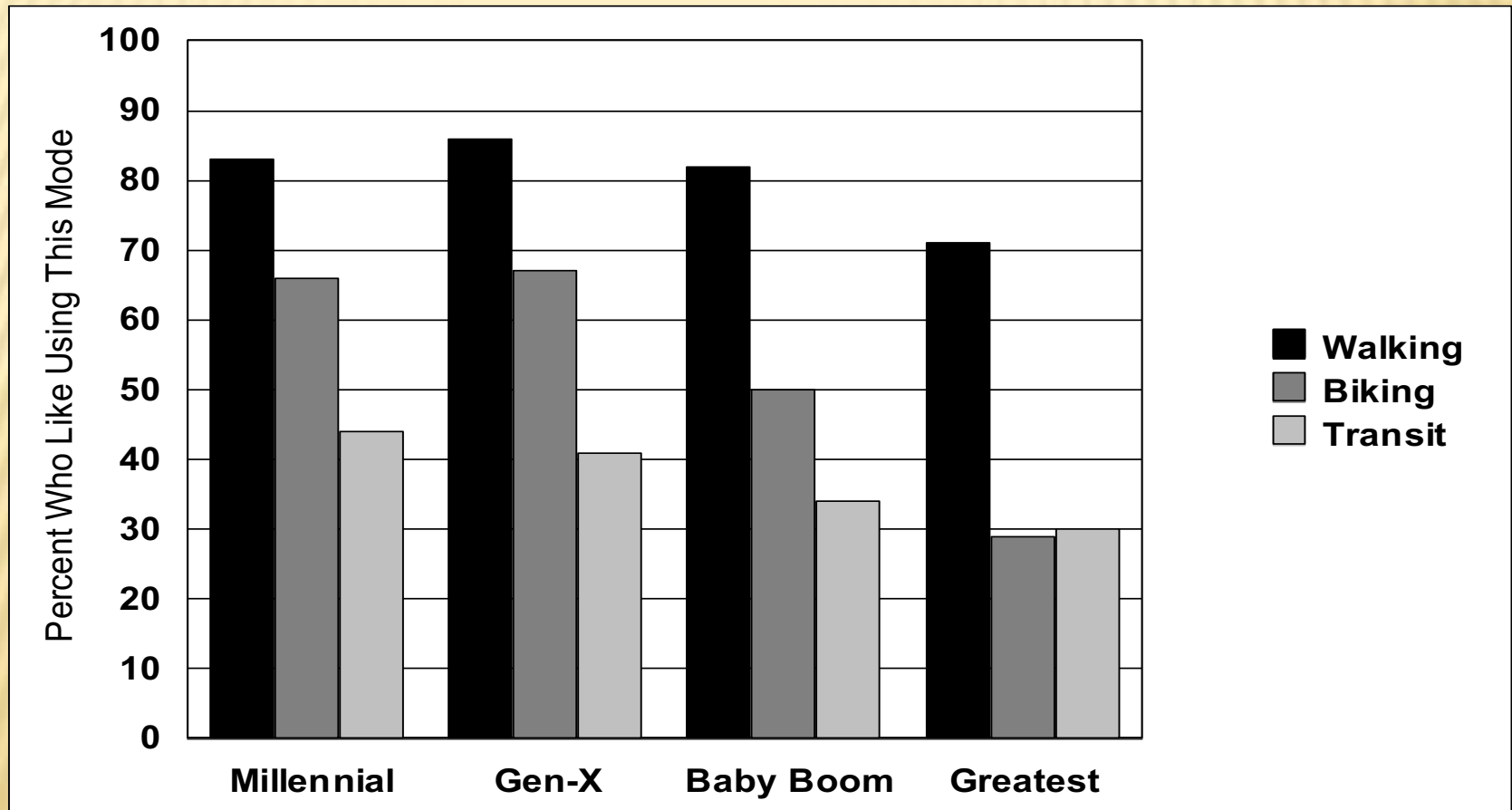
# PREFERRED ACCESSIBILITY OPTION BY PURPOSE & GENERATION



Source: Adapted from National Association of Realtors and Portland State University (2015)



# MOBILITY OPTION PREFERENCE BY GENERATION



Source: Adapted from National Association of Realtors and Portland State University (2015)

# WALKING OR BIKING TO WORK AND/OR ERRANDS, 1995-2009

Year	Walk/Bike to Work Less than 1 Mile	Walk/Bike to Errands Less than 1 Mile
1995	20%	26%
2001	30%	35%
2009	33%	42%
1995-2009	61%	59%

Source: Adapted from National Household Transportation Survey for each year. Work destination is from home to work and return. Errand destination is either from home or work and return.

# PREFERENCES

Imagine for a moment that you are moving to another community. These questions are about the kind of community you would like to live in. Please select the community where you would prefer	All Households	Households with Children	2+ Person HHs without Children	People living Alone
Own or rent an <b>apartment or townhouse</b> , and have an easy walk to shops and restaurants and have a shorter commute to work. OR	45%	38%	44%	54%
Own or rent a detached, single-family house, and have to drive to shops and restaurants and have a longer commute to work.	55%	62%	56%	47%

Source: Adapted from National Association of Realtors and Portland State University (2015) for nation's 50 largest metros.



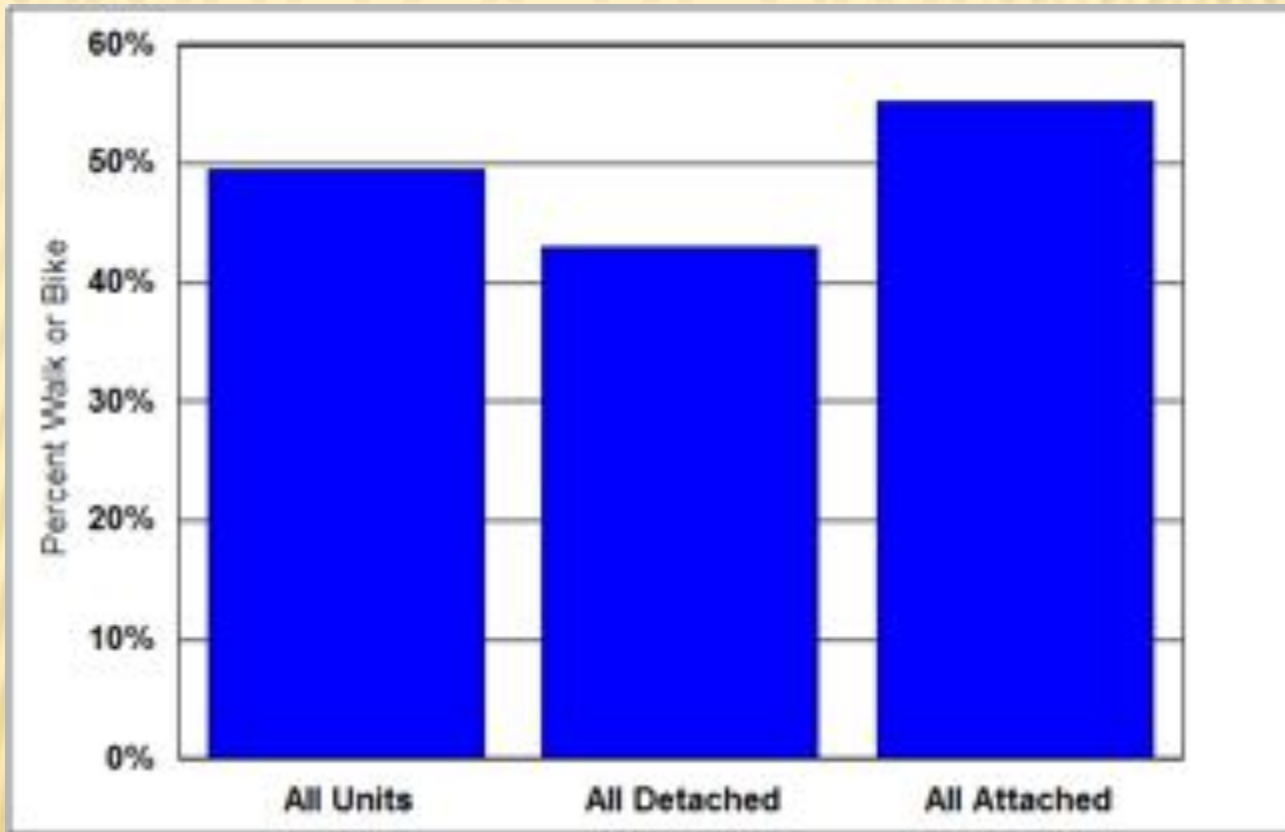
# US DEMAND 2010-2040 @ 40%

Household Type	2010	2040	Change	Share
Households	116,938	149,960	33,022	
Walkable Attached Demand	46,775	59,984	13,209	
Middle Supply in 2010	30,248	30,248	<b>net new =</b>	
Difference	16,528		29,737	<b>90%</b>

Figures in thousands  
Source: Arthur C. Nelson

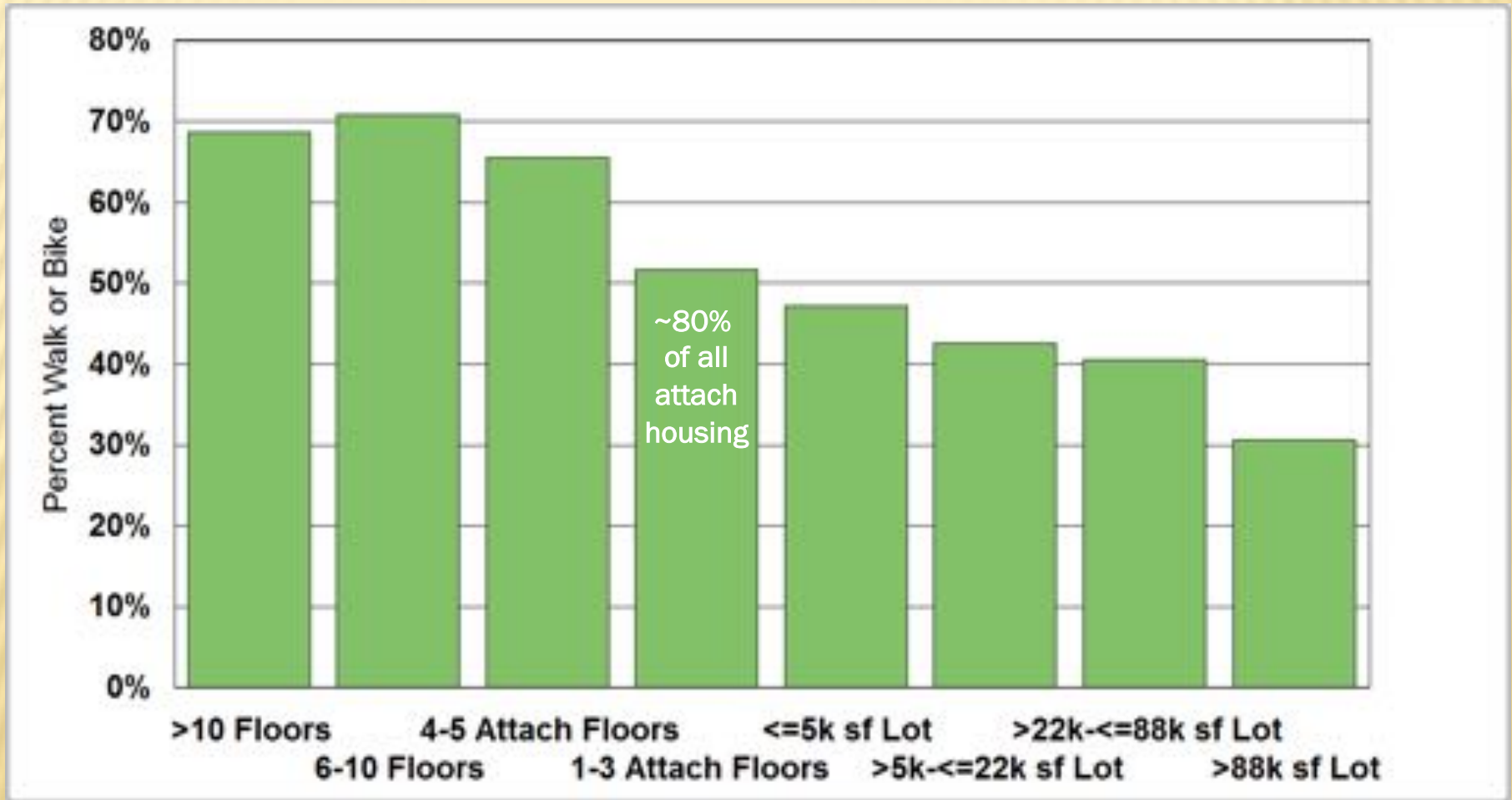


# WALK OR BIKE → ATTACHED & DETACHED UNIT



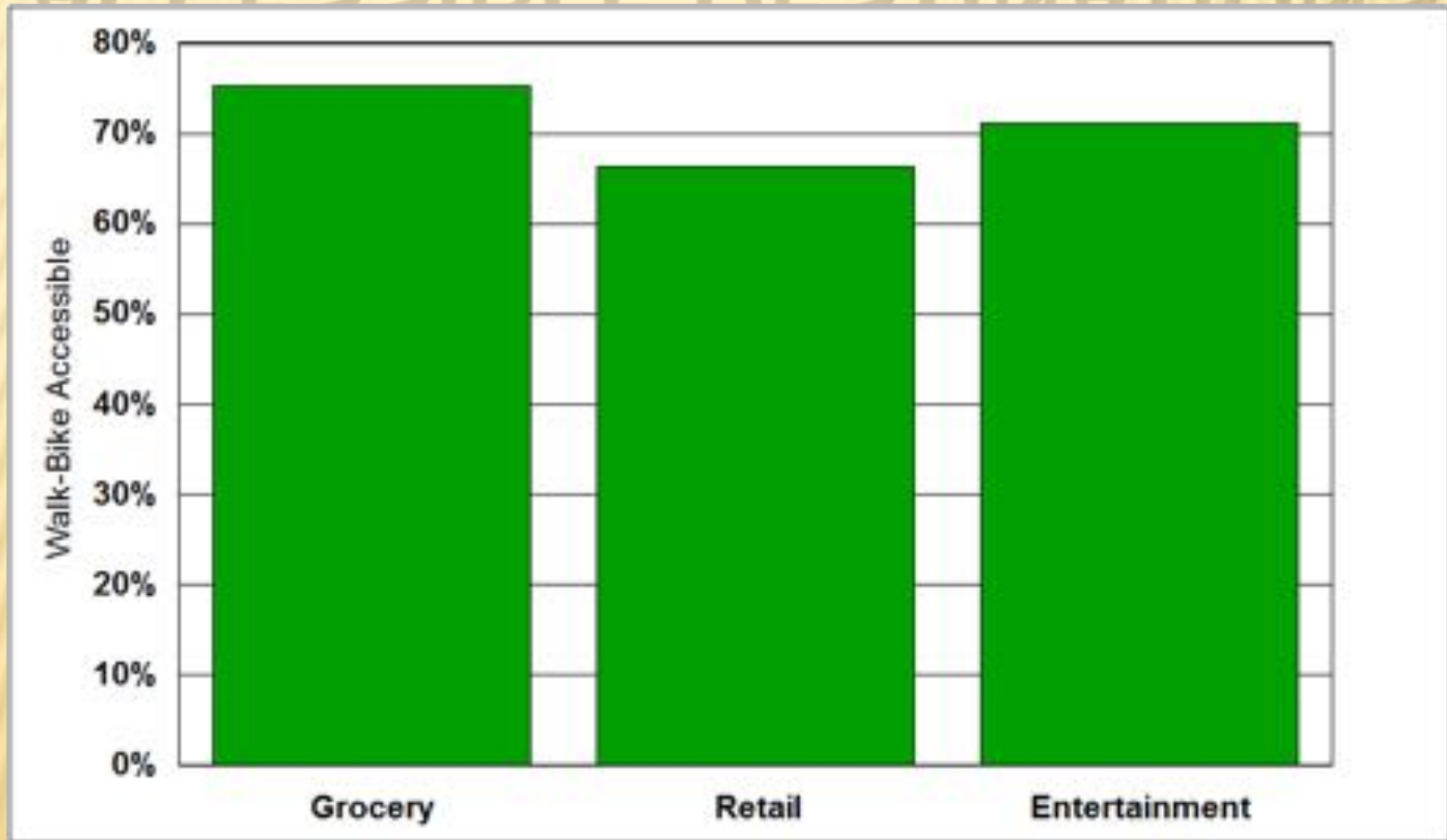
Source: American Housing Survey for 2013

# WALK OR BIKE → BUILDING TYPE



Source: American Housing Survey for 2013

# MIDDLE HOUSING WALK/BIKE ACCESSIBLE DESTINATIONS



Source: American Housing Survey for 2013

# MISSING MIDDLE HOUSING SAVES TAXES

Unit Type	Residential Units Per Square Mile, Range				
	26 - 700	751 - 2,000	2,001 - 4,000	4,001 - 6,000	>6,000
Detached Large Lot	\$40,279	\$27,302	\$19,479	\$17,432	\$16,093
Average Dwelling	\$33,566	<b>\$22,752</b>	\$16,232	\$14,526	\$13,411
Detached Cluster	\$30,210	\$20,477	\$14,609	\$13,074	\$12,070
Townhouse	\$28,867	\$19,567	\$13,960	<b>\$12,493</b>	\$11,533
Apartment/Condo	\$26,853	\$18,202	\$12,986	<b>\$11,621</b>	\$10,728

Source: Arthur C. Nelson et al. *Impact Fees: Equity and Housing Affordability – A Guidebook for Practitioners*, HUD (2007).





# MIDDLE HOUSING = RESILIENCE

- ✘ Expands housing choices.
- ✘ Allows people to stay in their community through different **stages of life**.
- ✘ **Stabilizes** neighborhood housing values.
- ✘ **Increases** job opportunities.
- ✘ **Reduces** foreclosures of owner-occupied homes.



# MEETING MISSING MIDDLE HOUSING DEMAND

The Next **BIG** Thing in Smart Growth

