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PlaceMakers, LLC

May 13, 2013
We are likely in the most dramatic transition in American housing since the era following WWII.
U.S. Population

1950    152 million
2000    281 million

Source: U.S. Census
(More than 30,000 Population)

1950      6,500 persons per square mile
2000   3,700 persons per square mile

Source: Arthur C. Nelson, *Reshaping Metropolitan America*
Between 1950 and 2000

• The share of Americans living in suburban areas rose from 27% to 52%.
• The suburban population grew by 100 million, from 41 million to 141 million.
• And suburbia accounted for three-quarters of the nation’s population change.

Source: Analysis by Arthur Nelson, U. of Utah
The future may not be like the past.
“Both of these huge demographic groups want something that the U.S. housing market is not currently providing: small one- to three-bedroom homes in walkable, transit-oriented, economically dynamic, and job-rich neighborhoods.”

Patrick C. Doherty & Christopher Leinberger
Washington Monthly, Nov/Dec 2010
Average Area of New Single-Family Houses, United States

Sources: U.S. Census; National Association of Home Builders.
More on Their Own Here...

Percent of adults who live alone, by gender and age, 1850-2010.

AGE 65 AND OLDER

- Sweden: 47%
- Norway: 40%
- Germany: 39%
- Netherlands: 36%
- Britain: 34%
- France: 34%
- Ukraine: 33%
- Japan: 31%
- Poland: 30%
- Italy: 29%
- Canada: 27%
- United States: 27%
- Spain: 25%
- Russia: 25%
- South Africa: 24%
- Ireland: 24%
- South Korea: 24%
- Serbia: 22%
- Israel: 19%
- Argentina: 16%
- Kenya: 15%
- Egypt: 13%
- Mexico: 11%
- Brazil: 10%
- China: 7%
- Pakistan: 3%
- India: 3%

Sources: NY Times (Feb. 5, 2012) Analysis by Susan Weber and Andrew Beveridge, Queens College, CUNY, from historical and current census data; Euromonitor International (households abroad)
## Projected Household Growth by Type, 2010-2030

<table>
<thead>
<tr>
<th>Category</th>
<th>Change</th>
<th>Share of Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Increase in HHs</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>HHS w/Children</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>HHS w/o Children</td>
<td>28%</td>
<td>87%</td>
</tr>
<tr>
<td>Single-Person HHS</td>
<td>44%</td>
<td>53%</td>
</tr>
</tbody>
</table>

Source: Arthur C. Nelson
<table>
<thead>
<tr>
<th>HH Age</th>
<th>% Change</th>
<th>Share of Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total HHS</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>35 &amp; under</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>35-64</td>
<td>6%</td>
<td>16%</td>
</tr>
<tr>
<td>65+</td>
<td>75%</td>
<td>74%</td>
</tr>
</tbody>
</table>

Source: Arthur C. Nelson
<table>
<thead>
<tr>
<th>Factors in an Ideal Community</th>
<th>% High Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Locally owned businesses nearby</td>
<td>55%</td>
</tr>
<tr>
<td>Being able to stay in the same neighborhood while aging</td>
<td>54%</td>
</tr>
<tr>
<td>Availability of sidewalks</td>
<td>53%</td>
</tr>
<tr>
<td>Energy-efficient homes</td>
<td>52%</td>
</tr>
<tr>
<td>Availability of transit</td>
<td>50%</td>
</tr>
<tr>
<td>Neighborhood parks</td>
<td>49%</td>
</tr>
<tr>
<td>Mix of housing price ranges</td>
<td>43%</td>
</tr>
<tr>
<td>A place that attracts young professionals to live</td>
<td>42%</td>
</tr>
<tr>
<td>A place with lots of things for kids to do</td>
<td>41%</td>
</tr>
<tr>
<td>Mix of housing choices</td>
<td>41%</td>
</tr>
<tr>
<td>Schools within walking distance</td>
<td>37%</td>
</tr>
<tr>
<td>Jobs within walking distance</td>
<td>33%</td>
</tr>
<tr>
<td>Unique character and/or culture</td>
<td>32%</td>
</tr>
<tr>
<td>Restaurants within walking distance</td>
<td>31%</td>
</tr>
<tr>
<td>Availability of bike lanes</td>
<td>25%</td>
</tr>
<tr>
<td>A place with lots of young children</td>
<td>17%</td>
</tr>
</tbody>
</table>

Source: APA Survey, June 2012
The New Look of “Mobility”

In your daily routine, losing which piece of technology would have the greatest negative impact on you?

% By age group

- **18-34 years old**
  - TV: 7%
  - Mobile phone: 30%
  - Computer: 28%
  - Car: 35%

- **35-44 years old**
  - TV: 9%
  - Mobile phone: 11%
  - Computer: 39%
  - Car: 41%

- **45-54 years old**
  - TV: 10%
  - Mobile phone: 17%
  - Computer: 28%
  - Car: 45%

- **55 years or more**
  - TV: 7%
  - Mobile phone: 13%
  - Computer: 31%
  - Car: 49%

## What Americans Want

<table>
<thead>
<tr>
<th>House Type</th>
<th>Demand (2006-2011)</th>
<th>Supply (2009)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attached</td>
<td>37%</td>
<td>30%</td>
</tr>
<tr>
<td>Small Lot</td>
<td>36%</td>
<td>20%</td>
</tr>
<tr>
<td>Larger Lot</td>
<td>27%</td>
<td>50%</td>
</tr>
</tbody>
</table>

Source: Arthur C. Nelson, Reshaping Metropolitan America
“By 2030, one-quarter to one-third of America’s 143 million households will want the very kinds of options provided in mixed-use, amenity-rich transit-accessible options that commercial corridors and nodes provide . . If all new homes built in America between 2010 and 2030 were built in these locations, demand for this option would not be met.”

-- Arthur C. Nelson, Reshaping Metropolitan America: Development Trends and Opportunities to 2030
The Affordability Challenge

Median US HH income, 2006-2010:  $52,000

Qualifies for mortgage on home for: $130-175,000

Median price, existing home (Sep., 2012): $184,000
Realistic Affordability

Rising Housing and Transportation Costs vs. Incomes for the Median-Income Household in the Largest 25 Metro Areas (costs and income are not adjusted for inflation)

- Housing Costs: +52%
- Transportation Costs: +33%
- Combined Housing + Transportation Costs: +44%
- Household Income: +25%

Source: Bipartisan Policy Center
An instant austerity lab:
National Disaster
FEMA “Neighborhoods”
An Alternative Approach
COTTAGE SQUARE
The Original Katrina Cottage
Cottage Square
Cottage Square
Cottage Square
Cottage Square
Mississippi Alternative Housing Pilot Program; Mississippi Cottage
Permanent Placement
Oak Park

CONCEPTUAL LAND PLAN

COTTAGES AT OAK PARK
OCEAN SPRINGS, MISSISSIPPI
Oak Park
Oak Park
Second Street

Eco-Cottage Schematic Design

3 Bedroom Plan Elevated for Pass Christian, MS
Cottages at 2\textsuperscript{nd} Street
Cottages at 2nd Street
Lessons Learned

Make ‘em safe:

- Engineering & design
- Location
- Materials
Lessons Learned:

Make ‘em efficient:

• Neighborhood location & site planning
• Interior space design
• Energy efficiency
• Accessibility
Lessons Learned:

Make ‘em appealing:

- Location
- Market-sensitive architectural design
- Site planning/landscaping
- Quality materials
- Accessibility