A Study on the Missing Middle

Creative Housing for the 21st Century

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The Issues

• National and Regional Demographics are changing and the current Housing Market is not adjusting

• 54% of National Population are Millennials and Baby Boomers

• 81% of land in Montgomery County is restricted by environmental or man-made constraints.
The Issues

Population by 2040:

• USA – 414 Million (+ 22%)
• Washington DMV – 6.9 million (+ 11%)
• Mont. County – 1.2 Million (+ 12%)

By 2023 – 64% increase in non-workers households.

George Mason University Study
The Issues

Households with kids Under 18
- 1950 – 44%
- 2015 – 22%

Average Size of Homes:
- 1950 – 980 sq.ft.
- 2000 – 2,057 sq.ft.
- 2016 – 2,422 sq.ft.
The Issues

2012 Montgomery County = 376,000 Total Units

- Single Family Detached: 48%
- Single Family Attached: 18%
- Multi Family Flats: 31%
- Other: 3%
The Issues

Townhouses: 16/ac +/- @ 2,400sf +

Detached family homes: 4/ac @ 3,000sf +

Multi-Family Apartments: 4-5 Story or greater Type 1, 3 or 5 construction typical
Supply is Well Behind Demand.

TREND CONTINUES

Permitted housing units
Forecasted demand

20-year average number of permitted units

3,438


Additional needed for all workers
Likely new HHs

Source: US Census Bureau, Building Permit Estimates and GMU Center for Regional Analysis

The Issues

Makeover Montgomery 4
The Issues

2016 – 12.2% of region’s population is over 65. Only 9% in 2000.

1/4 of Washington Region’s single family homes have not been on the market for more than 20 years, up from 1/5th in 2010.

Baby Boomers want to stay in neighborhood but can’t afford to move.

Of the 15 largest metro regions, Washington was 1 of 2 that recorded a decline in 25 – 35 year old’s.

Stephen S. Fuller Institute for Research
The Issues

58 percent prefer “a neighborhood with a mix of houses and stores and other businesses within an easy walk.”

National Association of Realtors Data

Dramatic mismatch between current housing stock and shifting demographics
The Issues

“Both of these huge demographic groups want something that the U.S. housing market is not currently providing: small, one-to-two-bedroom homes in walkable, transit-oriented, economically dynamic, and job-rich neighborhoods.”

Chris Leinberger – Brookings Institute
The Issues

As of 2012,

- Small-lot and attached housing under-supplied by 11% - approximately 13.5 million units nationally.
- Large lot houses oversupplied by 18% - approximately 28 million units.

Christopher Leinberger, Brookings Institute, 2012.
The Missing Middle

Missing Middle is a range of multi-unit or clustered housing types compatible in scale with single-family homes that help meet the growing demand for walkable urban living.

*Missing Middle can greatly diversify the choices available for households of different age, size, and income.*

Security

Increase Housing Supply

Array of Choices

Diversity

Daniel Parolek – Architect – Opticos Design

Makeover Montgomery 4
Auxiliary Units – Granny Flat  Side by Side Duplexes  Sixplex

• Simple Wood Construction
• Smaller, Well-Designed Units
Courtyard Housing
• Creates Community
• Medium Density But Lower Perceived Densities

Bungalow Court
Stacked Duplexes

- A Walkable Context
- An Important Part of Our Housing Solutions

Small Towns