

Another Perspective

An abstract graphic consisting of a series of vertical lines of varying heights and thicknesses, some solid and some outlined, creating a silhouette of a city skyline. The lines are arranged in a way that suggests a perspective or depth, with some lines appearing to recede into the distance. The background is a light blue gradient.

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Household Distribution

<u>Household Type</u>	<u>1960</u>	<u>2000</u>	<u>2030</u>
HH with Children	48%	33%	27%
Single-Person HH	13%	26%	30%

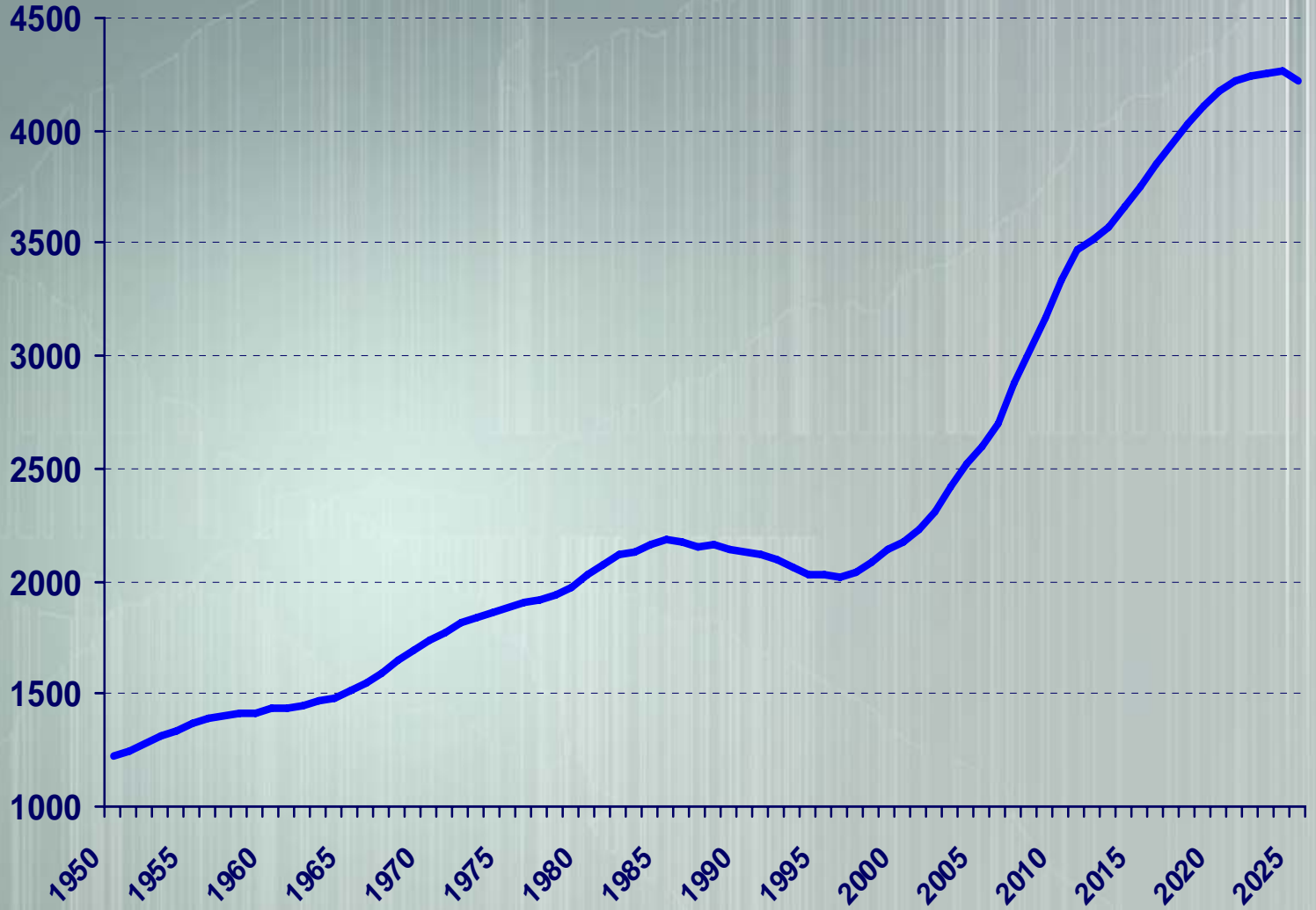
Source: Census for 1960 and 2000; 2030 adapted by Arthur C. Nelson from Martha Farnsworth Riche, *How Changes in the Nation's Age and Household Structure Will Reshape Housing Demand in the 21st Century*, HUD (2003).

Share of HH Growth 2000-30

<u>HH Type</u>	<u>2000</u>	<u>2030</u>	<u>Change</u>	<u>Share</u>
With children	34	38	4	11%
Without children	71	101	30	89%
<i>Single-person</i>	26	38	12	35%

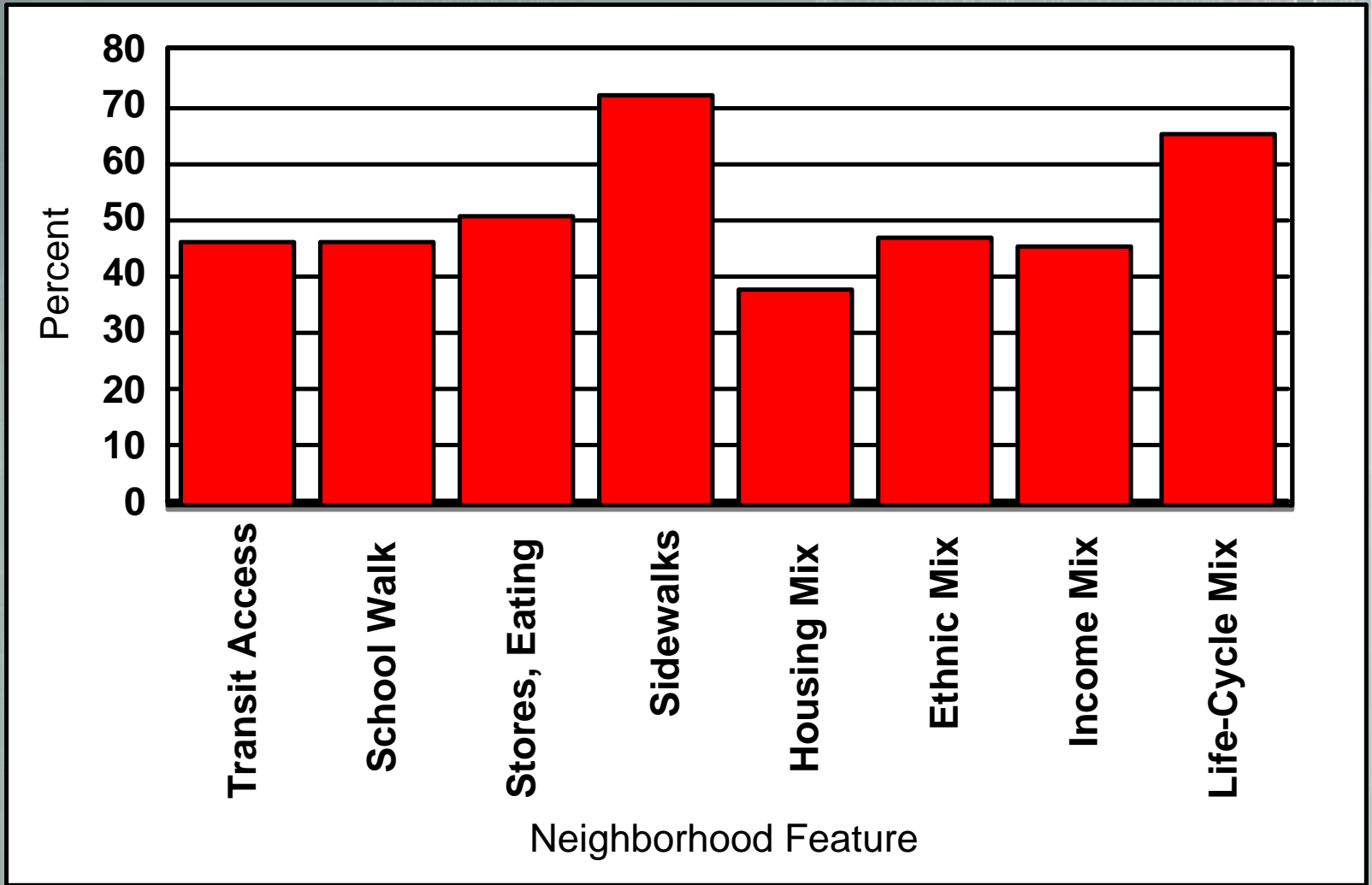
Source: Adapted by Arthur C. Nelson from Martha Farnsworth Riche, How Changes in the Nation's Age and Household Structure Will Reshape Housing Demand in the 21st Century, HUD (2003).

Persons turning 65 each year



Source: Rosen Consulting Group

Emerging Housing Tastes



Source: National Association of Realtors & Smart Growth America, American Preference Survey 2004.

Housing Type

Survey Range

Owner attached*

Townhouses

17% to 33%

Condos

9% to 14%

Total

26% to 47%

Small lots (<7k sf)

Cluster, other

37% to 57%

* Excludes apartment demand.

Source: Adapted from Myers & Gearin, "Future Demand for Denser Residential Neighborhoods", *Housing Policy Debate* (2001). Based on surveys of National Association of Home Builders, National Association of Realtors, Professional Builder magazine, AARP.

Future Housing Demand

<u>Housing Type</u>	<u>2000</u>	<u>2030</u>
Apartment	23%	27%
Owner Attached	26%	30%
Small Lot	16%	33%
Large Lot	35%	10%

Source: Figures for 2000 from Census 2000 using coefficients from *American Housing Survey*; Figures for 2030 estimated by Arthur C. Nelson.

Housing Demand 2000-2030

<u>Housing Type</u>	<u>2000</u>	<u>2030</u>	<u>Change</u>
Apartment	76k	122k	46k
Owner Attached	80k	135k	55k
Small Lot	51k	149k	98k
<u>Large Lot</u>	<u>118k</u>	<u>45k</u>	<u>-73k</u>
Total	325k	451k	126k
Units Lost/Rebuilt			62k
Total Units Built			186k
<i>Units Built as Percent of 2000</i>			<i>60%</i>

Source: Figures for 2000 from Census 2000 using coefficients from *American Housing Survey*; Figures for 2030 estimated by Arthur C. Nelson.

Space Per Job

474,000 Jobs 2000

500 Square Feet Per Job, Average

240 Million Square Feet of Space

645,000 Jobs 2030

500 Square Feet Per Job, Average

325 Million Square Feet of Space

85 Million Growth-Related Square Feet

160 Million Square Feet Replaced

245 Million Square Feet Built = 100% of 2000

Life-Span of Buildings



Source: Calculated by Arthur C. Nelson from US DoE, Energy Information Administration, Commercial Buildings Energy Consumption Survey, 1992 and 2003.

Redevelopment Capacity

<u>Land Use*</u>	<u>Space</u>	<u>FAR</u>	<u>@1.0 FAR</u>
Retail	32M	0.29	105M
Office	64M	0.49	60M
<u>Warehouse</u>	<u>4M</u>	<u>0.16</u>	<u>25M</u>
	100M	0.38	190M

Redevelopment Capacity

90M SqFt @ 500 SqFt/job	=	180,000 jobs
Growth 2005 - 2030	=	170,000 jobs

* Average lives are respectively 17 years, 65 years, 27 years.
Adjustment for office conversion @ 50%. Excludes parking lots,
vacant parcels, parcels in other uses that may be converted.

- *Demographic shifts* will be dramatic, favoring closer-in locations and higher levels of urbanity capturing most of the change in household location.
- *Well-positioned suburban areas* are prime locations for redevelopment from low FAR to higher FAR.
- *Transit accessibility* demand growing → AARP reports 71% favor it.
- *Technically*, probably no need to expand urban area into preserve but ...
- Housing affordability needs to be *top* priority.

More for Affordable Housing

- Clearly identify affordable housing needs by all household types, location.
 - **Montgomery County is a national leader.**
- Expand inclusionary housing requirements and apply to all developments.
 - **Broaden applicability in residential projects**
 - **Housing linkage fees for nonresidential**
- Allow by-right:
 - **low-cost material (HUD's PATH, for example)**
 - **no minimum house size if building codes met**
 - **accessory dwelling units in large-lot neighborhoods.**
- See *<http://www.anthonydowns.com/>*