An aerial photograph of St. Louis, Missouri, featuring the Gateway Arch in the foreground and the city skyline in the background. The image is overlaid with a semi-transparent blue filter. A white rectangular box is positioned in the upper left quadrant, containing the title text.

Considering the Role of “Missing Middle” Housing in a Greater Greater St. Louis

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Development Strategies

May 18, 2022

**DEVELOPMENT
STRATEGIES®**

An aerial photograph of St. Louis, Missouri, featuring the Gateway Arch on the left and the city skyline on the right. The image is overlaid with a semi-transparent blue filter. Four white rectangular boxes with blue text are positioned in the center-right area of the image.

Our Housing Context

What Do We Have?

What Are We Building?

Opportunities

An aerial photograph of St. Louis, Missouri, featuring the Gateway Arch on the left and the city skyline on the right. The image is overlaid with a semi-transparent blue filter. Four white text boxes are positioned in the center-right area, containing the following text:

Our Housing Context

What Do We Have?

What Are We Building?

Opportunities

OUR NATIONAL HOUSING CONTEXT

WHAT'S IN THE HEADLINES?

RISING PRICES

89% increase in home values since 2010

lpropertymanagement.com

HOUSING SHORTAGE

3.8 million housing unit shortage

[Freddie Mac](http://FreddieMac.com)

RISING RENTS

36% increase in rents 2010-2020;
17% in last year

Realtor.com

CONSTRUCTION COSTS

31% increase in material costs since 2020

[BLS, America's Rental Housing](http://BLS.com)

OUR LOCAL HOUSING CONTEXT RELATIVE TO THE NATIONAL PICTURE

Home Value to
Income Ratio

Population Growth
(2010-2020)

Home Price Growth
(since 2010)

Renter
Cost Burden



UNITED STATES



ST. LOUIS MSA



HAMPTON ROADS MSA

Source: ESRI, ZHVI YTD, PolicyMap

OUR LOCAL HOUSING CONTEXT RELATIVE TO THE NATIONAL PICTURE

Home Value to
Income Ratio

Population Growth
(2010-2020)

Home Price Growth
(since 2010)

Renter
Cost Burden

United States

4.1

8%

89%

48%

St. Louis MSA

3.2

2%

49%

44%

Hampton Roads

4.1

5%

33%

49%

An aerial photograph of St. Louis, Missouri, featuring the Gateway Arch in the foreground on the left. The city skyline is visible in the background, including the Missouri State Capitol building. The image has a blue color overlay.

Our Housing Context

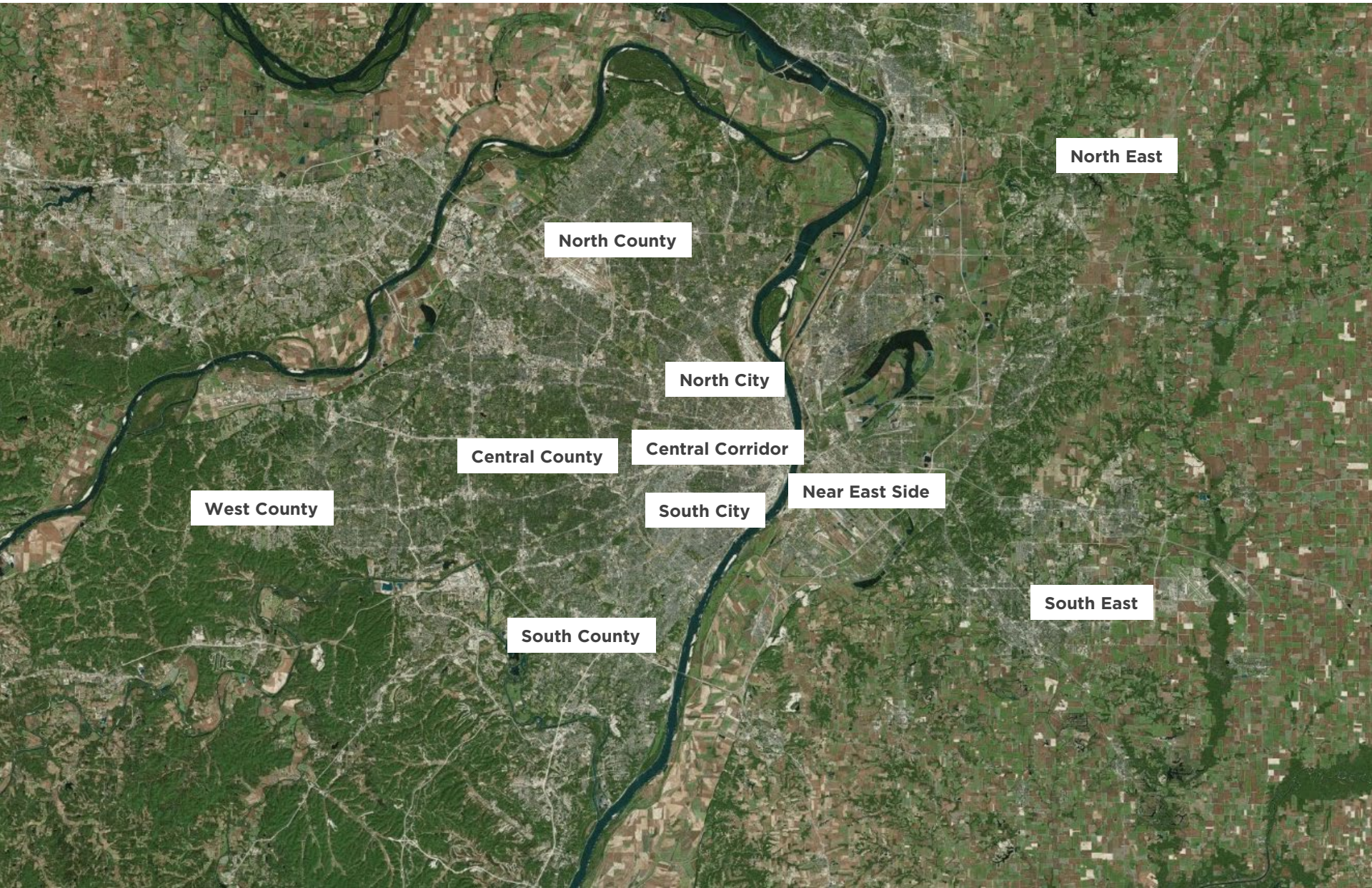
What Do We Have?

What Are We Building?

Opportunities

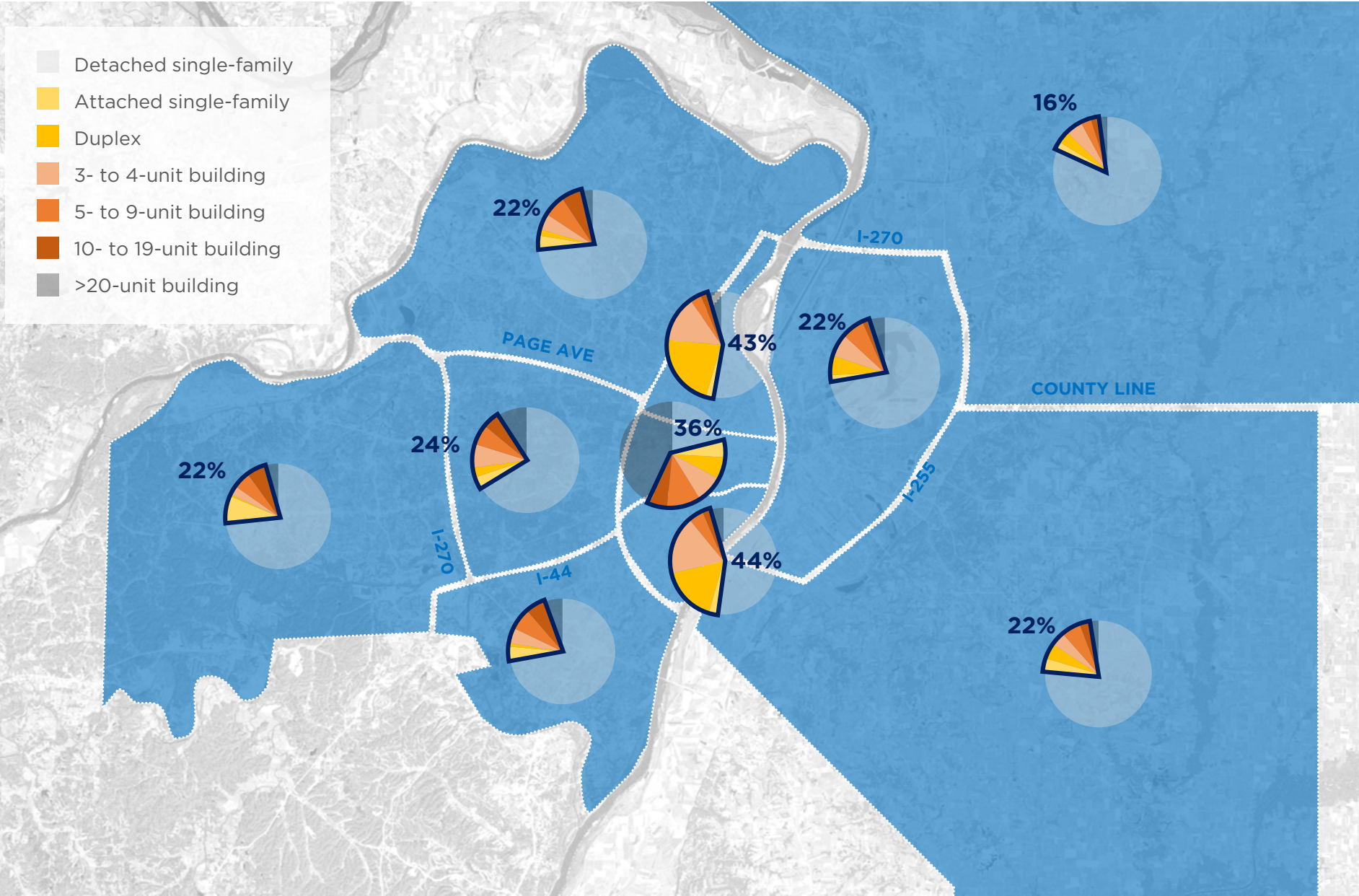
WHAT DO WE HAVE?

A SNAPSHOT OF OUR STOCK



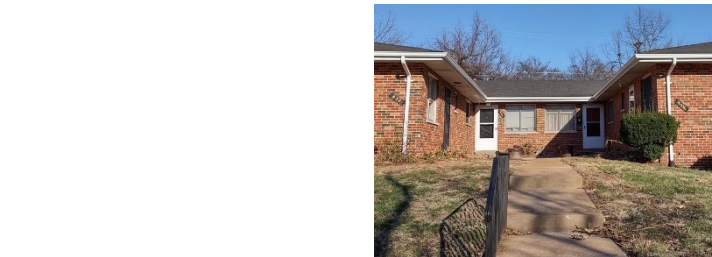
WHAT WE HAVE

SNAPSHOT OF OUR STOCK



WHAT WE HAVE WHAT'S IT LIKE?

ATTACHED 1-UNIT



DUPLEX



3-4 UNIT



5-9 UNIT



10-19 UNIT



WHAT WE HAVE
THE CONTEXT FOR WHAT WE HAVE



1900

When we
built a lot of
what we have

STL City
Pop. Density

2020

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Our Housing Context

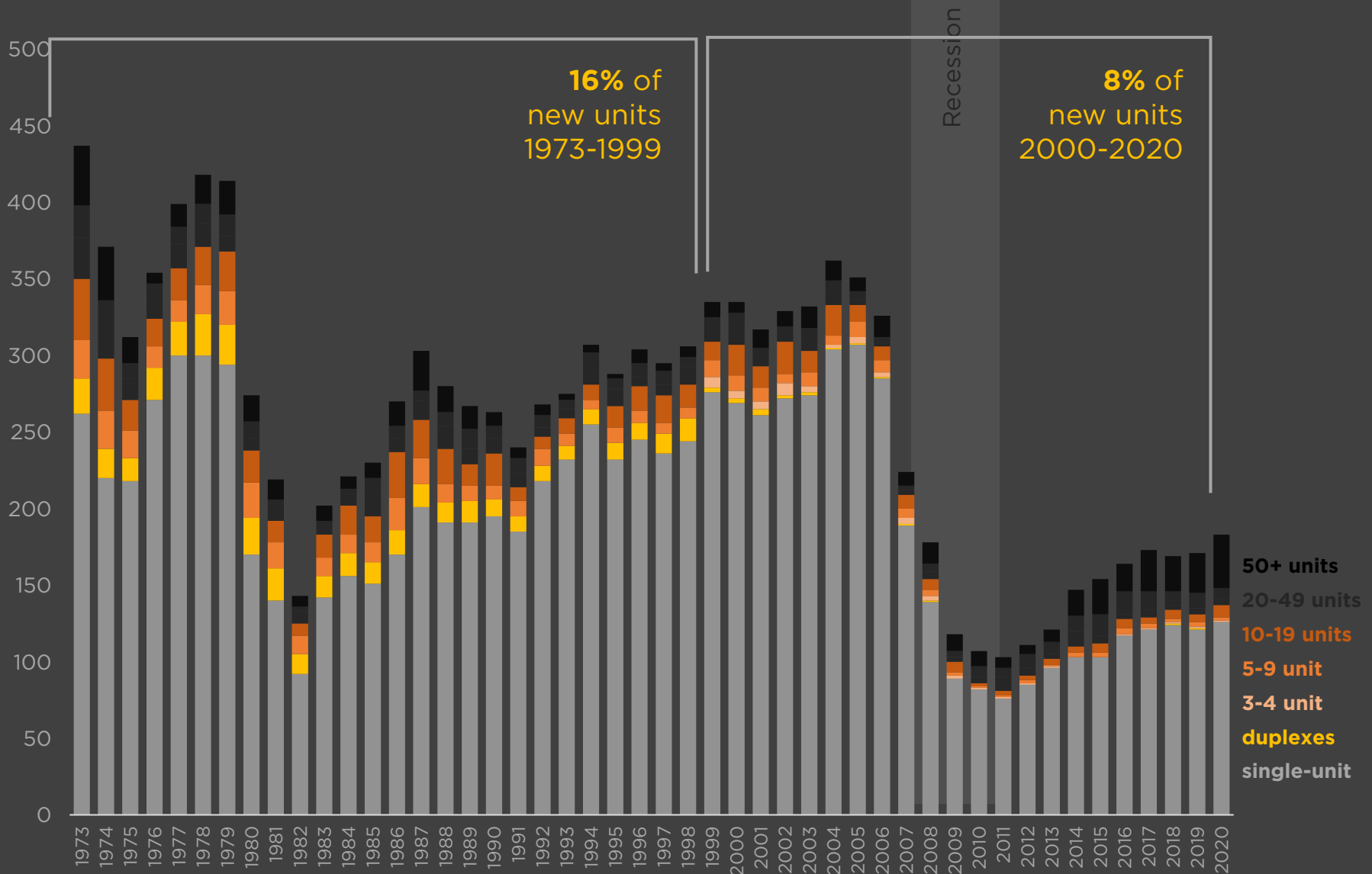
What Do We Have?

What Are We Building?

Opportunities

WHAT WE'VE BEEN BUILDING

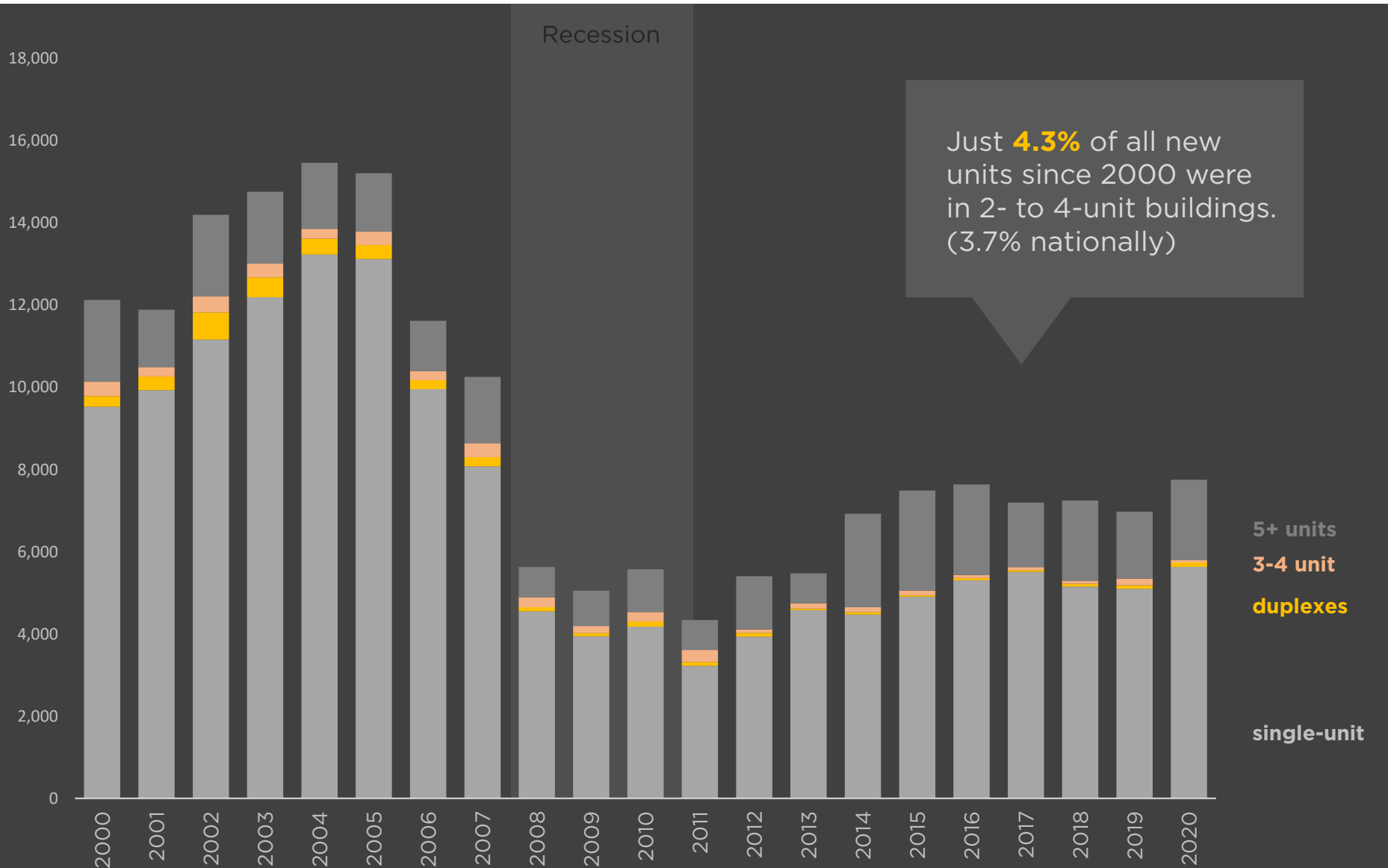
NEW UNITS BY PROPERTY TYPE IN THE MIDWEST (THOUSANDS OF UNITS)



Source: Survey of Construction, U.S. Census

WHAT WE'VE BEEN BUILDING

BUILDING PERMITS IN THE STL MSA



An aerial photograph of St. Louis, Missouri, featuring the Gateway Arch on the left and the city skyline on the right. The image is overlaid with a semi-transparent blue filter. The text is centered in the lower half of the image.

**What is the role
of Missing Middle
in our particular
housing context?**

An aerial photograph of St. Louis, Missouri, featuring the Gateway Arch on the left and the city skyline on the right. The image is overlaid with a semi-transparent blue filter. Four text boxes are positioned in the center-right area of the image.

Our Housing Context

What Do We Have?

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Opportunities

Can we create and preserve Missing Middle Housing to...



1

... strengthen walkable commercial districts throughout our region?



2

...expand housing options to help older adults age in community?

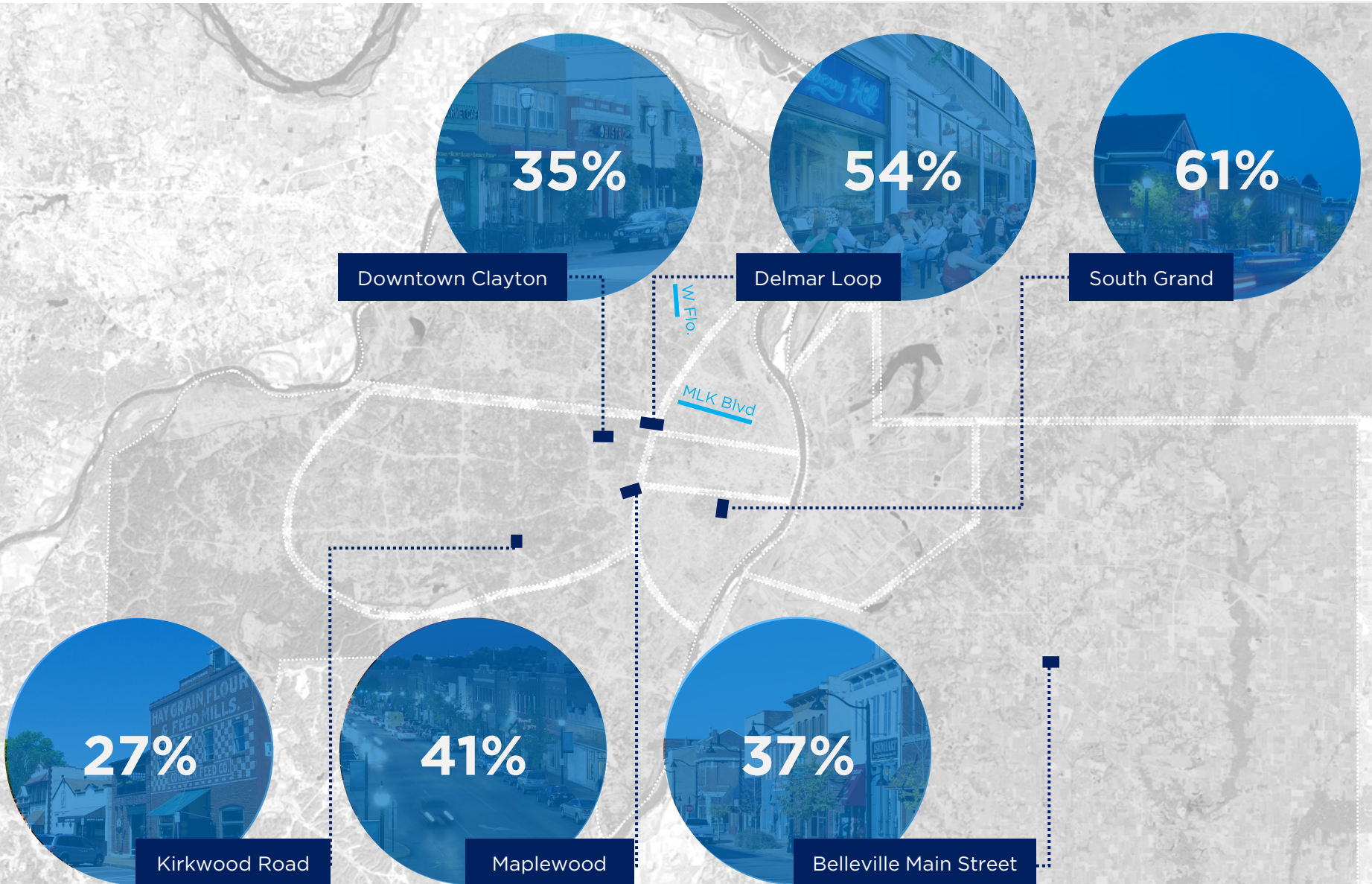


3

...help preserve attainable options in neighborhoods experiencing investment/growth?

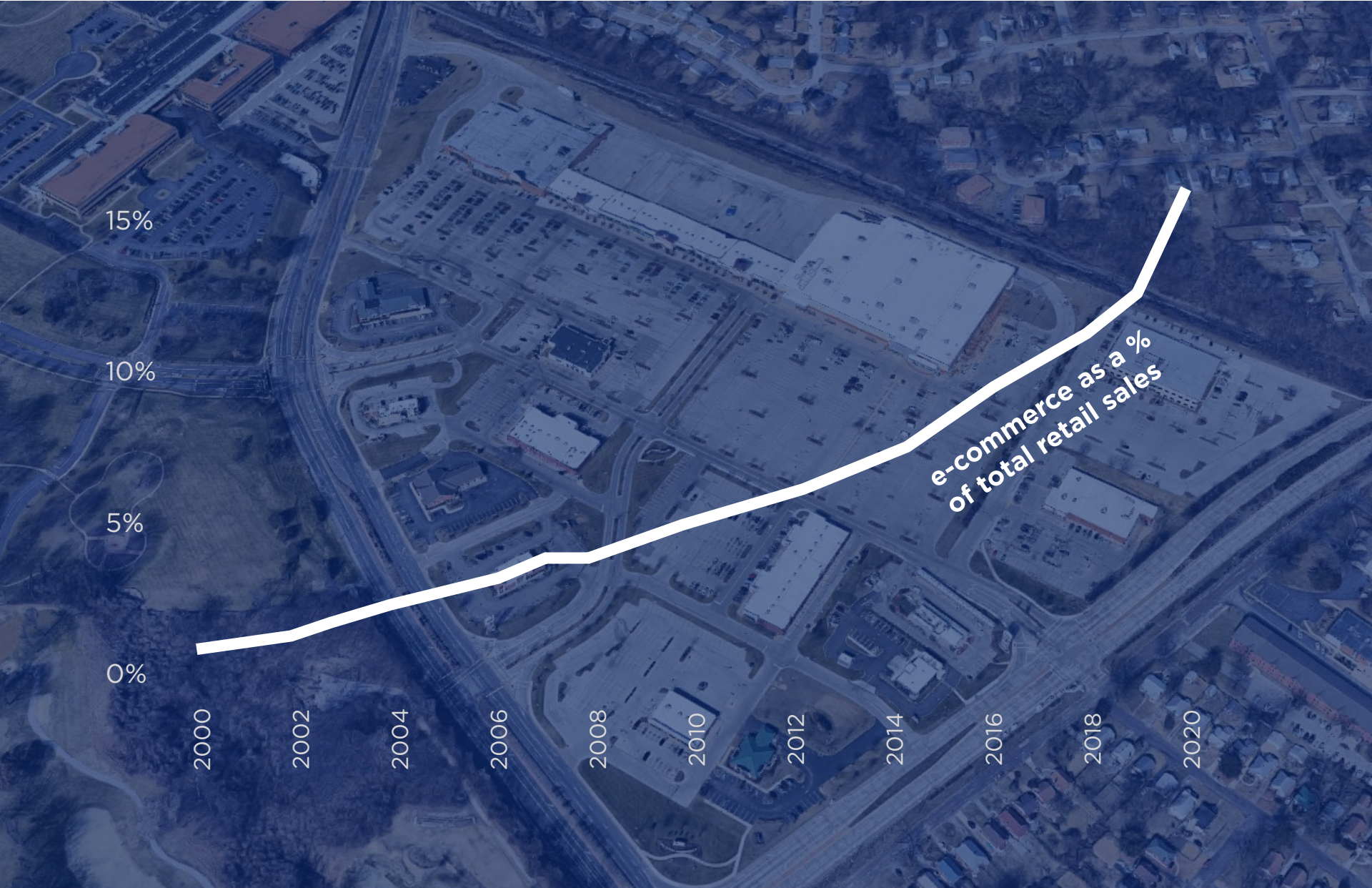
WALKABLE COMMERCIAL DISTRICTS

% MISSING MIDDLE HOUSING IN ¼-MILE RADIUS



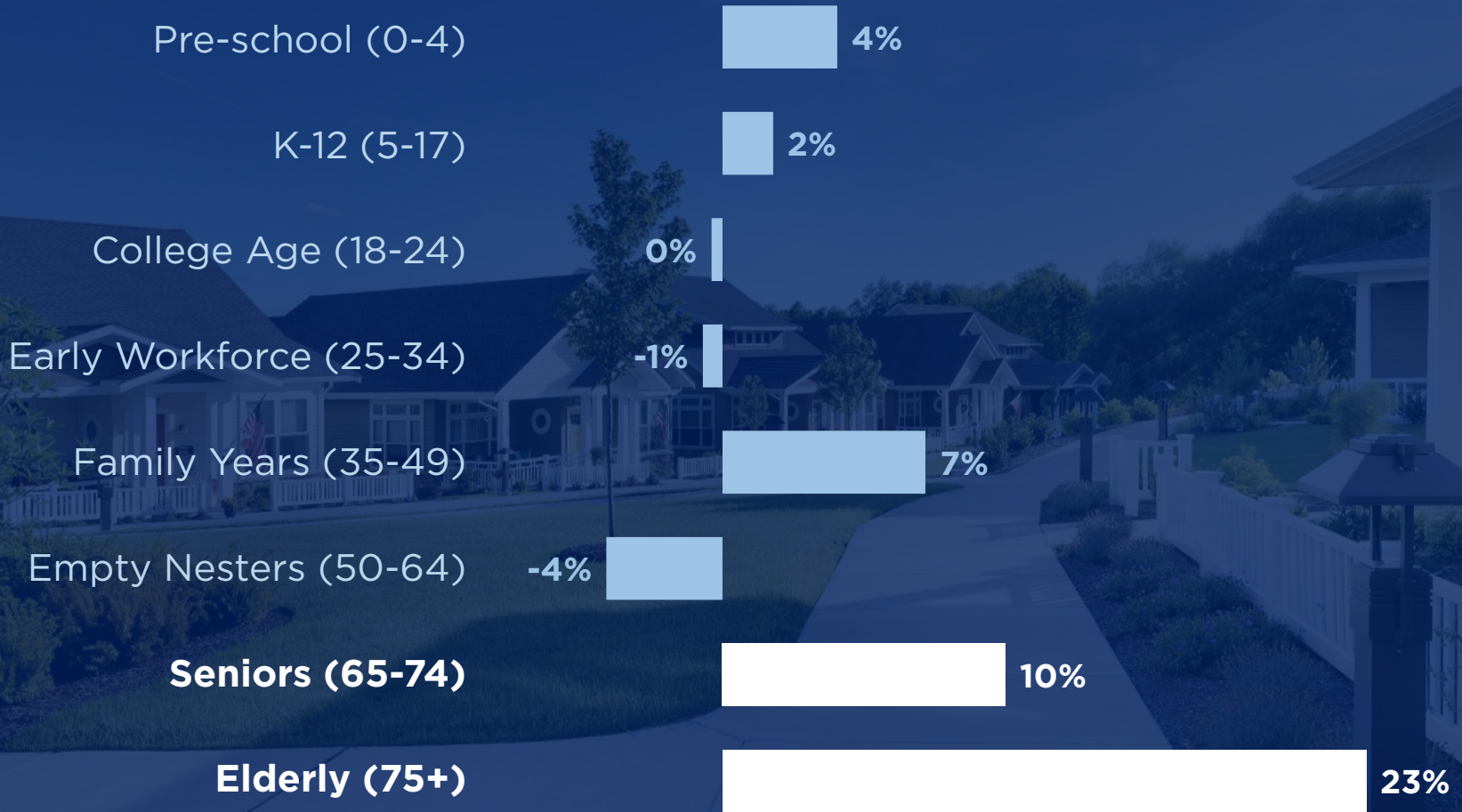
Source: ESRI; ¼ miles radius

WALKABLE COMMERCIAL DISTRICTS INTEGRATING HOUSING



AGING IN COMMUNITY

PROJECTED POPULATION GROWTH IN THE ST. LOUIS MSA BY AGE GROUP



AGING IN COMMUNITY

PROJECTED POPULATION GROWTH BY AGE GROUP



Garden Spot Village (New Holland, PA)

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CREATING & PRESERVING ATTAINABLE OPTIONS BOTH BUILDING AND PRESERVING

3



Affton

\$260k in 2022

1,285 sf | 4 bd 2.5br

60% increase in value

since 2014

Shaw Neighborhood

\$280k in 2022

1,800 sf | 2 unit building, 900sf apts

90% increase in value

since 2014

