

TOMORROW'S HOME

Emerging social trends and their impact on the built environment

SUMMARY

ACKNOWLEDGEMENTS

Author and Researcher - Lily Bernheimer, *Space Works Consulting*

Consultants and Editors - Robert Adam, Hugh Petter, *ADAM Urbanism*, Kurt Mueller, *Grainger*

With Thanks to - Yolande Barnes, *Savills*

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SUMMARY

This is a summary of the full report which seeks to paint a picture of emerging social trends in England and Wales and identify the influences that will be most significant for the future of the built environment.

The research focuses on the Millennial generation—today’s 18-34 year-olds—and what their changing lifestyles will mean for our homes, cities, and towns. It forecasts how these trends will shape the built environment, and presents practical implications for how architects, developers, and planners can build for the needs of the next generation. A copy of the full report is available at contact@adamarchitecture.com

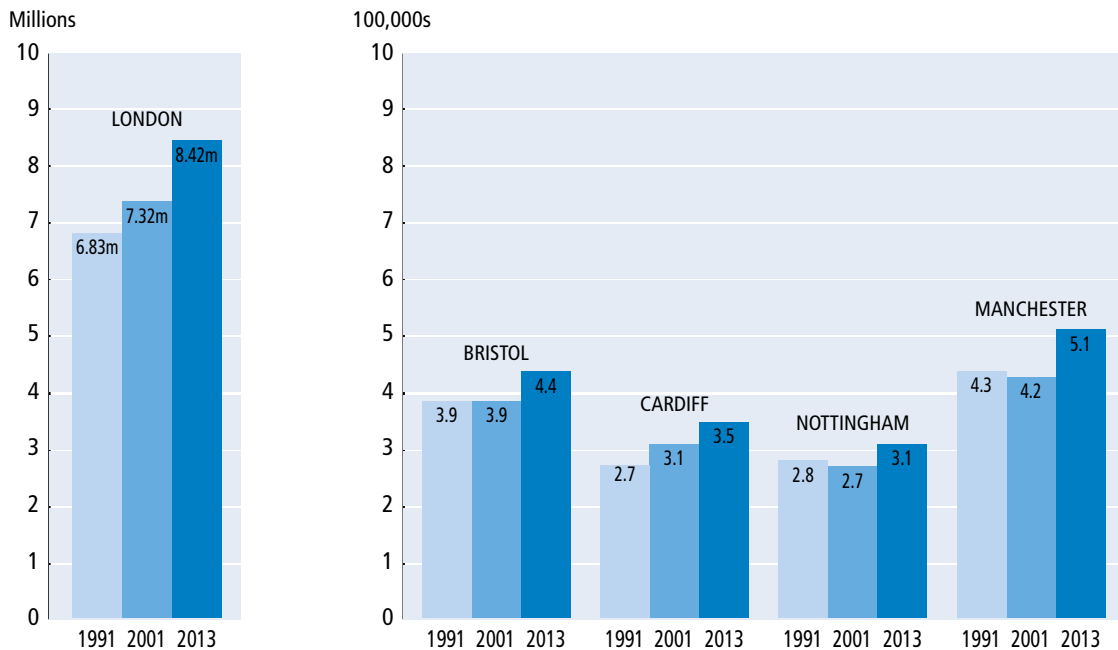
Individual Collectivism

Both socially and spatially, people have dispersed, individualised and are now drawing back together in new types of nodes and networks. This shift towards **individual collectivism** is evident in the resurgence of cities. Individual collectivism is a reaction to the individualised lifestyles of the latter twentieth century and the economic and environmental realities of the twenty-first century. So while driving is in decline and solo-living has stagnated (hence the oversupply of small flats), public transport and co-working spaces are burgeoning. This shift may be the distinctive imprint of the Millennial generation, just as the move towards suburban houses and cars was for their parents.

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Major cities are drawing in more people, especially the young and this is transforming their work and social lives. Population has grown in almost all UK cities since 2001, topped by Manchester, Milton Keynes and Peterborough.³⁰³ As the official designation is somewhat arbitrary, ‘city’ is defined here in terms of the 59 largest cities, towns and functional conurbations in England and Wales.³⁰⁴ 18-21 year-olds are pouring in by year and major growth is projected for 20-34 year-olds living and renting in large cities. Millennials are far more likely to live in cities and flats and far less likely to own and travel by car than recent generations were at the same age.

CITY POPULATION GROWTH 1991 - 2013

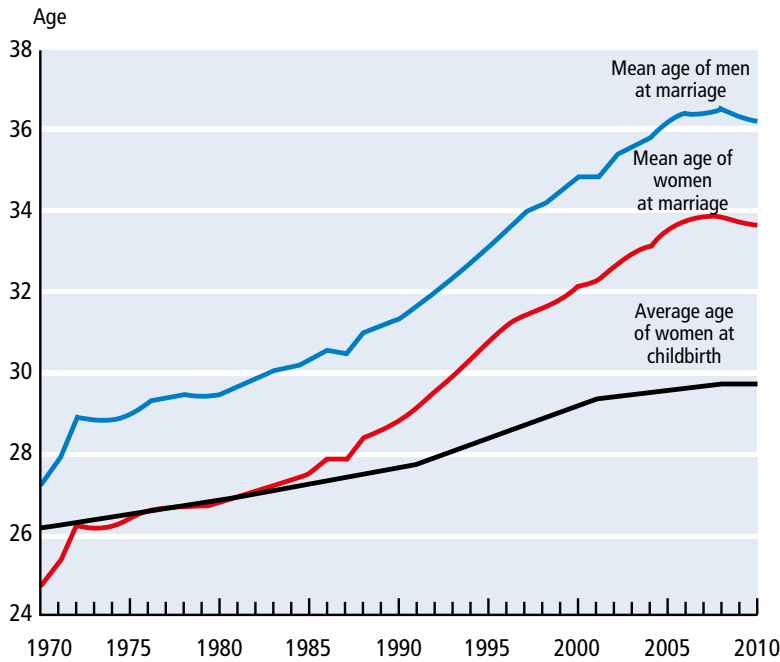


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Economic, tenure and social trends suggest that city-living isn't a blip for this generation. More Millennials are likely to live in cities for longer spans of their lives, because more are deferring or declining family formation and because many young families won't be able to afford to buy in first-tier suburbs and countryside areas. This demographic shift towards more young adults and young families will require different services and functions from cities.

AVERAGE AGE AT MARRIAGE AND CHILDBIRTH



SOURCE: Office for National Statistics
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Downloadable Lifestyles, Uploading Cities

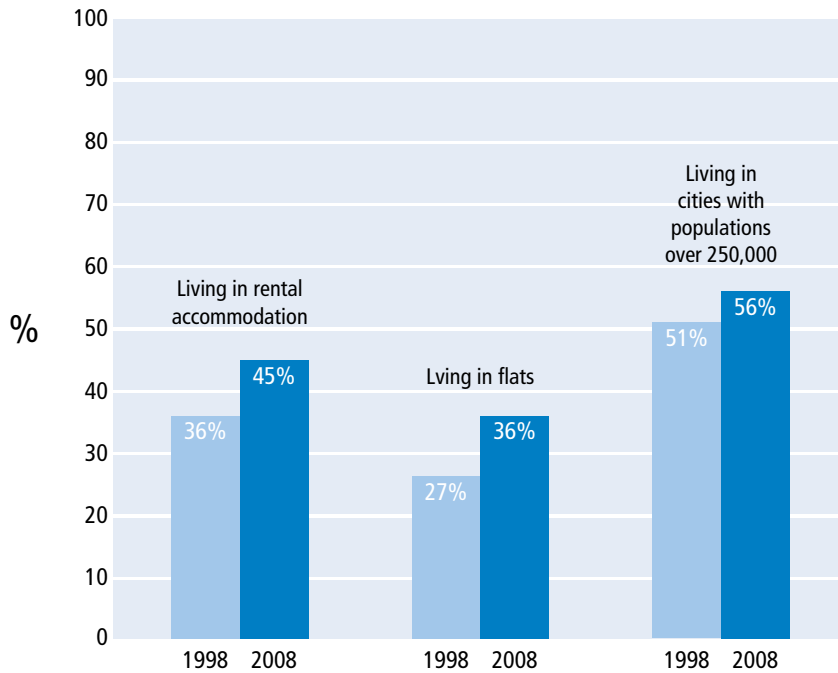
Millennial lifestyles seem increasingly **downloadable**. Renting, moving frequently, plugging into different workspaces and opportunities, and meeting up on the go, mean that young adults' work and personal lives are ever more detached from distinct long-term spaces. Finding flatmates through sites like Gumtree, work opportunities through Twitter, or dates through mobile apps like Tinder, means that digital technology is the driving force enabling this generation to live in a way that is at once collective and individual. One of the Joseph Rowntree Foundation's most compelling findings about the segment they call 'Young Professional Renters' is that they see shared housing as a life choice rather than an unfortunate economic necessity.³⁰⁵

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These downloadable lifestyles also require **uploading cities**, a trend we're seeing in the flexible, collective spaces and systems of the workspace and public realms, ranging from bikeshare and hotdesking to the explosion of public festivals and markets. A higher proportion of young city-dwellers postponing family formation while they focus on careers and saving for mortgages may require an interactive and flexible public sphere along the lines of phone booth WIFI hotspots, later-running public transport and spaces to recharge physically and electronically. Shrinking offices and growing populations also mean that city centres are becoming more residential, requiring amenities for the nights and weekends as well as lunchtimes. The highest residential growth in the UK is now projected for the City of London, followed by other central boroughs such as Tower Hamlets and Southwark.

The residential sector has already individualised in the form of small cellular flats, high security infrastructure and home-based living amenities, but has been less responsive to the collectivist component of this trend. The growth of

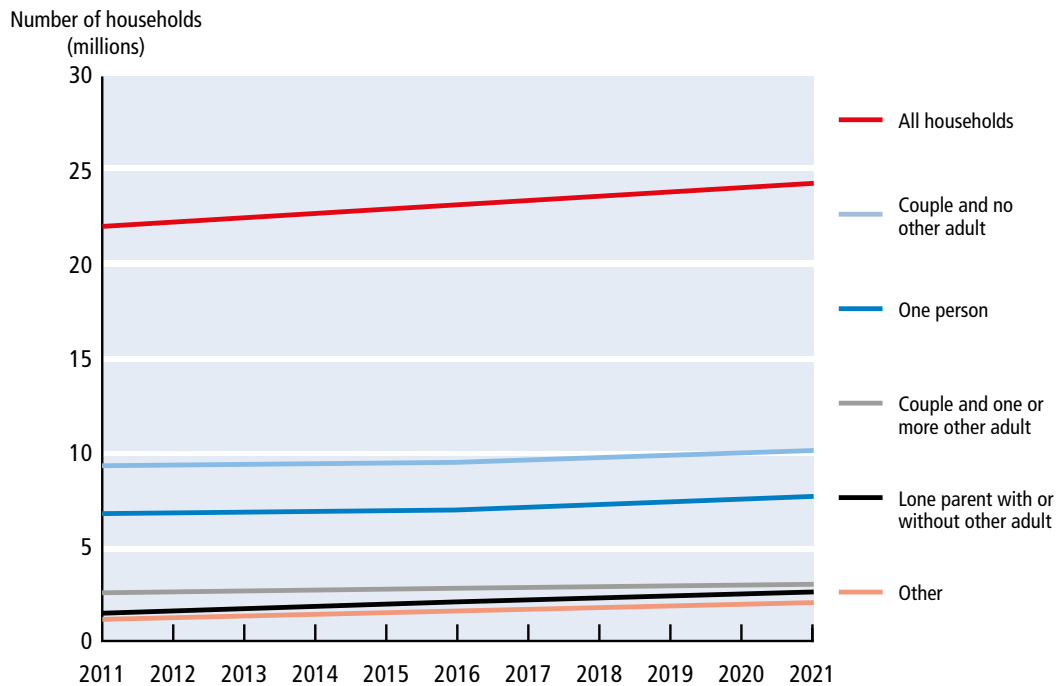
HOUSING TRENDS FOR (18-34 YEAR-OLDS)



SOURCE: Institute for Mobility Research, 2013

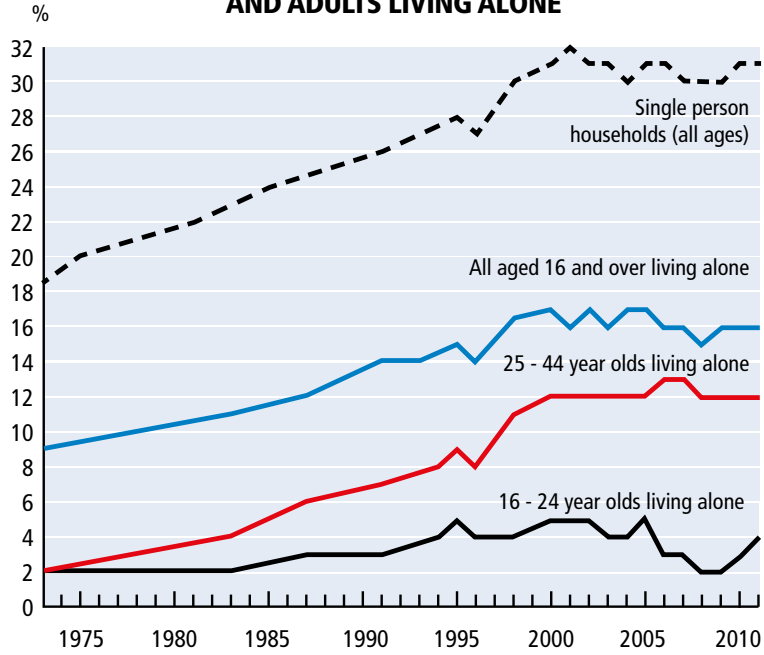
living alone has been greatly exaggerated. Only half of ‘single-person households’ are actual solo-dwellers and the slowing decline of household size also tells us that people are sticking together. ‘Other households’, which include students and other groups of adults sharing accommodation, are projected to grow 20% between 2011 and 2021 and we are likely to see a growing demand for housing to accommodate this sector.³⁰⁶

PROJECTED HOUSEHOLD TYPES BY NUMBER OF ADULTS - 2011 - 2021



SOURCE: Department for Communities and Local Government Household Interim Projections 2011-2021, England

PERCENTAGE OF SINGLE PERSON HOUSEHOLDS AND ADULTS LIVING ALONE



SOURCE: Adapted from data from the Office for National Statistics licensed under the Open Government Licence v.1.0

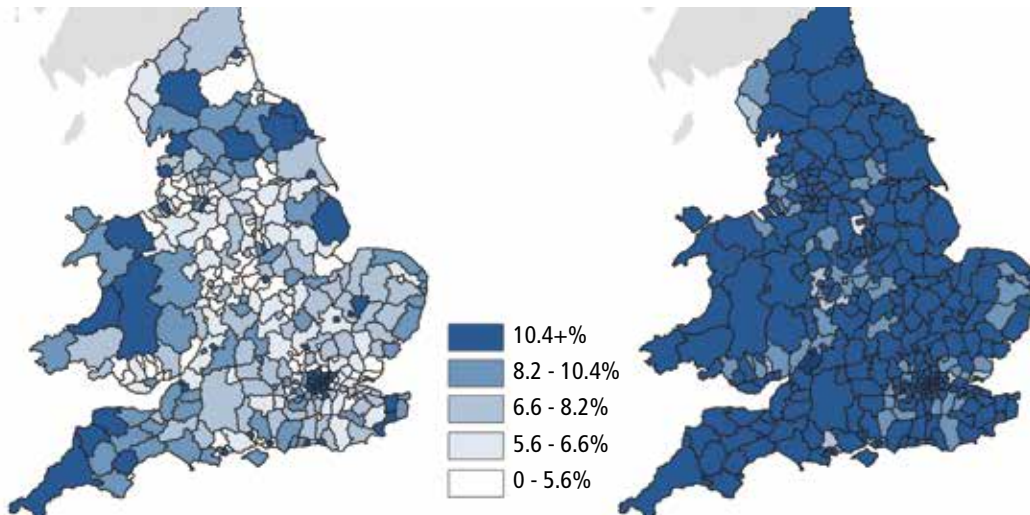
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As dwellings have shrunk and become spaces of individual leisure and labour rather than socialisation, developments that offer well-managed communal facilities are likely to be sought after. With no room in flats to start a social enterprise, throw a dinner party, or store a surfboard, cities will need to absorb and accommodate these functions in other ways. Integrated live/work developments, workhubs and entities like community centre gardens might foster better shared space by building community, management systems and vested interest. Extending the success and popularity of the sharing economy model will be an innovative area of growth to fulfil Millennials' unmet needs for green space, social space and storage space.

PERCENTAGE LIVING IN PRIVATE RENTED SECTOR

2001

2011



SOURCE: Adapted from data from the Office for National Statistics Licensed Under The Open Government Licence v2.0

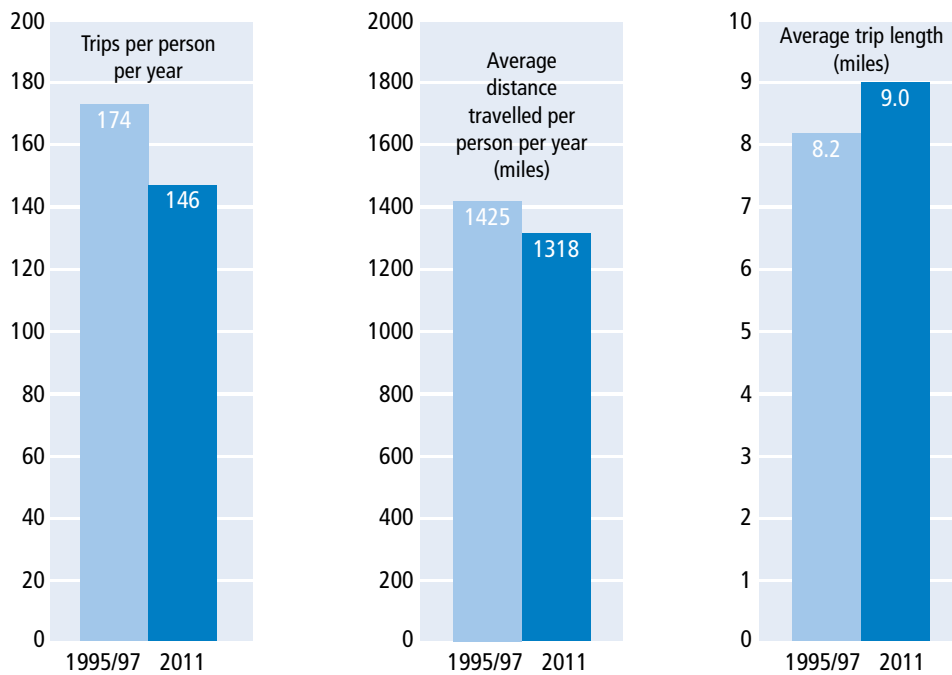
It is also clear that the private rental sector will increasingly be the only tenure available to many young families, particularly in London. All of the housing pathways involving young family formation identified by the JRF (11% total in London and the South East) are projected to rely more heavily on the PRS. The growing group of career-oriented mothers in their early and later 30s are also likely to be more PRS-dependent as ownership slips further into the future. Longer-term private rental tenure for families is expected to produce a new set of needs from these dwellings and their neighbourhoods, such as outdoor play space, greater storage capacity and a layout that is suitable to family life.

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The impact that these trends have in London and other large cities is also likely to differ from that in smaller cities. Housing need is usually discussed at the national level, but housing markets are more deeply defined by the local context of supply and demand. Thriving cities like Manchester, Oxford and Nottingham are predicted to see continuing strong demand for more housing. However, with both suburbs and major cities becoming more expensive, second- and third-tier cities may become increasingly appealing places to live. Growing population in such cities may call for the upgrading of existing housing stock, improving public transport and investing in broader quality of place.³⁰⁷

Mega/Micro Commuting

COMMUTER TRIPS PER PERSON PER YEAR BY NUMBER OF TRIPS, DISTANCE PER PERSON AND TRIP LENGTH



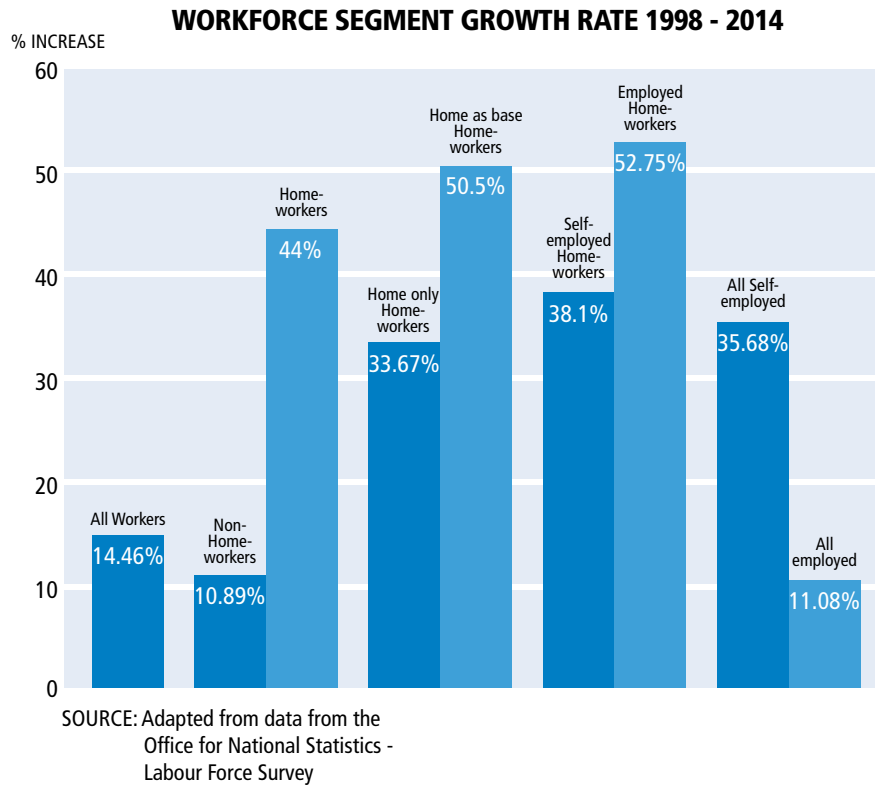
SOURCE: Department for Transport Statistics National Travel Survey

Commuting patterns tell two stories; commutes are reaching increasing extremes, either from Lincolnshire down to London, or simply from the bedroom to the kitchen table. In line with overall transportation trends, commuting has shifted to be longer and less frequent as teleworking and homeworking have grown over the past two decades. Between 1995-97 and 2011, the total number of commuting trips decreased 16%, but the average length of each trip went up by 9%.³⁰⁸ People are commuting longer distances, but are also working from home or other places more often. The feasibility of daily commute to the nearest city is losing influence over residential

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choice, replaced by sporadic access to major hubs, particularly London. The reach of functional metropolitan regions is expanding and overlapping to operate more like one single mega-region.

England's small size, high density and highly developed transport network, now combined with flexible employment trends, mean that many workers might live almost anywhere in the country while maintaining frequent contact with a main office, clients or colleagues. The 're-working' of residential geography – employing a combination of mega and micro commutes – is viable here in a way that isn't in China or the United States.



Mega/micro commuting bodes well for sustainability, economic development and even work/life balance. Decentralisation initially leads to longer commute distances, but people and employment rebalance as they spread out, leading to shorter journeys.³⁰⁹ When enough people move further out to support local services, transport patterns tend to localise. The upsurge in flexible working is the key factor expected to drive this transformation further. The homeworking workforce has increased by 44% since 1998, while traditional commuting employees grew by less than 11%.³¹⁰ And the growth of flexible working arrangements of all types is likely to escalate, as Millennials become a larger and more influential part of the workforce. The growth of the knowledge economy, part-time work and various individualised employment structures are building a labour market that is increasingly flexible and untied from regular daily commuting. The knock-on effect of mega/micro commuting has been an 8% overall decrease in miles travelled to work since the 1990s.³¹¹ Fewer miles on the road will be beneficial to local economies and also to the national economy as the congested transport network has been identified as a threat to the future of British economic development.³¹²

The End of the Dormitory Suburb

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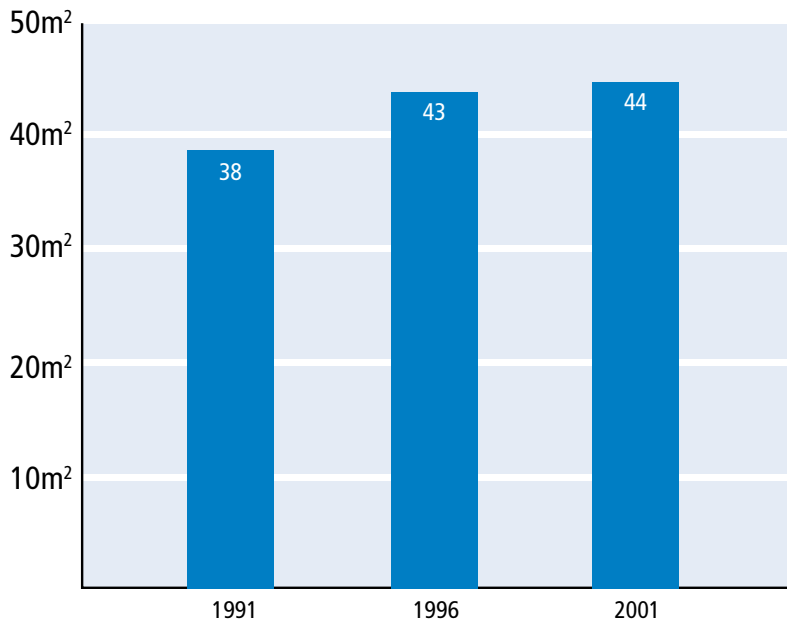
The blurring of living and working spaces we have seen so far forecasts an evident decline of the entire dormitory suburban model. Dormitory suburbs have been defined by their virtually exclusive residential use-type, a category including the largely residential areas of small towns. Many Millennials will still aspire to the ideal of the suburban house and mega/micro commuting may make this possible by opening up more affordable housing options further from centres of lucrative employment. These demographic and cultural shifts mean that dormitory suburbs are becoming less exclusively residential.

The combined rise of flexible employment trends, a resurgence in inner-city living and change in transport behaviour reveal a shifting landscape, one where dwellings and workspaces are more

closely interspersed in cities, town centres and suburban and rural settings. The functional and geographical separation of the dwelling from industry began during the industrial revolution, but the extreme of the post-war dormitory suburb may turn out to be a twentieth century anomaly.³¹³ As dedicated space per person in offices is shrinking, space per person in the dwelling has grown, reflecting, in part, the movement of work activity into the home. 41% of all UK businesses are now run from home and 55% in rural areas.³¹⁴ Whether this means literally working from home, a workhub, or more bespoke live/work units, these developments are all part of the shift that many see as a re-working of the pre-industrial proximity of living and working spaces.

41% of all UK businesses are now run from home and 55% in rural areas.

AVERAGE USEABLE SPACE PER PERSON



SOURCE: English House Condition Survey 2001, ODPM

Although mega commuting has sometimes been blamed for sprawl and ‘placelessness’, micro commuting may be a great tool for place-making and revitalisation. Live/work researchers such as Tim Dwelly have found a strong UK market for clusters of dual-use units, which can afford homeworkers a greater degree of professionalism, contribute to local economic development and mitigate the isolating potential of individualised employment. Specialised live/work communities can function like residentially integrated workhubs, though this may involve some policy updates to be feasible in terms of mortgages, taxation and planning controls.³¹⁵

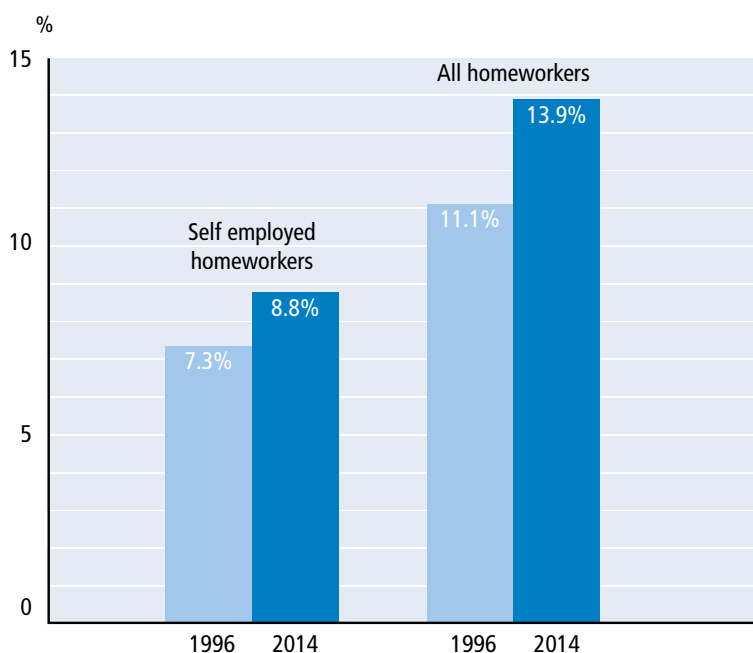
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Changing living and working patterns clearly show that the notion of residential developments as places where people go just to sleep is on the decline. We are

likely to see people spending more time where they live, which will lead to a need for different types of local services. The prospect of home-based working is a particular motivation for aspiring female entrepreneurs (70%, as compared to 56% of men) and for those over 35 because of the importance of family life for these groups.³¹⁶ Additional around-the-clock activity may require and support services such as cafés, crèches and shared facilities for printing and other office equipment. Strong public transport from both conventional service providers and the sharing economy sector, will be crucial to meet the needs of a generation with lower rates of car travel and ownership.

Homeworking is forecast to be particularly important to economic development in rural areas, where it already represents 18.88% of the workforce. The rural market is largely for highly tailored units for the self-employed and small businesses, rather than home-working employees.³¹⁷ However, employed homeworkers will be important to consider going forward. This sector grew by 52.8% between 1998 and 2014, faster than any other part of the workforce. In market towns there is a strong market for live/work districts; combinations of

live/work development may be especially important to consider for new settlements and the government have already called for such provision

HOMEWORKERS AS A PERCENTAGE OF ALL WORKERS

SOURCE: Office for National Statistics
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mixed-use units and workhubs. Finally, live/work development may be especially important to consider for new settlements and the government have already called for such provision in Eco-Towns and specific sites such as Thames Gateway.³¹⁸ Workspace and residential facilities can bring a new function to regenerate hollowed-out high streets across the board as shopping moves online.

The New Housing Ladders

Overall, it seems we're seeing two potentially divergent trends: mega/micro commuting may allow Millennials to pursue the great ideal of countryside living by dwelling farther from cities, or their city orientation may prevail as they start families, or don't. The dual-earner model and women's increasingly important role in the labour market may play into both of these patterns. The dormitory suburb was based on the twentieth century model of a single-earner going to work in the city while mothers stayed home with children. Many Millennial mothers (especially for the older segment likely to maintain existing careers) may prefer to stay in cities, with easier access to employment. Alternatively, homeworking in a new, more mixed-use type of suburb may be seen as an ideal work/life balance for part-time working mothers.

While these two visions might seem to be at odds, what they share is an end of the twentieth century dormitory suburban model of family and work life, housing and social interaction. It remains to be seen whether Millennials will follow in their parents' footsteps regarding housing aspirations and driving behaviour as they age, or whether their differing preferences will persist. But the economic and environmental forces facing this generation are so altered that forging a new and varied set of housing ladders seems certain. The future will likely see a combination of Millennials climbing both the ladders we have forecast.

Perhaps the more crucial question than whether Millennials will favour suburbs or cities is whether this dichotomy will continue to define our lives and landscapes in the same way. Transportation and social interaction patterns have both shown that as new technologies enable people to disperse, they are also regenerating and reorganising connections and economies on the local level. Millennials will inevitably leave their own imprint on the British landscape, but if the built environment is responsive to these changing social patterns, that impact may have great economic and environmental benefits for broader society. As Joel Ravetz writes, 'such changes in uses and users can reach a "tipping point" where radical building forms or adaptations are realised in design solutions'. The change in uses and users of dwellings and settlements in England and Wales is well underway and forward-thinking designs and adaptations are needed for the built environment to respond.

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