

# City of San Diego 2024 Annual Report on Homes



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# From the City Planning Department Director

The City of San Diego has prioritized the permitting and development of new homes to address housing affordability and ensure a better future for San Diegans. The City Planning Department has updated community plans to increase the capacity for new home construction and provide incentives for homes for all people. The City Planning Department also regularly updates the Land Development Code to streamline home permitting processes and to implement state legislation. Additionally, the City is refreshing the General Plan to provide an updated framework for building new homes while also helping meet the City's Climate Action Plan and equity goals. These efforts were recognized by the California Department of Housing and Community Development in 2022 with a "Pro-Housing" city designation.

Tracking the number of homes permitted is an important way to understand what is working and what may need adjustments. The 2024 Annual Report on Homes builds upon previous annual reports to track the development of new homes, the type of homes, their affordability levels, and locations. The data shows whether we are providing the homes needed to meet regional housing goals, providing new homes throughout the City, furthering fair housing, and meeting climate goals by building new homes with good transit access.

In 2023, the City permitted almost 9,700 new homes, and over a quarter of those homes are deed-restricted as affordable for very-low, low, and moderate-income San Diegans. While this increase is encouraging, the City of San Diego must continue to make additional changes to combat the inequities of previous housing policies, increase capacity, streamline approvals, and provide more homes where all San Diegans can live and thrive. I know that San Diego is up to meet this challenge to ensure that everyone has the housing opportunities they need to thrive and make our City the great City it is.

**Heidi Vonblum**, Director  
City Planning Department



*Mixed-Income Development in North Park*



# Reporting Requirements

The 2024 Annual Report on Homes summarizes the data compiled in the 2023 Housing Element Annual Progress Report (APR). The APR lists each building permit issued by the City of San Diego for new home development including the number and type of homes permitted. The APR was submitted to the Department of Housing and Community Development (HCD) in March 2024.

Due to the high volume of building permits issued by the City, information and trends can be difficult to visualize in the APR. The 2024 Annual Report on Homes is intended to show this data in an easy to understand, meaningful way. The 2024 Annual Report on Homes summarizes the APR data for home permits issued in 2023, including the use of the City's local home incentive programs. The 2024 Annual Report on Homes also tracks home permitting trends to show how and where home permitting has occurred over time, and to track the City's progress on meeting its housing needs identified in the General Plan's Housing Element (Housing Element). Tracking home permitting and the local programs is also critical in ensuring the City's progress on its commitment to affirmatively furthering fair housing and reviewing its local programs effectiveness.

The 2024 Annual Report on Homes includes analyses requested by HCD in its certification letter of the City of San Diego's 2021-2029 Housing Element. As part of the certification, HCD requested that the City provide additional information on fair housing, the Housing Element adequate site inventory, as well as outreach and engagement. The 2024 Annual Report on Homes includes the data and information to meet HCD's request.



*Mixed-Income Development in San Ysidro*



# Data Description and Methodology

**Data Collection.** The 2024 Annual Report on Homes uses data from the 2023 Housing Element Annual Progress Report. Home permit data is collected by the City's Development Services Department as permits are issued. Data on deed-restricted affordable homes is collected by the San Diego Housing Commission as building permits are issued. Building permit issuances are the report's primary focus because State and Federal reporting focuses on building permit issuances.

**Data Validation.** The City Planning Department reviewed all 2023 building permit issuances for projects creating more than one home, accessory dwelling unit home, or affordable home to ensure accuracy and data quality.

**Climate Goals.** The 2024 Annual Report on Homes tracks the permitting of new homes by mobility zones to identify how new housing is supporting the City's climate action goals. Mobility zones are areas of the city based on the amount of vehicular traffic per capita and per employee. Mobility Zones are further described in the adjacent discussion box. In general, Mobility Zones 1, 2, and 3 are considered to be areas where new development would be consistent with the City's climate goals because the amount of vehicular travel would be relatively lower.

**Equity Goals.** The 2024 Annual Report on Homes shows how home permitting was located in areas of opportunity throughout the city based on the State of California Tax Credit Allocation Committee (TCAC) Resource Area Opportunity Map to identify the equity of home permitting. The TCAC maps show the opportunity areas in each census tract in the city based on economic, environmental, and educational indicator scores. TCAC Resource Opportunity Areas are further described in the adjacent discussion box.

## Mobility Zones

**Mobility Zone 1:** Downtown Community Planning Area

**Mobility Zone 2:** Areas within the Sustainable Development Area

**Mobility Zone 3:** Community Planning Areas with 85 percent or less of the regional average for either resident Vehicle Miles Traveled (VMT) per capita or employee VMT per employee

**Mobility Zone 4:** Community Planning Areas with **greater** than 85 percent of the regional average for both resident VMT per capita and employee VMT

## TCAC Resource Opportunity Areas

**Highest Resource:** Areas that score the highest with economic, environmental, and educational indicators

**High Resource:** Areas that score high with economic, environmental, and educational indicators

**Moderate Resource:** Areas that have a mixture of high and low scores with economic, environmental, and educational indicators

**Low Resource:** Areas that score the lowest with economic, environmental, and educational indicators

**High Segregation and Poverty:** Areas where poverty and ethnic communities are concentrated at higher levels than other parts of the City



# 2023 Housing Data

- A. Home Building Permit Applications
- B. Home Building Permit Applications by Community
- C. Home Building Permits Issued
- D. Total Home Building Permits Issued by Community
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- M. Family Homes Issuances by Community
- N. Building Permit Issued Utilizing Home Incentive Programs

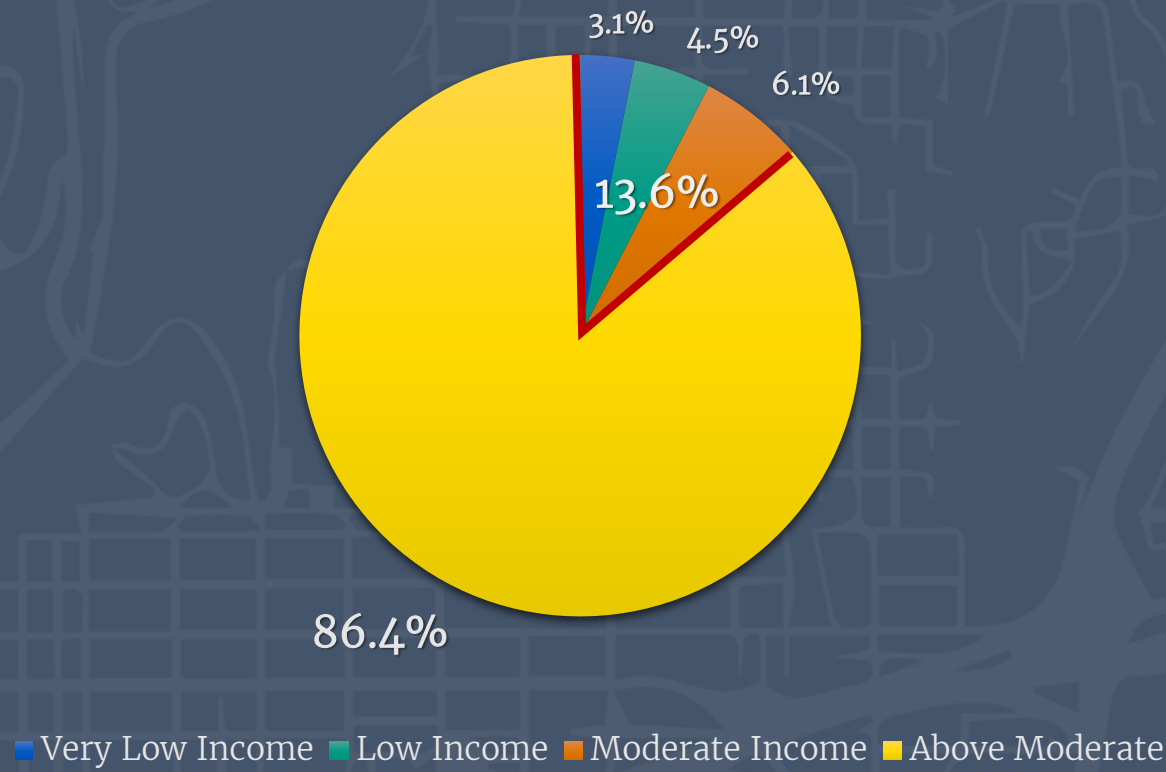


# 2023 Home Building Permit Applications

- The City received building permit applications for 10,288 new homes in Calendar Year 2023
- 13.6% of the homes in these permit applications are for deed-restricted homes at the following income levels:
  - Very-low income: 3.1%
  - Low-income: 4.5%
  - Moderate income: 6.1%

**New Home Applications.** This number represents homes proposed in permit applications received by the City in 2023. Development applications may change during the review of their application, including the number of homes, affordability levels, and other key elements of the project, but tracking the number of permits provides insight into the number of homes that could potentially be permitted in the future.

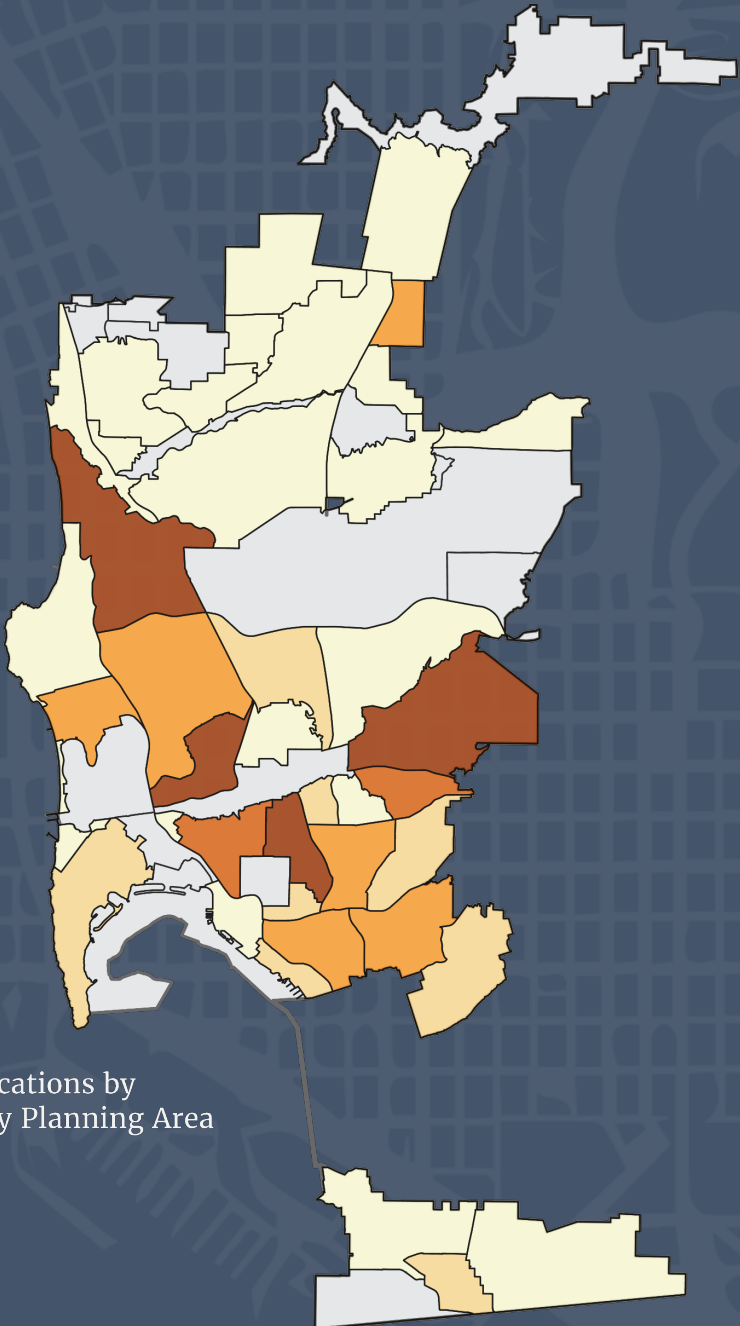
2023 Applications by Income Category



Very Low Income	Low Income	Moderate Income	Above Moderate Income	Total
321	459	623	8,885	10,288
3.1%	4.5%	6.1%	86.4%	100%

# 2023 Home Building Permit Applications by Community

The top 10 Community Planning Areas total new homes and affordable homes building permit applications In 2023 were:



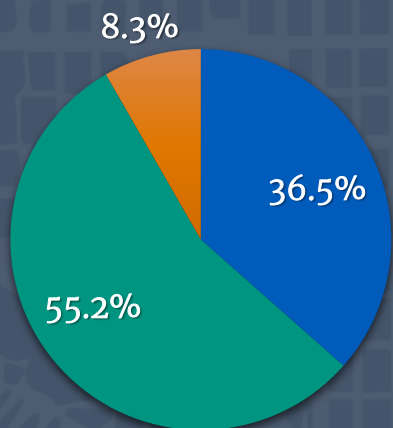
Community Plan Area	Total Homes	Total Affordable Homes
North Park	1,419	241
University	1,395	45
Linda Vista	1,125	154
Navajo	1,027	42
Uptown	782	74
College Area	525	173
Southeastern San Diego	491	80
Clairemont Mesa	406	98
Carmel Mountain Ranch	402	0
City Heights	335	108



# 2023 Home Building Permits Issued

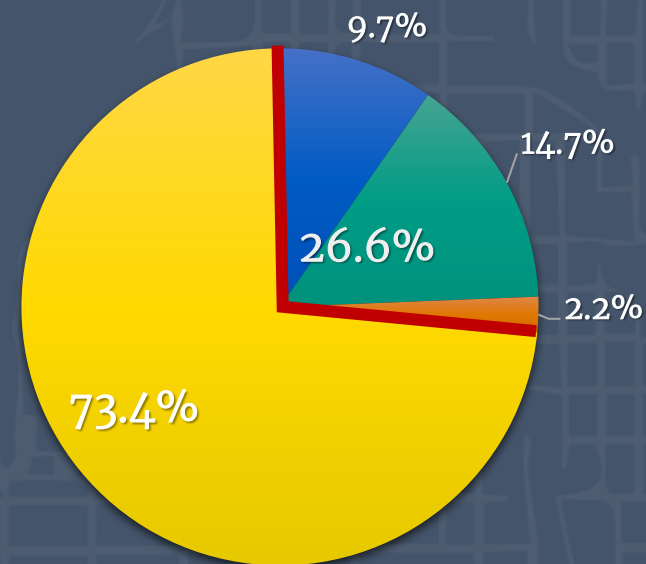
- 9,693 new homes were issued building permits in 2023
- Of these new home building permits, 27% were deed-restricted as affordable

2023 Percent of Affordable Homes by Income Category



Very Low Income Low Income Moderate Income

2023 Home Building Permit Issuance by Income Category

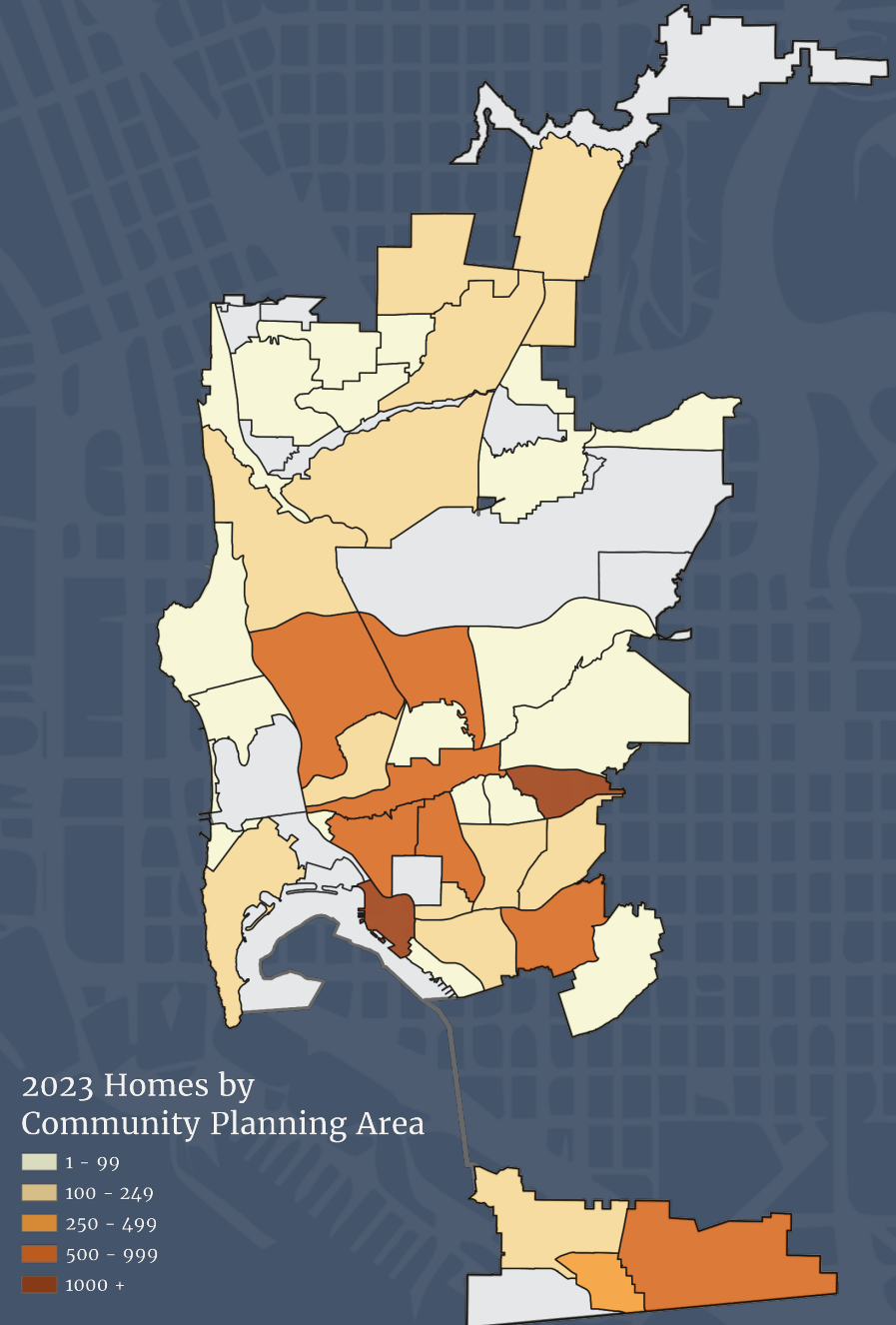


Very Low Income Low Income Moderate Income Above Moderate

Very Low Income	Low Income	Moderate Income	Above Moderate Income	Total
941	1,421	214	7,117	9,693
9.7%	14.7%	2.2%	73.4%	100%

# 2023 Total Home Building Permits Issued by Community

The top 10 Community Planning Areas total new homes in 2023 were:

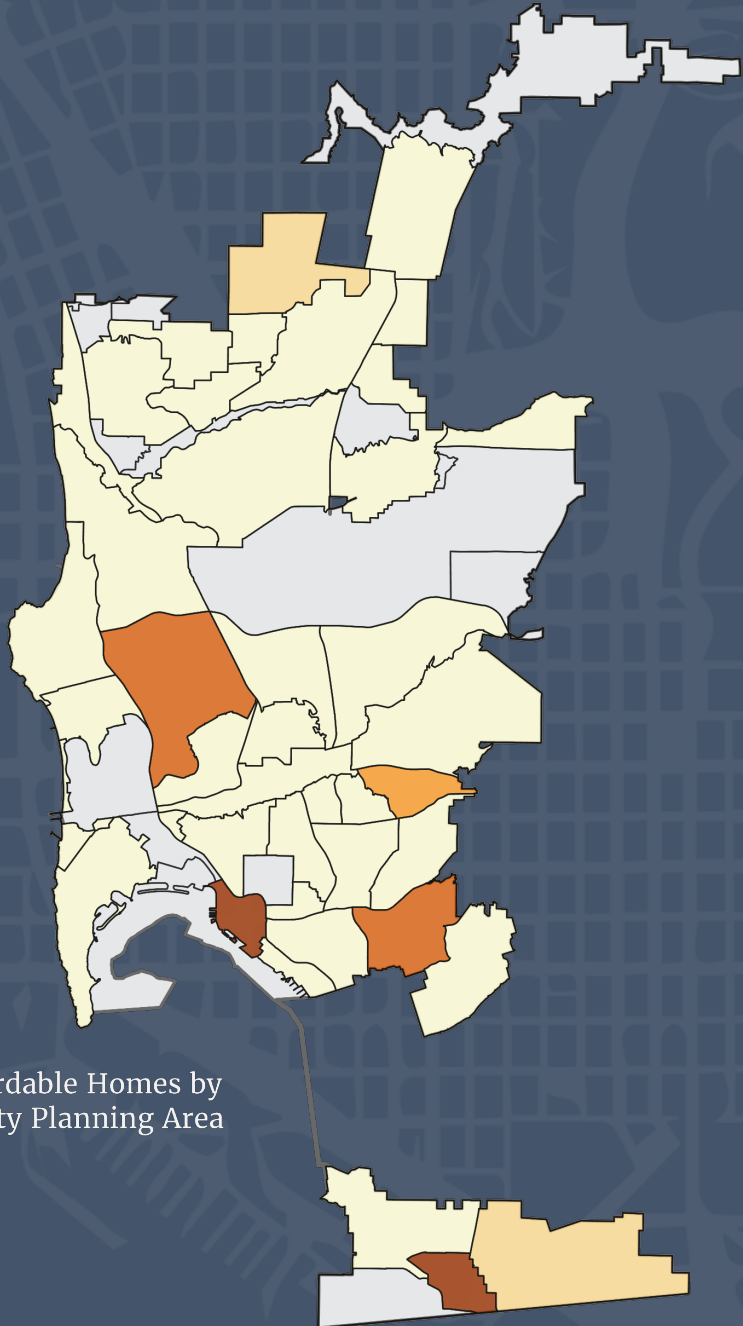


Community Plan Area	Total Homes Permitted
Downtown	1,095
College Area	1,023
Kearny Mesa	833
Mission Valley	762
Otay Mesa	661
North Park	648
Uptown	621
Clairemont Mesa	557
Encanto Neighborhoods	501
San Ysidro	482



# 2023 Home Building Permits Issued for Affordable Homes

The top 10 Community Planning Areas for permitted affordable homes in 2023 were:

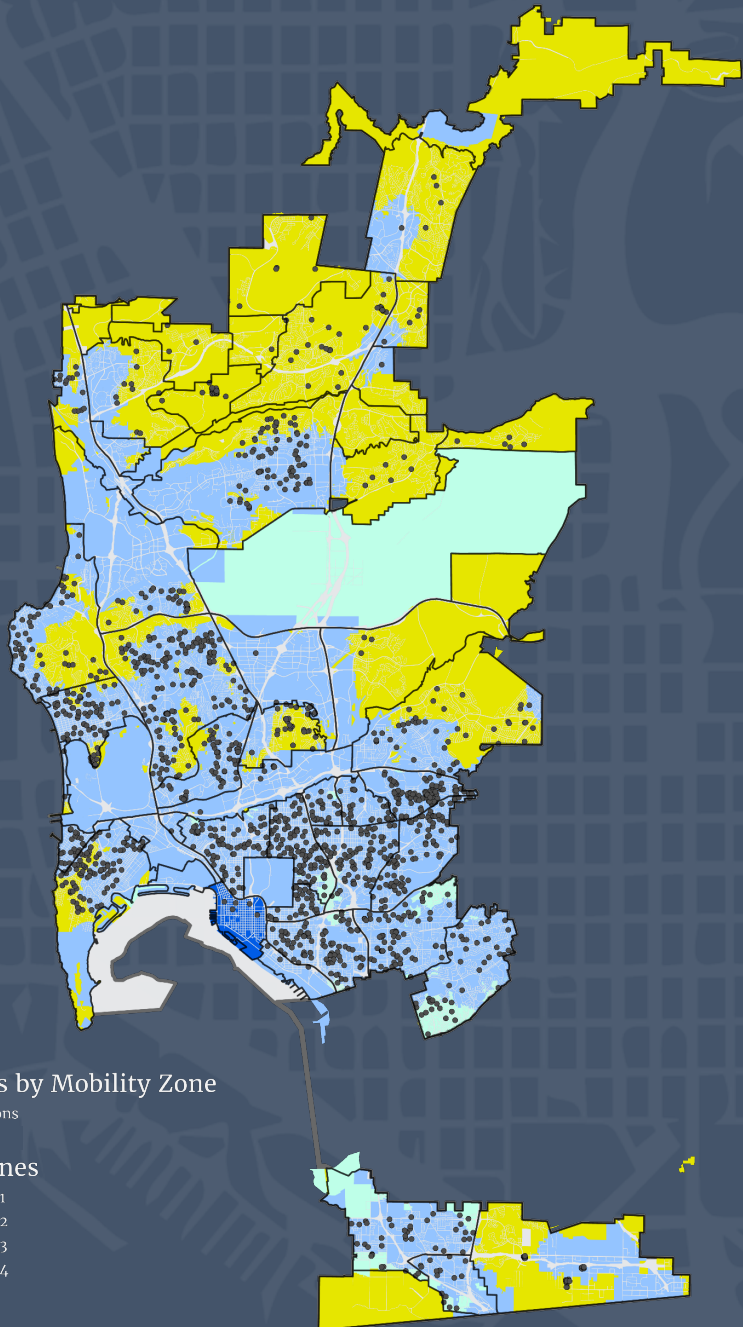


Community Plan Area	Total Affordable Homes Permitted
San Ysidro	466
Downtown	459
Encanto Neighborhoods	325
Clairemont Mesa	322
College Area	245
Black Mountain Ranch	169
Otay Mesa	133
Rancho Bernardo	99
Rancho Peñasquitos	82
North Park	58

# 2023 Home Building Permits Issued by Mobility Zone

Within walking distance to transit  
(Mobility Zones 1 & 2):

- 84% of all affordable homes
- 87% of all permitted homes



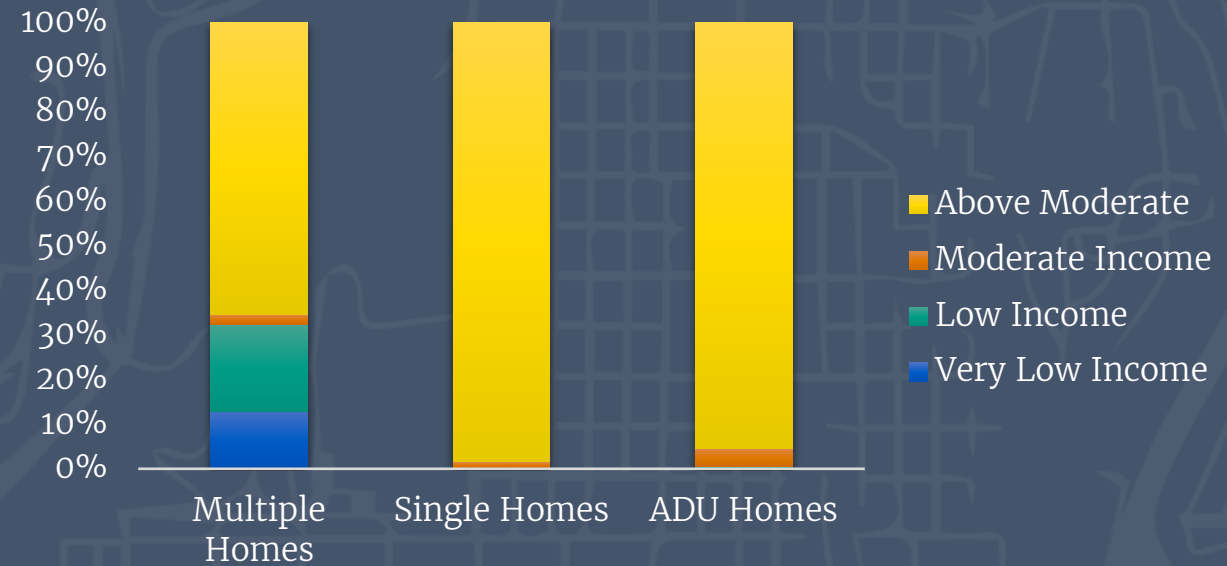
Mobility Zone	% Affordable Homes Permitted	% Total Homes Permitted
Mobility Zone 1	17.8%	11.3%
Mobility Zone 2	66.4%	76.4%
Mobility Zone 3	0.8%	1.1%
Mobility Zone 4	15.0%	11.2%



# 2023 Home Building Permits Issued by Type

- Nearly 75% of all permitted new homes were in multiple home developments
- Accessory Dwelling Unit (ADU) homes represented almost 20% of all homes permitted
- Most permitted new homes were located near transit in Mobility Zones 1 and 2

2023 Home Building Permits Issued by Type



**Multiple Homes.** Multi-family home types include more than one home including small scale home buildings and large residential towers.

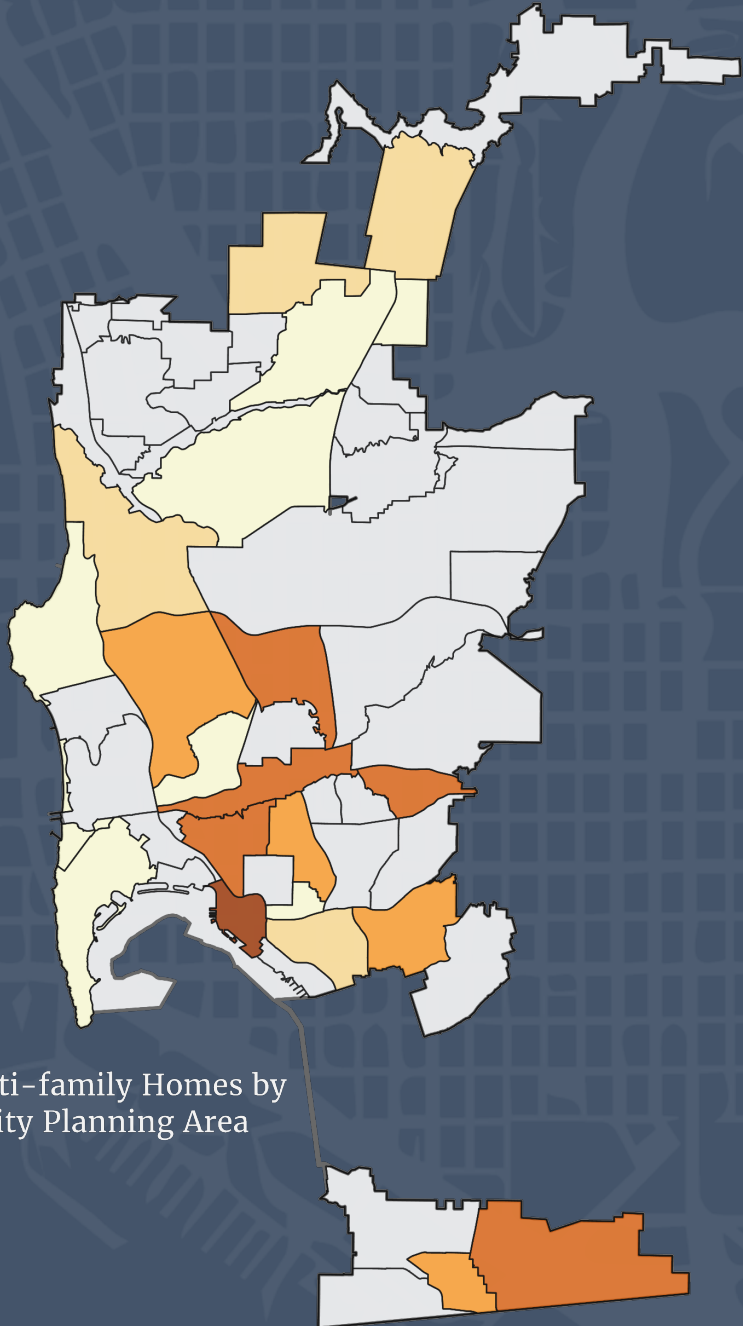
**Single Homes.** Single home types include single detached homes or multiple single attached homes like townhomes and rowhomes.

**Accessory Dwelling Unit Homes.** Accessory Dwelling Units homes are homes that are accessory to a primary home on the same lot.

Mobility Zone	ADU Homes	Multiple Homes	Single Homes
Mobility Zone 1	0	1,095	0
Mobility Zone 2	1,574	5,503	331
Mobility Zone 3	106	0	1
Mobility Zone 4	229	610	244

# 2023 Multiple Home Building Permits Issued

The top Community Planning Areas for new multiple homes and new affordable multiple homes permitted were:



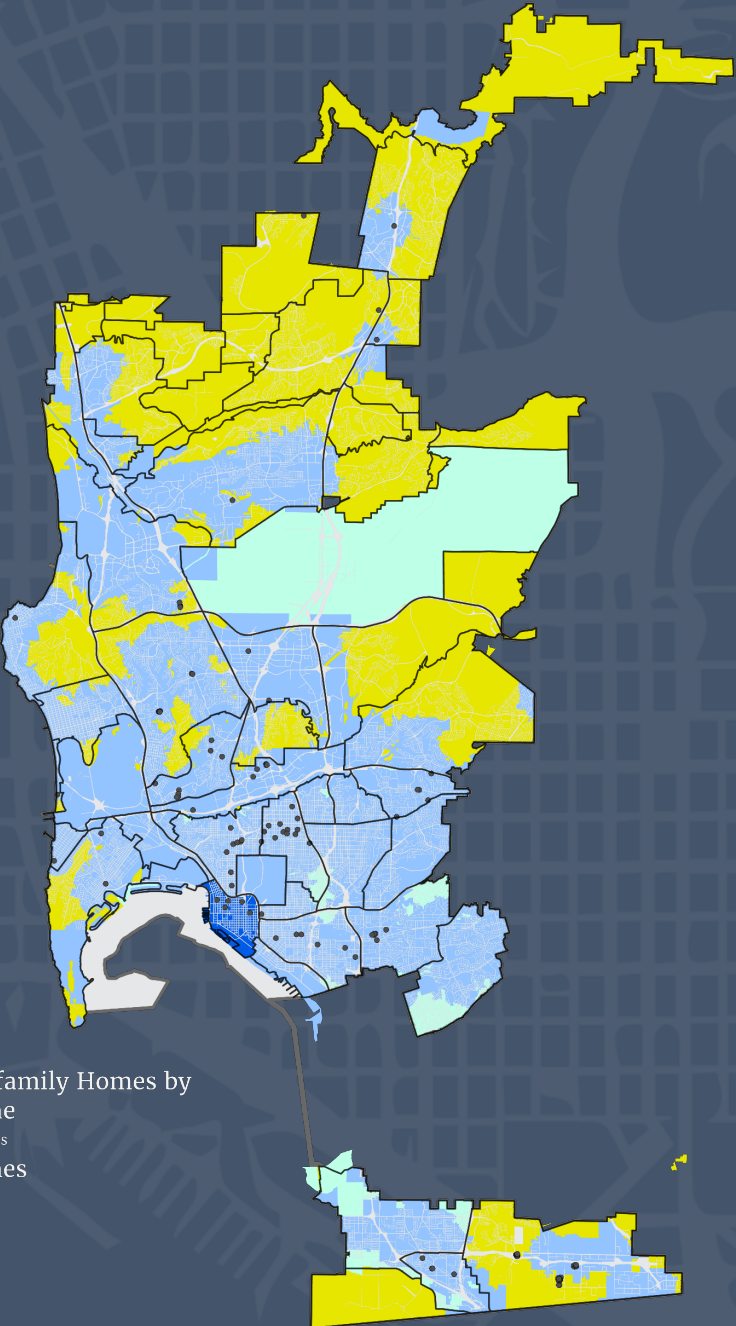
Community Plan Area	Total Homes Permitted	Total Affordable Homes Permitted
Downtown	1,095	459
College Area	904	235
Kearny Mesa	833	49
Mission Valley	732	25
Otay Mesa	652	133
Uptown	510	42
North Park	486	50
San Ysidro	468	466
Clairemont Mesa	343	308
Encanto Neighborhoods	319	316



# 2023 Multiple Home Building Permits Issued By Mobility Zone

Within walking distance to transit (Mobility Zone 1 and 2):

- 84.5% of all affordable multiple homes
- 91.5% of all multiple homes



2023 Multi-family Homes by Mobility Zone

- Project Locations

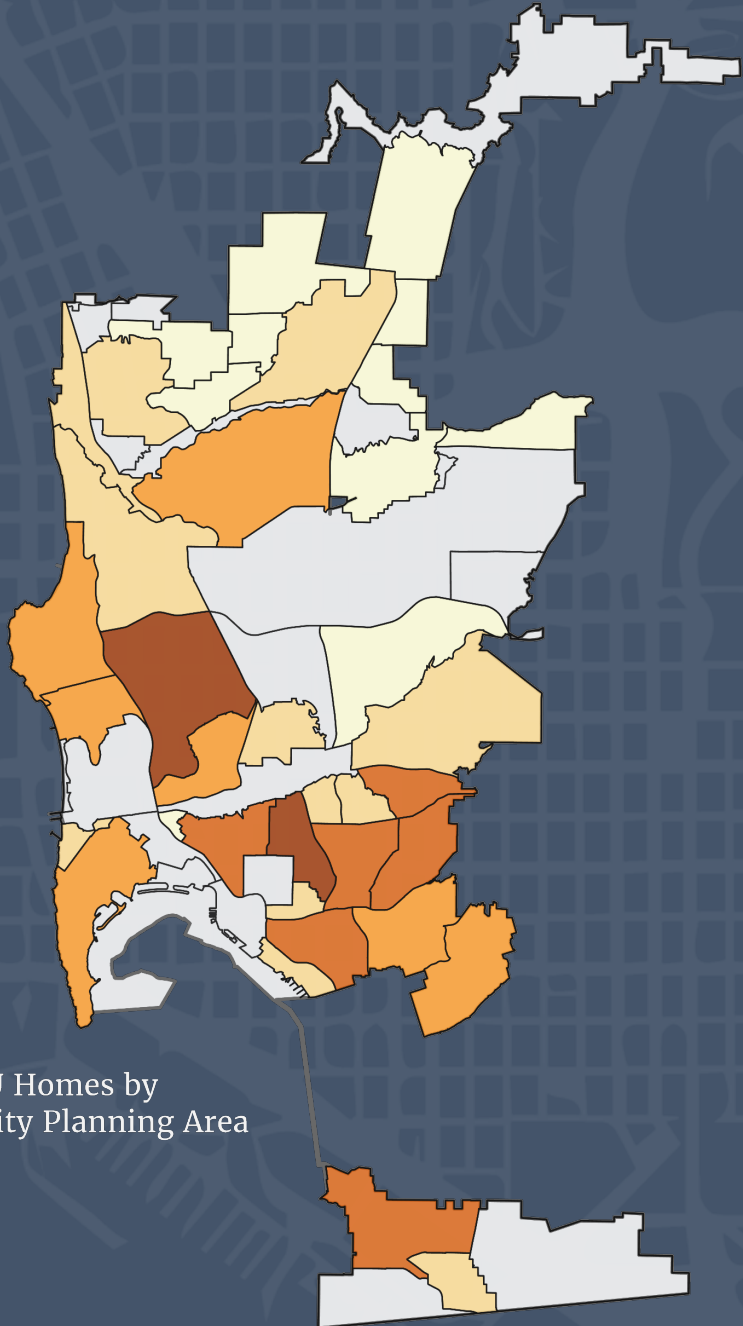
Mobility Zones

- Mobility Zone 1
- Mobility Zone 2
- Mobility Zone 3
- Mobility Zone 4
- Not Applicable

Mobility Zone	% Affordable Multiple Homes Permitted	% Total Multiple Homes Permitted
Mobility Zone 1	18.5%	15.2%
Mobility Zone 2	66%	76.3%
Mobility Zone 3	0%	0%
Mobility Zone 4	15.5%	8.5%

# 2023 ADU Homes Issued Building Permits

The top 10 Community Planning Areas for new Accessory Dwelling Unit homes and new affordable Accessory Dwelling Unit homes were:



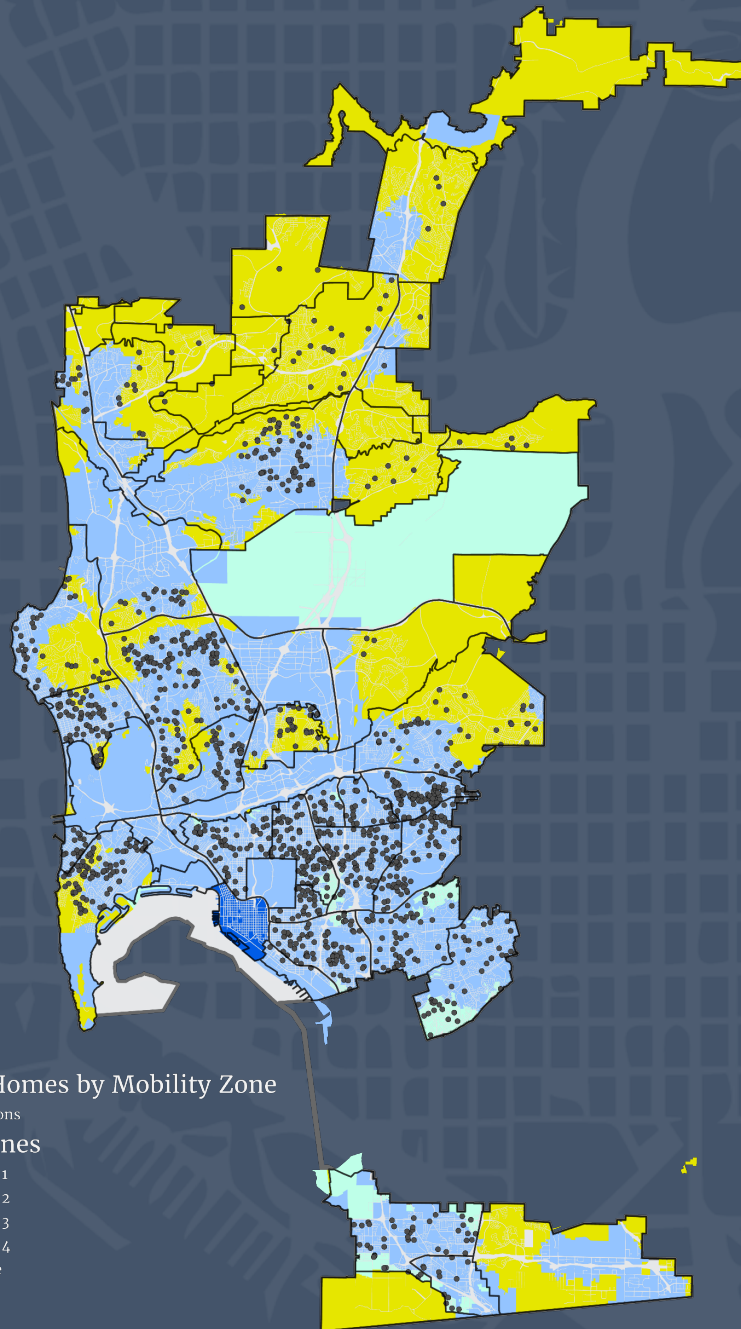
Community Plan Area	Total ADU Homes Permitted	Total Affordable ADU Homes Permitted
Clairemont Mesa	188	12
North Park	156	8
City Heights	137	1
Southeastern San Diego	130	5
College Area	119	10
Eastern Area	115	6
Uptown	104	8
Otay Mesa-Nestor	102	24
Peninsula	90	1
Pacific Beach	83	1



# 2023 ADU Homes Issued Building Permits by Mobility Zone

Within walking distance to transit  
(Mobility Zone 1 and 2):

- 75% of all affordable ADU homes
- 83% of all ADU homes



2023 ADU Homes by Mobility Zone

- Project Locations
- Mobility Zones**
- Mobility Zone 1
- Mobility Zone 2
- Mobility Zone 3
- Mobility Zone 4
- Not Applicable

Mobility Zone	% Affordable ADU Homes Permitted	% Total ADU Homes Permitted
Mobility Zone 1	0%	0%
Mobility Zone 2	74.2%	82.4%
Mobility Zone 3	23.6%	5.6%
Mobility Zone 4	2.2%	12.0%

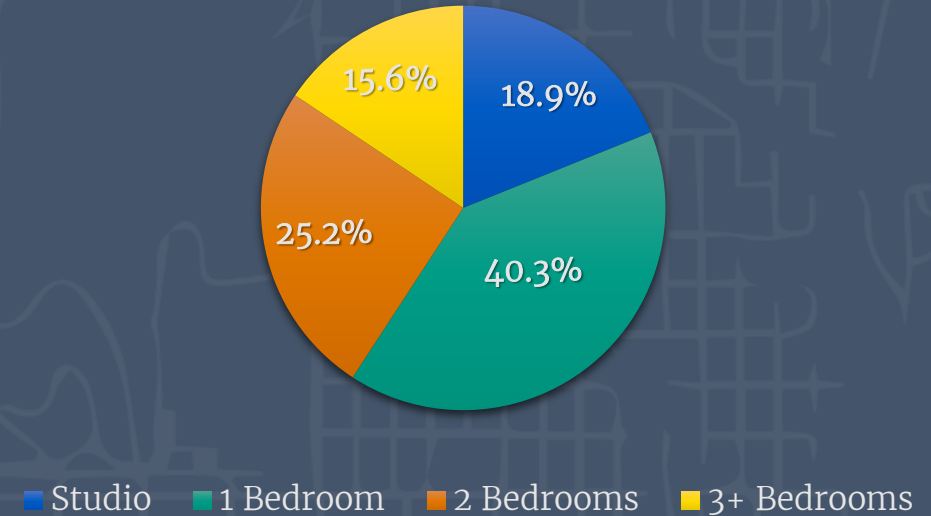
# 2023 Family Homes Issued Building Permits

- Over 59% of all homes permitted in 2023 were one-bedroom or studio homes
- Less than 16% of homes permitted in 2023 had 3 or more bedrooms
- Homes permitted with at least 2 bedrooms were mostly located in highest or low resource areas

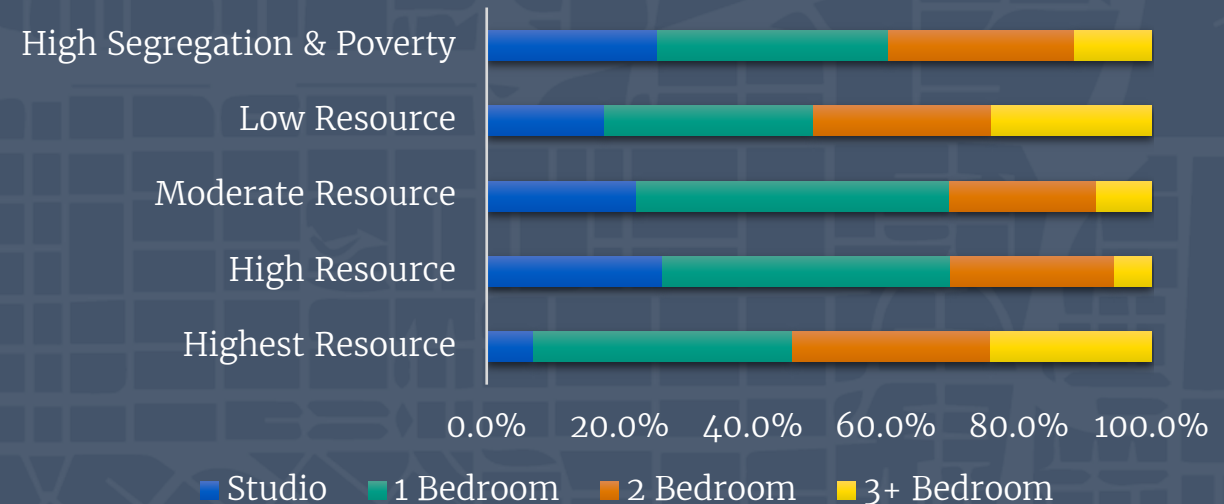
**What are Family Homes?** Family Homes have at least 2 bedrooms. To identify Family Homes, the City Planning Department reviewed a sample of permits in 2023 to determine the number of bedrooms in new permitted homes.

**Why do Family Homes Matter?** Family Homes are an important metric to track because it is critical that the City's housing production matches the needs of the people in our City. Families with children and intergenerational families need additional space to live comfortably and thrive.

## Number of Bedrooms in Homes Permitted in 2023



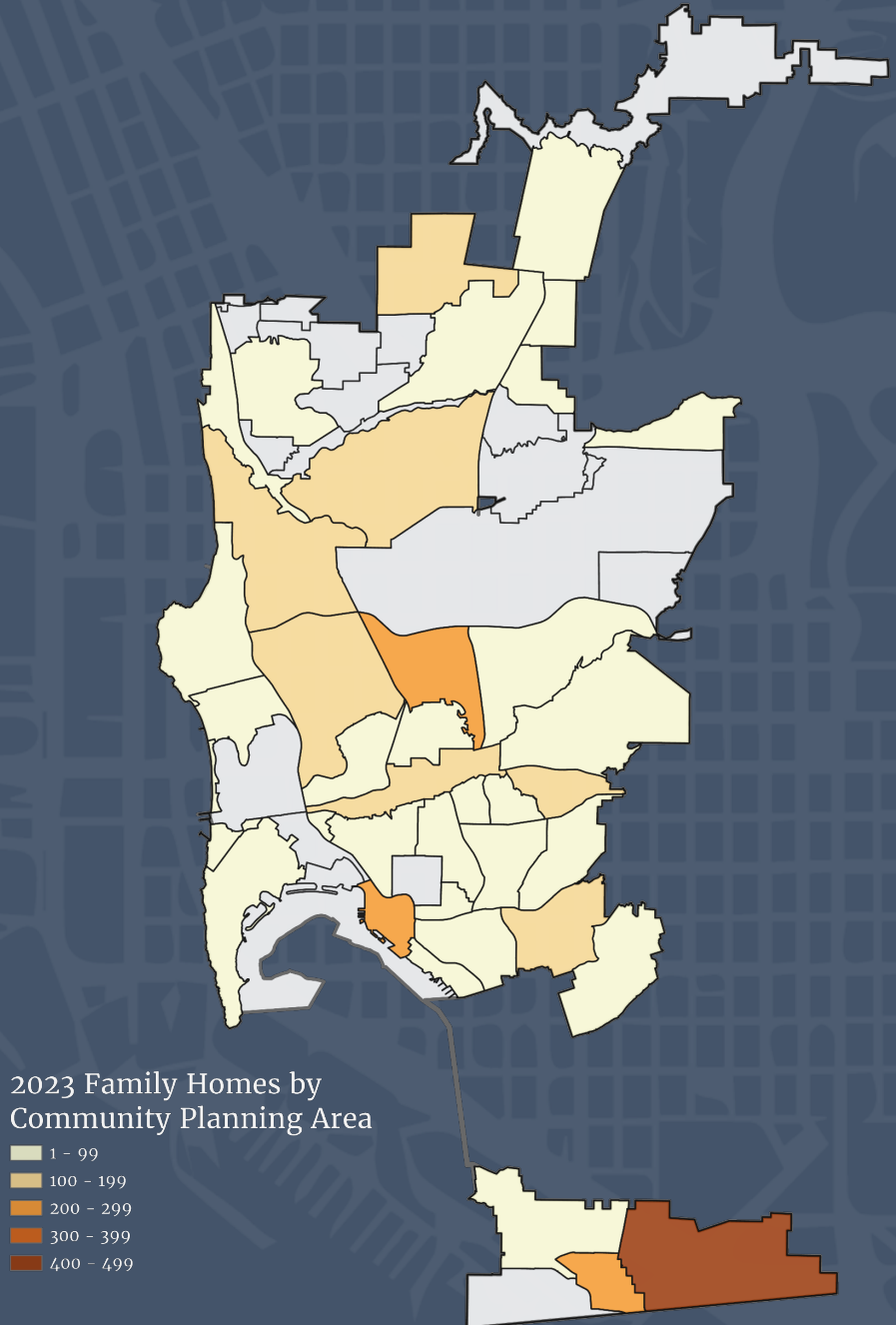
## Bedroom Mix of Developments by TCAC Resource Opportunity Area Permitted in 2023





# 2023 Family Sized Homes Issued Building Permits

The top 10 Community Planning Areas for new homes with at least 2 bedrooms were:



Community Plan Area	Total
Otay Mesa	473
San Ysidro	278
Downtown	266
Kearny Mesa	250
Clairemont Mesa	197
College Area	156
Mira Mesa	142
University	138
Mission Valley	137
Black Mountain Ranch	130

# 2023 Building Permit Issued Utilizing Home Incentive Programs

- The ADU Home Density Bonus was used to permit 158 ADU Homes, including 79 Moderate Income ADU Homes
- Complete Communities: Housing Solutions was used to permit 1,131 homes
- The Affordable Home Density Bonus program was used to permit 3,530 homes, including 1,260 low-income homes

**ADU Home Density Bonus.** This program allows for the development of an additional ADU home when an ADU home is deed-restricted as affordable. The ADU Homes permitted through the ADU Home Density Bonus accounted for 8.3% of total ADU Homes. For more information, see [Information Bulletin 400](#)

**Complete Communities: Housing Solutions (CCHS).** CCHS provides additional homes for development that provides affordable homes and either the development of enhanced public spaces or the contribution of funds for neighborhood improvements. For more information, see [Information Bulletin 411](#).

**Affordable Home Density Bonus.** This program awards additional homes to a project in exchange for deed-restricting a portion of homes as affordable including development where all homes are deed-restricted as affordable. For more information, see [Chapter 14](#) of the San Diego Municipal Code.



*Development in Mira Mesa*

Home Type	Very Low Income Homes	Low Income Homes	Moderate Income Homes	Above Moderate Homes	Total
ADU Home Density Bonus	3	3	79	73	158
CCHS	43	30	42	1,016	1,131
Affordable Home Density Bonus	817	1,260	80	1,373	3,530

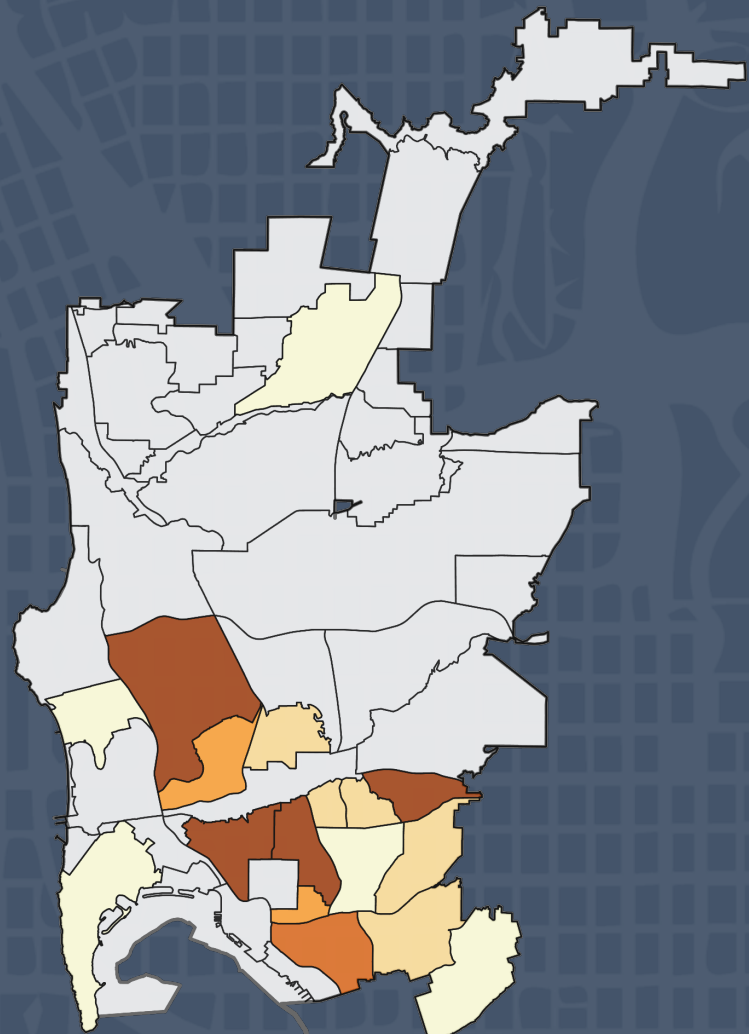


# **City** **Programs**

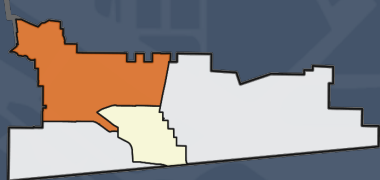
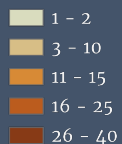
- A. ADU Home Density Bonus**
- B. Affordable Home Density Bonus**
- C. Complete Communities: Housing Solutions**
- D. Home Expedite Program**
- E. Affordable Housing Permit Now Program**

# ADU Home Density Bonus Building Permits Issued 2021-2023

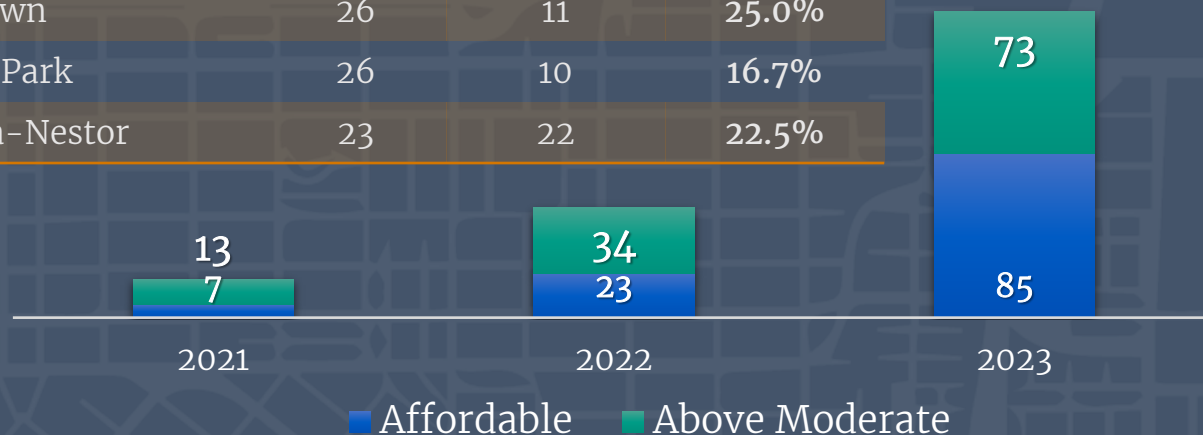
- 239 new homes permitted through the ADU home density bonus program between 2021 and 2023
- Almost half of all homes permitted through ADU Home Density Bonus Program are deed-restricted as affordable



2021-2023 ADUDB Homes by Community Planning Area



Community Plan Area	ADUDB Homes	Affordable ADUDB Homes	ADUDB Share of Total ADUs
College Area	40	18	33.6%
Clairemont Mesa	31	16	16.5%
Uptown	26	11	25.0%
North Park	26	10	16.7%
Otay Mesa-Nestor	23	22	22.5%

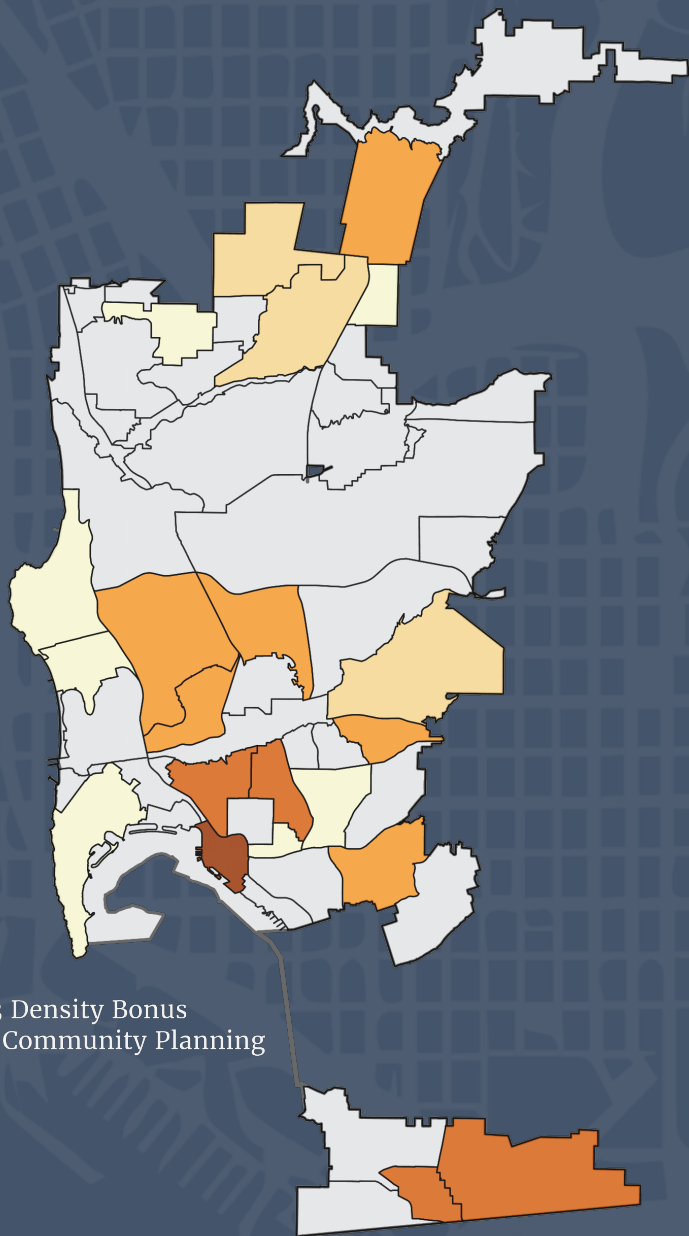


■ Affordable ■ Above Moderate



# Affordable Home Density Bonus Program Building Permits Issued 2021-2023

- 2,157 new affordable homes were permitted through the Density Bonus Program in 2023
- 6,107 new homes have been permitted through the Density Bonus Program between 2021 and 2023
- The top Community Planning Areas that utilized the density bonus program were:

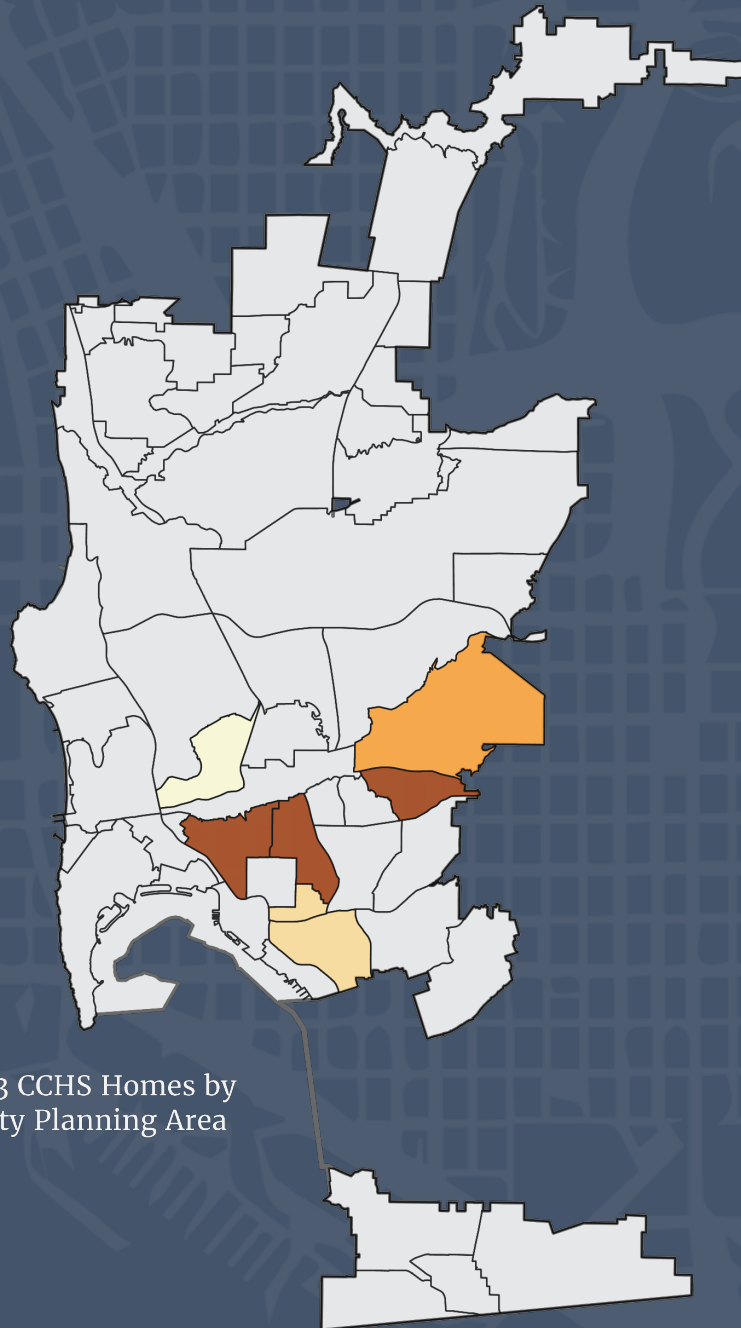


Community Plan Area	Total	Affordable
Downtown	1,457	494
North Park	684	108
Otay Mesa	514	70
Uptown	501	38
San Ysidro	468	466

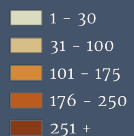


# Complete Communities: Housing Solutions Building Permits Issued 2021-2023

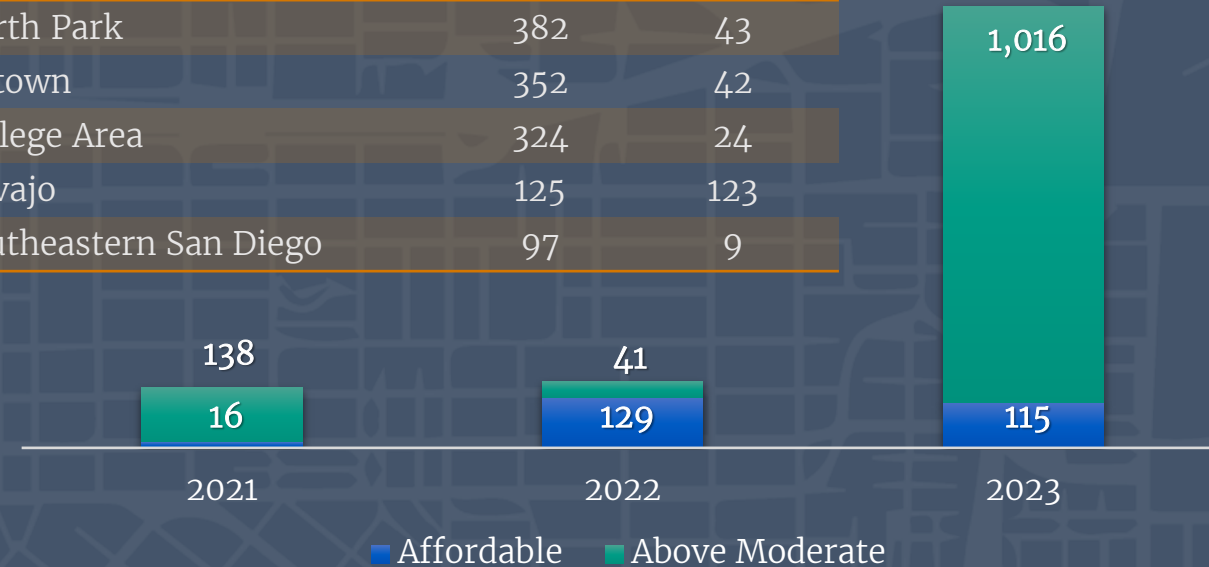
- 1,455 homes were permitted through the CCHS program between 2021 and 2023
- Nearly 18 percent of new homes permitted through CCHS are deed-restricted as affordable
- The top Community Planning areas that utilized CCHS for total homes and affordable homes were:



2021-2023 CCHS Homes by Community Planning Area



Community Plan Area	Total	Affordable
North Park	382	43
Uptown	352	42
College Area	324	24
Navajo	125	123
Southeastern San Diego	97	9



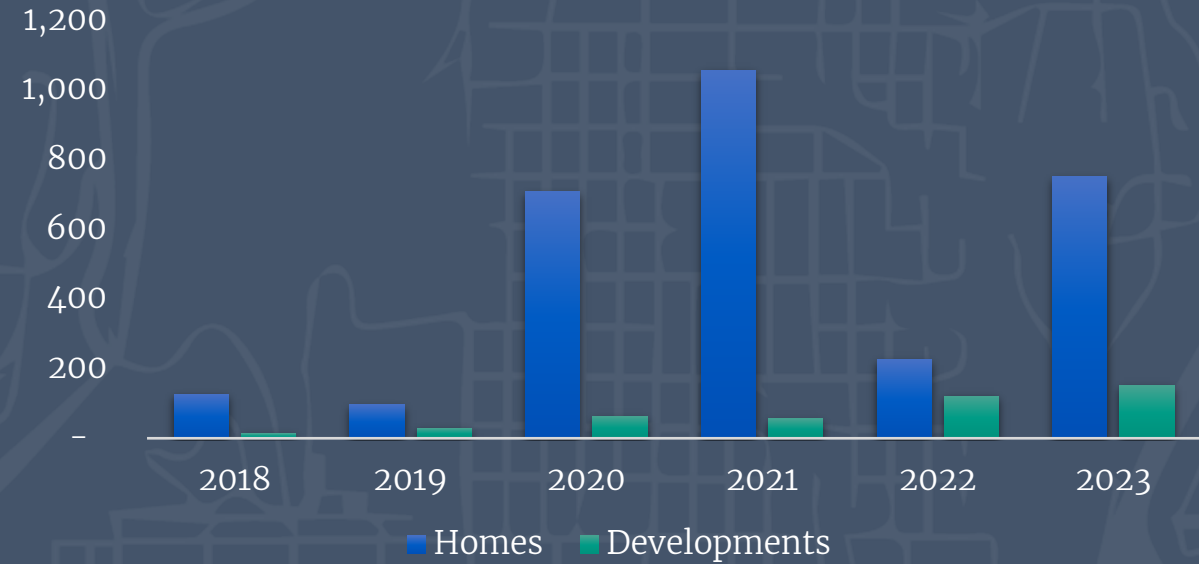
Affordable Above Moderate

# Home Expedite Program Building Permits Issued 2018-2023

- 151 development projects used the Home Expedite Program in 2023
- 435 development projects have used the Home Expedite Program between 2018 and 2023
- 2,965 new homes have been permitted through the Home Expedite Program between 2018 and 2023

**The Home Expedite Program:** The City created the Affordable, In-Fill Housing and Sustainable Buildings Expedite Program to reduce permit review times and waive fees for eligible projects that propose affordable homes. For more information on the Home Expedite Program, refer to the [Information Bulletin 538](#)

Homes Permitted Through Home Expedite Program



Year	Homes Permitted	Development Projects
2018	127	15
2019	97	29
2020	708	63
2021	1,056	56
2022	226	121
2023	751	151



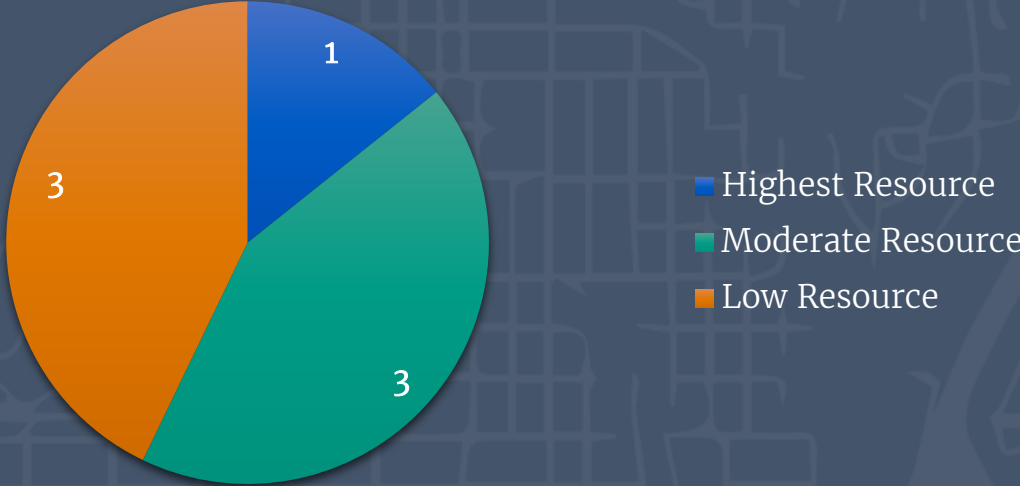
# Affordable Housing Permit Now Building Permits Issued

- 1,082 new homes were permitted in 2023 through Affordable Housing Permit Now
- 56 percent of new homes permitted using the executive order are in moderate, high, and highest resource areas
- Community Planning Areas with homes permitted using Affordable Housing Permit Now include:

• Downtown:	273
• Encanto Neighborhoods:	238
• Clairemont Mesa:	230
• Black Mountain Ranch:	171
• San Ysidro:	100
• Southeastern San Diego:	70

**Executive Order 2023-1.** On January 11, 2023, Mayor Todd Gloria issued Executive Order 2023-1 (EO1) directing City Departments to expedite and streamline the permitting of qualified 100% affordable home development, including emergency shelters, transitional housing, and permanent supportive housing. On March 15, 2023, the Development Services Department launched the Affordable Homes Permit Now Program to implement EO1.

Projects Utilizing Affordable Housing Permit Now By TCAC Resource Area



TCAC Resource Area	Homes Permitted	Development Projects Permitted
Highest Resource	171	1
High Resource	0	0
Moderate Resource	438	3
Low Resource	473	3
High Segregation and Poverty	0	0

# **Trends and Implementation**

- A. Trends and Implementation**
- B. Regional Housing Needs Assessment**
- C. Homes Permitted 2014-2023**
- D. Issuances by Planning Area 2021-2023**
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- K. ADU Home Issuances by Mobility Zone 2021-2023**

# Trends and Implementation

The General Plan Housing Element is the City's housing plan. The City is required to adequately plan to meet the housing needs of everyone in the community and to update the Housing Element every eight years. The Regional Housing Needs Assessment (RHNA) serves as the foundation for the Housing Element and is prepared by the San Diego Association of Governments (SANDAG). As part of this process, the RHNA provides the State's estimate for the region's housing needs across all income groups for the upcoming eight years. SANDAG then determines how much of the region's total housing needs to be planned for and permitted by each jurisdiction in the region. In the Housing Element, the City must identify enough potentially developable land zoned for residential use to meet the City's RHNA housing capacity target and must provide goals, objectives, policies, and programs to meet the housing needs of all San Diegans.

To implement the Housing Element, the City has engaged in several different types of outreach events. Almost all outreach events that implemented housing goals solicited community feedback on issues pertaining to fair housing. Planning efforts by the City often encompass more than one Housing Element Goal. The analysis of community outreach and engagement reviews each Housing Element Goal and what types of engagement were used for that goal.



*Mixed-Income Development in North Park*

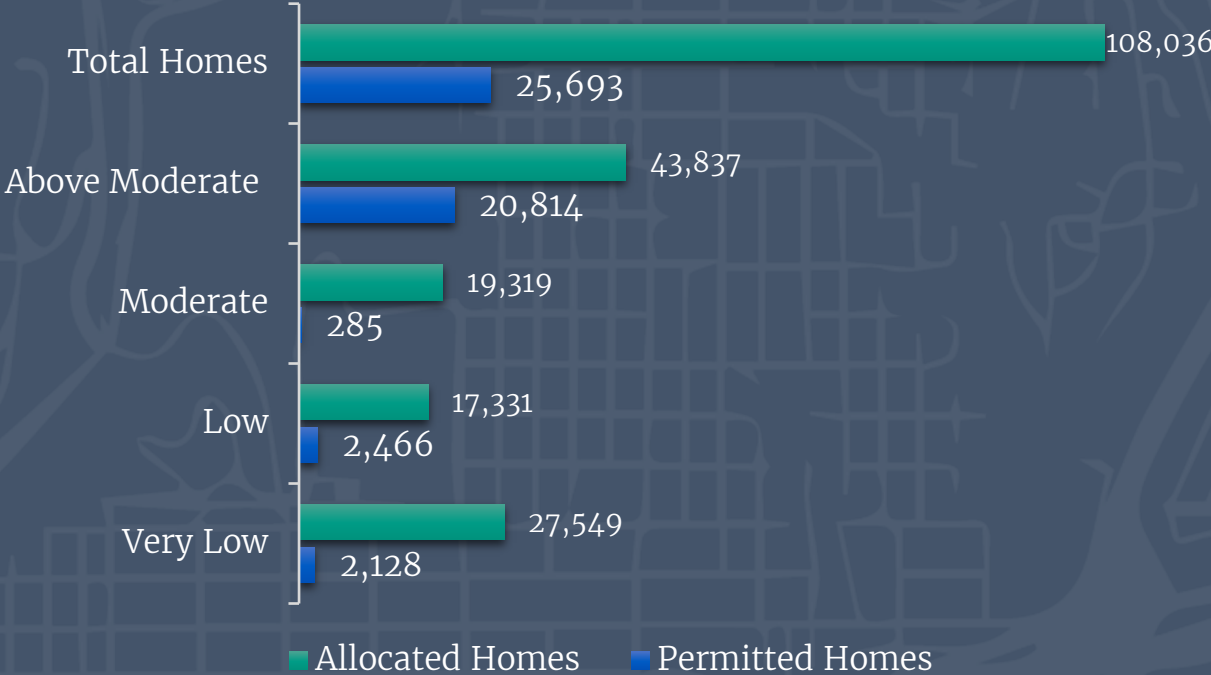


# Regional Housing Needs Assessment 2021–2029

- The City has permitted 23.8% of homes allocated through RHNA between 2020 and 2023
- Of the 25,692 new homes permitted between 2020 and 2023, the City has permitted the following:
  - Very low-income: 2,128
  - Low-income: 2,466
  - Moderate income: 285
  - Above moderate income: 20,814
- The City will need to permit 82,344 more homes to meet the RHNA allocation

**Regional Housing Needs Assessment (RHNA).** RHNA allocations are the number of homes San Diego must permit by 2029 by income category to meet the needs of the existing and projected population. The RHNA Plan is prepared by the San Diego Association of Governments (SANDAG) to allocate the homes needed in the region to each city and the county.

## Remaining Homes for RHNA By Income Level



## Total Home Building Permit Issuances in RHNA 6<sup>th</sup> Cycle

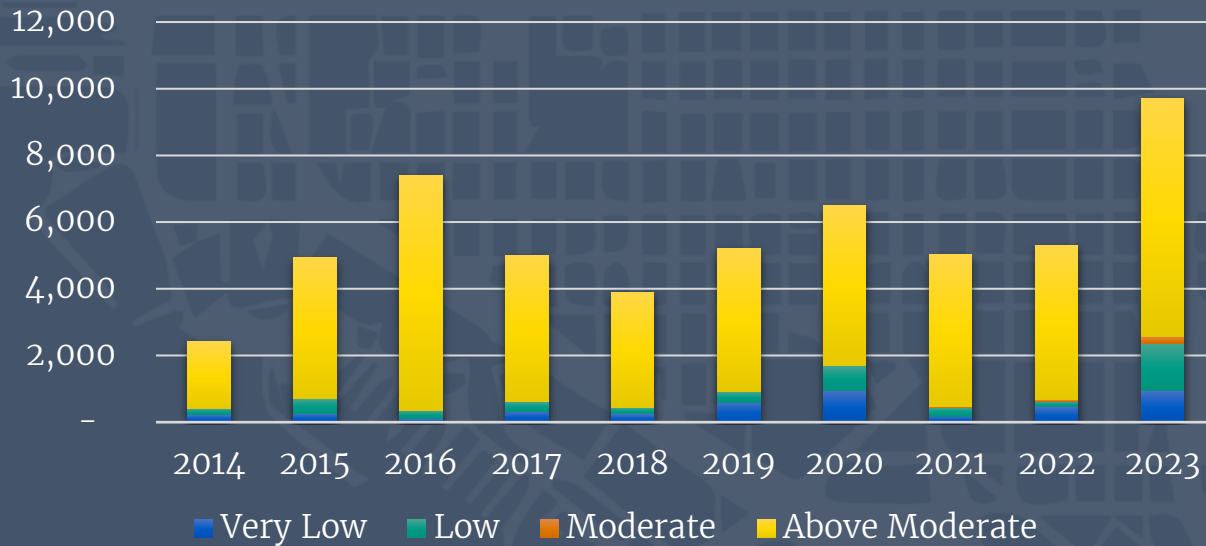
Income Level	Very Low	Low	Moderate	Above Moderate
2020*	536	603	3	4,275
2021	192	269	25	4,700
2022	459	173	43	4,722
2023	941	1,421	214	7,117

\*HCD utilizes a projection period beginning 6/30/2020 for RHNA.

# Homes Permitted 2014-2023

- After several years of relatively similar building permit numbers, the City saw a home permitting increase at all income levels in 2023.
- In 2023, the City permitted more than triple the number of moderate-income homes compared to previous years

Homes Issued Since 2014 by Income

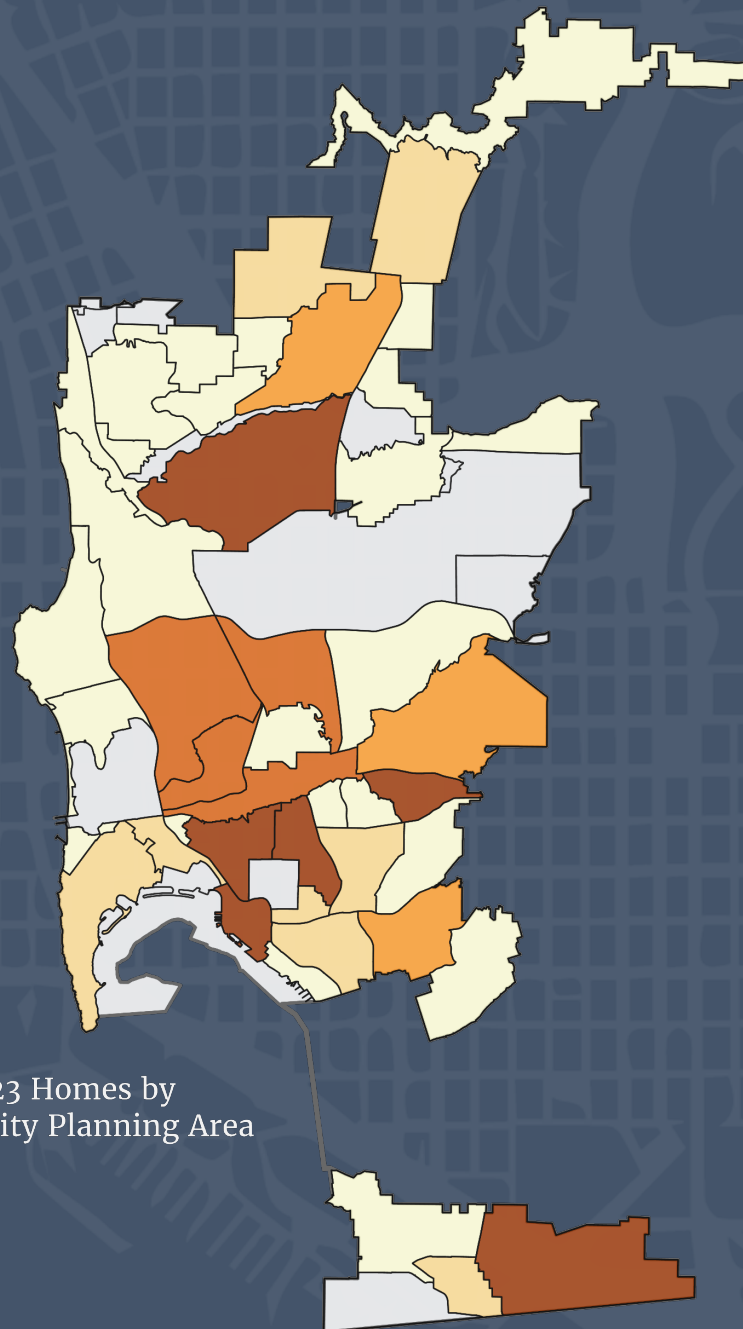


Homes Permitted Since 2014 by Income

Year	Very Low	Low	Moderate	Above Moderate
2014	229	184	-	1,995
2015	265	446	-	4,221
2016	103	253	-	7,028
2017	324	295	-	4,395
2018	249	203	-	3,437
2019	602	314	-	4,281
2020	937	768	3	4,774
2021	192	269	25	4,700
2022	459	173	43	4,722
2023	941	1,421	214	7,117

# Homes Issued Building Permits by Community Planning Area 2021-2023

Between 2021 and 2023, the top community planning areas for new homes permitted and affordable homes permitted:



2021-2023 Homes by Community Planning Area

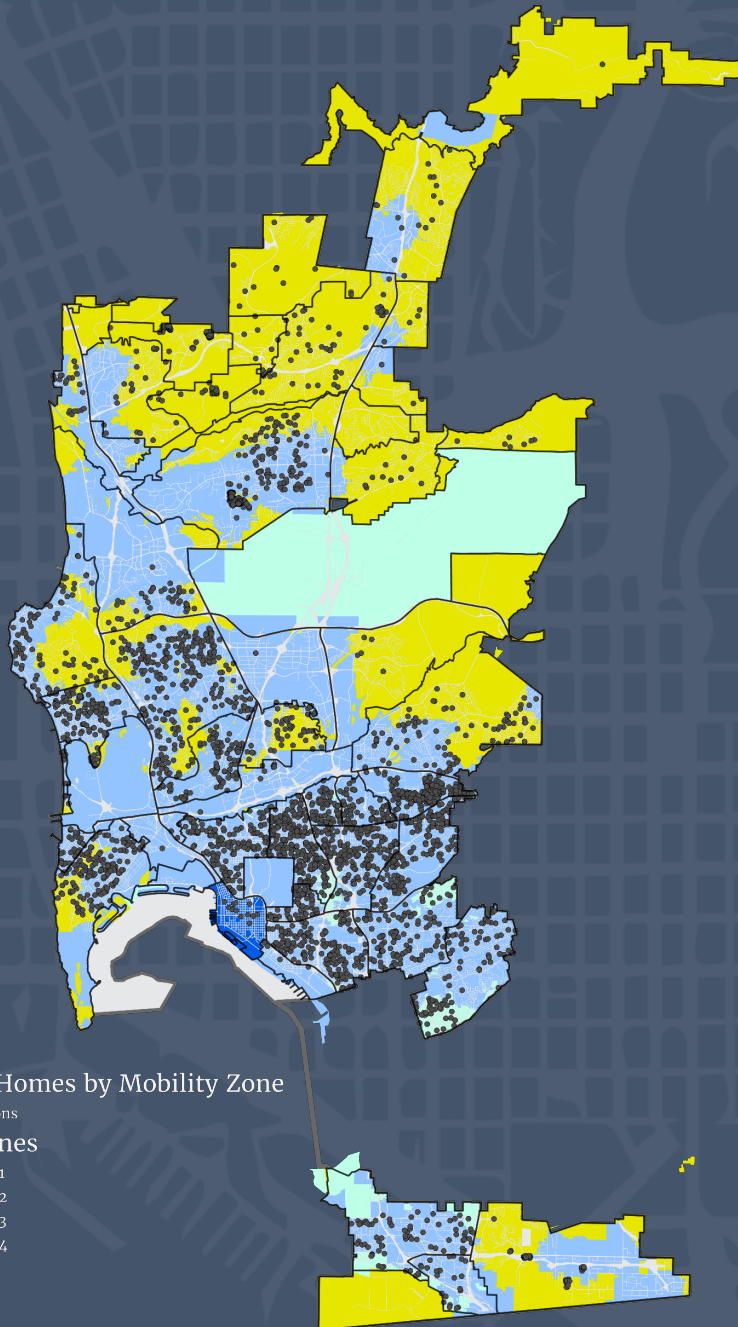
- 1 - 249
- 250 - 499
- 500 - 749
- 750 - 999
- 1,000 +

Community Plan Area	Total	Affordable
Downtown	2,778	571
North Park	1,872	182
College Area	1,414	401
Mira Mesa	1,365	0
Otay Mesa	1,267	143
Uptown	1,255	95
Linda Vista	898	217
Clairemont Mesa	878	329
Kearny Mesa	833	49
Mission Valley	768	25
Navajo	665	147
Encanto Neighborhoods	636	371
Rancho Penasquitos	548	104



# Homes Issued Building Permits by Mobility Zone 2021-2023

- 88% of affordable homes permitted between 2021 and 2023 were located near transit in Mobility Zones 1 and 2
- 86% of the total homes permitted between 2021 and 2023 were located near transit in Mobility Zones 1 and 2



2021-2023 Homes by Mobility Zone

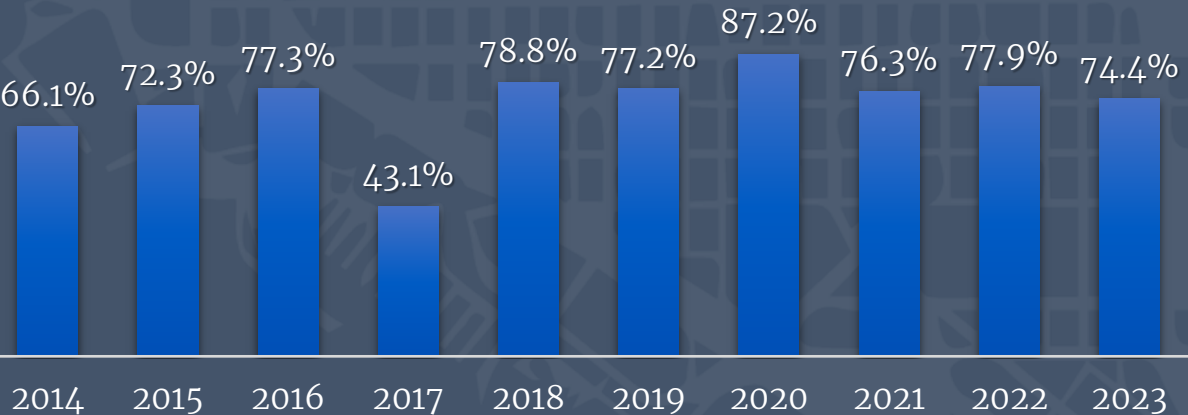
- Project Locations
- Mobility Zones**
- Mobility Zone 1
- Mobility Zone 2
- Mobility Zone 3
- Mobility Zone 4
- Not Applicable

Mobility Zone	Affordable Homes	Total Homes
Mobility Zone 1	15.3%	13.8%
Mobility Zone 2	72.7%	72.7%
Mobility Zone 3	0.6%	0.6%
Mobility Zone 4	11.4%	13.4%

# Multiple Homes Issued Building Permits 2014-2023

- In 2023, the City permitted 7,207 homes part of a multiple home development, the largest number of multiple homes permitted in a single year
- 74.4% of all homes permitted in 2023 were multiple homes
- Homes part of a multiple home development have consistently been the most common type of homes permitted

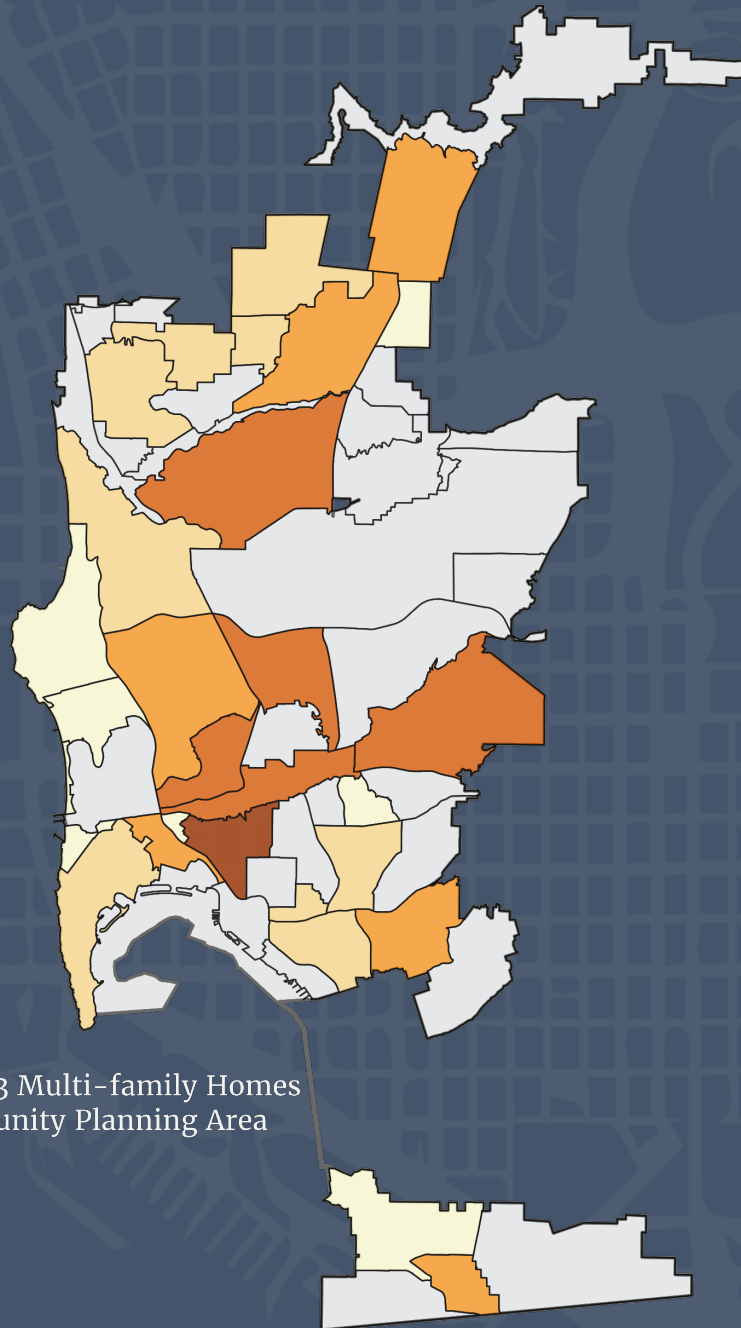
Share of Homes That are Part of Multiple Home Development



Year	Multiple Homes Permitted	% Multiple Homes of Total Homes Permitted
2014	1,592	66.1%
2015	3,565	72.3%
2016	5,707	77.3%
2017	2,159	43.1%
2018	3,065	78.8%
2019	4,010	77.2%
2020	5,650	87.2%
2021	3,958	76.3%
2022	4,202	77.9%
2023	7,207	74.4%

# Multiple Homes Issued Building Permits by Community Planning Area 2021-2023

Between 2021 and 2023, the top community planning areas for new multiple home development and new affordable multiple home development were:



2021-2023 Multi-family Homes by Community Planning Area

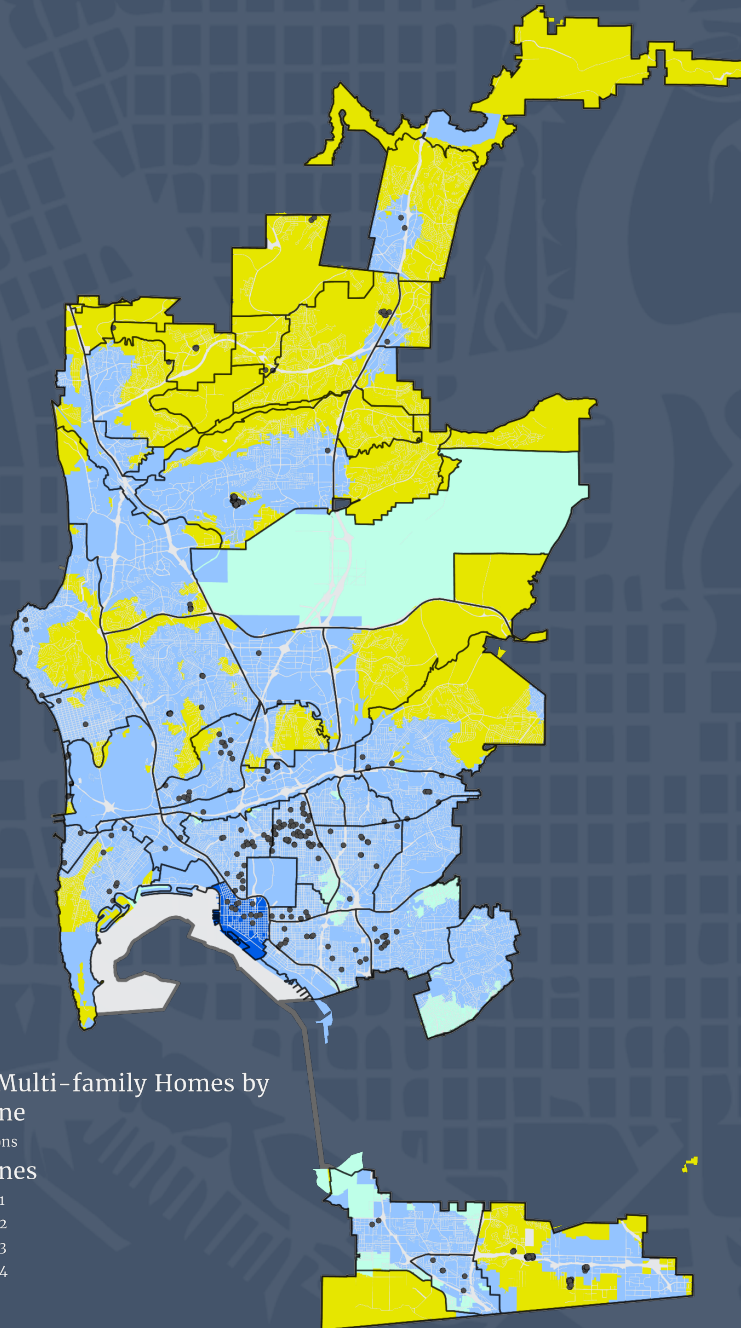
- 1 - 99
- 100 - 249
- 250 - 499
- 500 - 999
- 1000 +

Community Plan Area	Total Homes Permitted	Total Affordable Homes Permitted
Downtown	2,776	571
North Park	1,586	170
Otay Mesa	1,257	143
College Area	1,132	383
Uptown	1,051	84
Kearny Mesa	833	49
Mira Mesa	805	0
Linda Vista	755	211
Mission Valley	738	25
Navajo	575	147
Clairemont Mesa	477	309
San Ysidro	472	466



# Multiple Homes Issued Building Permits by Mobility Zone 2021-2023

- 88.1% of total permitted homes part of multiple home development are near transit in Mobility Zones 1 and 2
- 90% of permitted affordable homes part of multiple home development homes are near transit in Mobility Zones 1 and 2

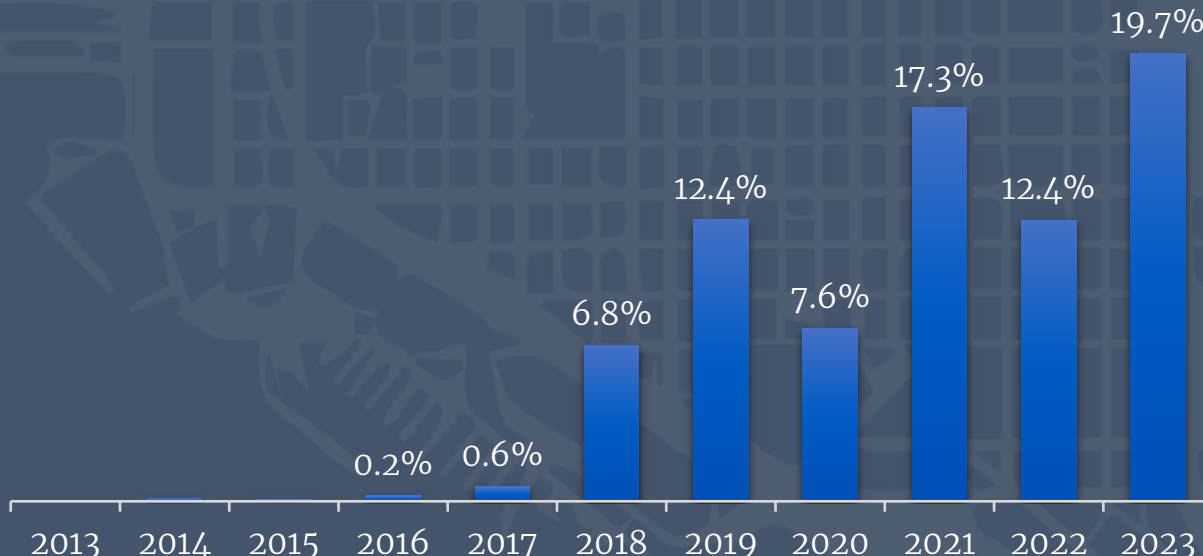


Mobility Zone	% Affordable Multiple Homes Permitted	% Total Homes Permitted
Mobility Zone 1	15.8%	18.0%
Mobility Zone 2	72.3%	72.0%
Mobility Zone 3	0%	0%
Mobility Zone 4	11.8%	9.9%

# ADU Homes Issued Building Permits 2014-2023

- In 2023, the City permitted 1,909 ADU homes, the largest number of ADU homes permitted in a single year
- 20% of all homes permitted in 2023 were ADU homes, the largest ever share of ADU homes

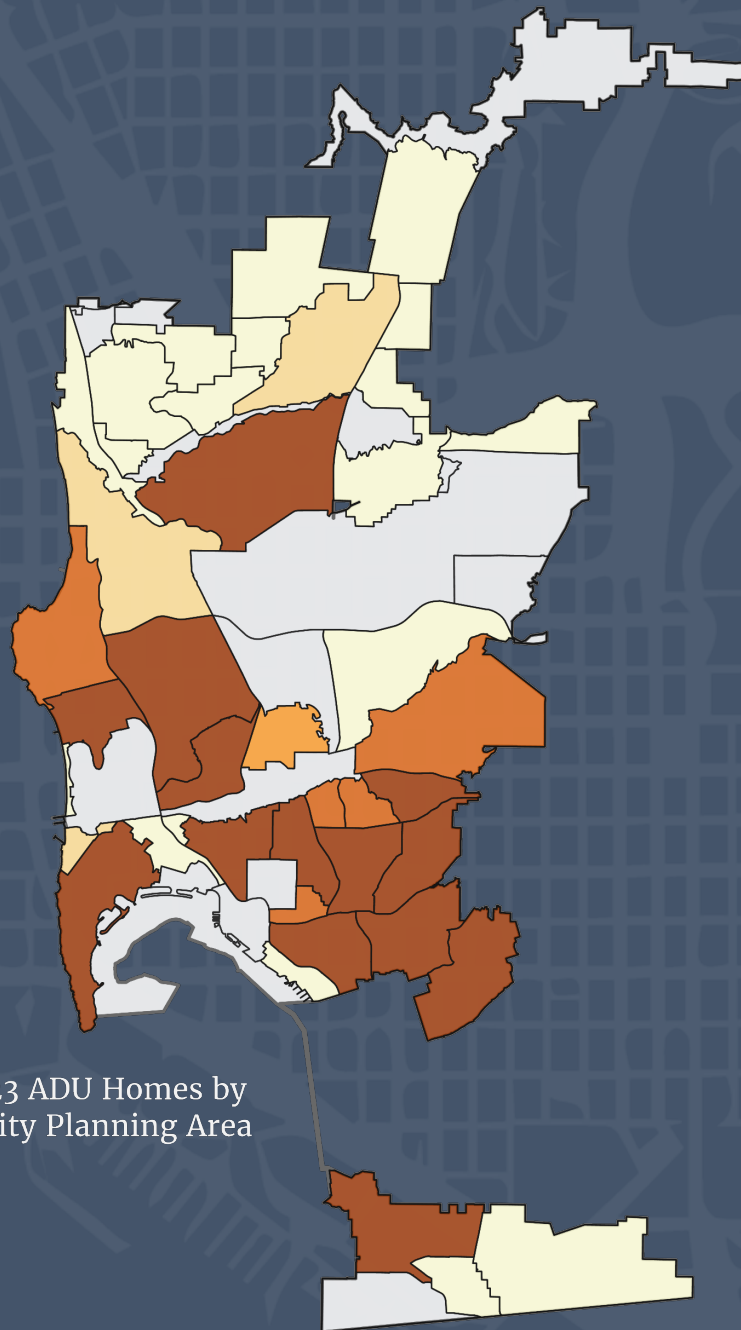
Share of Permitted Homes That are Accessory Dwelling Units



Year	ADU Homes Permitted	% ADU Homes of Total Homes Permitted
2014	3	0.1%
2015	4	0.1%
2016	18	0.2%
2017	32	0.6%
2018	266	6.8%
2019	627	12.1%
2020	493	7.6%
2021	871	17.3%
2022	658	12.4%
2023	1,909	19.7%

# Accessory Dwelling Unit Homes Issued Building Permits by Community Planning Area 2021-2023

Between 2021 and 2023, the top Community Planning Areas for new ADU homes and affordable ADU homes were:

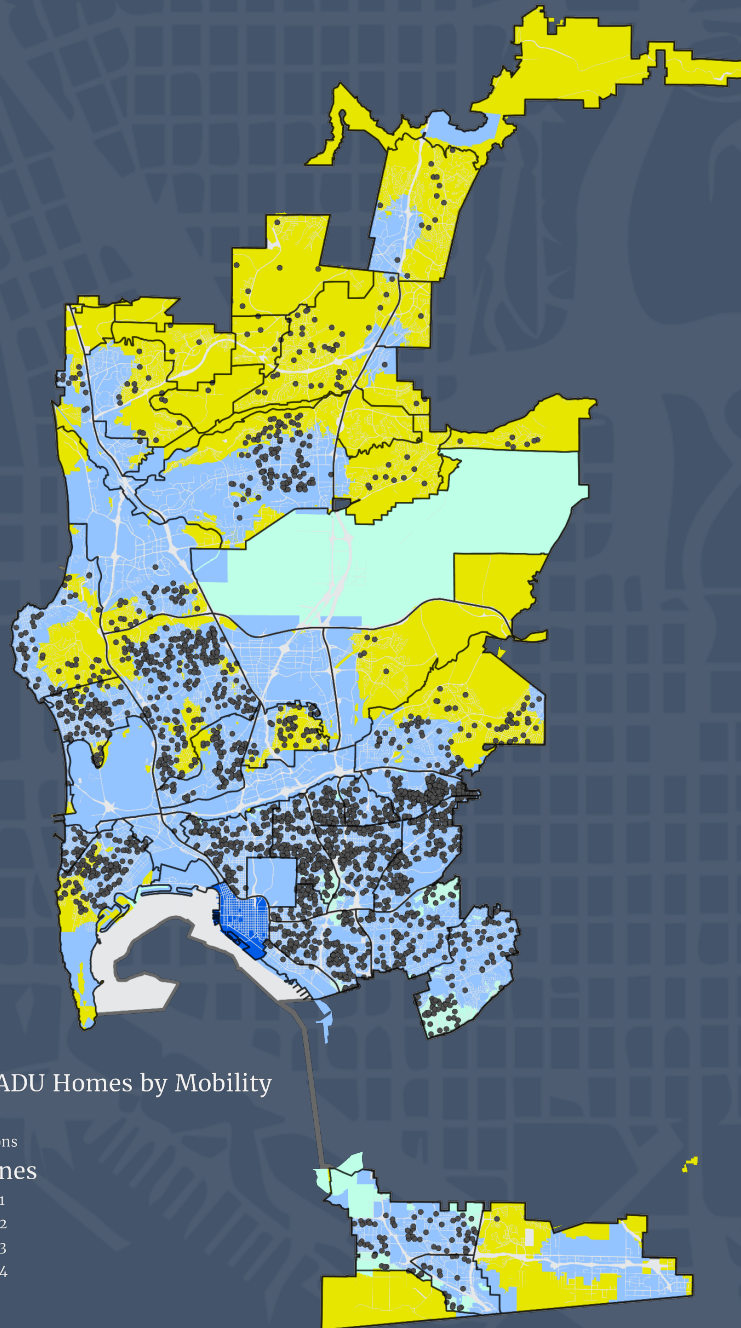


Community Plan Area	Total	Affordable
Clairemont Mesa	356	18
College Area	276	18
North Park	268	12
Southeastern San Diego	254	8
Mid-City: City Heights	253	1
Mid-City: Eastern Area	213	6
Uptown	182	11
Peninsula	150	1
Otay Mesa-Nestor	139	24
Mira Mesa	132	0
Linda Vista	129	4
Encanto Neighborhoods	128	5
Pacific Beach	119	1



# Accessory Dwelling Unit Homes Issued Building Permits by Mobility Zone 2021-2023

- 84% of total permitted ADU homes were near transit in Mobility Zones 1 and 2
- 82% of permitted affordable ADU homes were near transit in Mobility Zones 1 and 2



2021-2023 ADU Homes by Mobility Zone

- Project Locations
- Mobility Zones**
- Mobility Zone 1
- Mobility Zone 2
- Mobility Zone 3
- Mobility Zone 4
- Not Applicable

Mobility Zone	% Affordable ADU Homes Permitted	% Total ADU Homes Permitted
Mobility Zone 2	81.9%	83.9%
Mobility Zone 3	16.5%	4.7%
Mobility Zone 4	1.6%	11.3%

# **Housing Element**

## **Adequate Sites & Outreach**

- A. Adequate Sites Overview**
- B. Inventory Analysis**
- C. Inventory Capacity**
- D. Outreach**

# Housing Element-Adequate Sites

The Housing Element identified adequate sites to meet Regional Housing Needs Assessment (RHNA) housing goals for very low-, low-, moderate-, and above moderate-income households needed to meet the RHNA target of 108,036 new homes by 2029, including 44,880 affordable new homes for lower-income households. The City can reasonably achieve these targets with its current land use plans and zoning regulations. The Adequate Sites Inventory identified sites for at least 174,678 new homes, including 72,191 sites for affordable homes for lower-income households throughout the City.

To assess how many homes are being produced relative to the number of homes anticipated in the Adequate Sites Inventory, the City Planning Department utilizes a metric called “Adequate Site Efficiency.” Additionally, the City monitors the number of homes issued building permits on sites identified as a “Non-Vacant” site, due to the difficulty of developing on non-vacant sites.

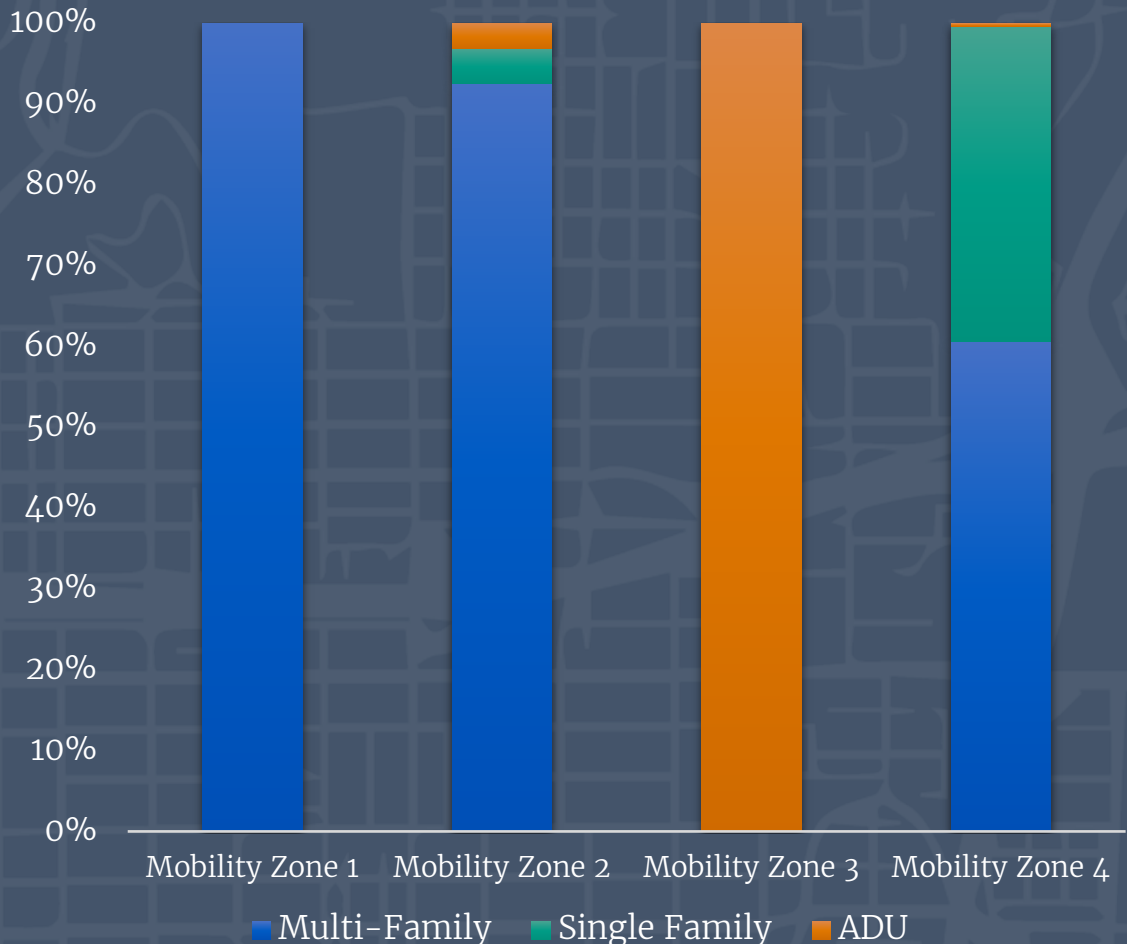




# Housing Element Adequate Sites Inventory Analysis 2021-2023

- In Mobility Zone 1 (Downtown), 100% of all homes permitted between 2021 and 2023 on an adequate site were part of a multiple home development
- In Mobility Zone 2, 92.5% of all homes permitted between 2021 and 2023 on an adequate site were part of a multiple home development
- In Mobility Zone 3, 100% of all homes permitted between 2021 and 2023 on an adequate site were ADU homes
- In Mobility Zone 4, 60.6% of all homes permitted between 2021 and 2023 on an adequate site were part of a multiple home development

Types of Permitted Homes on Sites Identified in Adequate Sites Inventory



# Housing Element Adequate Sites Inventory Analysis

- The City has permitted more homes than anticipated on sites identified in the adequate sites inventory in Mobility Zones 1 and 2
- Non-vacant sites identified in the Adequate Sites Inventory produce more homes than anticipated when located in Mobility Zones 1 and 2

**Adequate Sites Efficiency:** The percentage of permitted homes to anticipated permitted homes on sites that are identified in the Housing Element Adequate Sites Inventory.

**Non-Vacant Sites Efficiency:** A large portion of sites identified in the Adequate Sites Inventory are non-vacant and are assessed separately because these sites can be more challenging to develop.

## Adequate Sites Efficiency

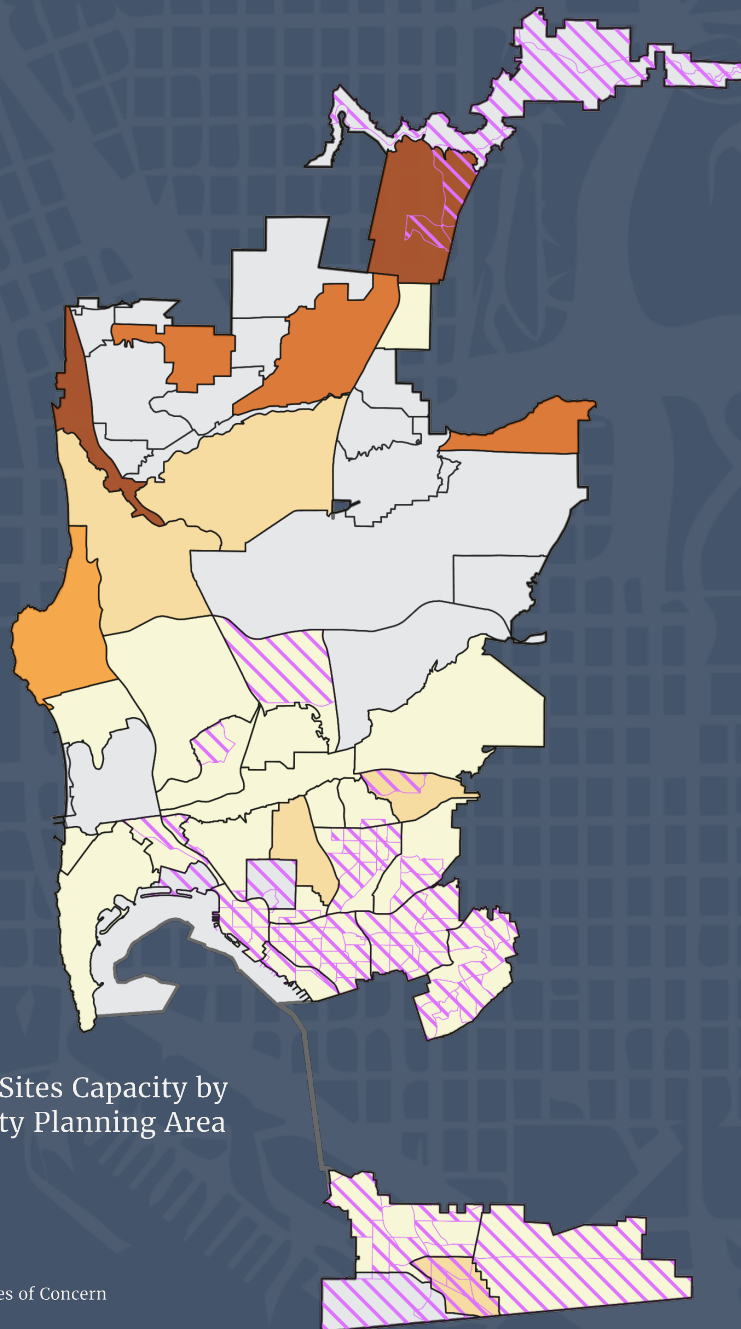
Mobility Zone	Permitted Homes	Anticipated Homes	Mobility Zone Efficiency
Mobility Zone 1	2,778	613	453.2%
Mobility Zone 2	14,476	5,150	281.0%
Mobility Zone 3	166	16	1,037.5%
Mobility Zone 4	2,627	3,547	74.1%

## Non-Vacant Adequate Sites Efficiency

Mobility Zone	Permitted Homes	Anticipated Homes	Mobility Zone Efficiency
Mobility Zone 1	1,803	613	294.1%
Mobility Zone 2	5,297	2,848	186.0%
Mobility Zone 3	11	14	78.6%
Mobility Zone 4	179	760	23.6%

# Housing Element Adequate Sites Inventory Capacities

Between 2021 and 2023, the top community planning areas for new homes and identified Adequate Sites Inventory capacity were:



Adequate Sites Capacity by Community Planning Area

- 1% - 20%
- 21% - 40%
- 41% - 60%
- 61% - 80%
- 80% +
- Communities of Concern

Community Planning Area	Homes Permitted	Adequate Sites Inventory Capacity
Downtown	2,778	21,315
North Park	1,872	8,858
College Area	1,414	5,345
Mira Mesa	1,365	5,802
Otay Mesa	1,267	10,096
Uptown	1,255	11,408
Linda Vista	898	4,401
Clairemont Mesa	878	4,710
Kearny Mesa	833	14,146
Mission Valley	768	28,744
Navajo	665	8,314
Encanto Neighborhoods	636	5,972



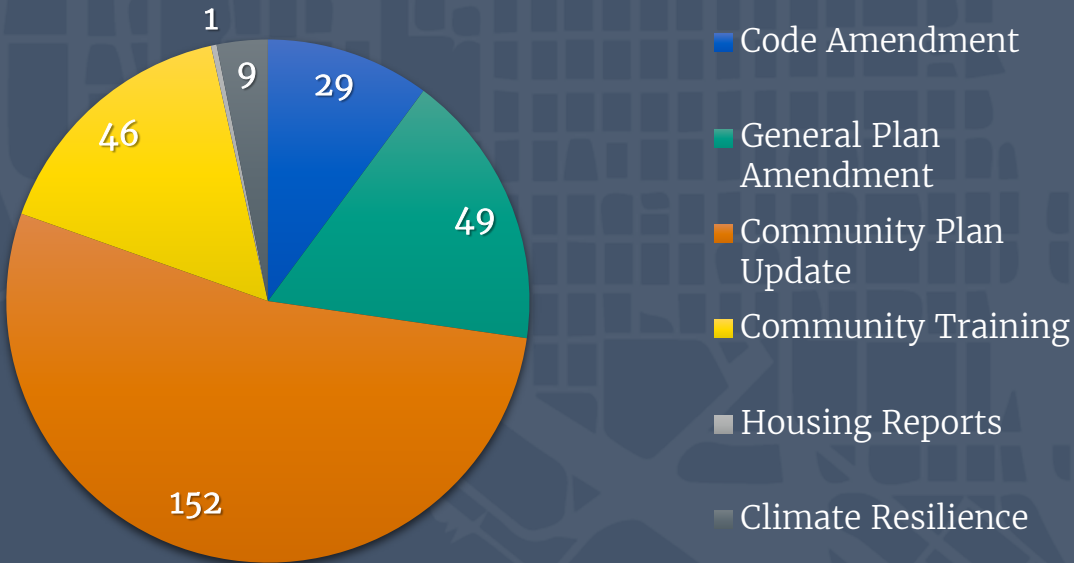
# City Planning Department Outreach and Engagement

- The City Planning Department has hosted 286 Housing Element related outreach events between 2021 and 2023
- 9,321 participants were engaged across all outreach efforts
- Outreach events hosted for community plan updates garnered the most participants

## Outreach and Engagement 2021-2023

Action	Outreach Events	Public Hearings	Participants
Code Amendment	29	14	1,009
General Plan Amendment	49	1	854
Community Plan Update	152	5	3,919
Report	1	3	11
Stakeholder Training	46	0	2,408
Sustainability Initiative	9	0	1,120

2021-2023 Housing Element Outreach Events



# **Fair Housing Assessment**

- A. Fair Housing Overview**
- B. 2024 TCAC Resource Area Distribution**
- C. Residential Land Use Distribution**
- D. Total Home Applications**
- E. Total Homes Permitted**
- F. Affordable Homes Permitted**

# Fair Housing Overview

The State has adopted legislation defining fair housing and requiring cities and counties to affirmatively further fair housing in their housing elements and other planning documents. The City is committed to affirmatively furthering fair housing by developing and implementing new policies to encourage new homes of all affordability levels in all communities. This provides people with the opportunity to live in a neighborhood of their choice and can begin to end segregated living patterns. Anti-racist zoning and policies encourage more affordable homes in places where they do not currently exist, providing greater access to opportunity and addressing disparities in housing need.

This section evaluates the geographic distribution of the City's housing production, both affordable and market rate, between 2021 and 2023 by California Tax Credit Allocation Committee (TCAC) resource area. It also includes descriptions of both new and amended programs intended to affirmatively further fair housing. Each year, TCAC resource areas may change due to changes in TCAC methodology. To account for this, new home building permits utilize the TCAC map issued the same year as the building permit.



*100% Affordable Development in Rancho Bernardo*

## Affirmatively Furthering Fair Housing Definition

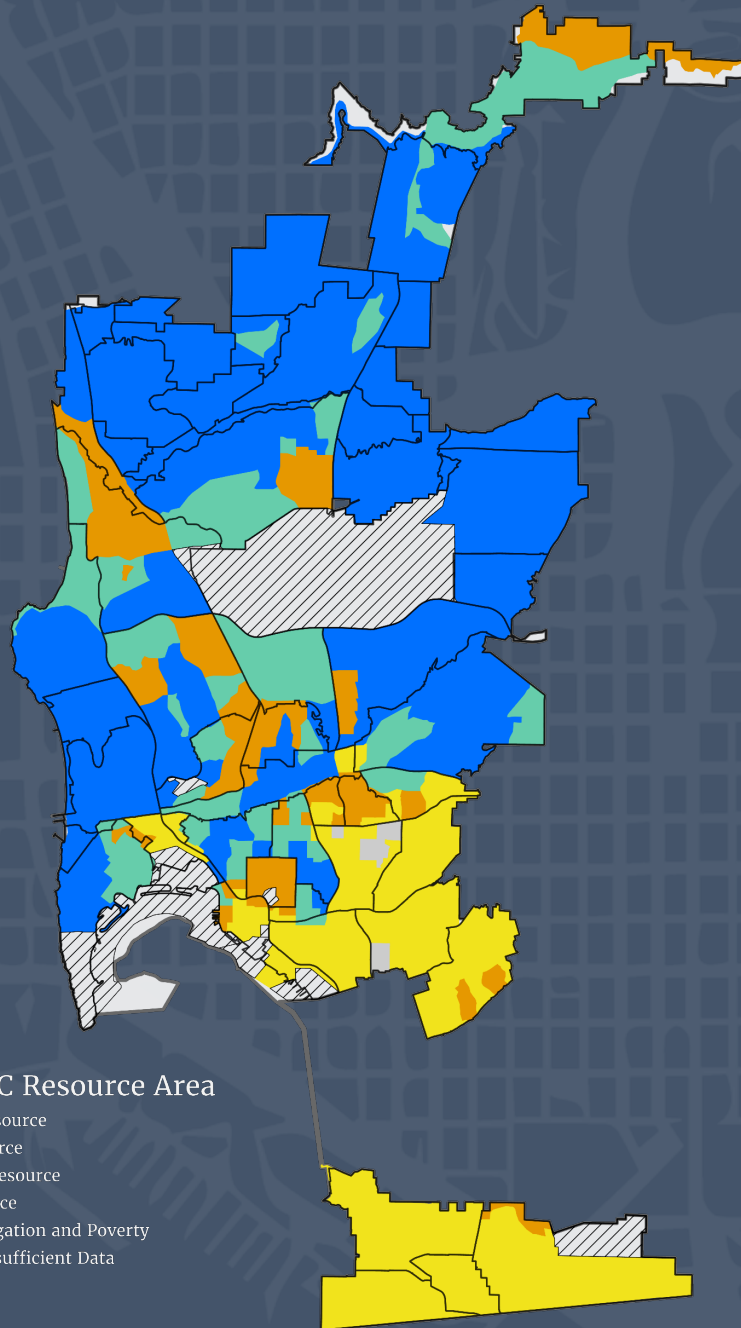
### California Government Code 8899.50

Affirmatively furthering fair housing means taking meaningful action that addresses significant disparities in housing needs and access to opportunity, replacing segregated living patterns with truly integrated and balanced living patterns, transforming racially and ethnically concentrated areas of poverty into areas of opportunity, and fostering and maintaining compliance with civil rights and fair housing laws.



# 2024 TCAC Resource Area Distribution

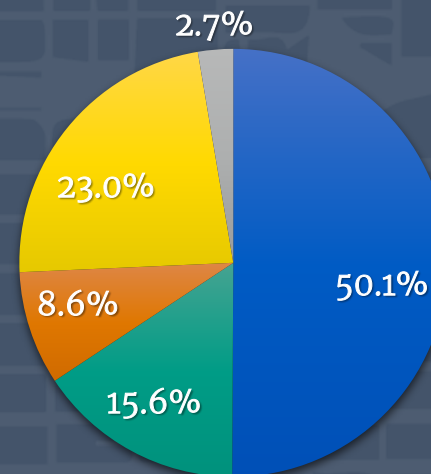
- 66% of the City is in a High or Highest Resource Area
- About 9% of the City is in a Moderate Resource Area
- 23% of the City is in a Low Resource Area
- 3% of the City is in a High Segregation and Poverty area



2024 TCAC Resource Area

- Highest Resource
- High Resource
- Moderate Resource
- Low Resource
- High Segregation and Poverty
- Missing/Insufficient Data

2024 TCAC Distribution

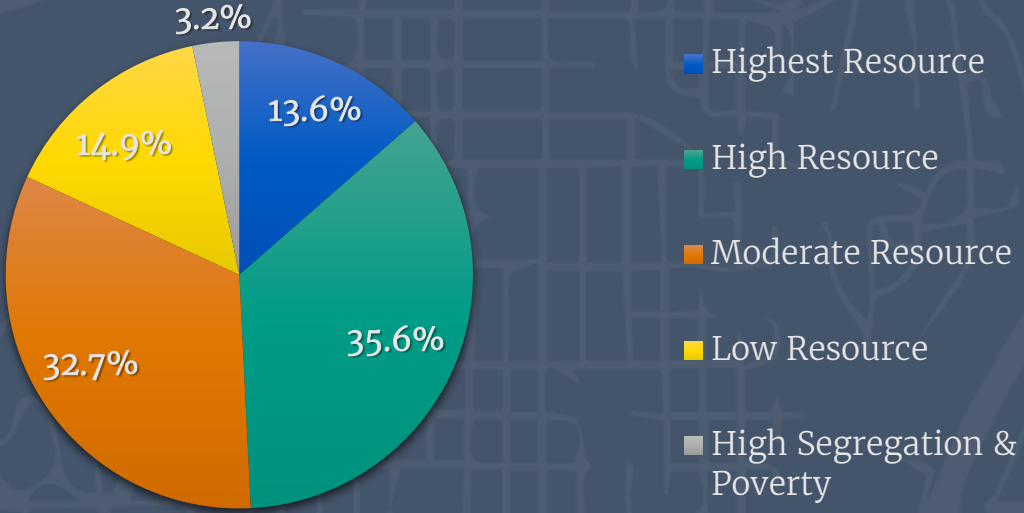


- Highest Resource
- High Resource
- Moderate Resource
- Low Resource
- High Segregation and Poverty

# Total Home Building Permit Applications 2021-2023

- 18.1% of new home building permit applications were in High Segregation and Poverty and Low Resource areas
- 32.7% of new home building permit applications were in Moderate Resource areas
- 49.2% of new home building permit applications were in High and Highest Resource areas
- More affordable homes are being permitted in Moderate, Low, and High Segregation poverty areas, and fewer are being permitted in High and Highest Resource Areas

Total Home Applications 2021-2023

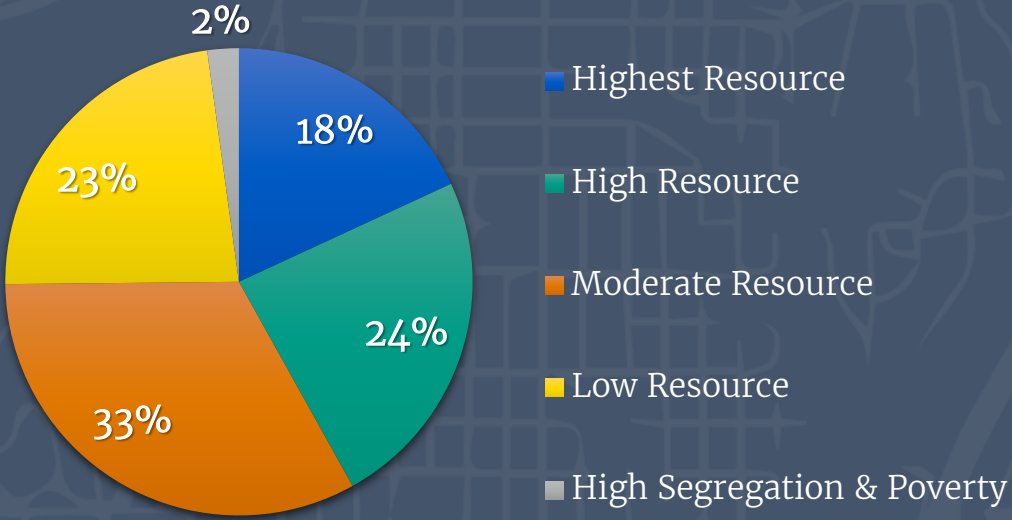


TCAC Resource Area	Total Homes	% Total Homes	Affordable Homes	% Affordable Homes
Highest Resource	3,124	13.6%	33	1.9%
High Resource	8,196	35.6%	388	22.3%
Moderate Resource	7,514	32.7%	653	37.6%
Low Resource	3,424	14.9%	567	32.6%
High Segregation and Poverty	742	3.2%	96	5.5%

# Total Homes Issued Building Permits 2021-2023

- 75% of all homes permitted were in a Moderate, High, or Highest Resource area, which collectively comprise 74.3% of the City
- 33% of all new homes were permitted in a Moderate Resource Area, which comprises just 8% of the City
- Less than 20% of all new homes were permitted within a Highest Resource Area, which comprises 50% of the city

Total Homes Permitted 2021-2023



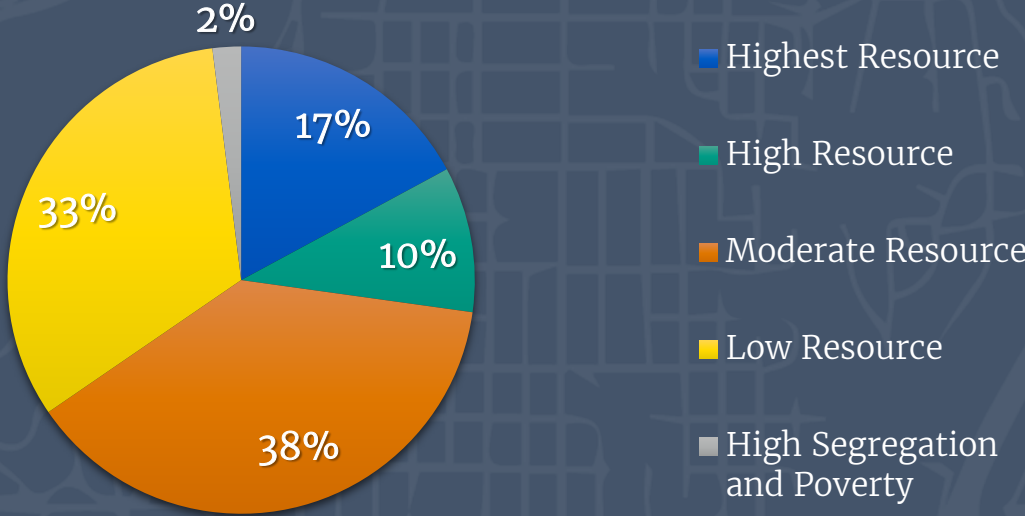
TCAC Resource Area	Total Homes	Total
Highest Resource	3,631	18%
High Resource	4,872	24.1%
Moderate Resource	6,654	32.9%
Low Resource	4,608	22.8%
High Segregation and Poverty	436	2.2%



# Affordable Home Issued Building Permits 2021-2023

- 2% of permitted new affordable homes are in High Segregation and Poverty Resource areas (2.7% of the total land)
- 34% of permitted new affordable homes are in Low Resource areas (23% of the total land)
- 38% of permitted affordable homes were in Moderate Resource areas (8.6% of the total land)
- 27% of affordable homes were permitted in High and Highest Resource areas (65.7% of the total land)

Affordable Homes Permitted 2021-2023

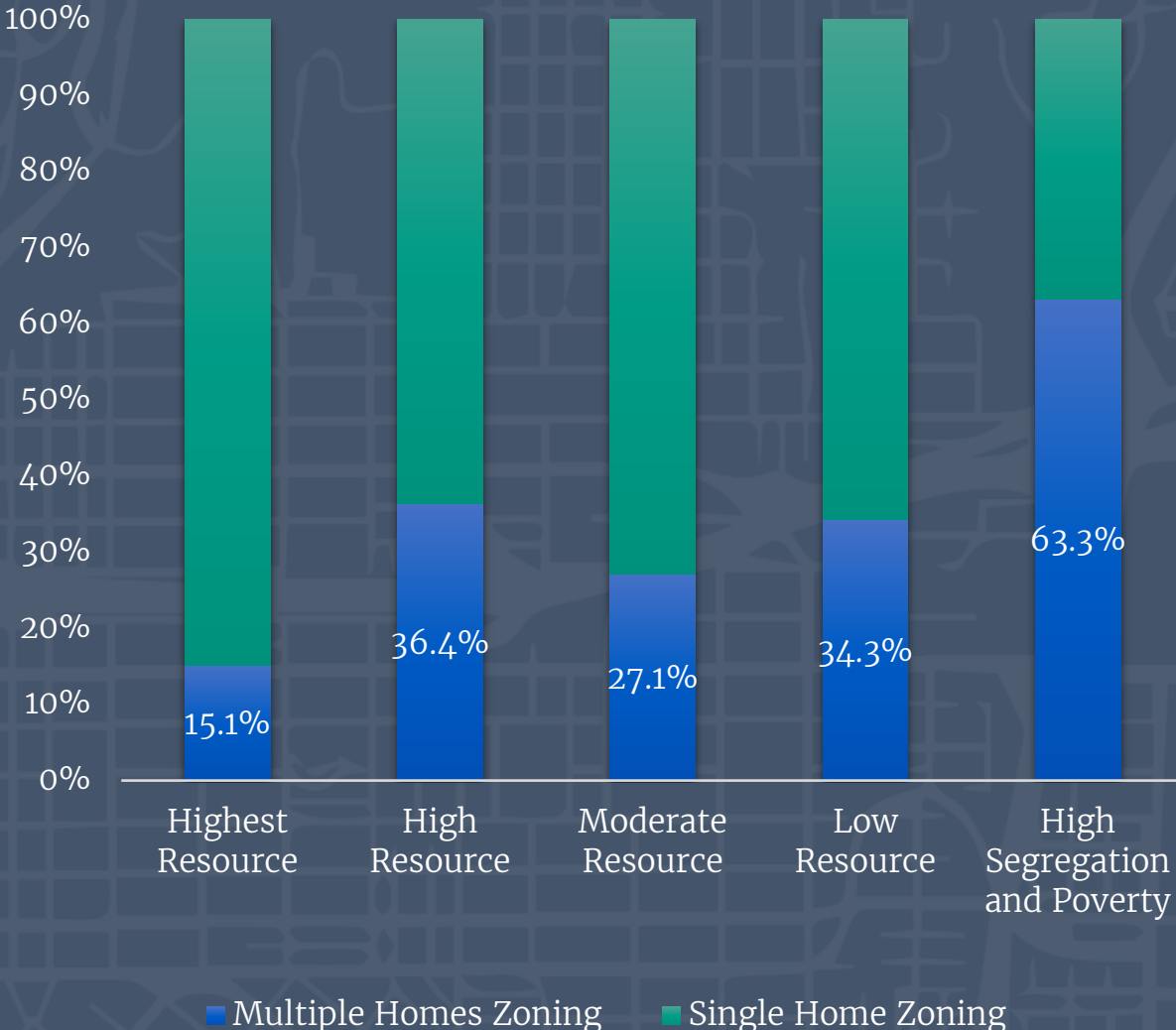


TCAC Resource Area	Total Homes	Total Homes (%)	Affordable Homes	Affordable Homes (%)
Highest Resource	3,631	17.9%	607	16.2%
High Resource	4,872	24.1%	385	10.3%
Moderate Resource	6,654	32.9%	1,427	38.2%
Low Resource	4,608	22.8%	1,251	33.5%
High Segregation and Poverty	436	2.2%	67	1.8%

# Residential Land Use Distribution

- 15% of Highest and 36% of High Resource areas are currently zoned Multi-Family
- 27% of Moderate Resource areas are currently zoned Multi-Family
- 34% of Low Resource areas are currently zoned Multi-Family
- 63% of High Segregation and Poverty areas are currently zoned Multi-Family
- Zoning that allows only single home development is a barrier to the provision of homes that people of all incomes can afford
- To affirmatively further fair housing, High and Highest Resource areas need to include more zones that allow for multiple homes development

Residential Zoning Distribution by TCAC Resource Area



# **Key** **Takeaways**

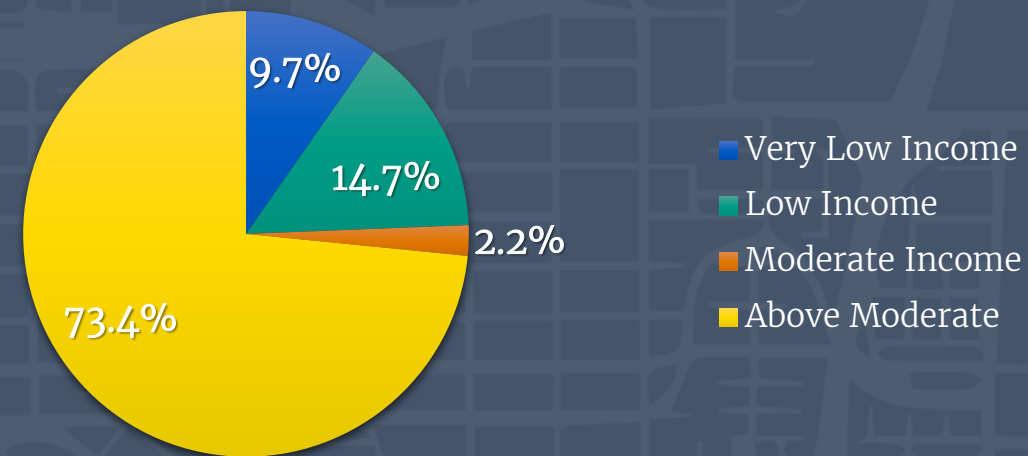
- A. 2023 New Homes Permitted**
- B. 10 Year Trend Analysis**
- C. RHNA Allocations**
- D. Fair Housing Analysis**
- E. Residential Land Use**



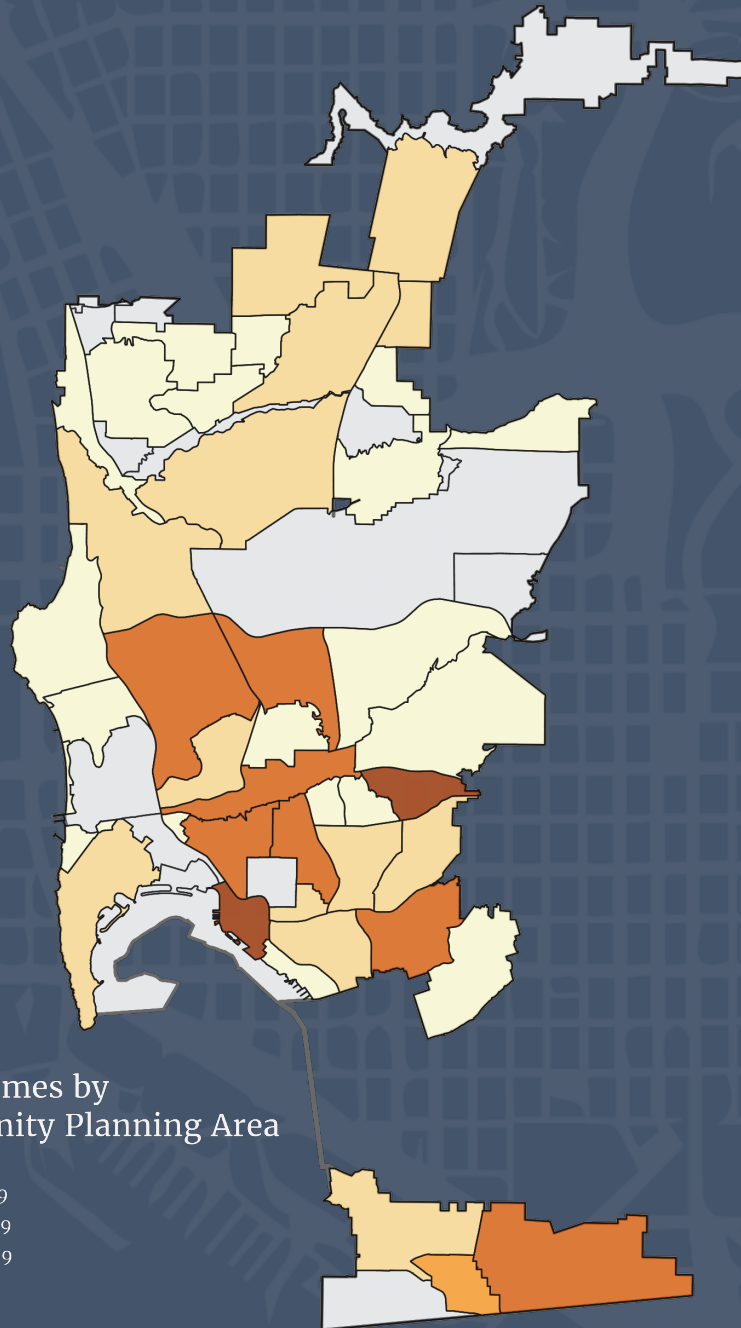
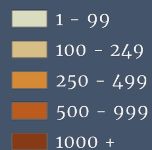
# 2023 Homes Issued Building Permits

- In 2023, 9,693 new homes were permitted of which 27% were deed-restricted as affordable
- Homes permitted for very low-, low-, and moderate-income households lag behind homes for above-moderate households
- The City continues to permit homes in nearly every community

2023 Homes Permitted by Income Category



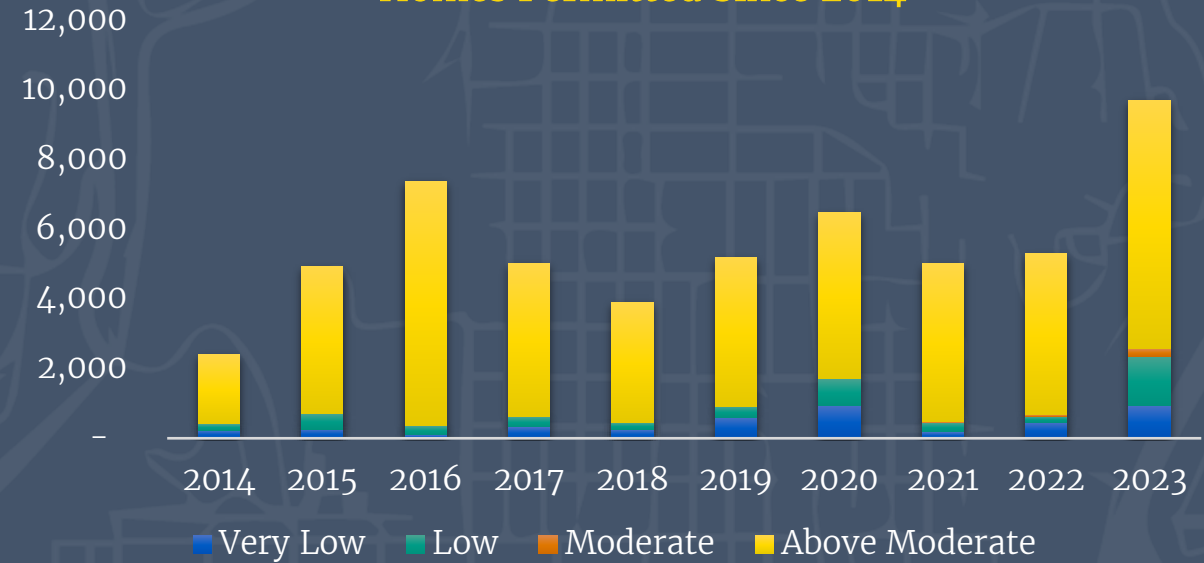
2023 Homes by Community Planning Area



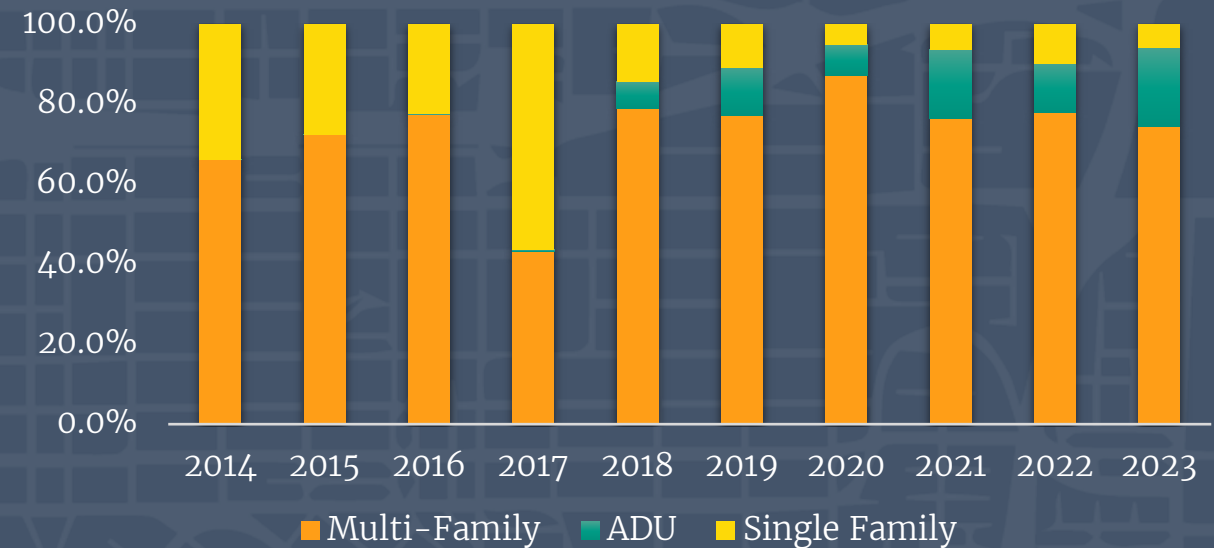
# 10 Year Trend Analysis of Homes Issued Building Permits

- Over the last 10 years, the City permitted the highest number of homes in 2023
- More ADUs homes were permitted in 2023, representing 20% of the homes permitted
- Homes part of multiple home development continue to be the primary way new homes are permitted

Homes Permitted Since 2014



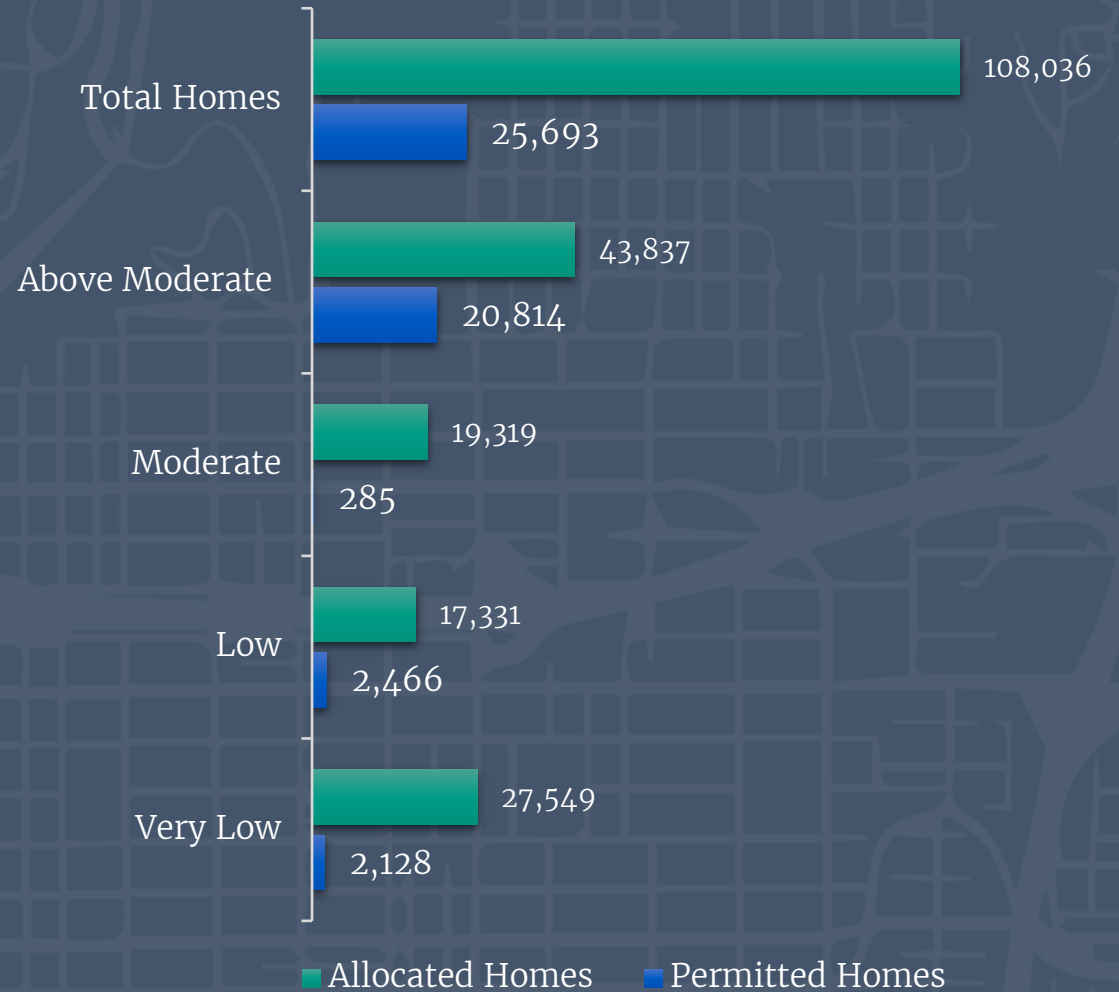
Home Type Since 2014



# RHNA Allocations

- The City has permitted 24% of homes allocated by RHNA
- The City will need to permit 82,344 more homes to meet the RHNA allocation by 2029
- City is on pace for meeting RHNA for above-moderate homes
- The City needs to permit more homes deed-restricted as affordable for moderate-, low-, and very low-income households

Remaining Homes for RHNA By Income Level

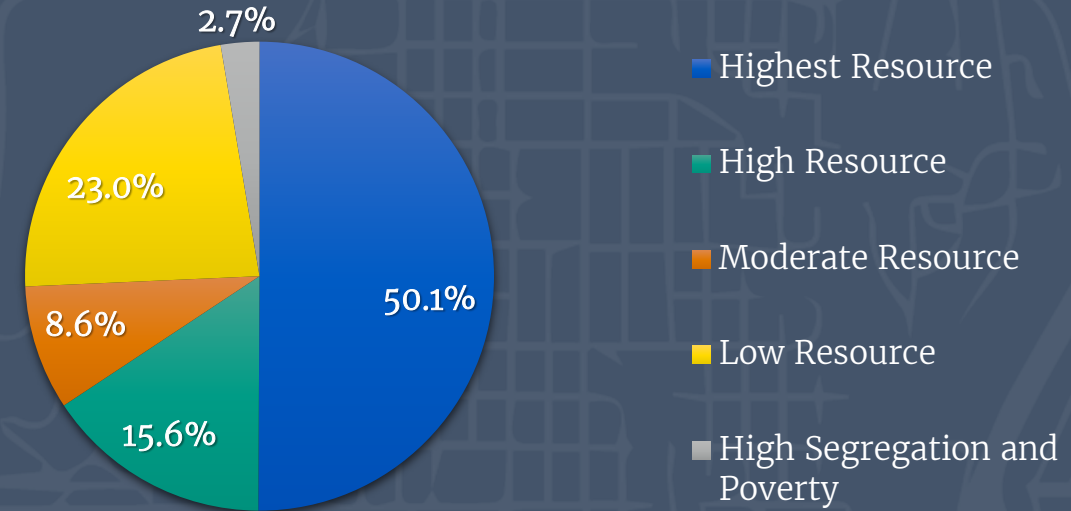




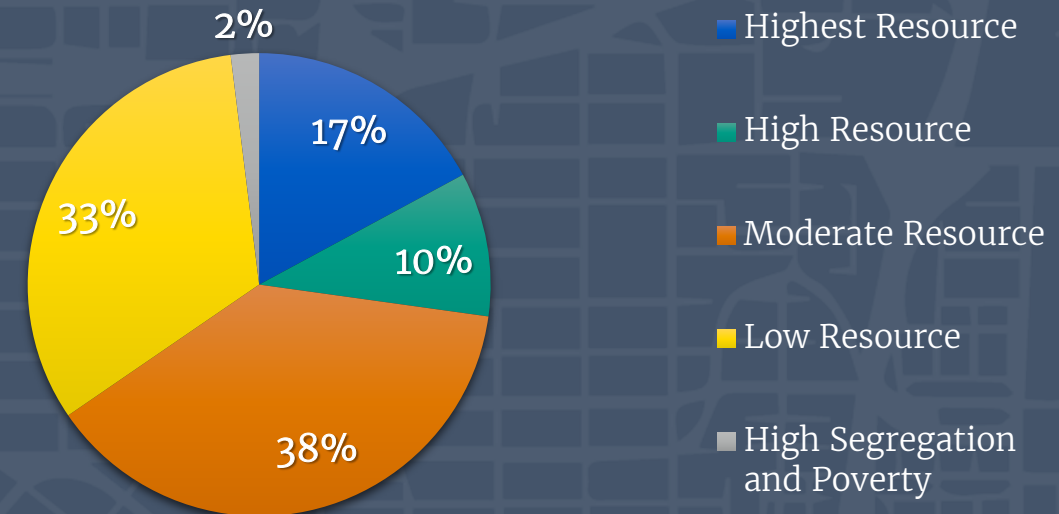
# Fair Housing Analysis

- 27% of affordable homes were permitted in High and Highest Resource areas
- High and Highest Resource areas account for 69% of the City
- More affordable homes are needed in High and Highest Resource areas to continue to address disparities in housing need and access to opportunity, create integrated and balanced living patterns, and affirmatively further fair housing

2024 TCAC Resource Area Distribution



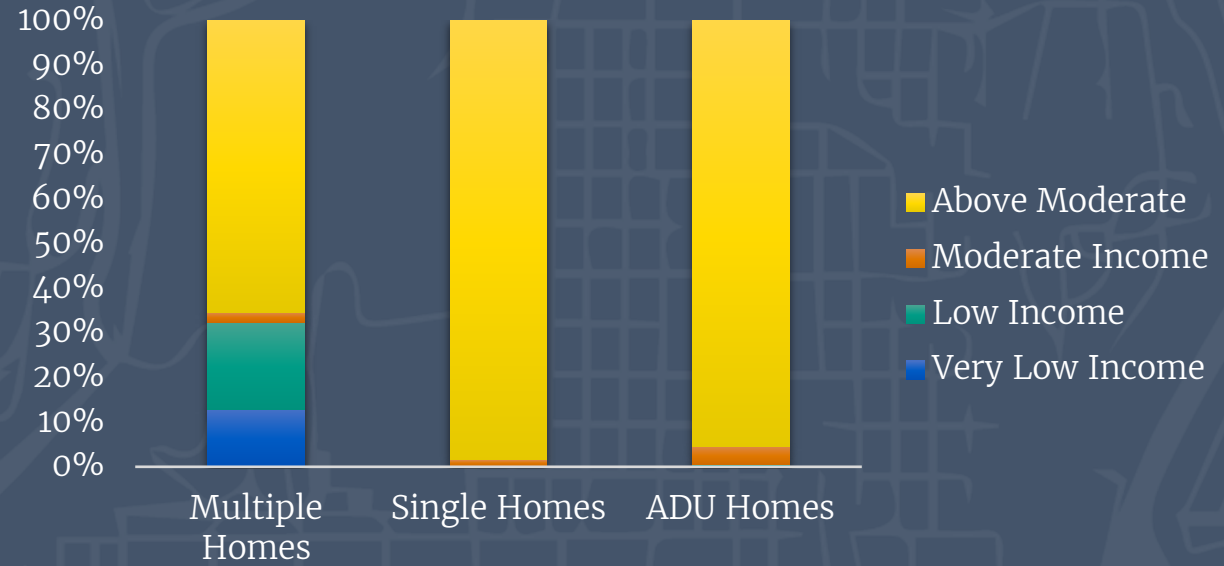
Affordable Homes Permitted by TCAC Resource Area 2021-2023



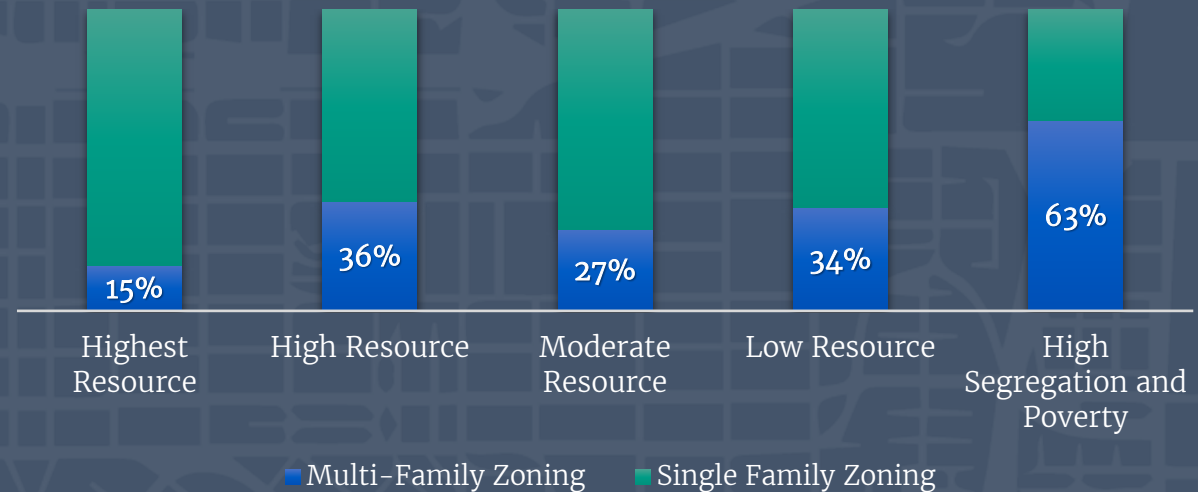
# Residential Land Use

- Deed-restricted affordable homes are primarily a part of multiple home developments
- 19% of High and Highest Resource areas are zoned to allow for multiple home development
- Affordable homes for moderate-income families are primarily being built by multiple home development projects and ADU homes
- Additional land zoned to allow for multiple home development is needed in Highest and High resource areas
- Allowing for more multiple homes in High and Highest Resource areas, including in areas that were created through discriminatory regulations, is critical to addressing disparities in housing need and furthering fair housing in the City through the advancement of anti-racist zoning

2023 Home Building Permits Issued by Type



Existing Distribution of Zoning that Allows Multiple Homes by TCAC Resource Area



# APPENDICES

- A. Additional Resources**
- B. 2021–2023 Housing Element Data**
- C. HCD Housing Element Certification Letter**



# Appendix A Additional Resources

[City of San Diego General Plan Housing Element 2021-2029](#)

[City of San Diego Housing Element Annual Progress Reports](#)

[City of San Diego Housing Element 2021-2029 Adequate Sites Inventory](#)

[City of San Diego Mobility Zones](#)

[California Tax Credit Allocation Committee Resource Opportunity Areas Map](#)

