

San Diego Planning Commission Meeting

PHONE-IN TESTIMONY PERIOD NOW OPEN FOR Item 7: 2024 Annual Report on Homes - Workshop

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When prompted, input Webinar ID: **160 758 6412**

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2024 Annual Report on Homes

Planning Commission

August 29, 2024

Item #7

About the Report

- Based on the Housing Element Annual Progress Report
- Tracks Regional Housing Needs Allocation progress
- Includes an analyses on:
 - Use of City Home Incentive Programs
 - Home Permitting Trends
 - Housing Element Adequate Sites Inventory
 - Fair Housing Assessment

2023 Housing Data

2023 Types of Homes Issued Building Permits

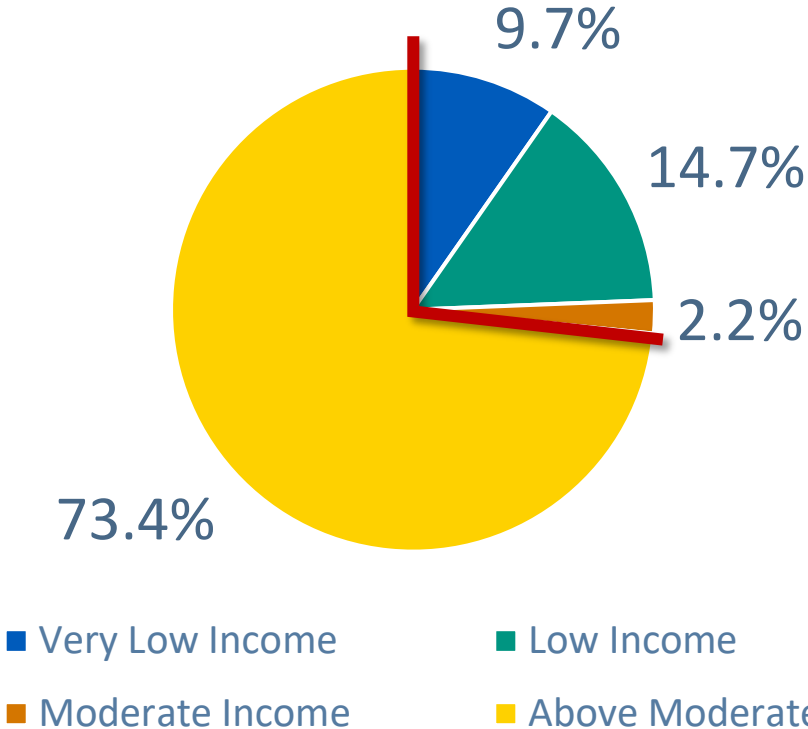
9,693

new homes permitted for construction in 2023

2,576

new affordable homes permitted for construction in 2023. This represents about 27% of all new home

2023 Homes Permitted by Income



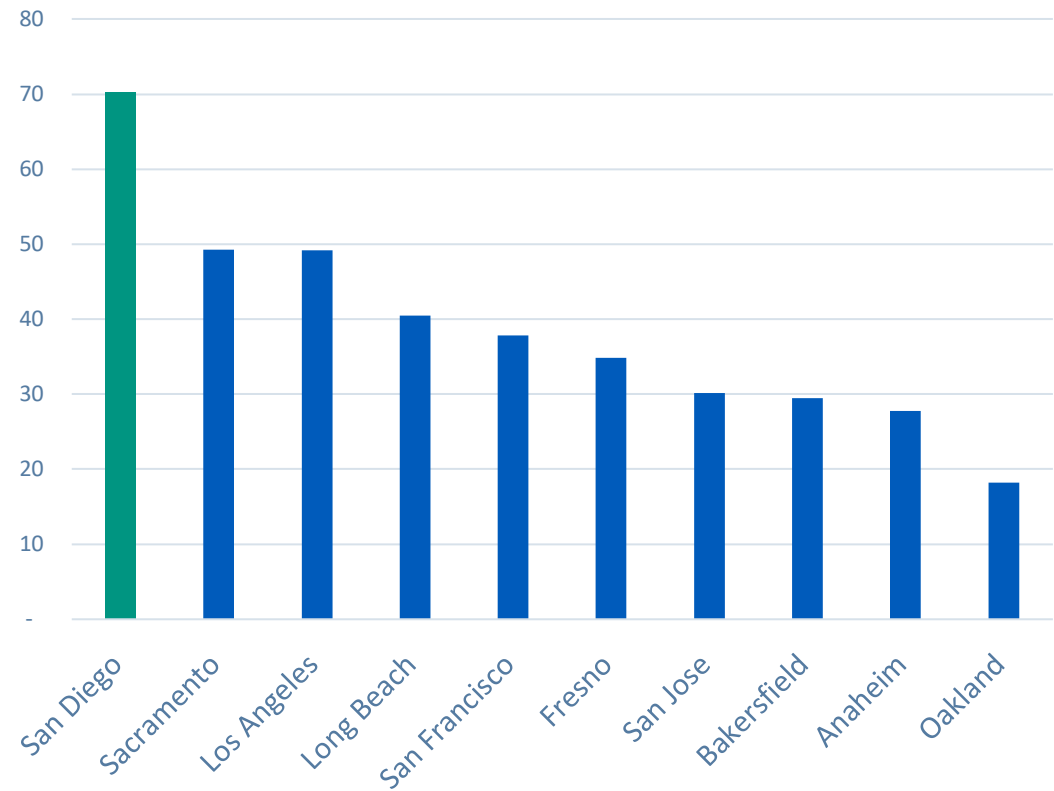
Peer Cities Comparison

70

Issued home permits per 10,000 population

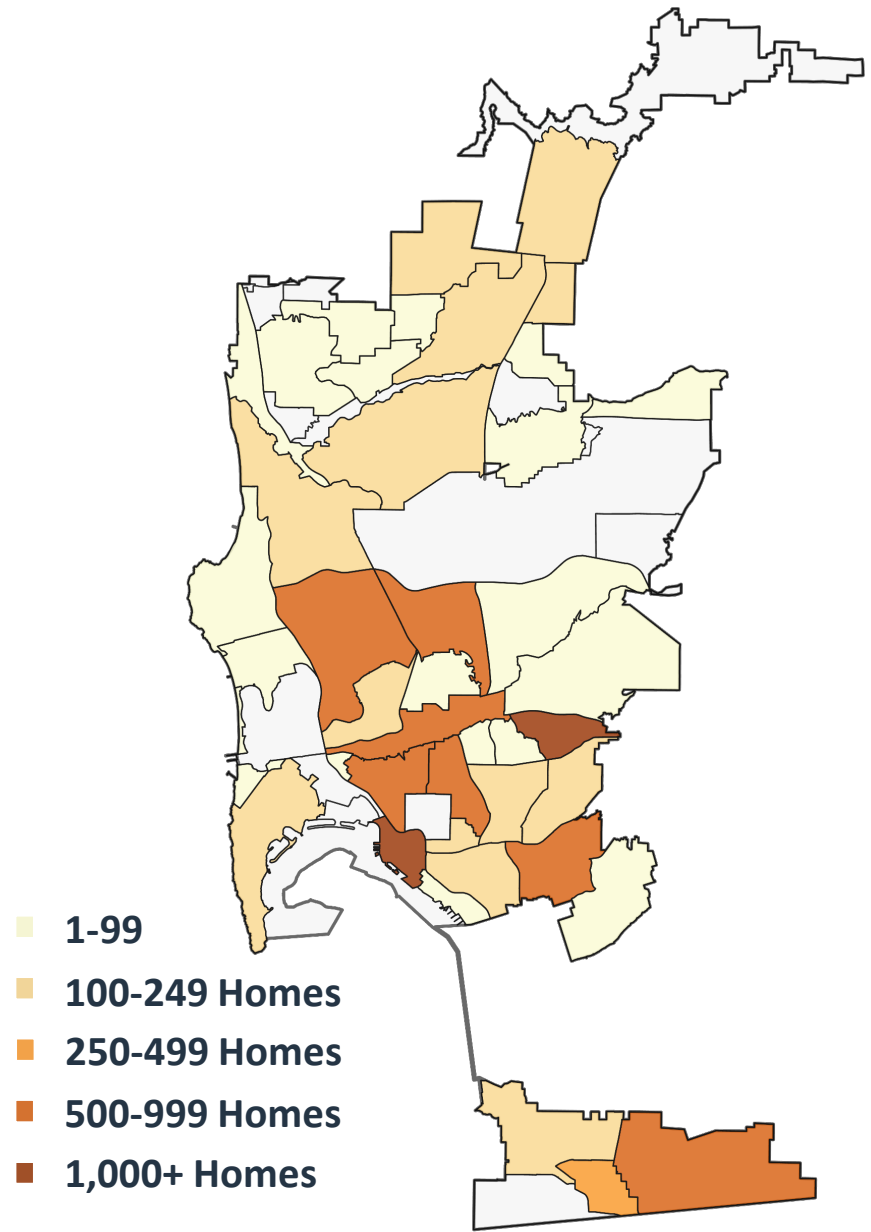
Cities	Total Homes Permitted	Homes Per 10k Population
San Diego	9,693	70
Sacramento	2,603	49
Los Angeles	18,781	49
Long Beach	1,827	40
San Francisco	3,055	38

Permitted Homes Per 10,000 Population



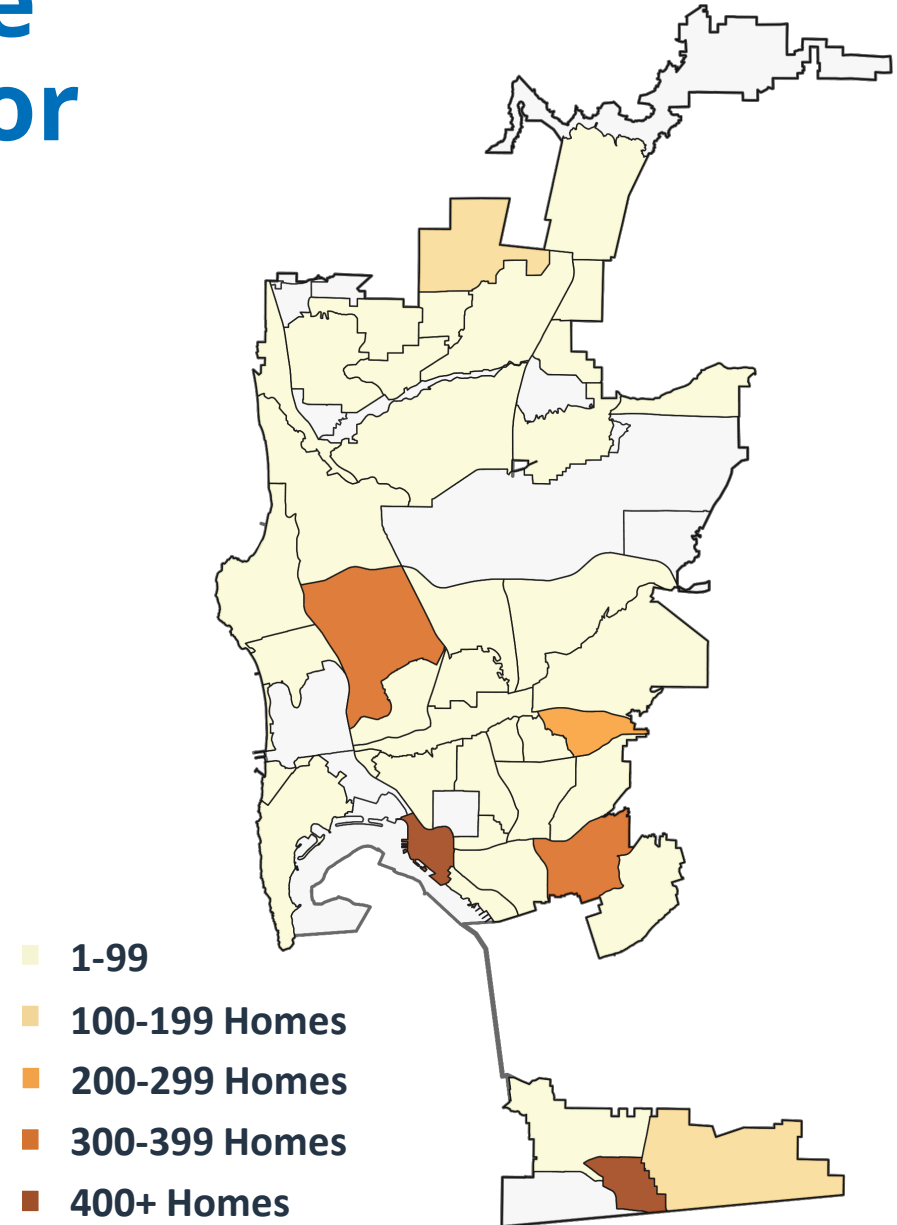
Where are new homes being permitted for construction in 2023?

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



Where are new affordable homes being permitted for construction in 2023?

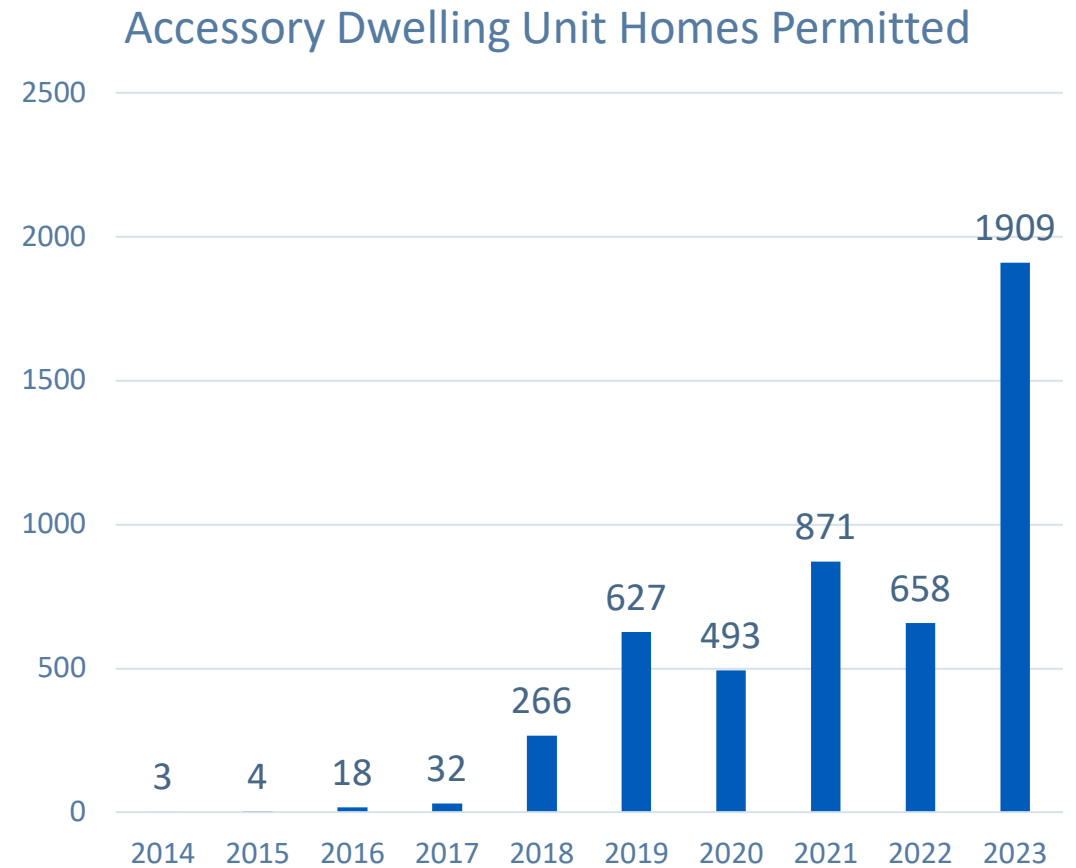
Community Plan Area	Total Affordable Homes Permitted
San Ysidro	466
Downtown	459
Encanto Neighborhoods	325
Clairemont Mesa	322
College Area	245
Black Mountain Ranch	169
Otay Mesa	133
Rancho Bernardo	99
Rancho Peñasquitos	82
North Park	58



2023 ADU Home Building Permits Issued

1,909

New ADU homes permitted for construction in 2023

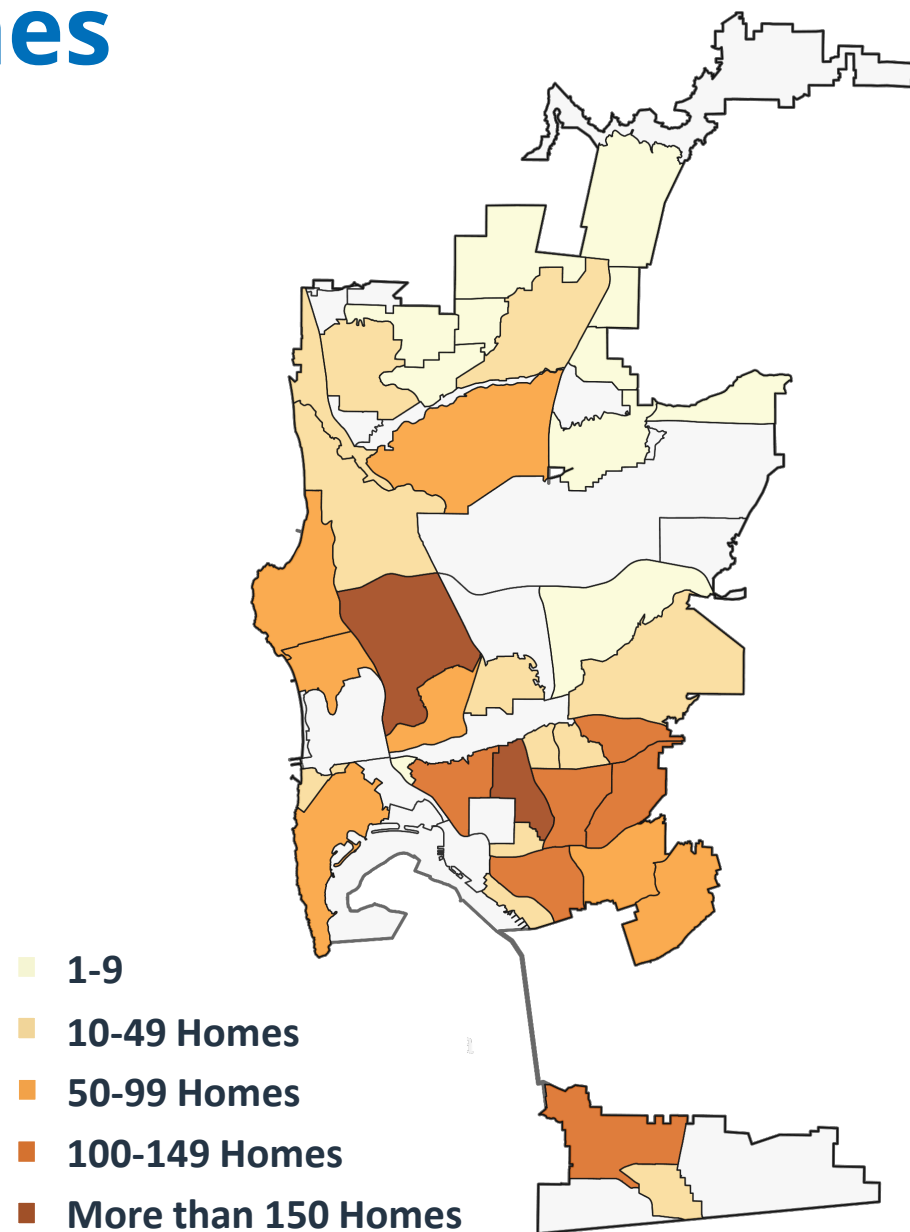


Where are new ADU homes being permitted for construction in 2023?

20%

of new homes are ADU homes

Top Communities	Total ADU Homes	Total Affordable ADU Homes
Clairemont Mesa	188	12
North Park	156	8
City Heights	137	1

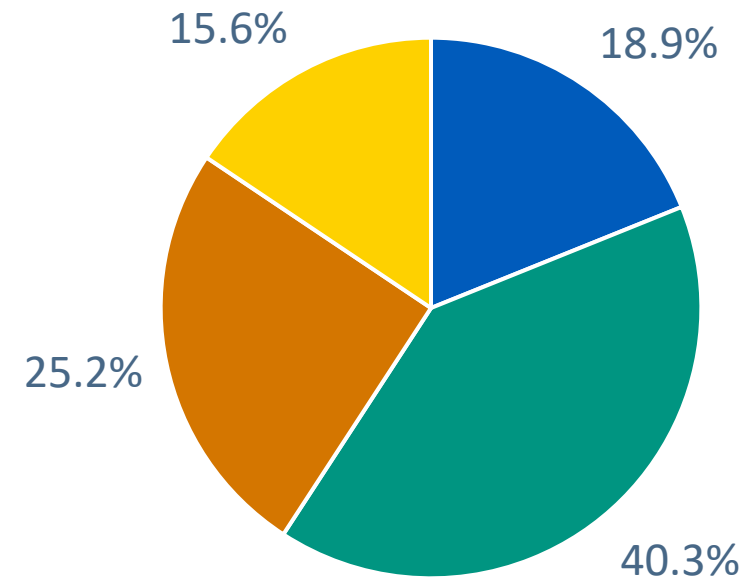


2023 Family Homes Issued Building Permits

59%

of new homes in 2023 sample were one-bedroom or studio homes

Number of Bedrooms in Homes Permitted in 2023



■ Studio ■ 1 Bedroom ■ 2 Bedrooms ■ 3+ Bedrooms

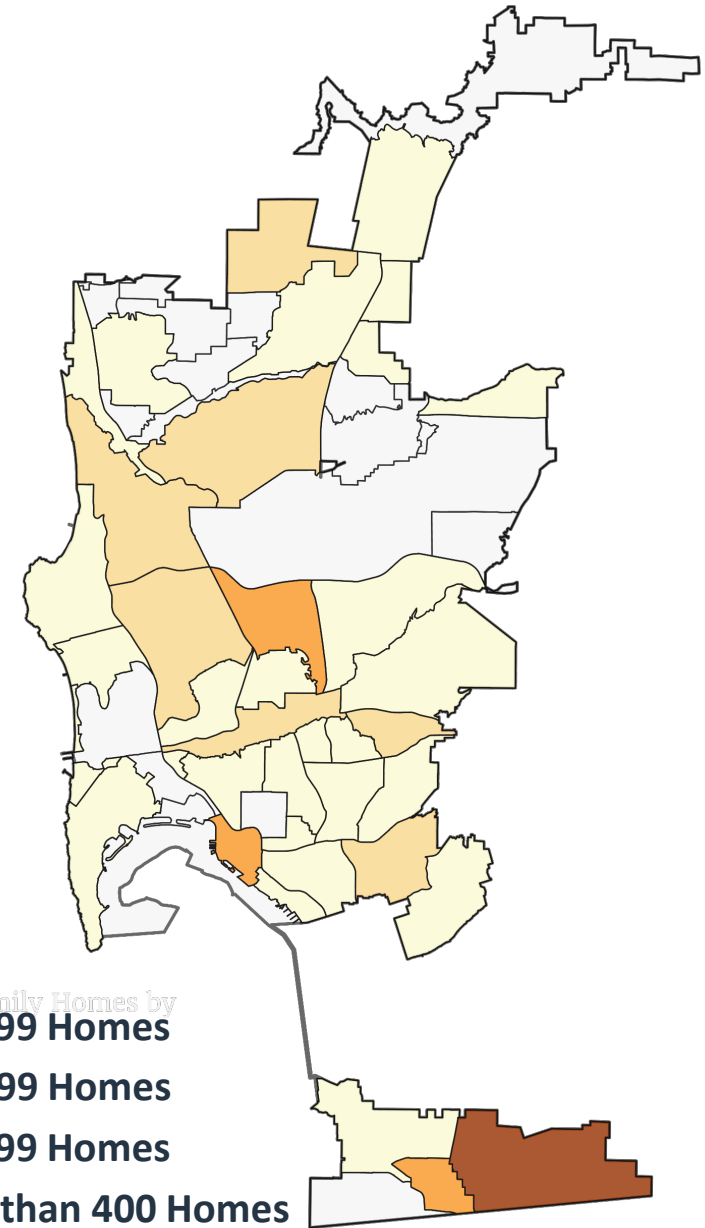
Where are new family homes being permitted for construction?

41%

of new homes had 2 or more bedrooms

Top Communities	Permitted Family Sized Homes
Otay Mesa	473
San Ysidro	278
Downtown	266

- 2022 Family Homes by
- 1-99
 - 100-199 Homes
 - 200-299 Homes
 - 300-399 Homes
 - More than 400 Homes



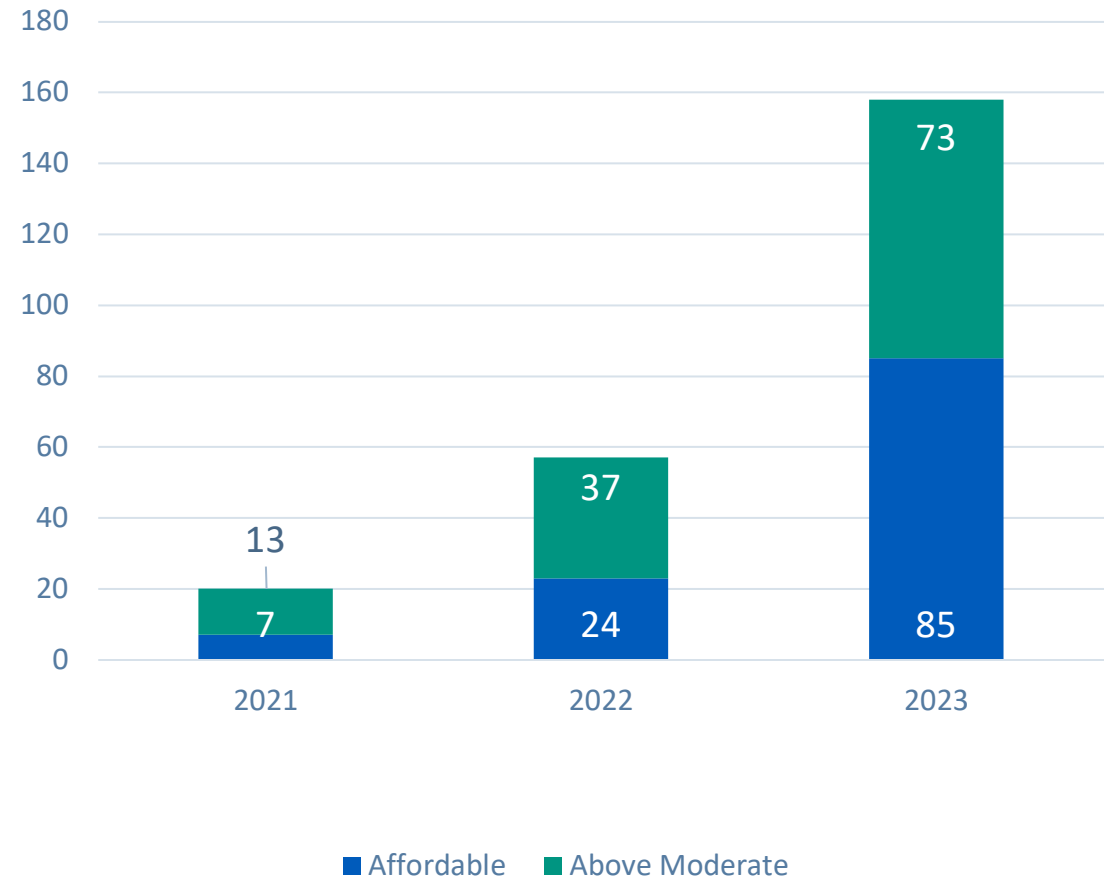
City Programs

2021-2023 ADU Home Density Bonus

158

New ADU homes issued through the ADU Home Density Bonus program in 2023

Top Communities (2021-2023)	Permitted ADUDB Homes
College Area	40
Clairemont Mesa	31
Uptown	26



2021-2023 Complete Communities: Housing Solutions

1,131

New homes permitted through the Complete Communities: Housing Solutions program in 2023

Top Communities (2021-2023)	Total Homes	Affordable Homes
North Park	382	43
Uptown	352	42
College Area	324	24

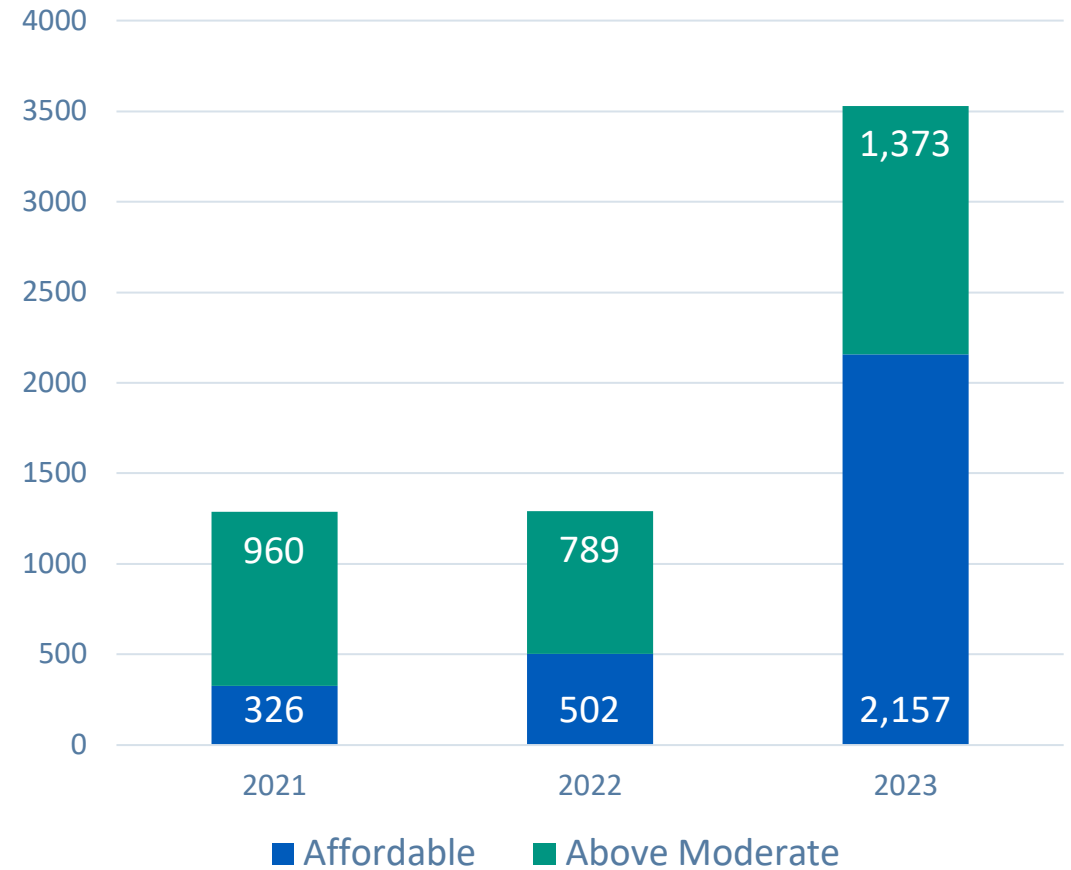


2021-2023 Affordable Home Density Bonus Program

2,157

New affordable homes were permitted through the density bonus program in 2023

Top Communities (2021-2023)	Total Homes	Affordable Homes
Downtown	1,457	494
North Park	684	108
Otay Mesa	514	38



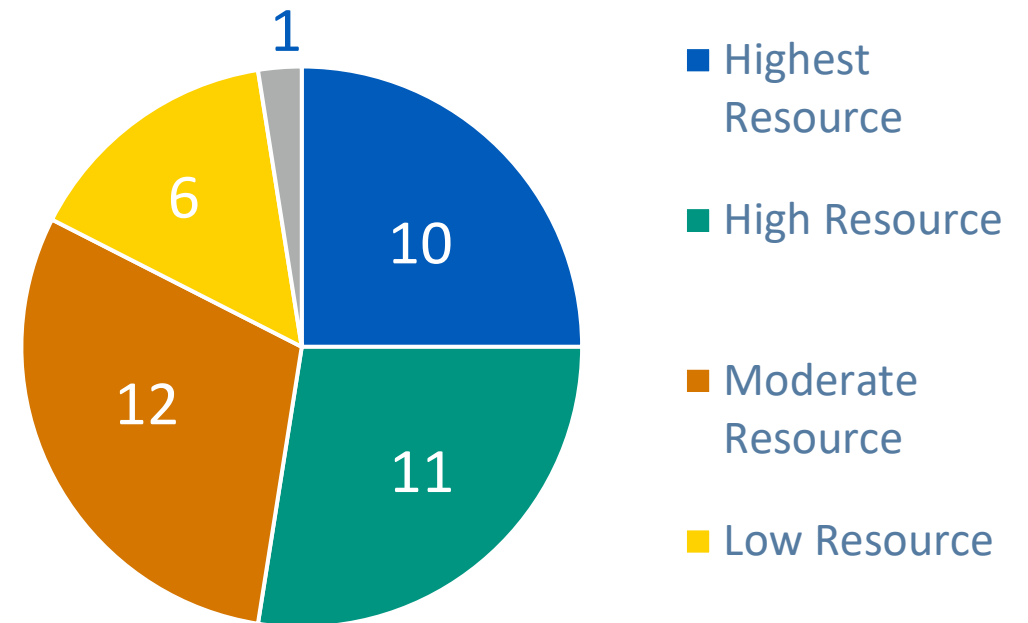
2021-2023 Inclusionary Housing

234

New affordable homes permitted through Inclusionary Housing programs

Top Communities (2021-2023)	Total Affordable Homes
Downtown	77
College Area	34
Kearny Mesa	22
Rancho Peñasquitos	22

Projects Issued Permits Through Inclusionary Housing by TCAC Resource Areas since 2021



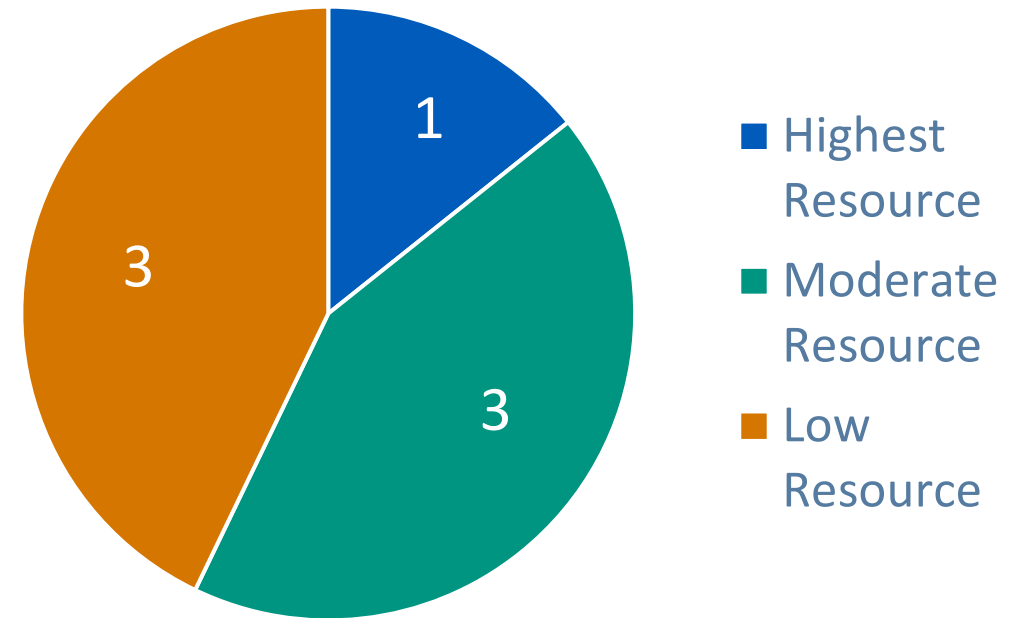
2023 Affordable Housing Permit Now

1,082

New homes permitted through the Affordable Housing Permit Now program

Top Communities (2021-2023)	Total Homes
Downtown	273
Encanto Neighborhoods	238
Clairemont Mesa	230

Projects Utilizing Affordable Housing Permit Now By TCAC Resource Area

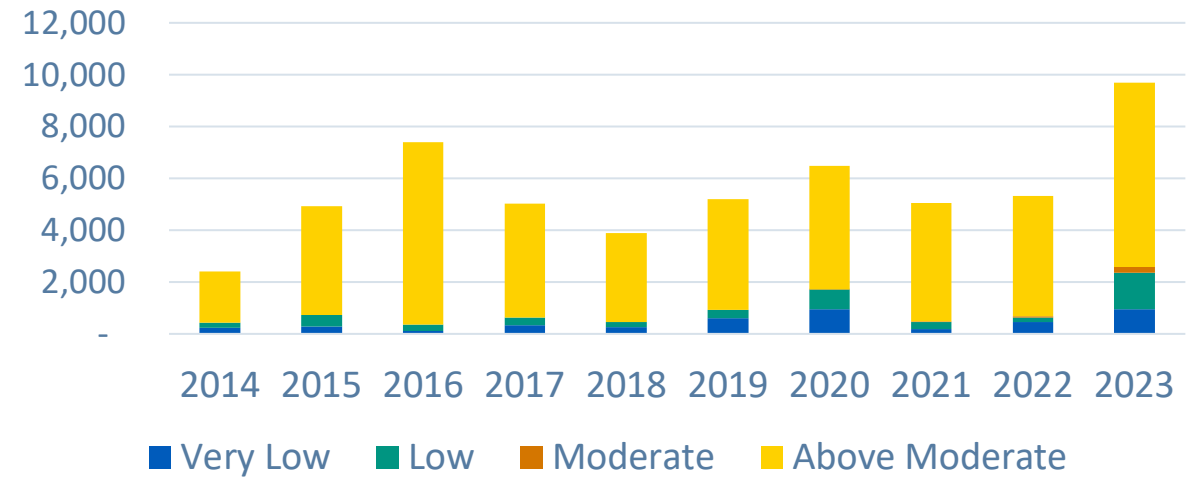


Trends and Implementation

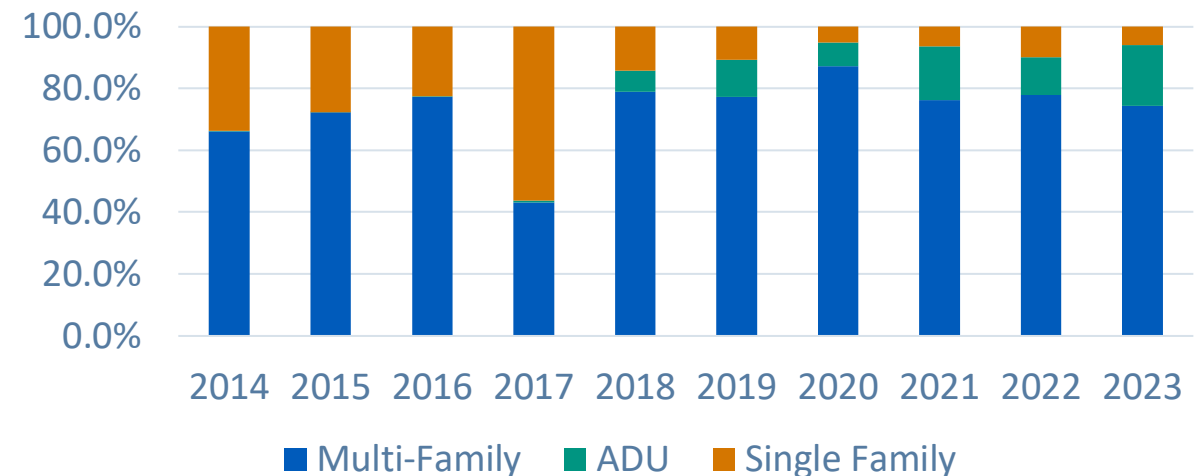
2014 – 2023 Trend Analysis of Homes Issued Building Permits

- In 2023, the City permitted the highest number of homes
- Multi family homes and ADUs homes represent 83% of the homes permitted since 2014

Homes Permitted Since 2014



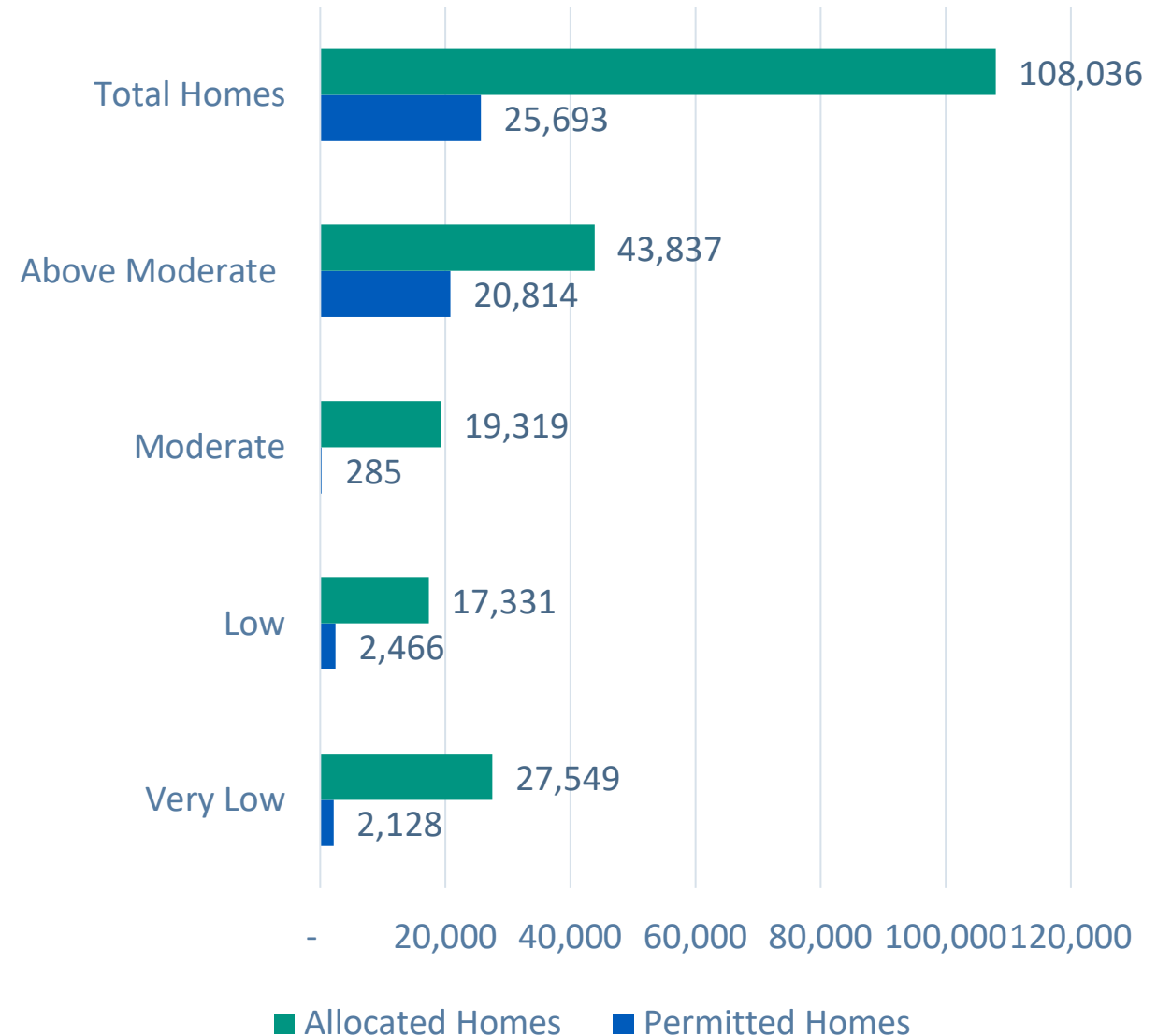
Home Type Since 2014



RHNA Allocations

- The city needs to permit over 80,000 new homes to meet housing goals
- City is on pace to meet above-moderate income home goals

Remaining Homes for RHNA By Income Level



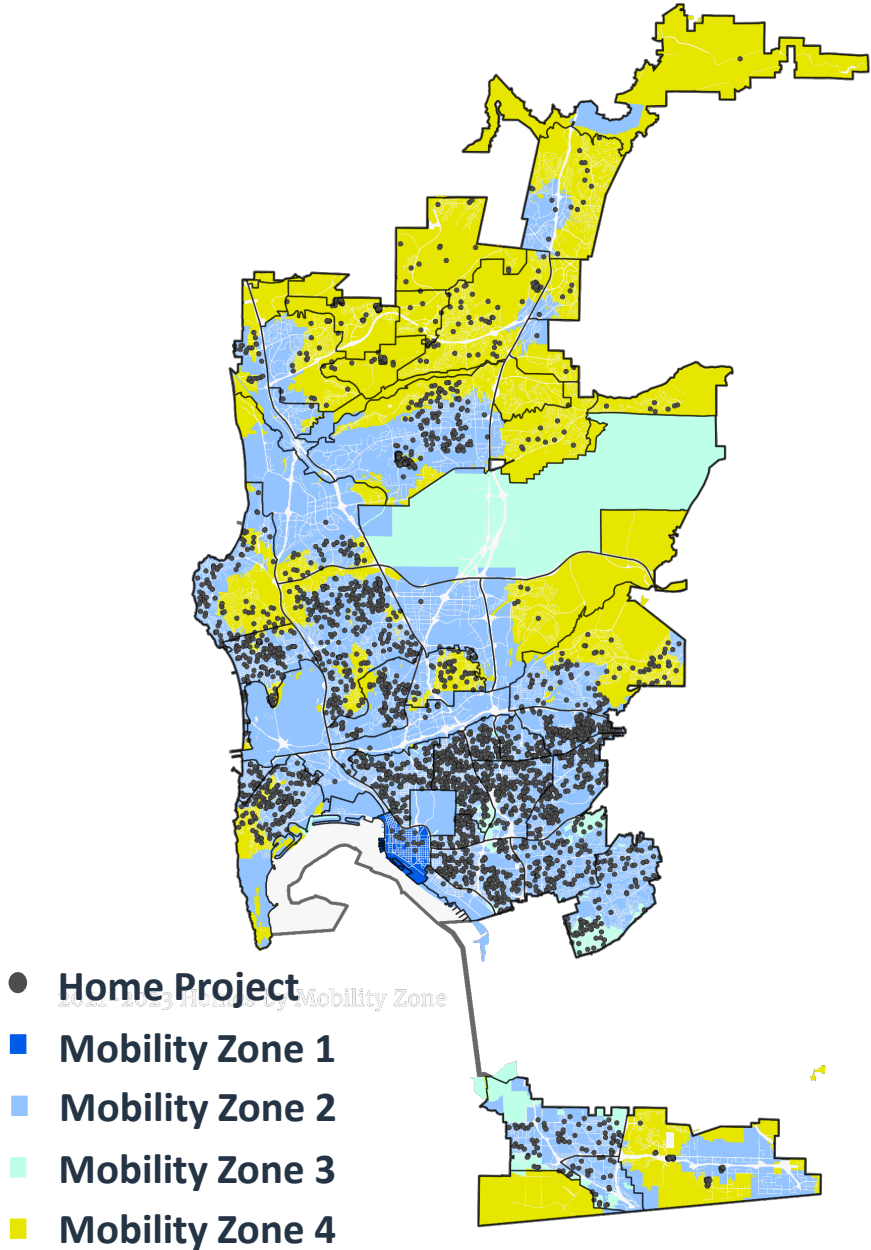
Issued Home Permits in Mobility Zones Since 2021

86%

*New homes permitted since 2021
are in Mobility Zones 1 and 2*

88%

*of affordable homes
permitted since 2021 are in
Mobility Zones 1 and 2*



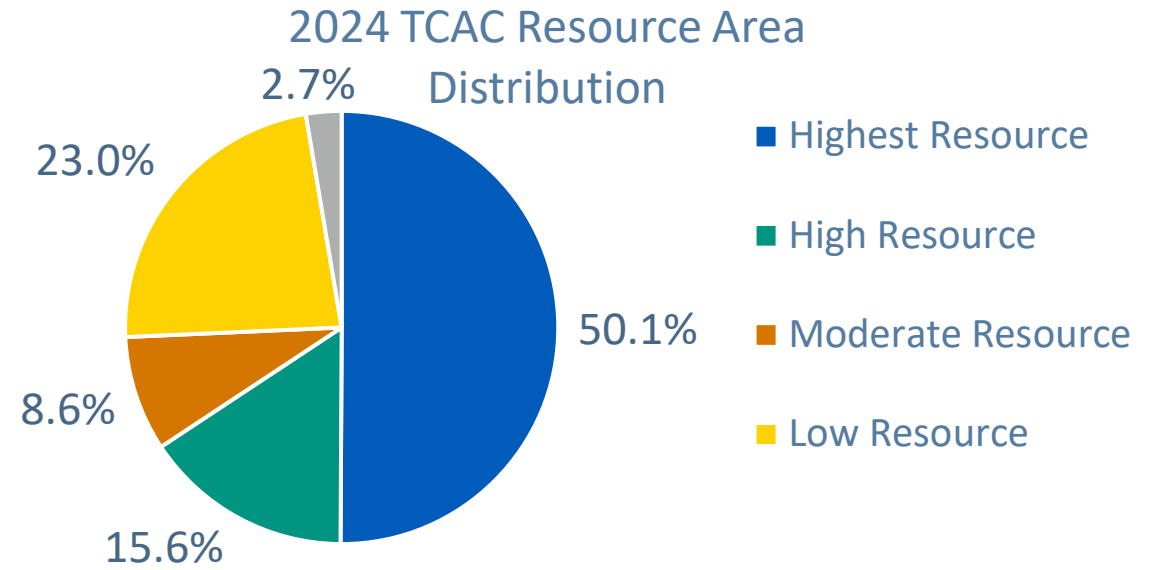
Fair Housing Analysis

66%

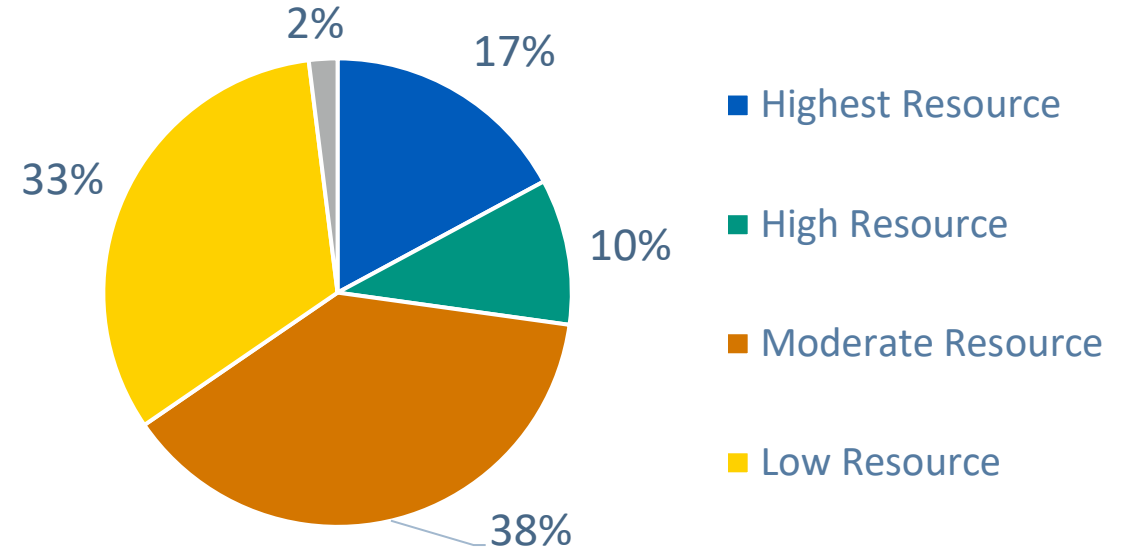
of the City is in a High or Highest Resource area

27%

of affordable homes were permitted in High or Highest Resource areas



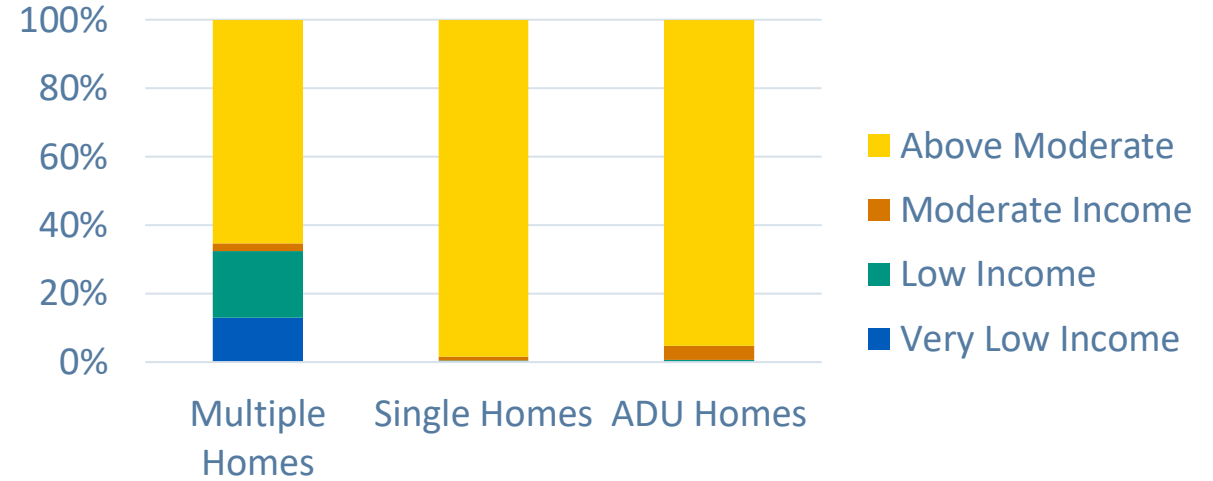
Affordable Homes Permitted by TCAC Resource Area 2021-2023



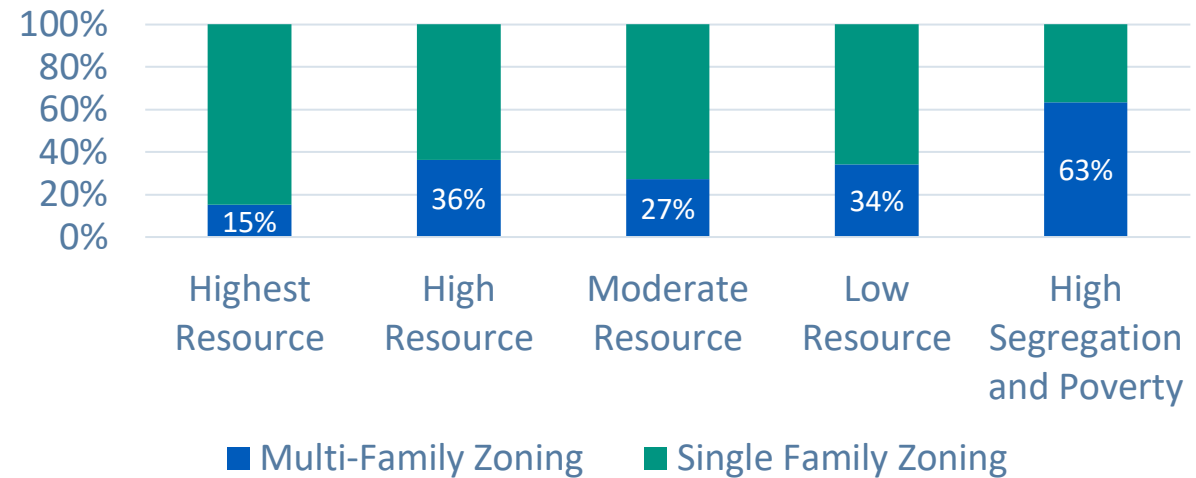
Residential Land Use

- Affordable homes are primarily a part of multiple home developments
- 15% of High Resource areas are zoned to allow for multiple home development

2023 Home Building Permits Issued by Type



Multiple Homes Zoning by TCAC Resource Area



Key Takeaways and Next Steps

Key Takeaways

- 9,693 homes issued building permits in 2023
- 2,756 affordable homes issued building permits in 2023
- City will need to permit 82,344 homes, including 59,320 affordable homes by 2029 to meet RHNA goals

Fair Housing Key Takeaways

- Affordable homes are mostly built through developments with Multiple Homes
- Moderate resource areas are producing the most affordable homes
- More affordable homes needs to be built in Highest and High Resource areas

Next Step

- Present Annual Report on Homes to San Diego City Council in September