

San Diego Planning Commission Meeting

PHONE-IN TESTIMONY PERIOD NOW OPEN FOR

Item 4: 2025 Annual Report on Homes - Workshop

Telephone - Dial 669-254-5252 or (Toll Free) 833-568-8864.

When prompted, input Webinar ID: **160 944 0367**

How to Speak to a Particular Item or During Non-Agenda Public Comment:

TO "RAISE YOUR HAND": click the button on your computer, tablet, or Smartphone, or by dialing ***9** on your phone. You will be taken in the order in which you raise your hand. You may only speak once on a particular item.

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ITEM - 4

2025 Annual Report on Homes

Planning Commission
October 30, 2025

About the Report

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

2024 Housing Data

What Types of Homes were Permitted in 2024?

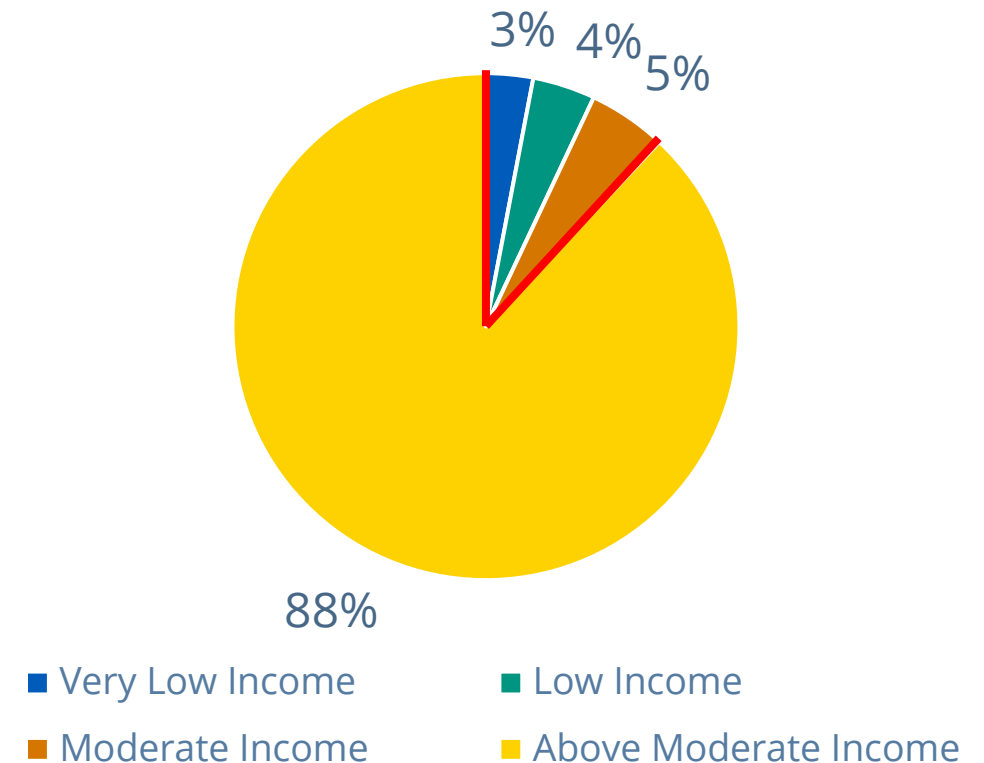
8,782

New homes permitted for construction in 2024

1,061

New affordable homes permitted for construction in 2024. This represents about 12 percent of all new homes

2024 Home Building Permit Issuance by Income Category

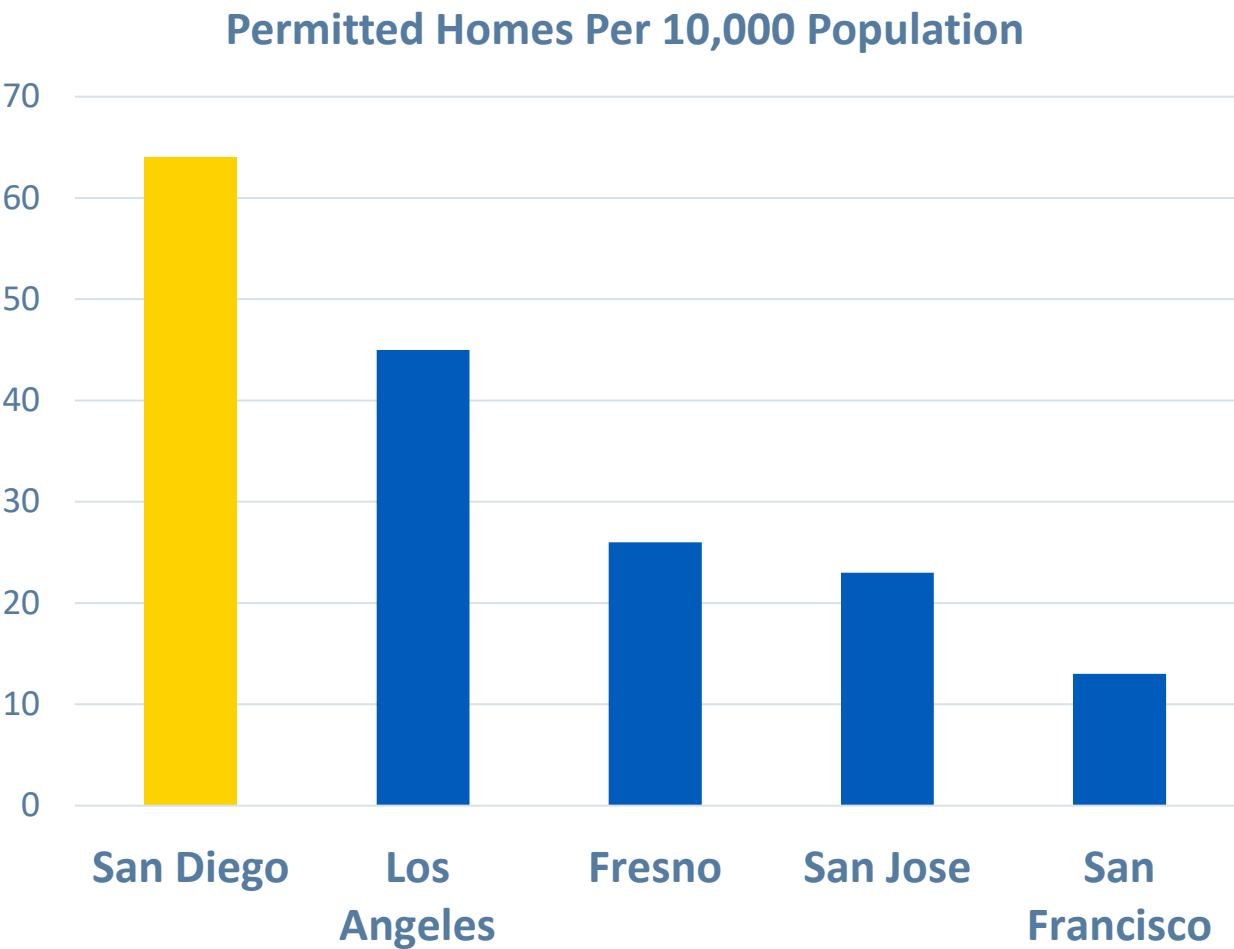


How does San Diego Compare to California's largest Cities?

64

*Issued home permits
per 10,000 population*

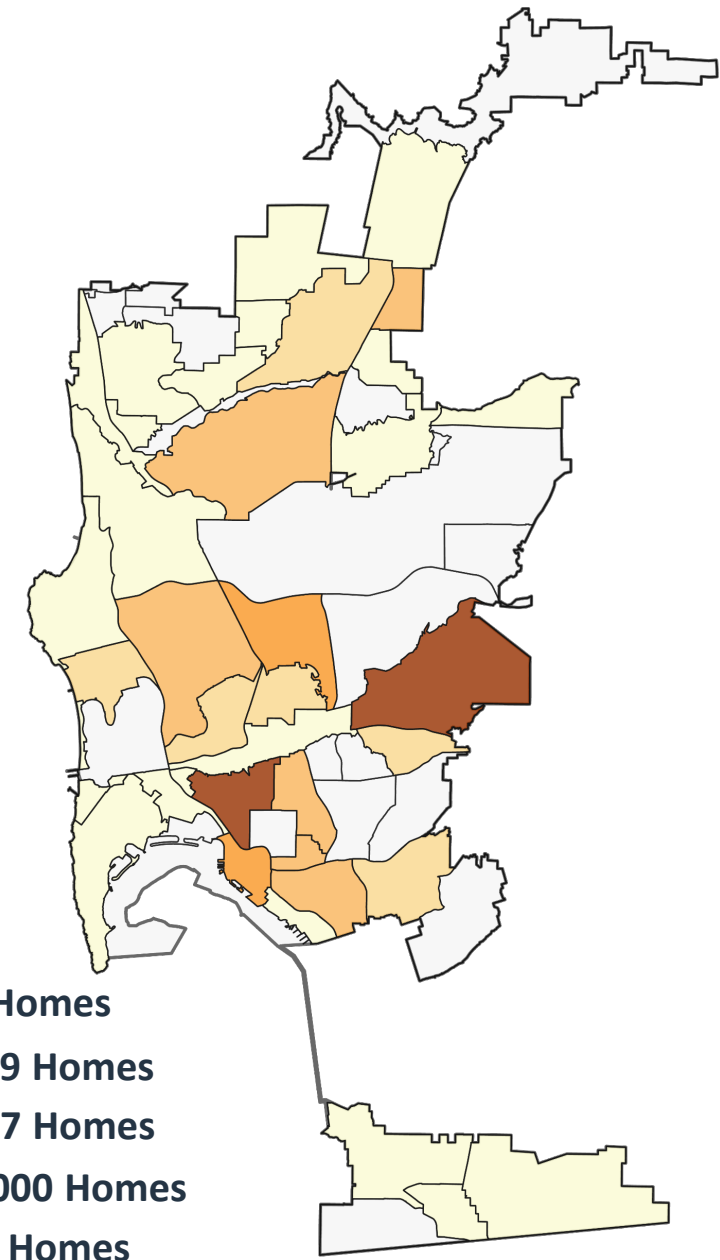
Cities	Total Homes Permitted	Homes Per 10k Population
San Diego	8,782	64
Los Angeles	17,195	45
Fresno	1,415	26
San Jose	2,207	23
San Francisco	1,074	13



Where are new homes being permitted for construction in 2024?

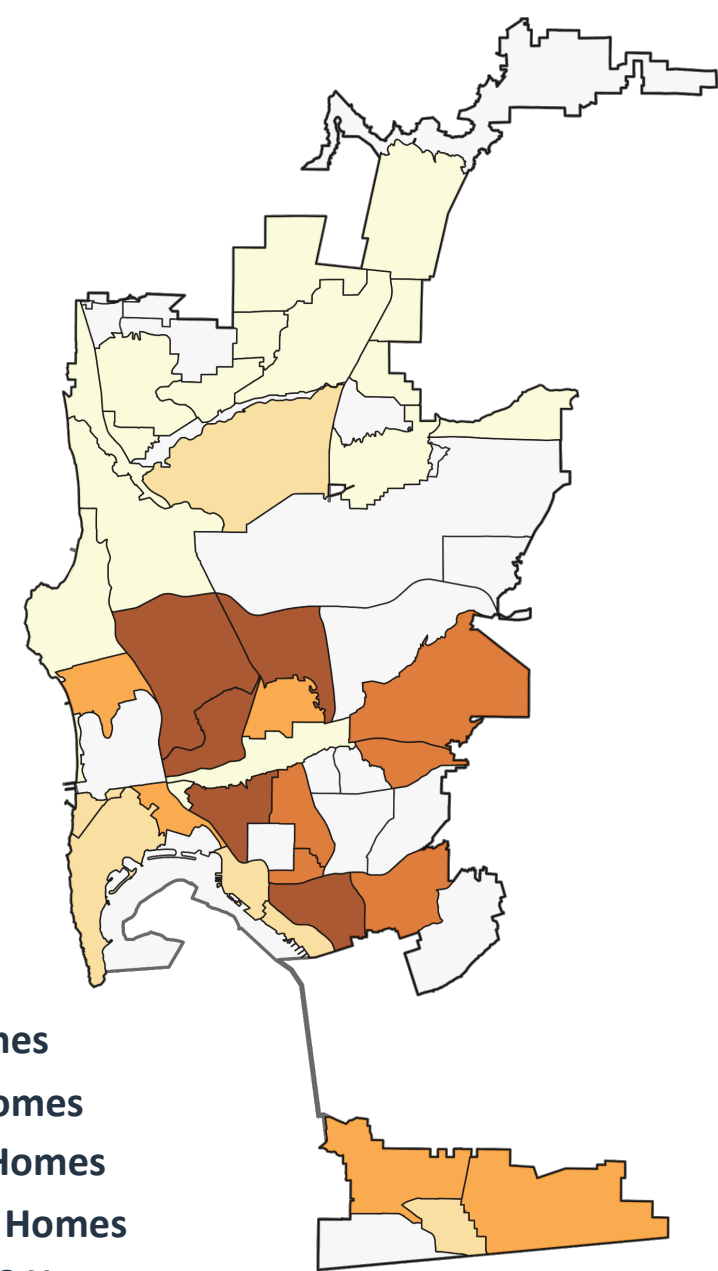
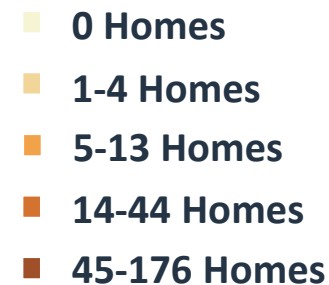
Community Plan Area	Total Homes Permitted
Uptown	1,527
Navajo	1,002
Kearny Mesa	685
Downtown	629
North Park	527
Carmel Mountain Ranch	516
Mira Mesa	392
Clairemont Mesa	364
Southeastern San Diego	360
City Heights	352

- 1-102 Homes
- 103-269 Homes
- 270-527 Homes
- 528-1,000 Homes
- 1,000+ Homes



Where are new affordable homes being permitted for construction in 2024?

Community Plan Area	Total Homes Permitted
City Heights	219
Uptown	175
Clairemont Mesa	138
Southeastern San Diego	114
Kearny Mesa	74
Linda Vista	60
Navajo	40
North Park	42
Kensington-Talmadge	26
Greater Golden Hill	24

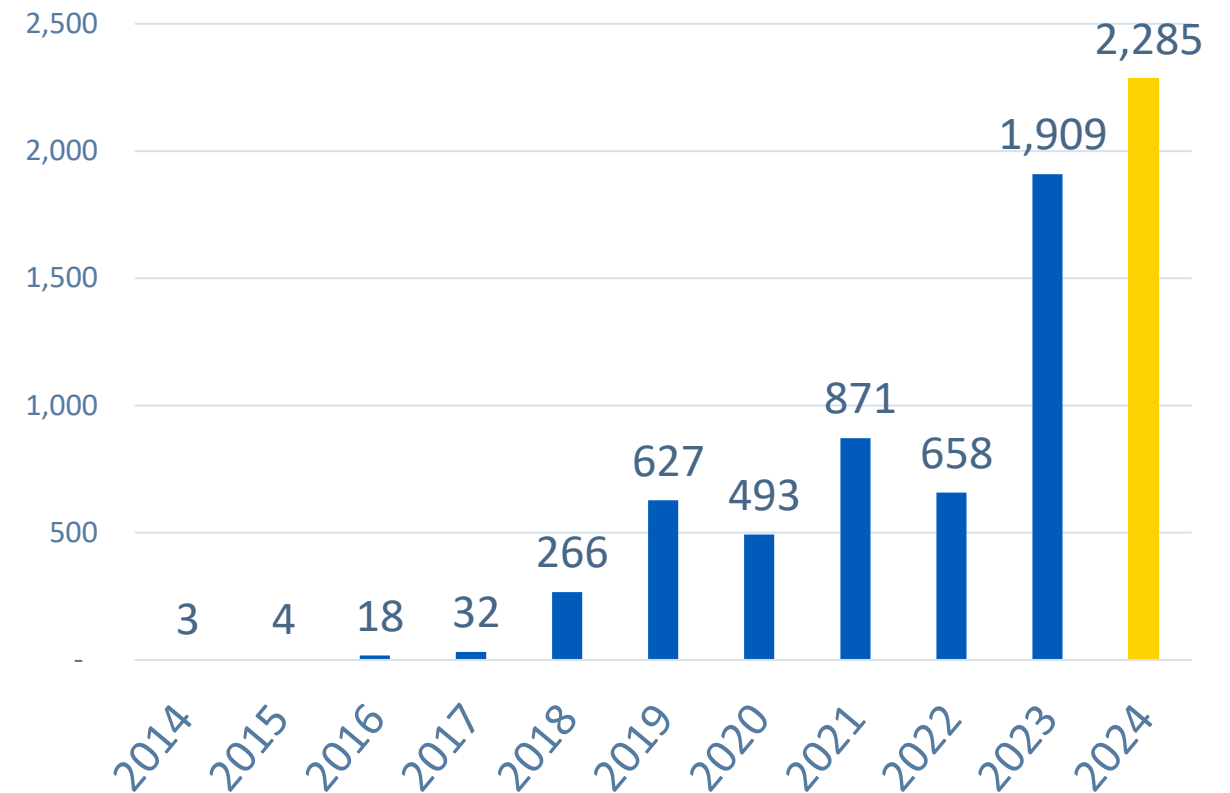


How many ADU Home Building Permits were Issued in 2024?

2,285

New ADU homes permitted for construction in 2024

Accessory Dwelling Unit Homes Permitted

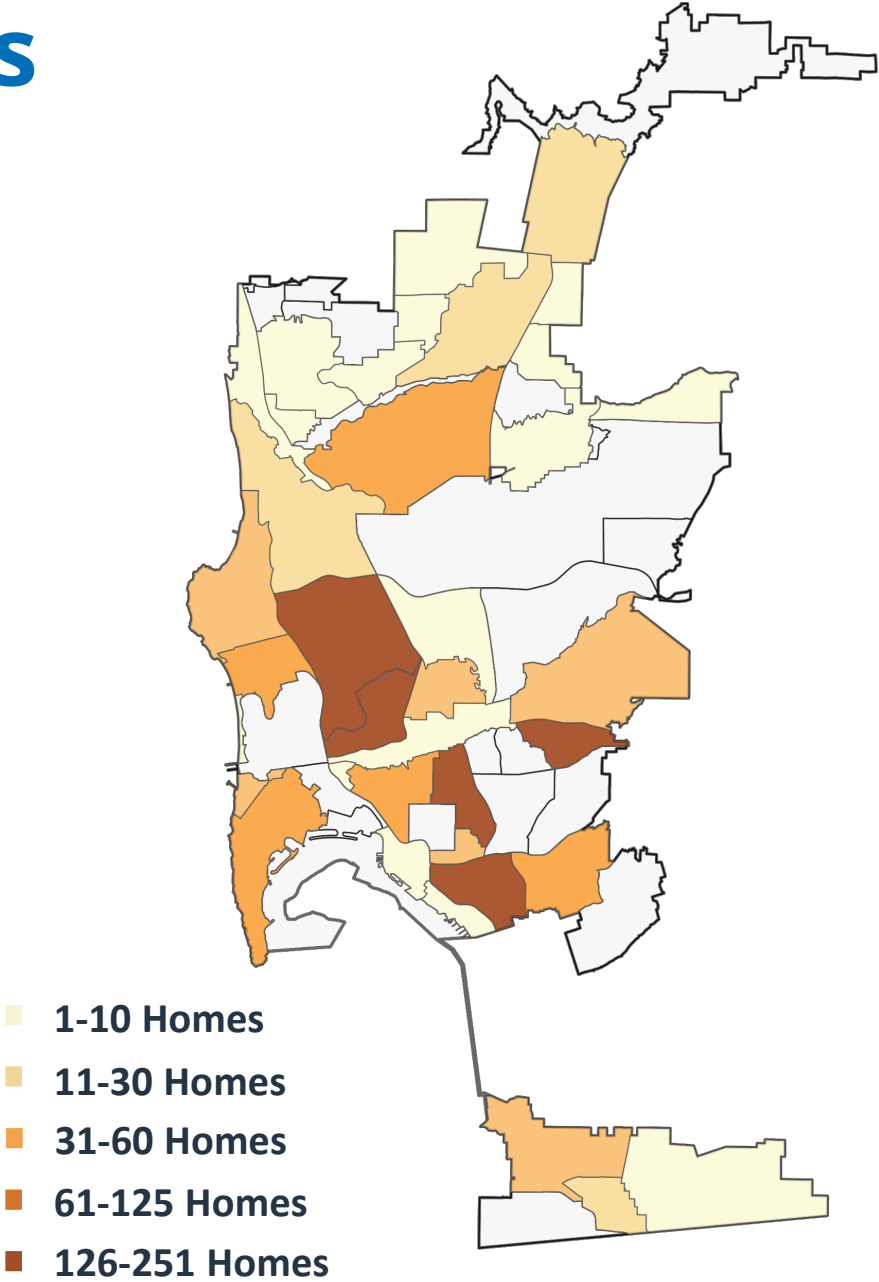


Where are new ADU homes being permitted for construction in 2024?

26%

Of new homes are ADU homes

Top Communities	Total ADU Homes	Total Affordable ADU Homes
Clairemont Mesa	251	43
North Park	204	12
Southeastern San Diego	181	31

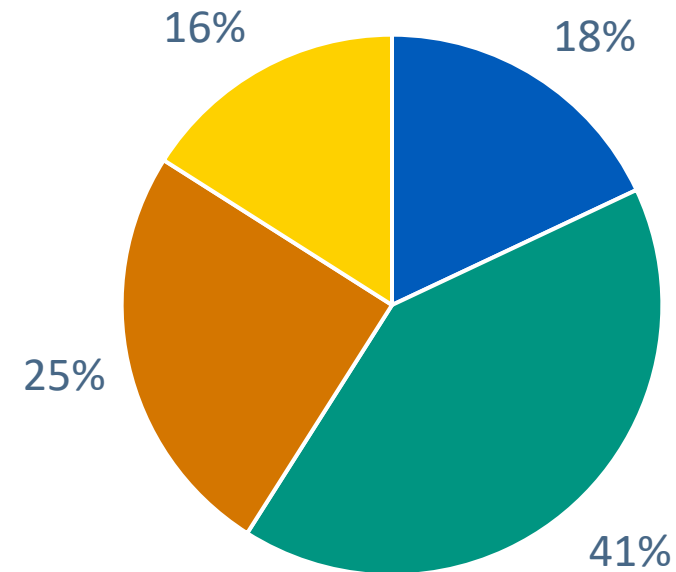


What percentage of Homes Permitted were One-Bedroom or Studios in 2024?

59%

Of new homes were one-bedroom or studio homes in 2024

Number of Bedrooms in Homes Permitted in 2024



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

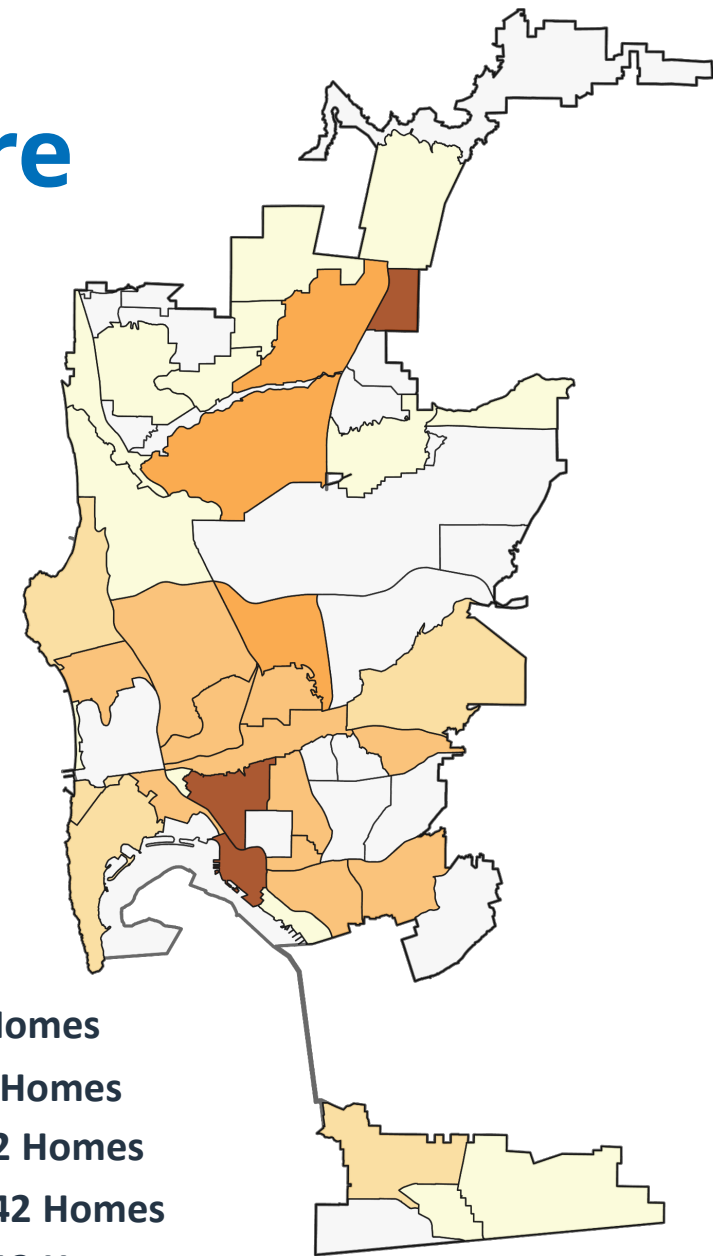
What Percentage of Homes with 2 or more Bedrooms were Permitted in 2024?

41%

Of new homes had 2 or more bedrooms

Top Communities	Permitted Homes with 2 or more Bedrooms
Carmel Mountain Ranch	513
Uptown	429
Downtown	380

- 1-14 Homes
- 15-43 Homes
- 44-132 Homes
- 133-242 Homes
- 243-513 Homes



City Density Bonus Programs

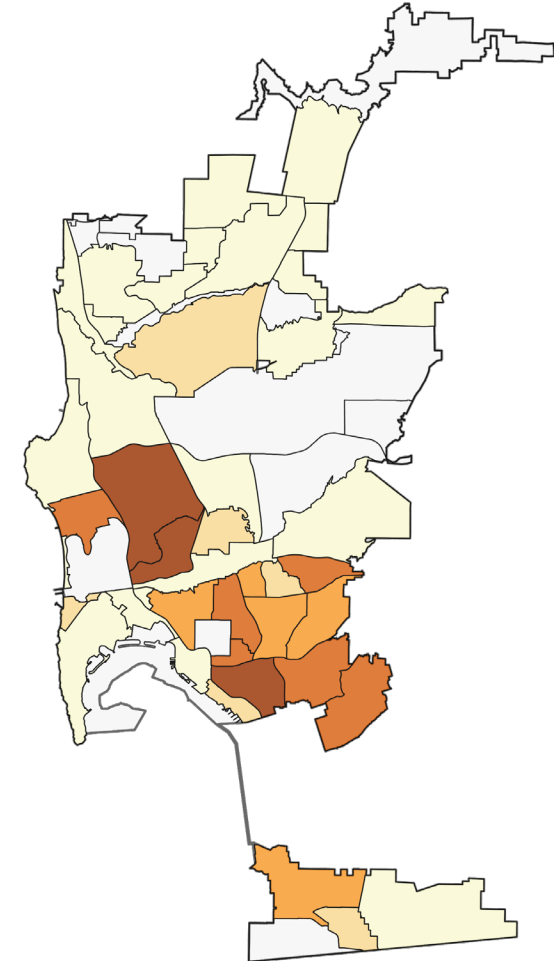
How many ADU Homes using the Density Bonus (ADUDB) Program were permitted in 2024?

653

New ADU homes issued through the ADU Home Density Bonus program in 2024

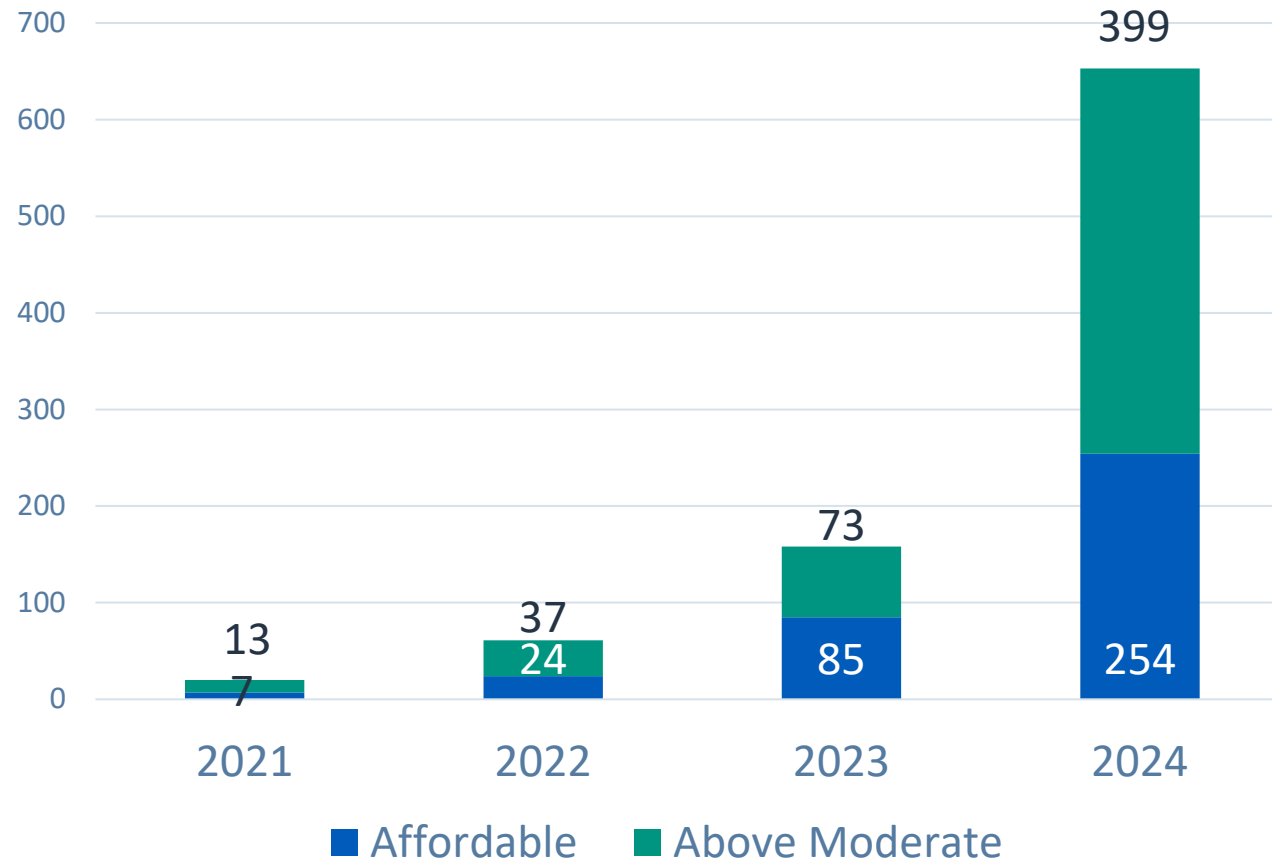
Top Communities	Total ADUDB Homes	Total Affordable ADUDB Homes
Clairemont Mesa	103	42
Linda Vista	102	42
Southeastern San Diego	85	31

- 0-2 Homes
- 3-10 Homes
- 11-24 Homes
- 25-44 Homes
- 45-103 Homes



2021-2024 ADU Home Density Bonus

Top Communities (2021-2024)	Permitted ADUDB Homes
Clairemont Mesa	134
Linda Vista	115
Southeastern San Diego	105
College Area	84
North Park	66
Skyline/Paradise Hills	46
Encanto Neighborhoods	44
Uptown	44
Greater Golden Hill	42
Otay Mesa-Nestor	37



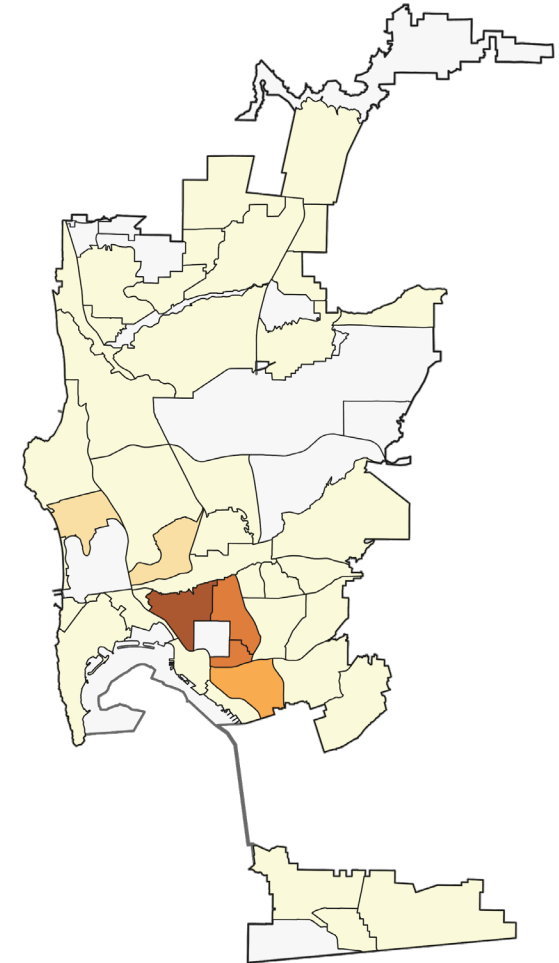
How many homes were permitted with the Complete Communities Housing Solution Program in 2024?

1,917

New homes permitted through the Complete Communities: Housing Solutions program in 2024

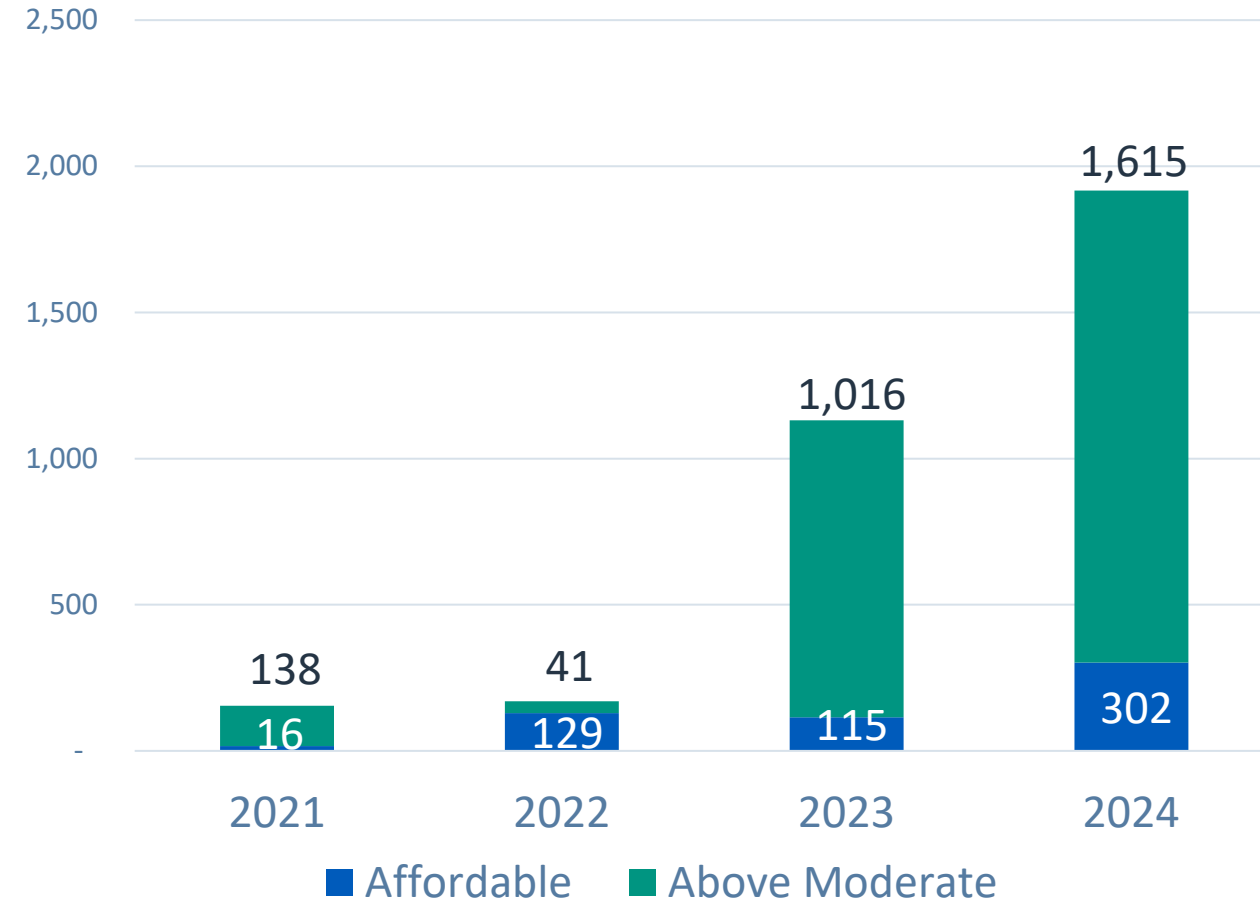
Top Communities	Total CCHS Homes	Total Affordable CCHS Homes
Uptown	1,190	165
North Park	271	28
Greater Golden Hill	213	11

- 0 Homes
- 1-44 Homes
- 45-155 Homes
- 156-271 Homes
- 272-1,190 Homes



2021-2024 Complete Communities: Housing Solutions

Top Communities (2021-2024)	Total CCHS Homes	Total CCH Affordable Homes
Uptown	1,190	165
North Park	271	28
Greater Golden Hill	213	11
Southeastern San Diego	156	81
Linda Vista	44	13
Pacific Beach	44	4



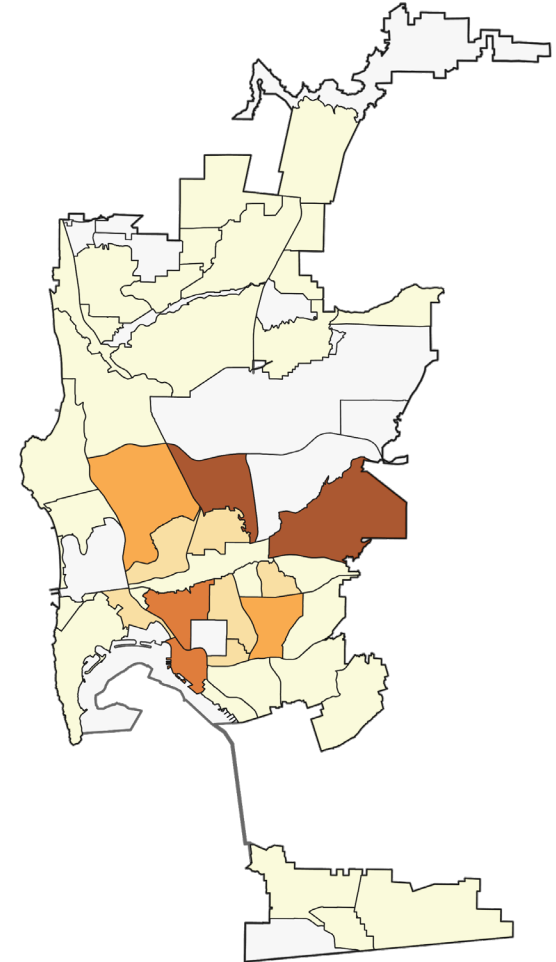
How many Homes were permitted with the Affordable Home Density Bonus Program in 2024?

2,619

New affordable homes were permitted through the density bonus program in 2024

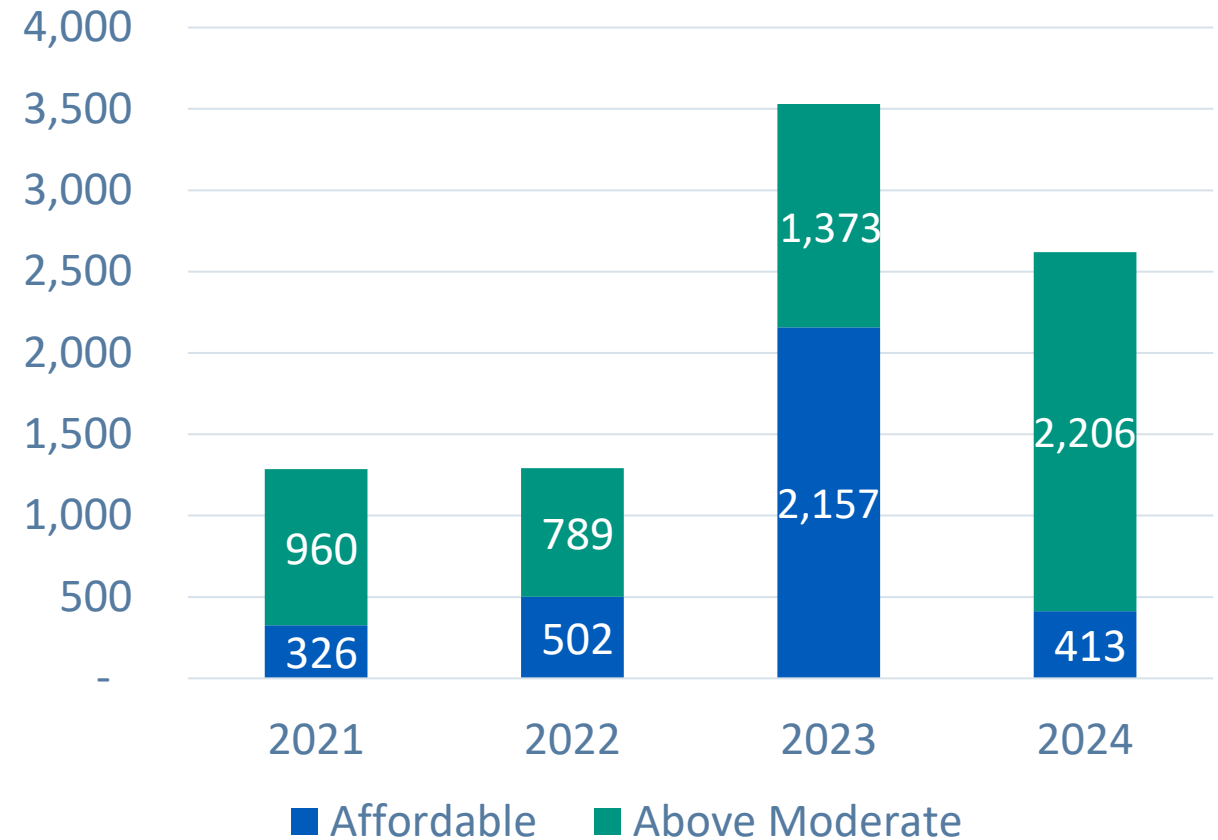
Top Communities	Total Homes	Total Affordable Homes
Navajo	968	43
Kearny Mesa	683	74
Uptown	249	3

- 0-20 Homes
- 21-71 Homes
- 72-137 Homes
- 138-249 Homes
- 250-968 Homes



2021-2024 Affordable Home Density Bonus Program

Top Communities (2021-2024)	Total Homes	Total Affordable Homes
Downtown	1,640	494
Navajo	1,068	53
Kearny Mesa	985	101
Uptown	750	41
North Park	714	110
Otay Mesa	534	83
San Ysidro	468	466
Clairemont Mesa	426	404
College Area	389	322
Encanto Neighborhoods	326	314



How Many Affordable Homes were Permitted between 2021-2024 with the Inclusionary Housing Program?

235

new affordable homes permitted through Inclusionary Housing Program

Top Communities (2021-2024)	Total Homes
Downtown	77
College Area	34
Kearny Mesa	22
Rancho Peñasquitos	22
North Park	19
Navajo	14
Otay Mesa	14
Linda Vista	9
Peninsula	7
Encanto Neighborhoods	6

How Many Homes were Permitted Between 2023-2024 with the Affordable Housing Permit Now Program?

3,094

New homes permitted through the Affordable Housing Permit Now program

Top Communities (2023-2024)	Total Homes
Encanto Neighborhoods	506
Downtown	479
Clairemont Mesa	450
City Heights	392
Mission Valley	357
San Ysidro	200
Black Mountain Ranch	171
Eastern Area	131
Rancho Bernardo	100
Rancho Peñasquitos	81

Trends and Implementation

How many Homes were Permitted between 2014-2024?

**Average of 5,100
homes permitted
Between 2014 and 2022**

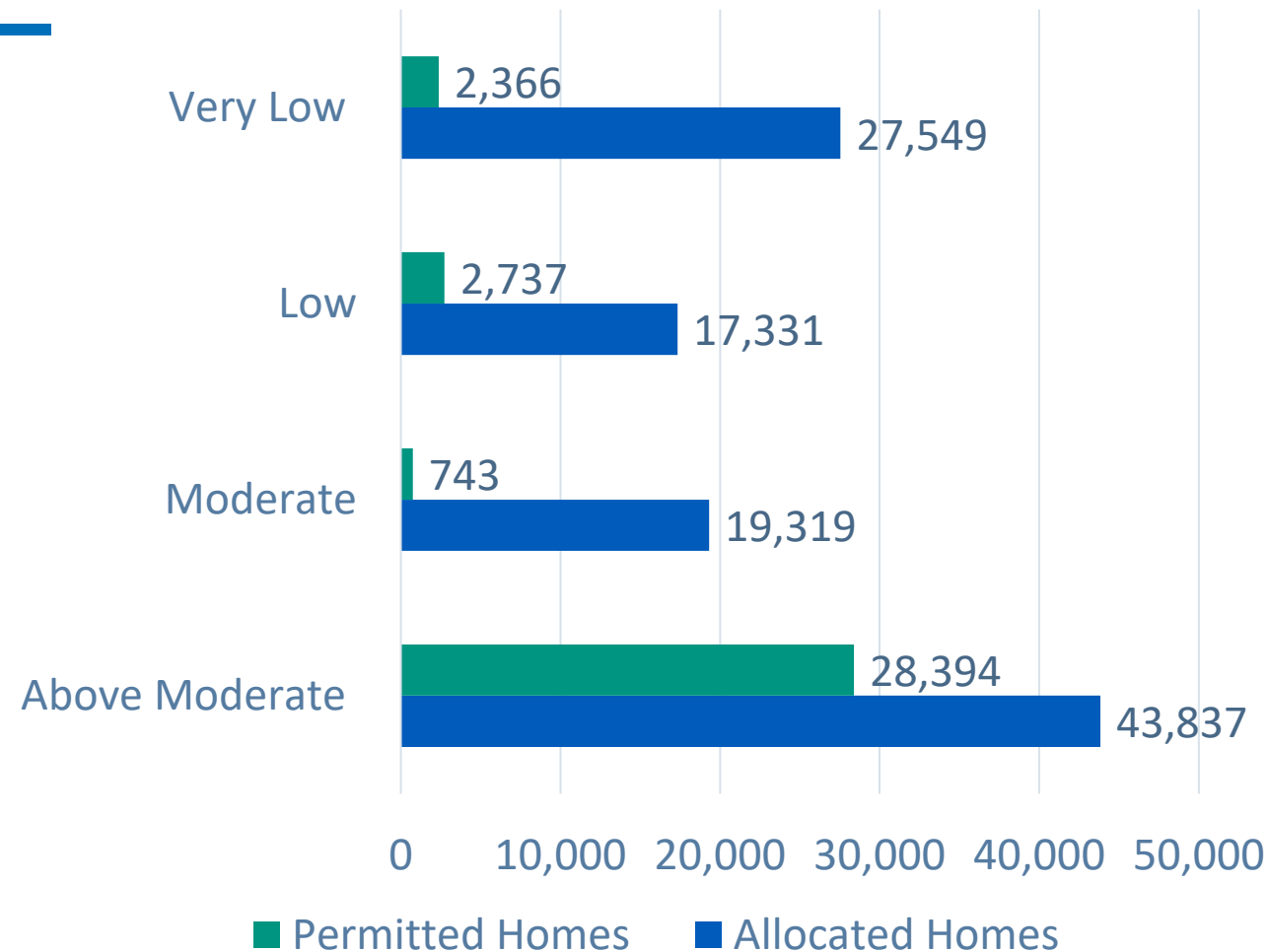
**Average of 9,200
homes permitted
Between 2023 and 2024**

Year	Very Low	Low	Moderate	Above Moderate	Total
2014	229	184	-	1,995	2,408
2015	265	446	-	4,221	4,932
2016	103	253	-	7,028	7,384
2017	324	295	-	4,395	5,014
2018	249	203	-	3,437	3,889
2019	602	314	-	4,281	5,197
2020	937	768	3	4,774	6,482
2021	192	269	25	4,700	5,186
2022	459	173	43	4,722	5,397
2023	941	1,421	214	7,117	9,693
2024	276	320	465	7,721	8,782

RHNA Allocations

**On pace to meet
above-moderate
income home goals**

Remaining Homes for RHNA by Income Level



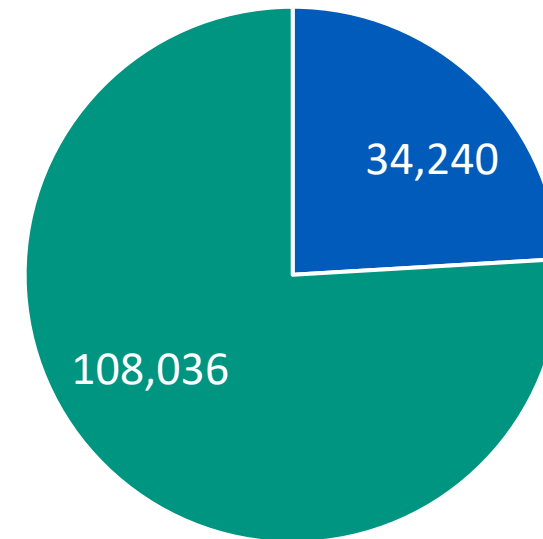
Total Homes Permitted in 6th RHNA Cycle (2021-2024)

**To meet housing goals:
Need to Permit:**

- **73,796 Homes Total**
- **14,760 Homes per Year**

Between 2025 - 2029

Total Homes Permitted



■ Total Homes Permitted ■ RHNA Allocation

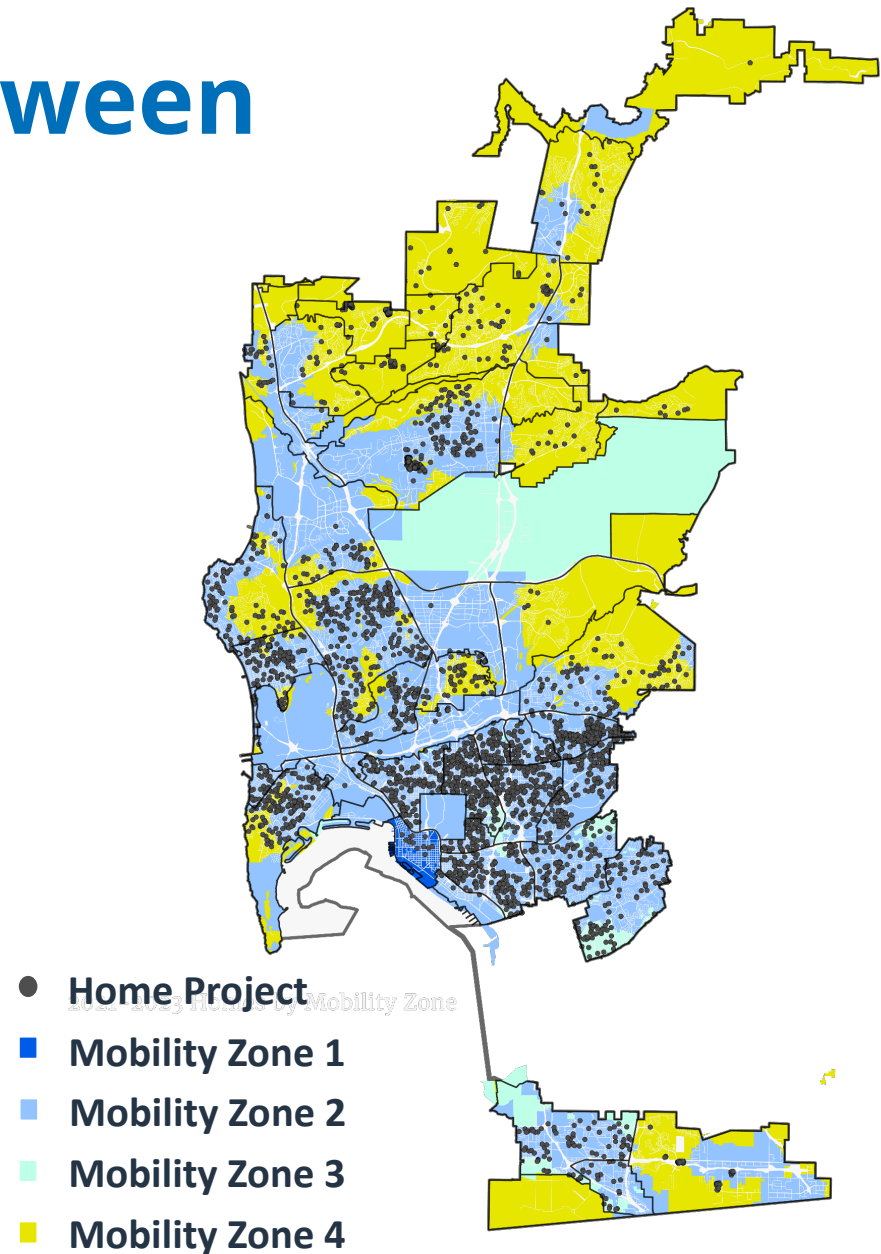
In which Mobility Zone are Home being Permitted between 2021-2024?

86%

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

90%

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



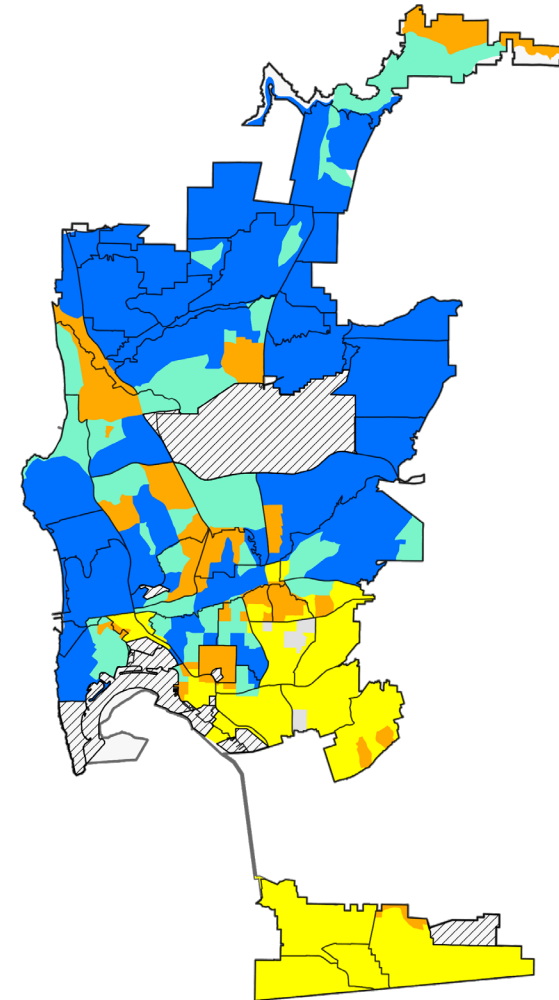
What percentage of homes were Permitted in a High or Highest Resource Area Between 2021-2024?

68%

Of the City is in a High or Highest Resource areas

31%

Of affordable homes were permitted in High or Highest Resource areas

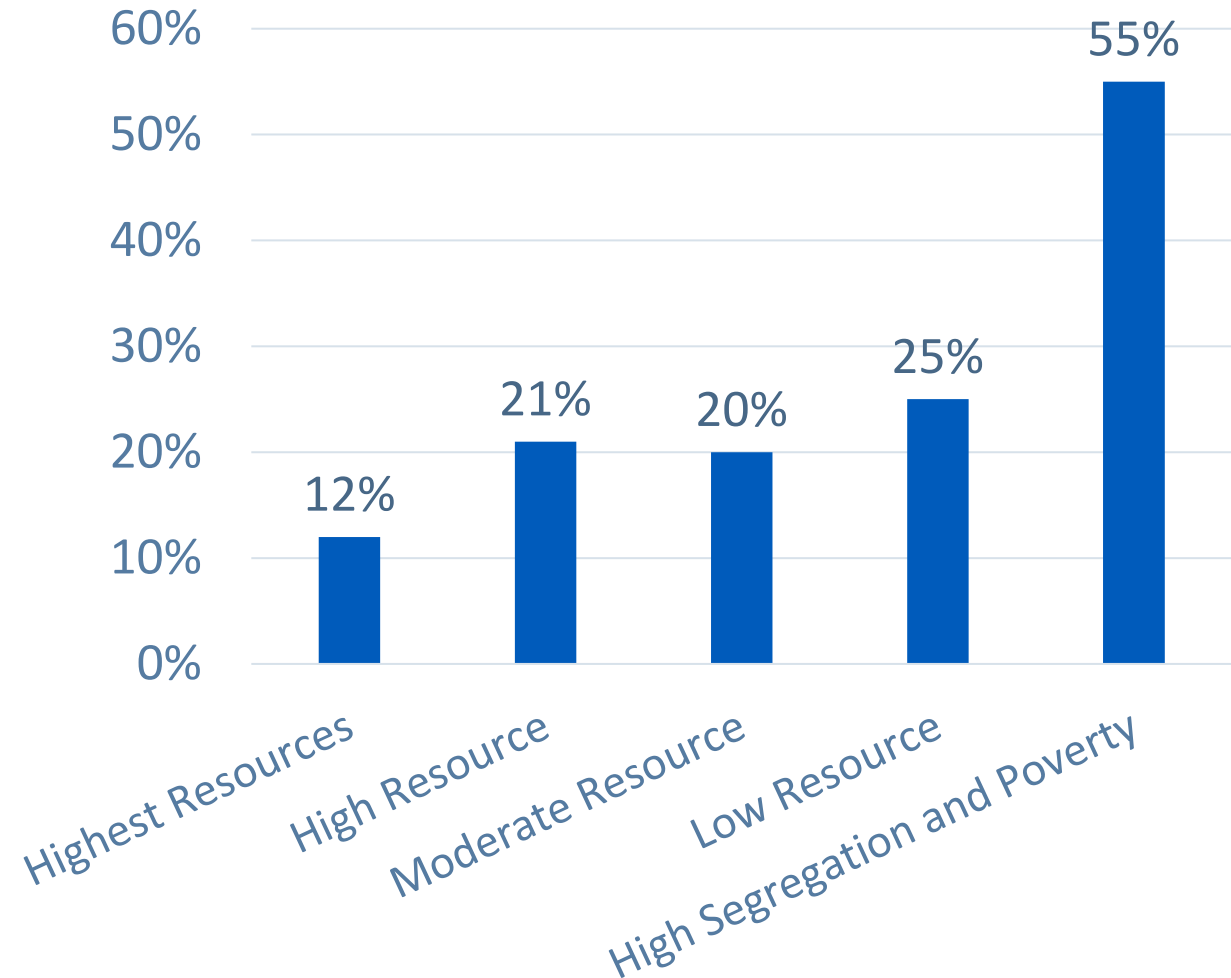


- Highest Resource
- High Resource
- Moderate Resource
- Low Resource
- High Segregation & Poverty
- Missing/Insufficient Data

Residential Land Use

12 percent of Highest Resource area and 21 percent of High Resource area permit multi-home developments

Share of Land Zoned for Multi-Home Development by TCAC Resource Area



Key Takeaways and Next Steps

What are the Key Takeaways?



8,782 homes permitted in 2024



1,061 affordable homes permitted in 2024

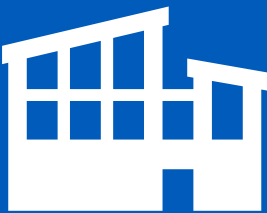


Need to permit 73,796 homes, including 58,353 affordable homes by 2029, to meet RHNA goals

What are the Fair Housing Key Takeaways?



Deed-restricted affordable homes are primarily approved as part of multi-home developments

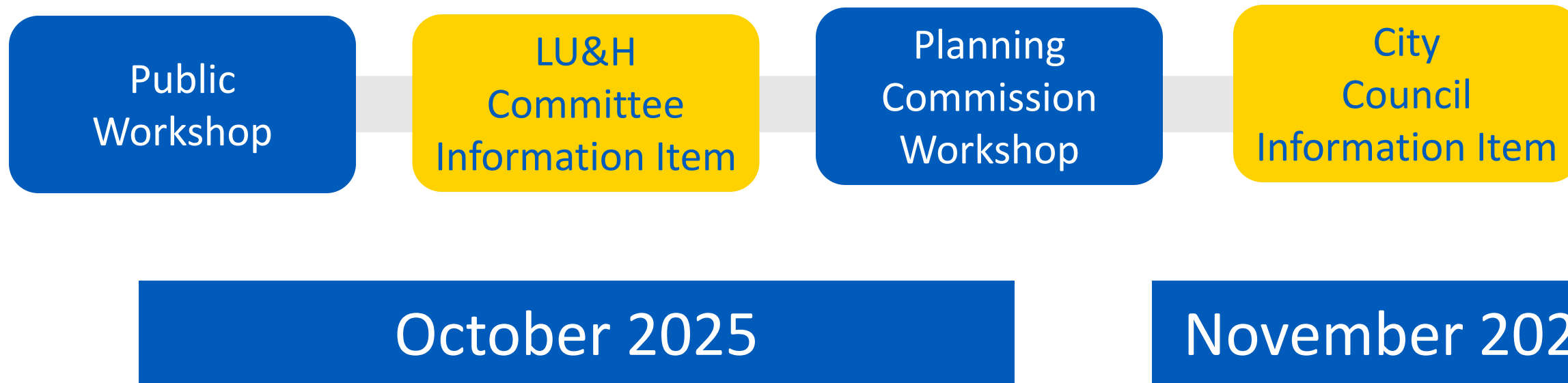


Low resource areas are producing the most affordable homes



More affordable homes needs to be built in Highest and High Resource areas

What are the Next Steps?



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