

# SPUR

**Ideas + Action for a Better City**

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#SFHousingStrategies*

An aerial photograph of a dense residential neighborhood in San Francisco, showing a variety of colorful row houses in shades of blue, yellow, orange, and white. The houses are built on a hillside, and the image is taken from a high angle, looking down at the buildings.

# Strategies for San Francisco's Housing Future

Presentation to SPUR  
August 1, 2018



San Francisco  
**Planning**

## THREE EFFORTS



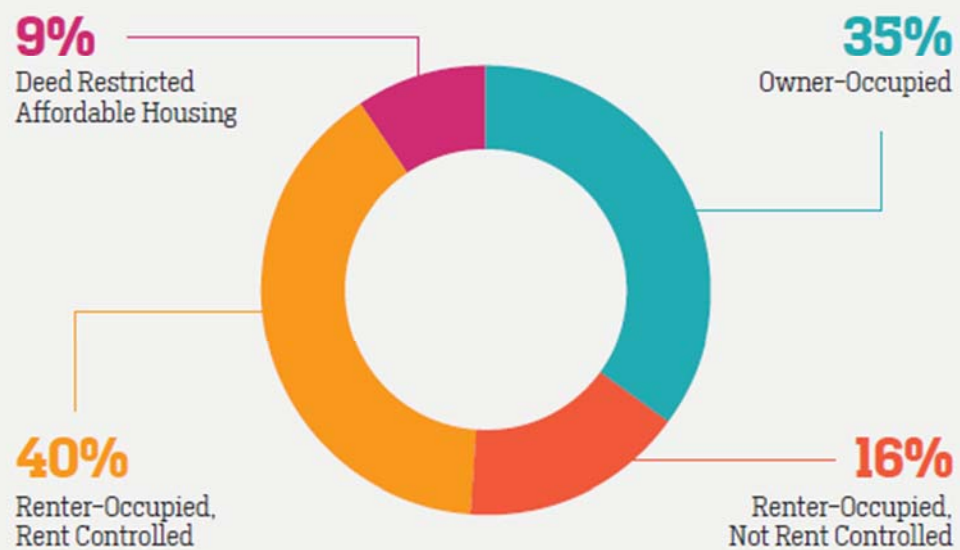
**Housing  
Needs and  
Trends  
Report**

**Housing  
Affordability  
Strategy**

**Community  
Stabilization and  
Anti-displacement  
Strategy**

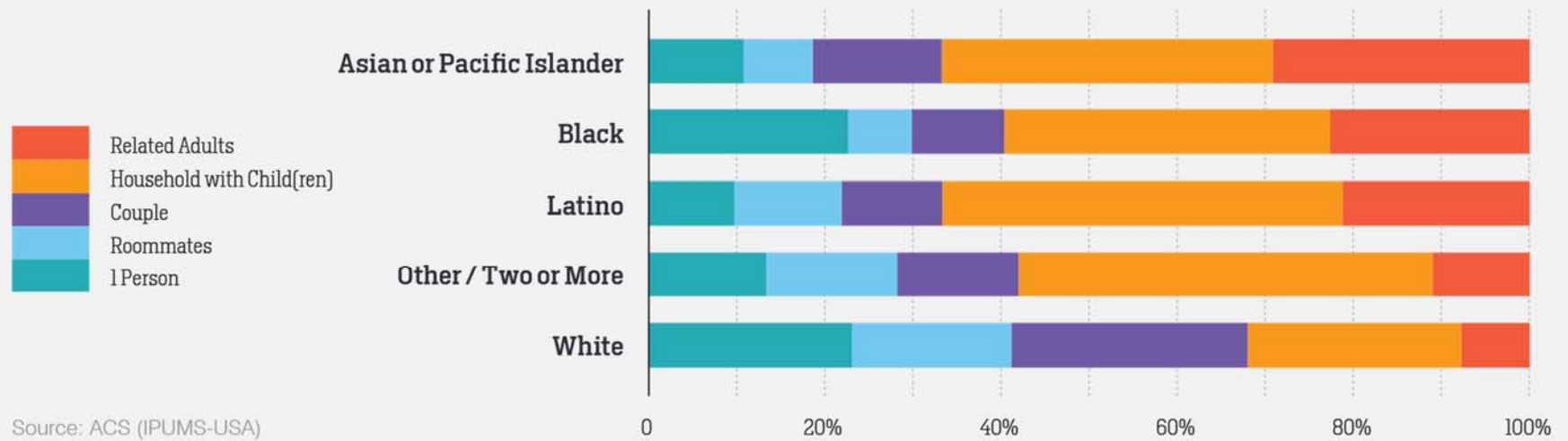
## QUESTION 1

## Tenure of Occupied Housing Units in San Francisco, 2015



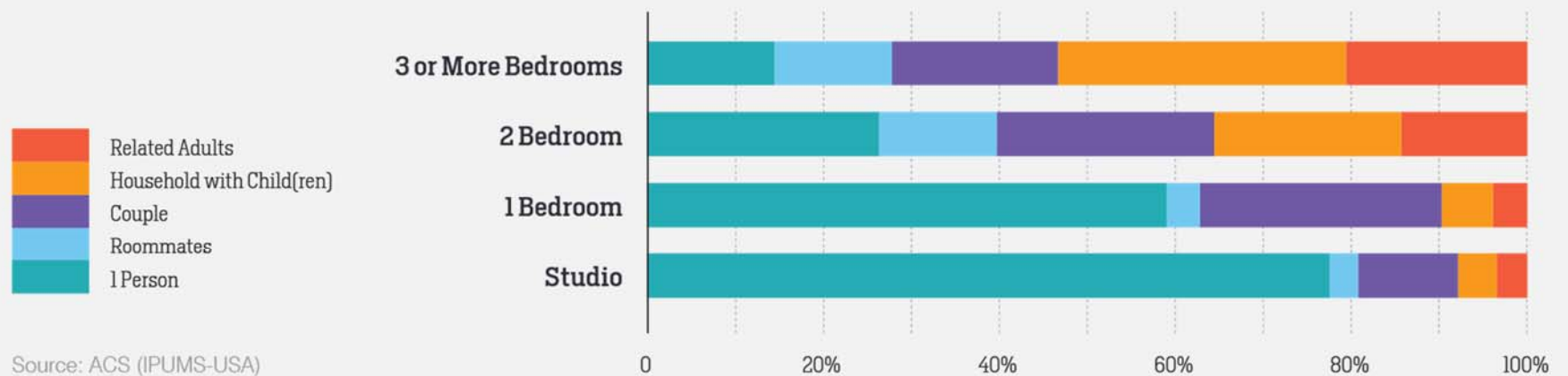
PUMS DATA

**Distribution of San Francisco Household Types by Race/Ethnicity, 2011-2015**



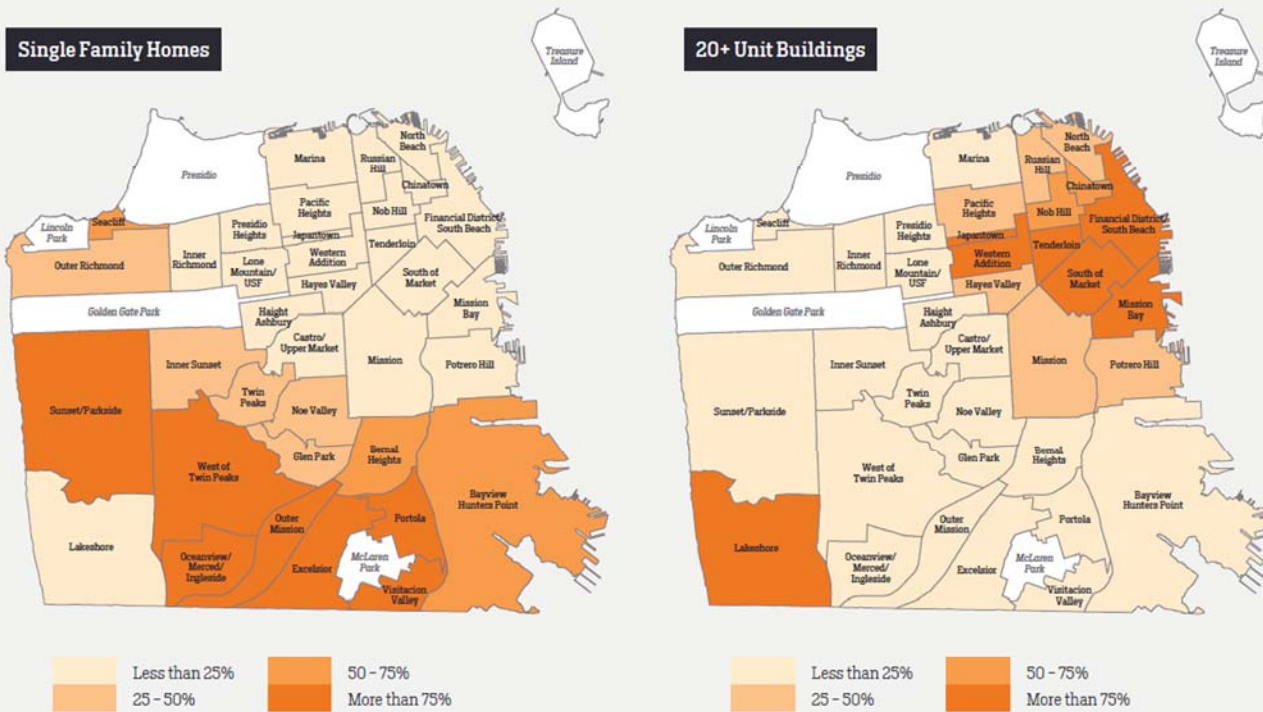
**PUMS DATA**

Percentage of Housing Units by Unit Size and Household Type in San Francisco, 2015



PUMS DATA

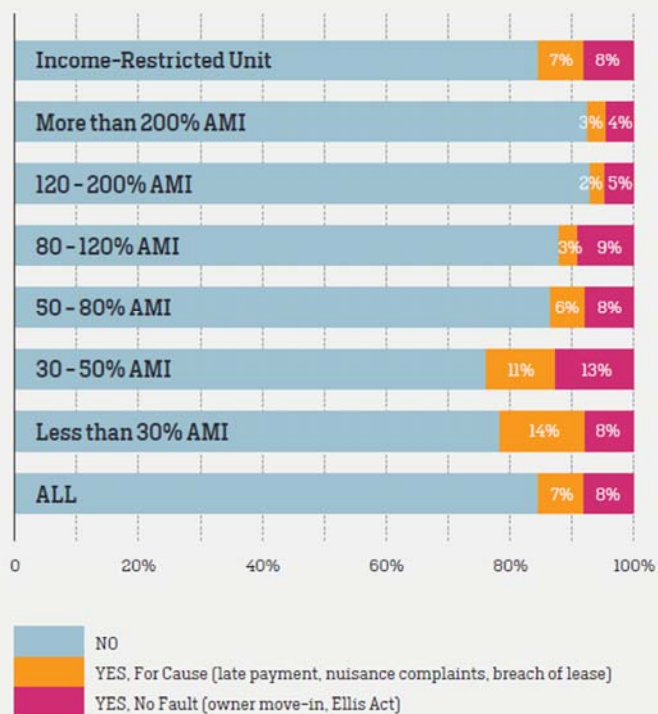
## Distribution of Building Sizes Across Neighborhoods in San Francisco, 2016



## Planning Department Data: Housing Densities by Neighborhood

FIGURE 42.

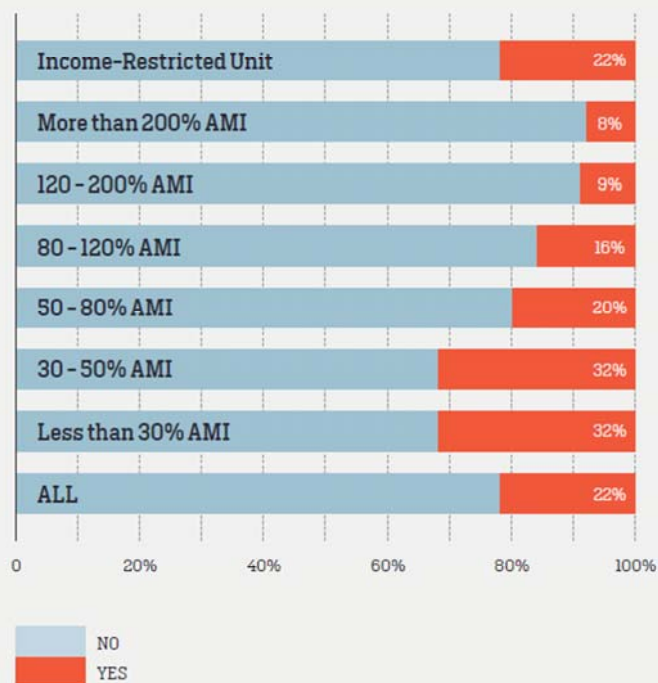
Percentage of San Francisco Housing Survey Respondents Who Reported Being Threatened with an Eviction in Previous 5 Years by Income, 2018



Source: San Francisco Planning Department Housing Survey

FIGURE 43.

Percentage of San Francisco Housing Survey Respondents Who Reported Unstable Housing Conditions in Previous 5 Years by Income, 2018

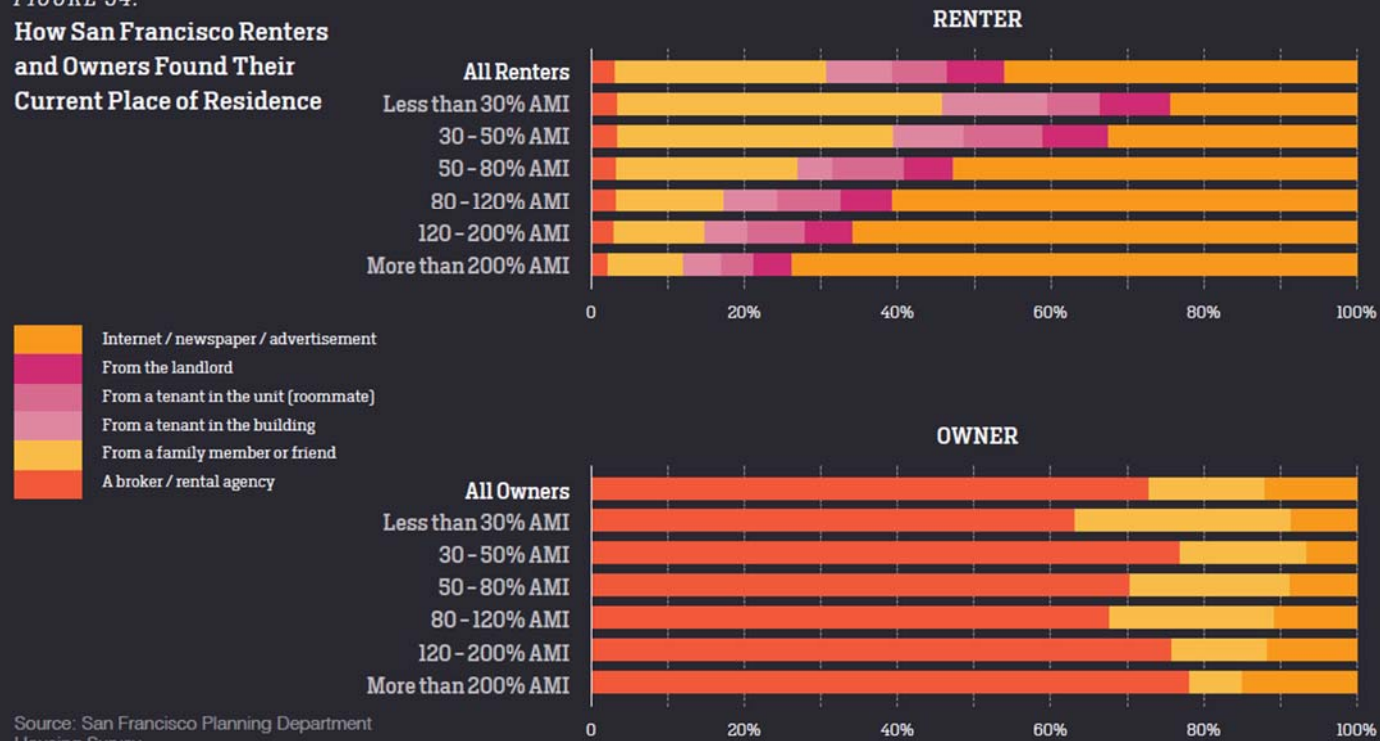


Source: San Francisco Planning Department Housing Survey

## SF Housing Survey: Tenure Security

FIGURE 34.

**How San Francisco Renters and Owners Found Their Current Place of Residence**

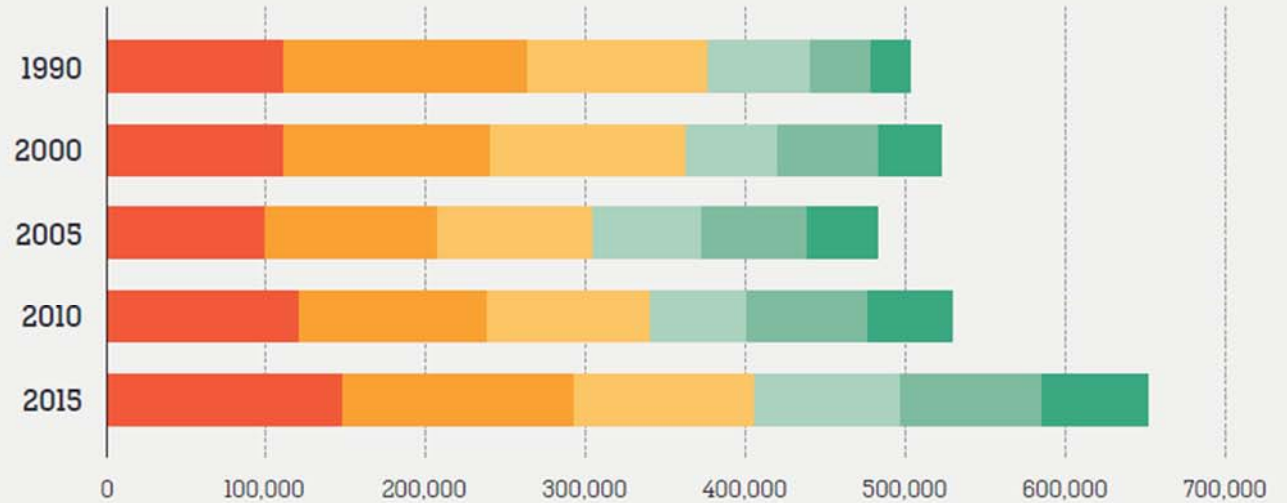


Source: San Francisco Planning Department  
Housing Survey

## SF Housing Survey: How San Franciscans Find Their Homes

## QUESTION 2-

### Number of Workers in San Francisco by Wage Group, 1990 - 2015

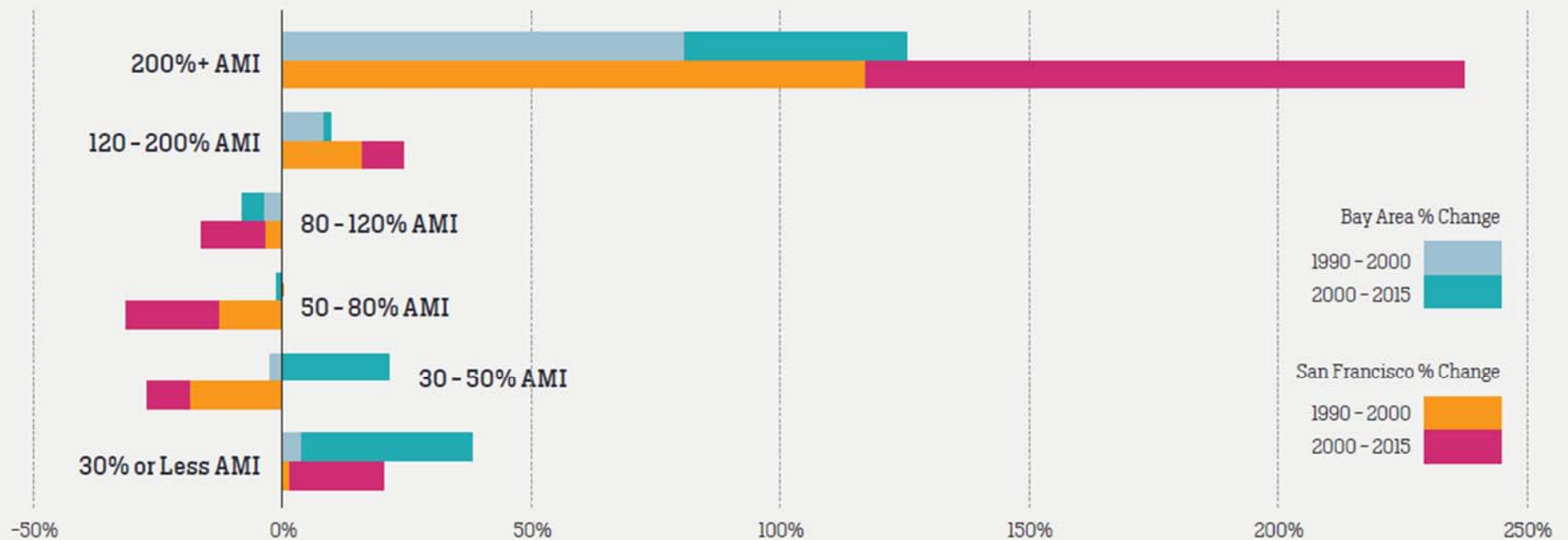


Decennial Census (1990, 2000, 2010) and ACS (2005, 2015) (IPUMS-USA)

**San Francisco Gained Workers in All Wage Groups, but Particularly High Earners**

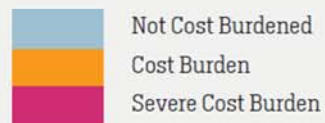
# Cumulative Percent Change in Number of Households Since 1990 by Income Group in 2000 and 2015, San Francisco and Bay Area

Source: Decennial Census (2000 and 2010) and American Community Survey (2015) (IPUMS-USA)

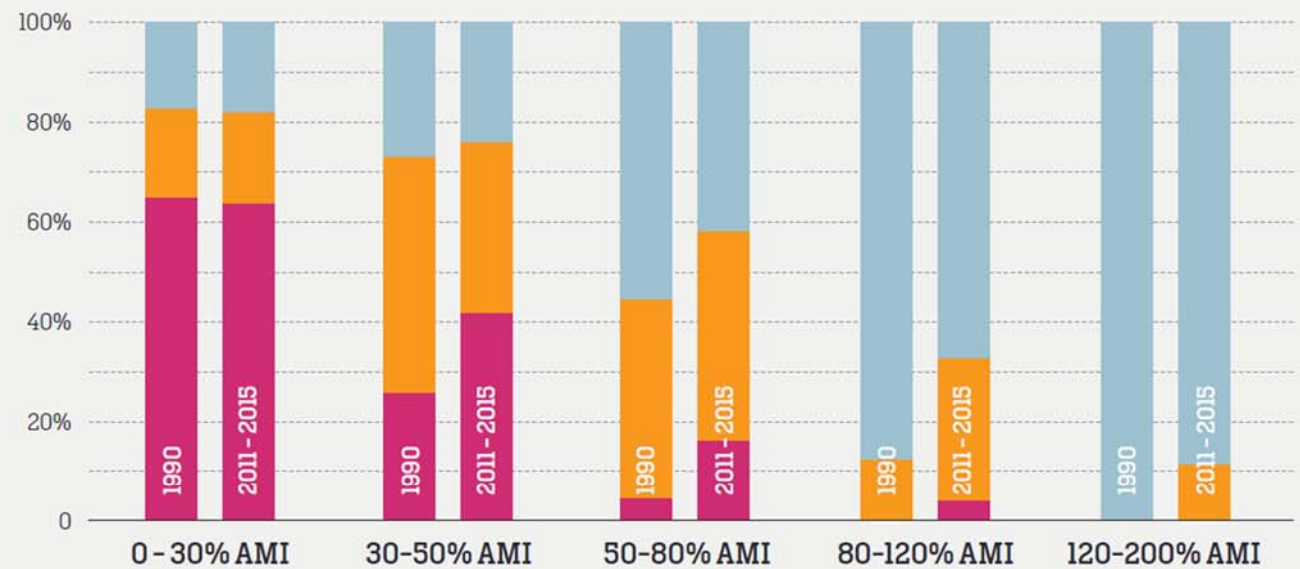


**Above Moderate Income HHs Increased, Low and Mod Income HHs Decreased**

## Percent of San Francisco Renter Households that Are Under Rent Burden by Household Income, 1990 and 2015



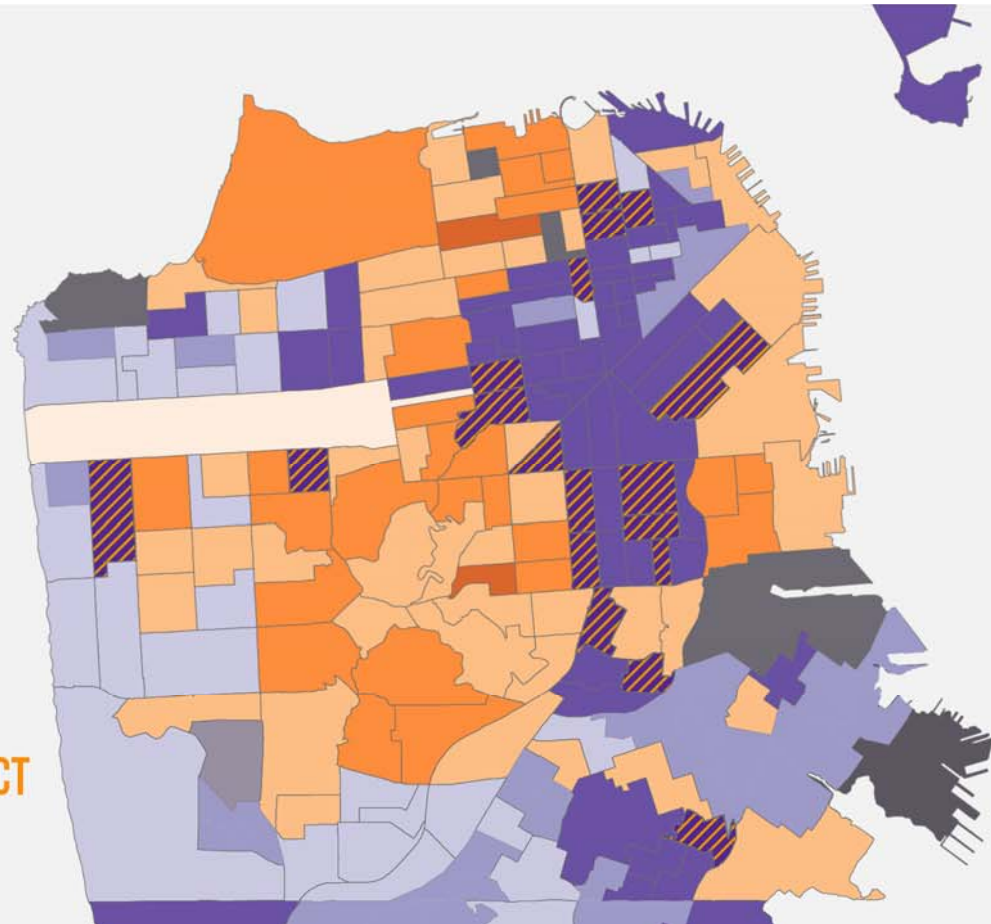
Source: Decennial Census (2000 and 2010) and American Community Survey (2015) (IPUMS-USA)



## CHANGE TO HOUSING COST BURDEN BY RACE

### Stages of Gentrification and/or Displacement

- LI - Not losing low income households or very early stages
- LI - At risk of gentrification and/or displacement
- LI - Ongoing Gentrification and/or Displacement
- MHI - Advanced Gentrification
- MHI - Not losing low income households or very early stages
- MHI - At risk of exclusion
- MHI - Ongoing Exclusion
- MHI - Advanced Exclusion
- College Town
- CV too high
- Missing Variable Data
- Data Variables

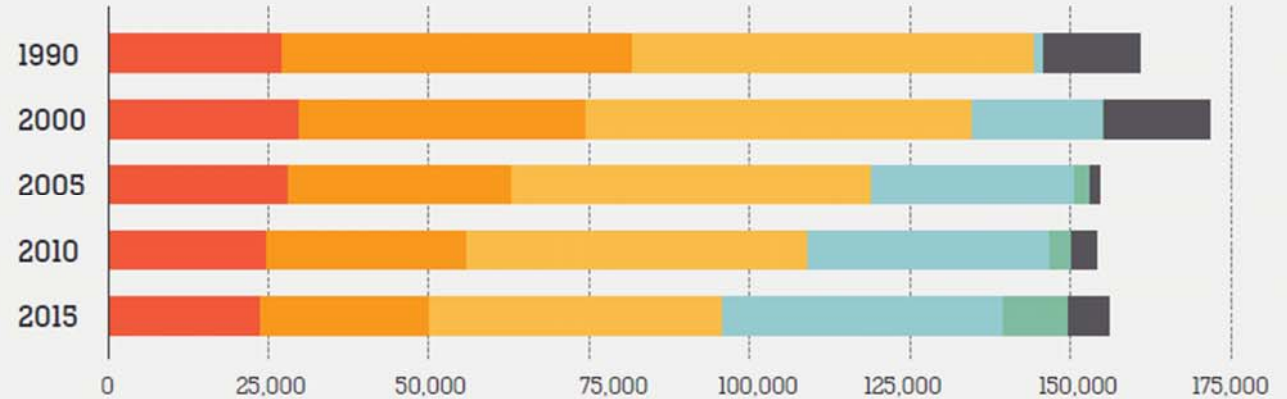


**UC BERKELEY'S URBAN DISPLACEMENT PROJECT**

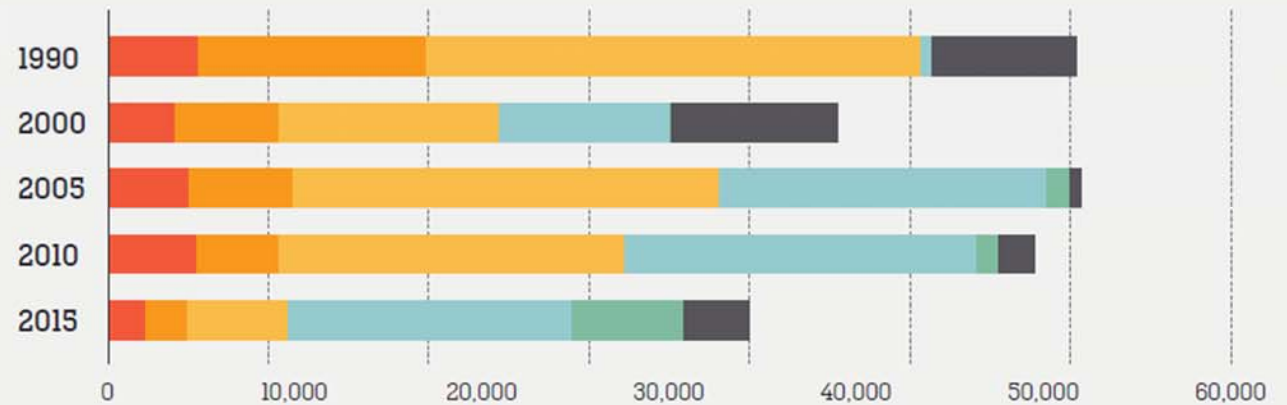
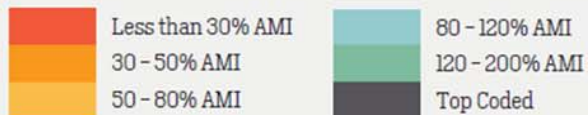
**Understanding Stages of Gentrification and Displacement**

## QUESTION 3

**Number of Residential Multifamily Rental Units Built Before 1980 Affordable by Income Level in San Francisco, 1990 - 2015**



**Number of Residential Multifamily Rental Units Built Before 1980 Rented in Previous 2 Years Affordable by Income Level in San Francisco, 1990-2015**



**Older Rental Stock Remains Relatively Affordable but Affordability Has Eroded**



**Tenant  
Protections**



**SRO Residential Hotels  
Protections**



**Preservation of  
Affordable Units**



**Production of  
Affordable Housing**



**Small Business, Non- Profit,  
Artists Protections**



**Workforce and Economic  
Development**

**Assessing** Existing Programs and Policies

## TOOLKIT: AFFORDABLE HOUSING PRESERVATION

Policy / Program	Lead Agency
Small Sites Program	MOHCD
Preservation of Sound Housing	Planning
Residential Hotel Conversion Ordinance	Department of Building Inspection
Condo Conversion Restrictions	Public Works
Rental Assistance Demonstration (RAD)	Housing Authority
Short-Term Rental Regulations	Office of Short-Term Rentals

### Assessing Existing Programs and Policies

## TOOLKIT: TENANT PROTECTION TOOLS

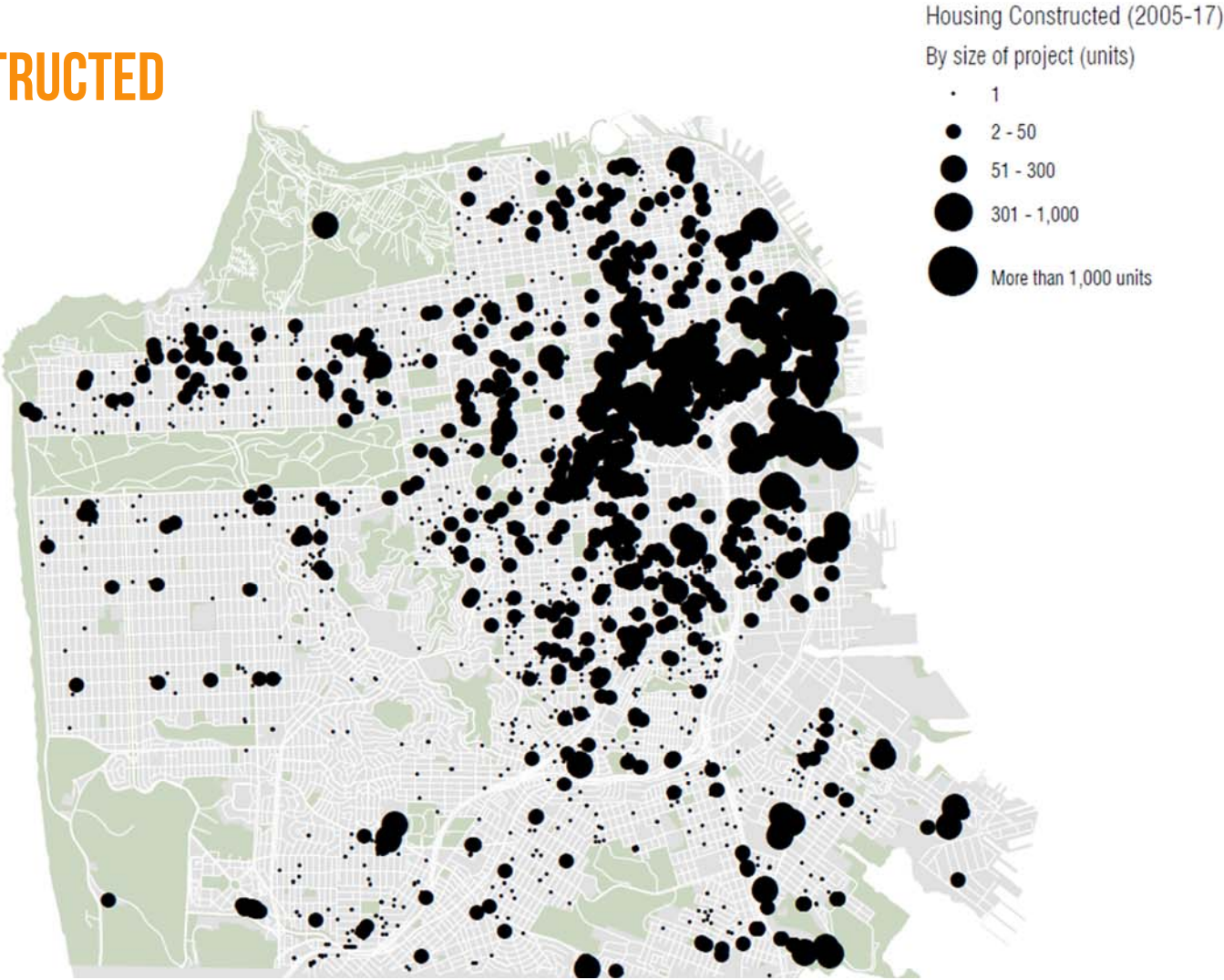
Policy / Program	Lead Agency
Tenant Counseling and Education	Rent Board, Non Profits
Tenant Legal Representation	Non-profits
Eviction Protections and Relocation Benefits	Rent Board
Lottery Preference Programs	MOHCD
Rental Assistance Programs	MOHCD



## **Assessing** Existing Programs and Policies

## QUESTION 4

# HOUSING CONSTRUCTED

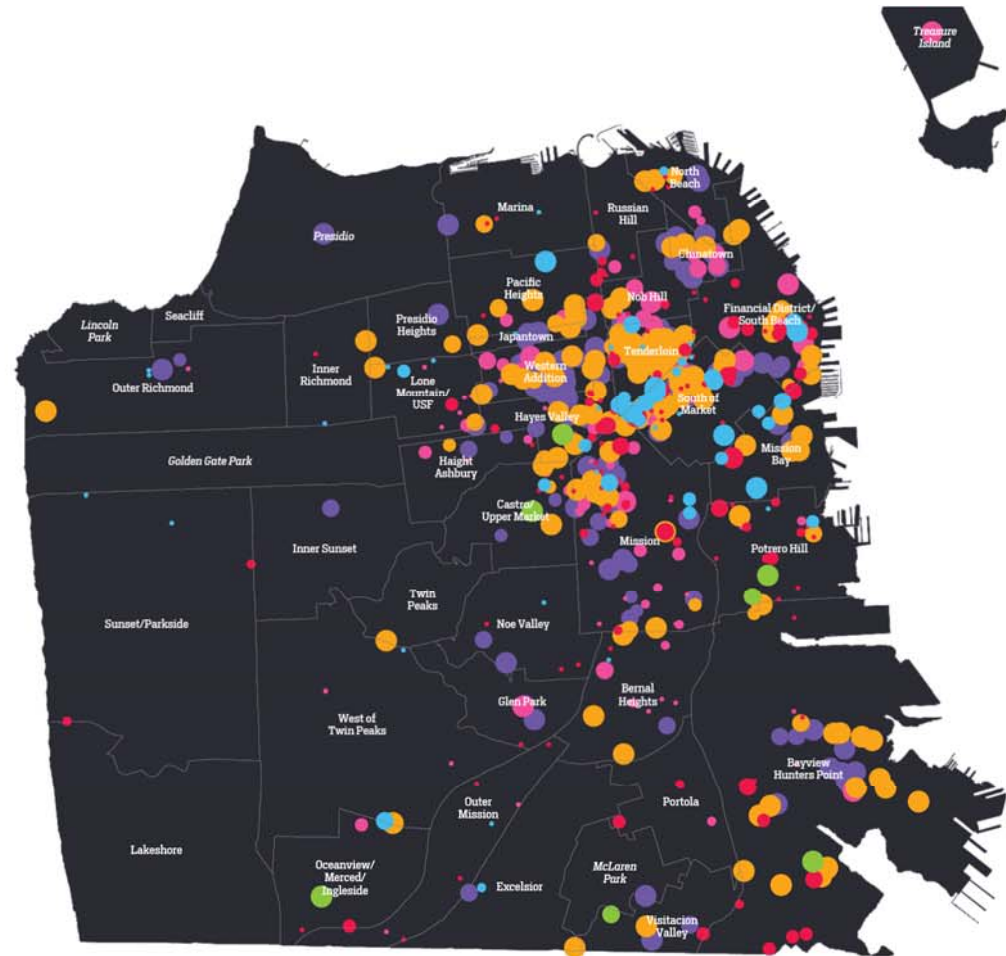


# BELOW MARKET RATE UNITS

Location of Affordable Housing Units in San Francisco  
by Type and Number of Units Per Building, 2018



Unit Size of Affordable Housing Developments

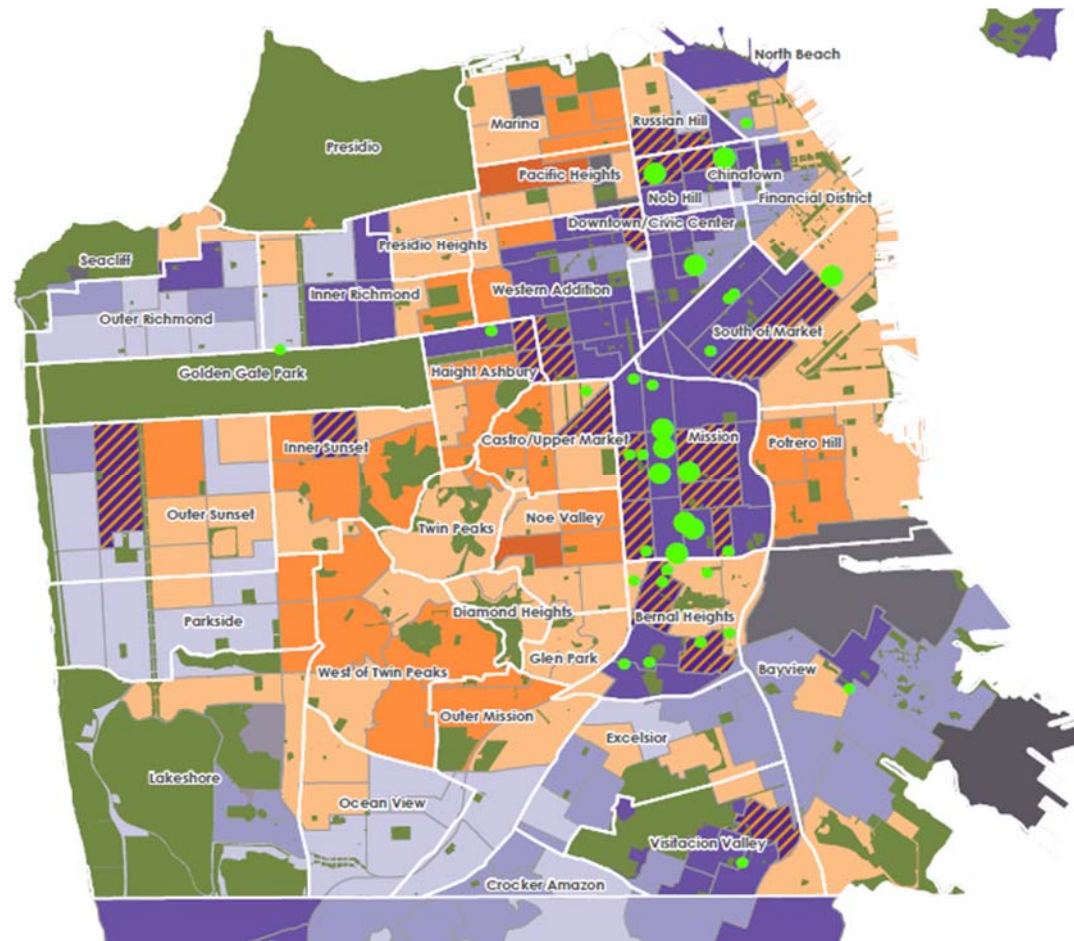


# SMALL SITES

## Small Sites Projects

### By size

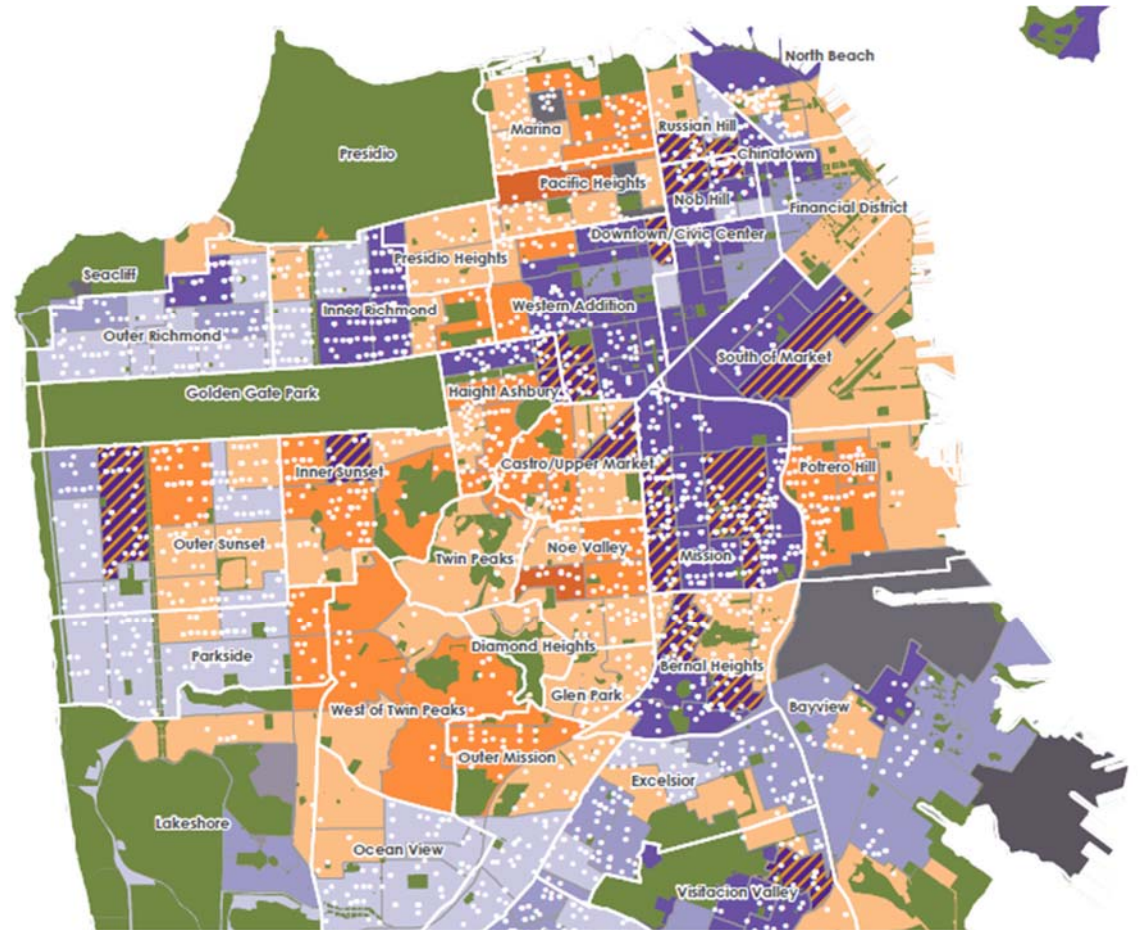
- 3 - 6 units
- 7 - 25 units



## Assessing Existing Programs and Policies

## EVICTIIONS AND STAGES OF DISPLACEMENT/ GENTRIFICATION

1 white dot = 1 no-fault eviction  
(since 2008)



Further Understanding of Neighborhood Trends

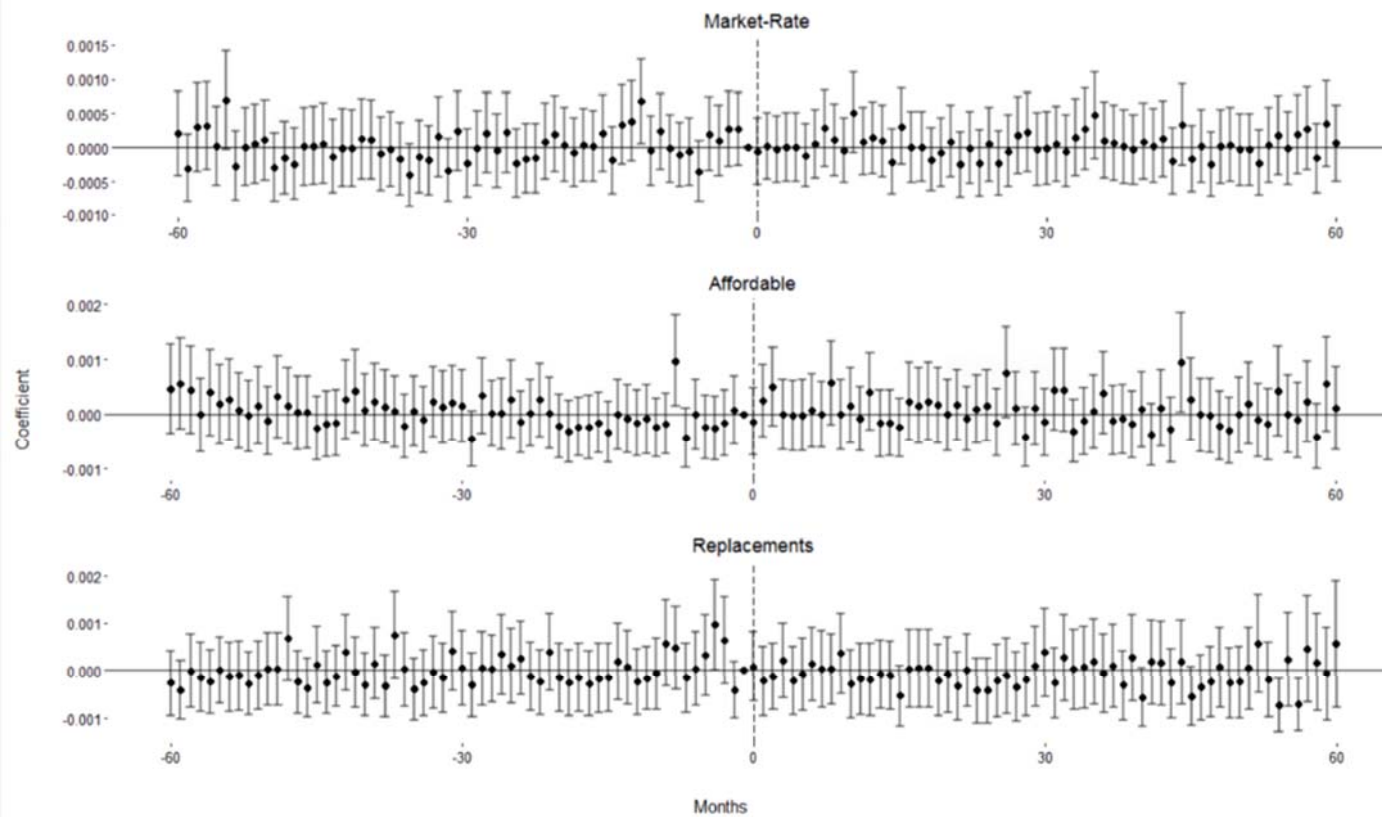


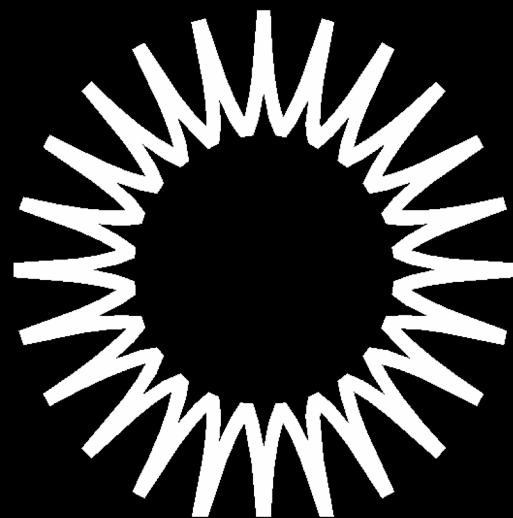
Figure 5: Event Studies

## Housing Research



**San Francisco**  
**Planning**

**THANK YOU!**



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