



# SPUR REGIONAL STRATEGY

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SPUR REPORT  
HOUSING



# Meeting the Need

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The path to 2.2 million new homes  
in the Bay Area by 2070

APRIL 2021







**SPUR REPORT SERIES**

EXECUTIVE SUMMARY

APRIL 2021

# Housing the Region

**A 50-year vision for solving the Bay Area's  
affordability crisis**

# Three reports

**Housing as Infrastructure**



**Meeting the Need**



**Rooted and Growing**



# Filter for Recommendations

- 50 year vision
- Sized to solve the problem
- Focused on people and units
- Housing as a human right as a value, while acknowledging and making use of the way housing is treated as a commodity in the United States
- Solutions that work within current systems and which also push to change systems
- Solutions work together and reinforce each other

Some recommendations may not be currently possible politically. Future advocacy work will be needed to change the frame of possibility.



# Meeting the Need: The path to 2.2 million new homes



## **Meeting the Need: The path to 2.2 million new homes**

Rec 1: Change zoning to allow for a sufficient amount of housing near transit, commercial corridors and suburban infill locations

Rec 2: Strengthen the state's land use laws to support housing production

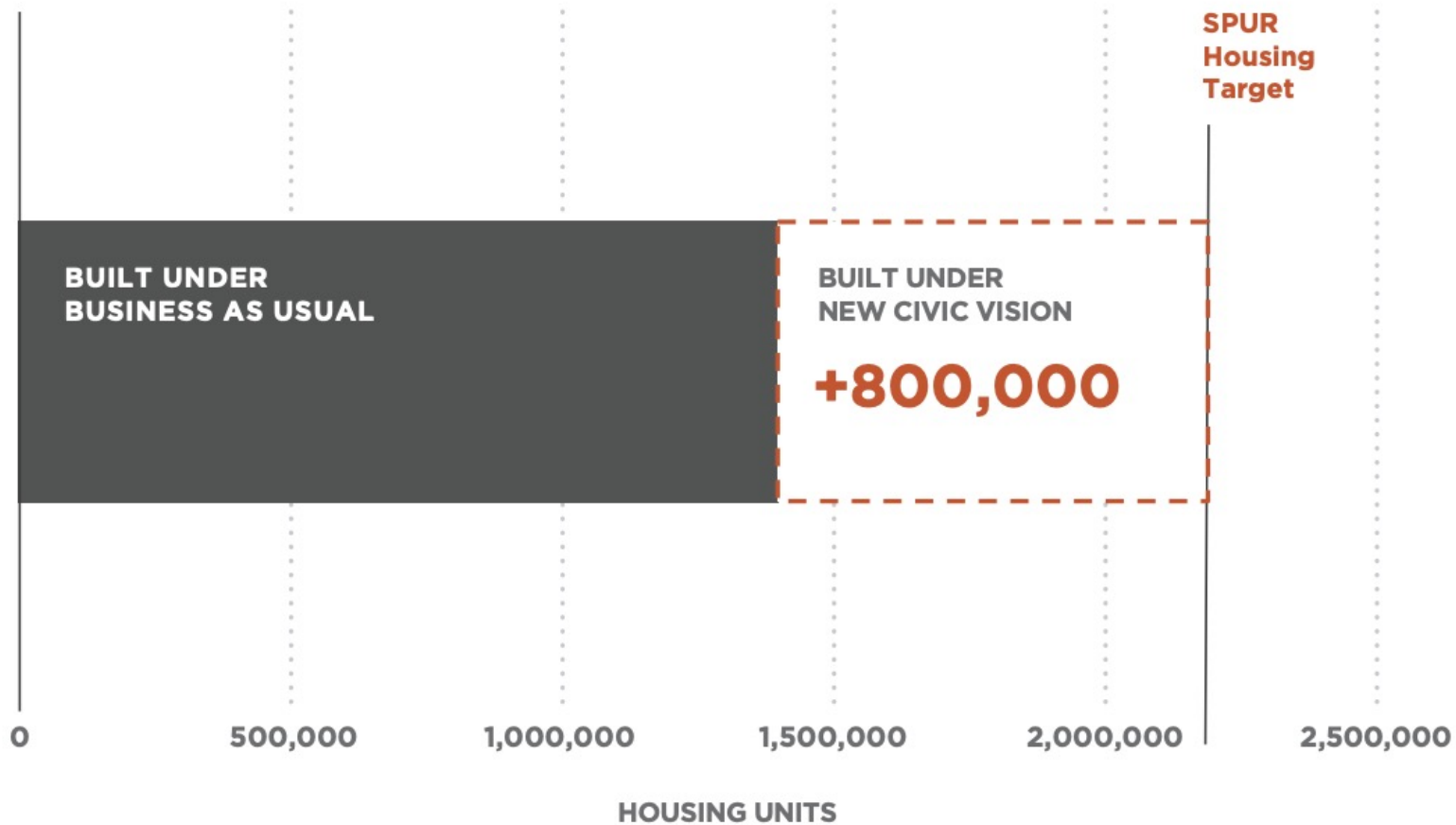


# Rec 1: Change zoning to allow for a sufficient amount of housing near transit, commercial corridors and suburban infill locations

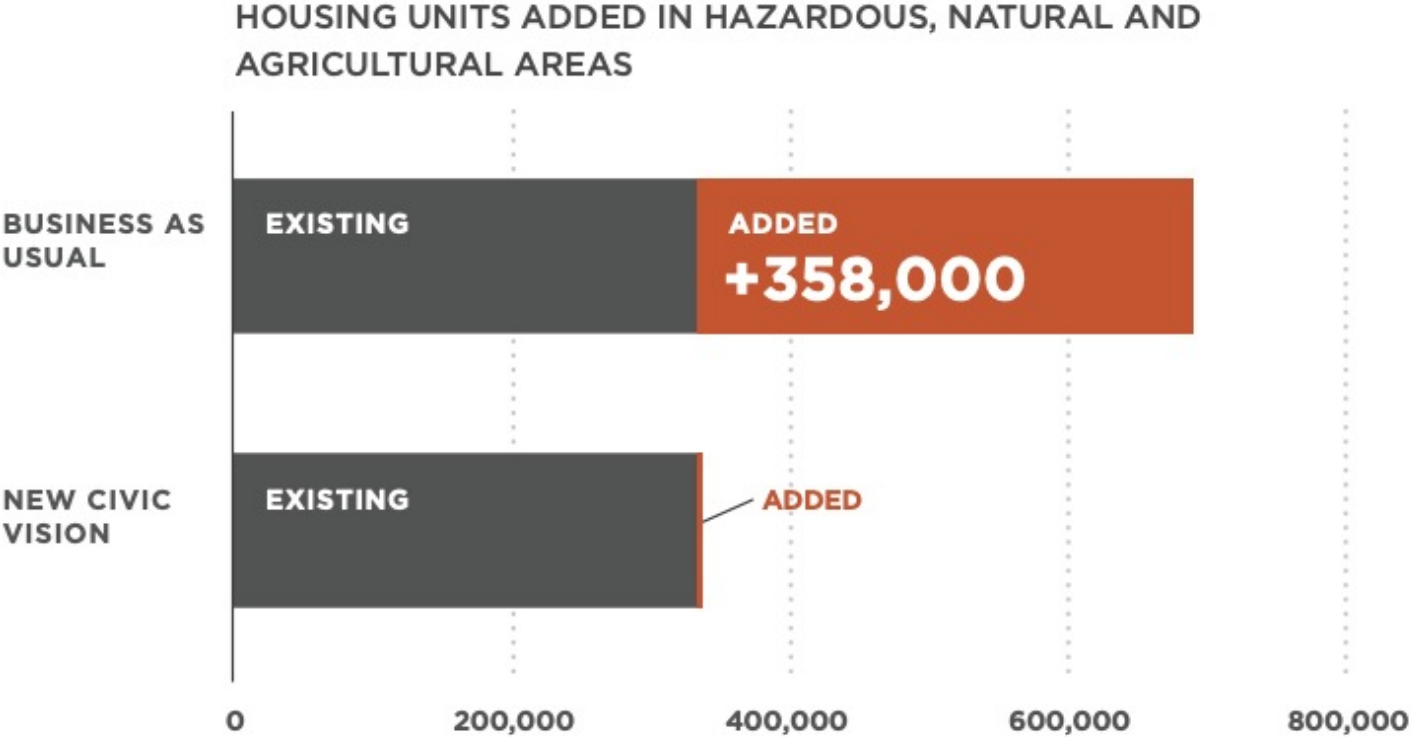




# Under Business As Usual, the Bay Area Won't Have Enough Housing



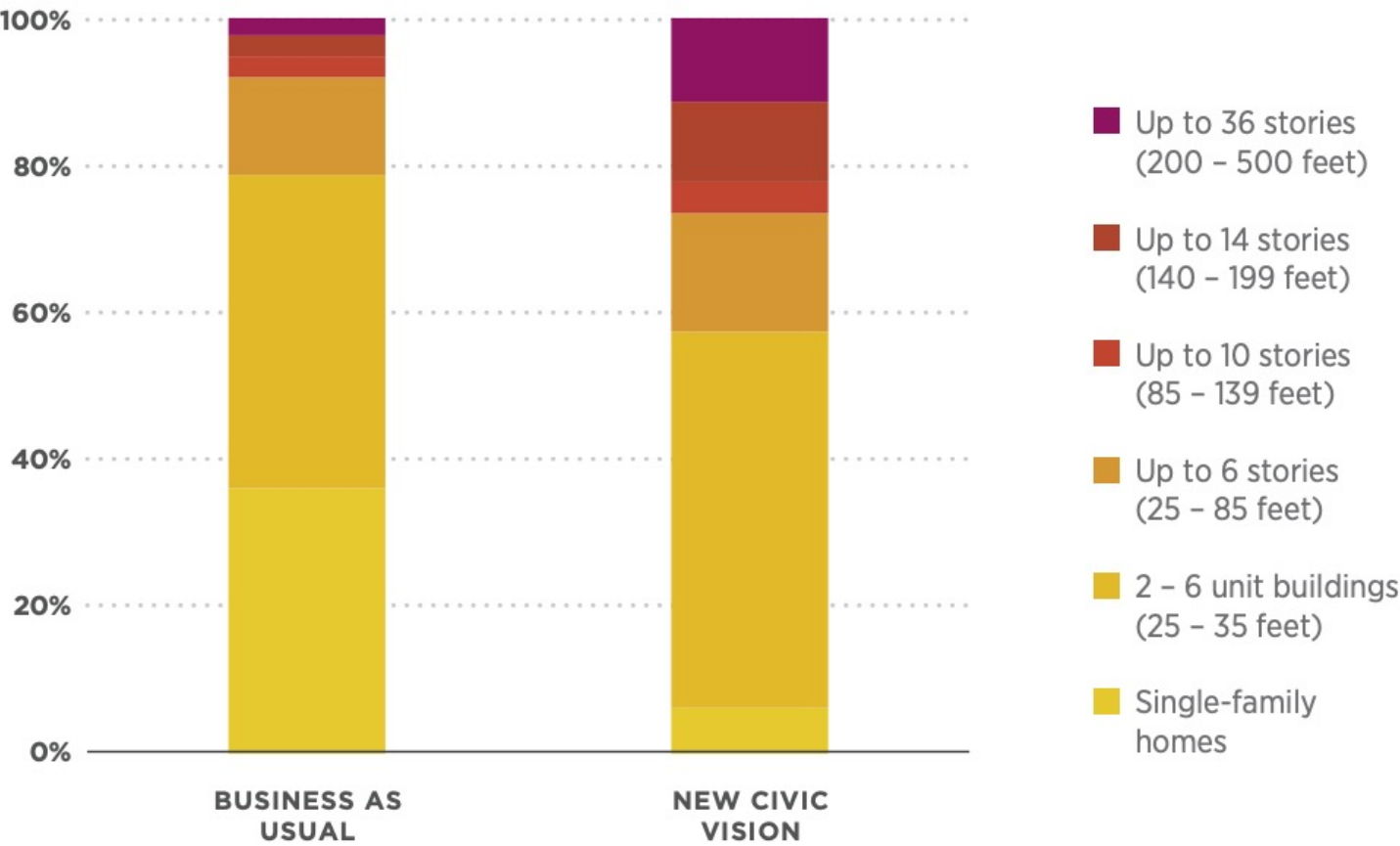
# Without changes in policy, the region will continue to grow in natural areas, farmlands and hazardous areas





# Compared to BAU, the New Civic Vision creates twice as much multifamily housing and a fraction of single-family homes

NET NEW UNITS BY BUILDING TYPE

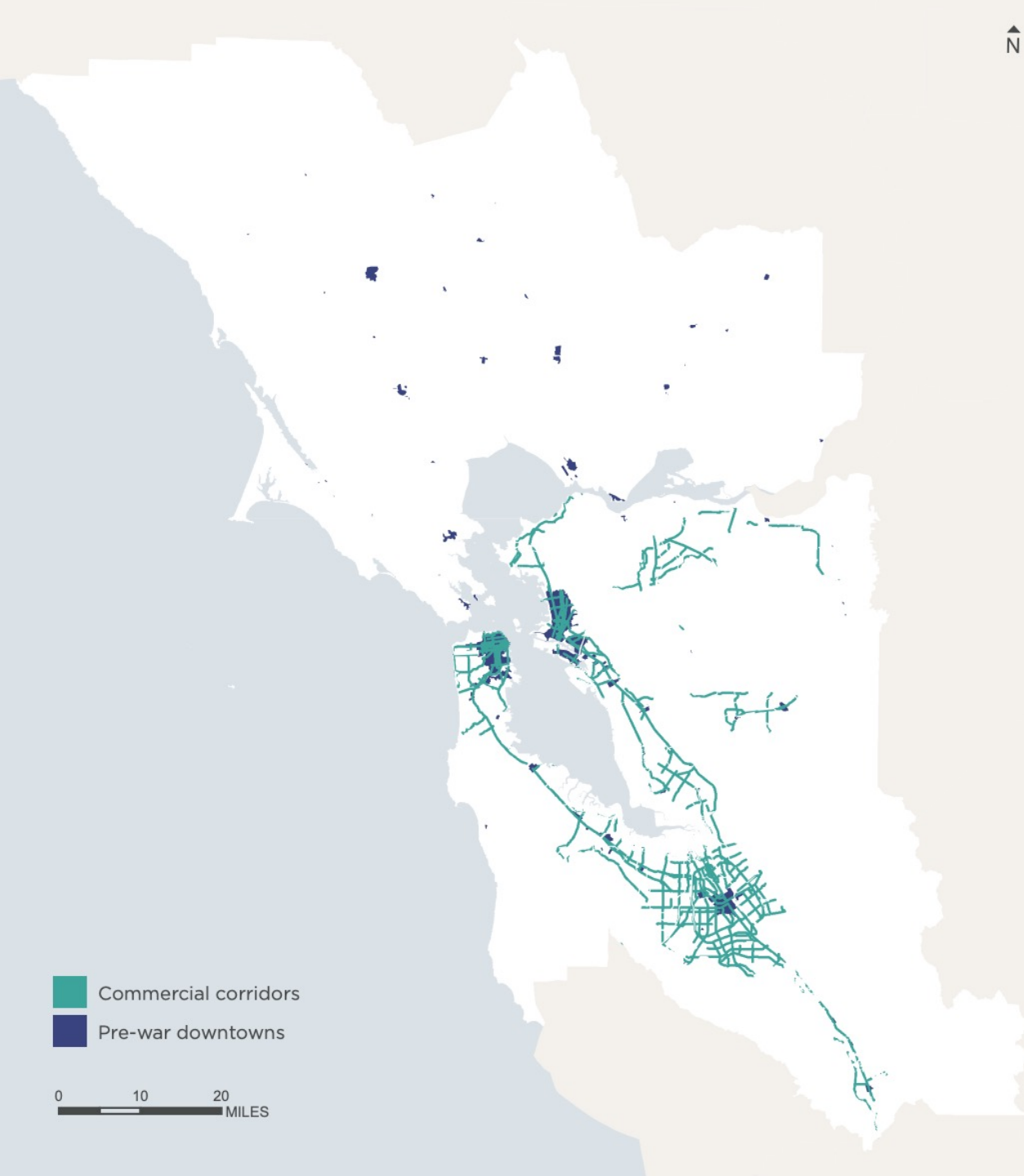




**Jobs and housing should concentrate close to existing and future regional rail stations, light rail stations and high-frequency bus stops**



**Jobs and housing  
should concentrate  
along major  
commercial corridors  
and in pre-war  
downtowns so that  
they can be served by  
high-frequency transit**

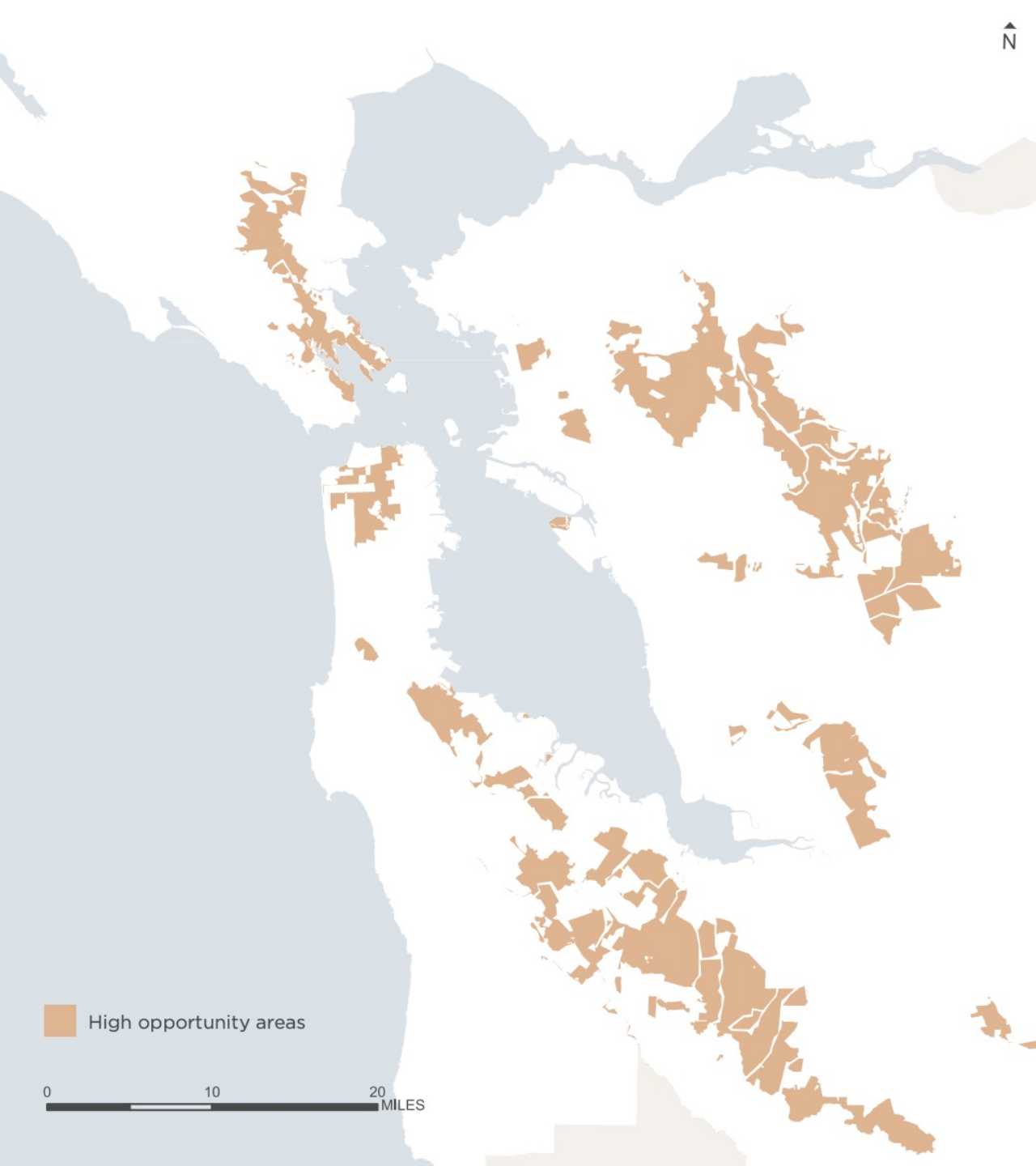


A map of California with green lines representing commercial corridors and dark blue dots representing pre-war downtowns. The map shows a dense network of corridors and downtowns in the Central Valley and Southern California, with fewer in the North. A north arrow is at the top center, and a scale bar is at the bottom left.

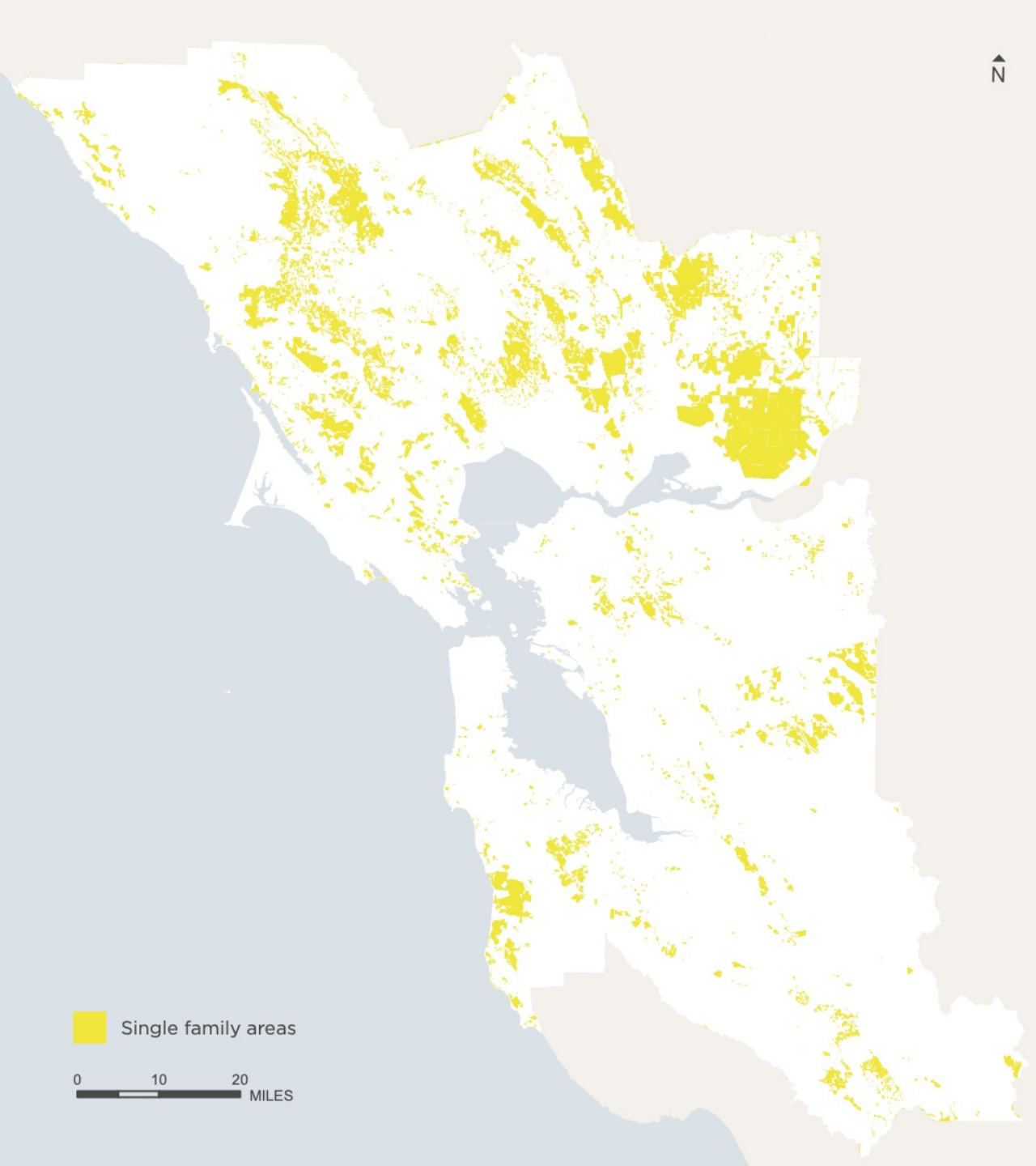
Commercial corridors  
Pre-war downtowns

0 10 20  
MILES

**Housing should  
be added so that  
all can access  
high-quality K-12  
schools, jobs,  
and low  
environmental  
burdens, which  
research shows  
enable upward  
mobility**







**More housing types should be allowed in previously exclusive single-family neighborhoods, including ADUs and 2-6 unit housing**

# Where should growth go?

Concentrate jobs and housing close to existing and future regional rail stations, light rail stations and high-frequency bus stops	500,000 units
Concentrate jobs and housing along major commercial corridors and in pre-war downtowns	543,000 units
Add housing in areas with good K-12 schools and access to high quality amenities	513,000 units
Allow "gentle density" in single family neighborhoods	523,000 units

## Rec 2: Strengthen the state's land use laws to support housing production





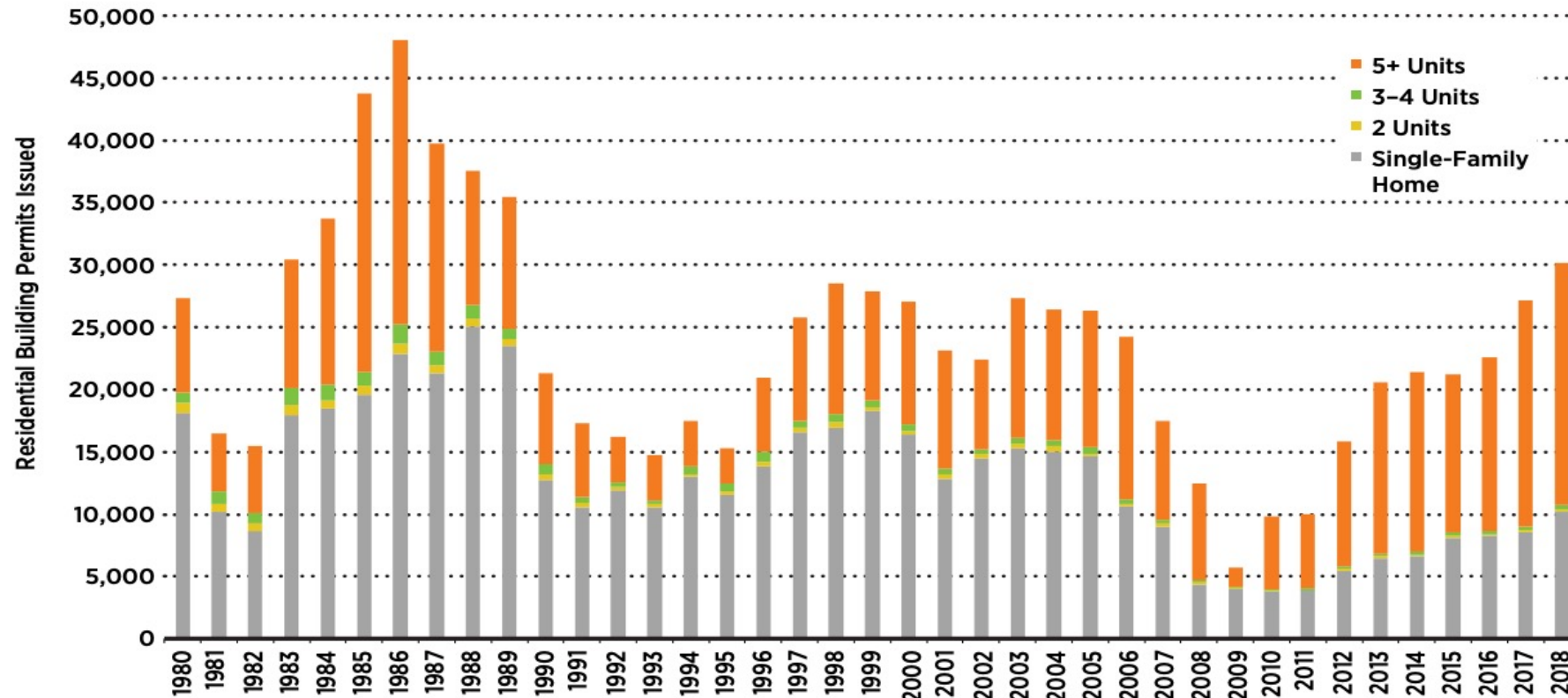
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# Residential Building Permits Issued in the Bay Area

1980-2018



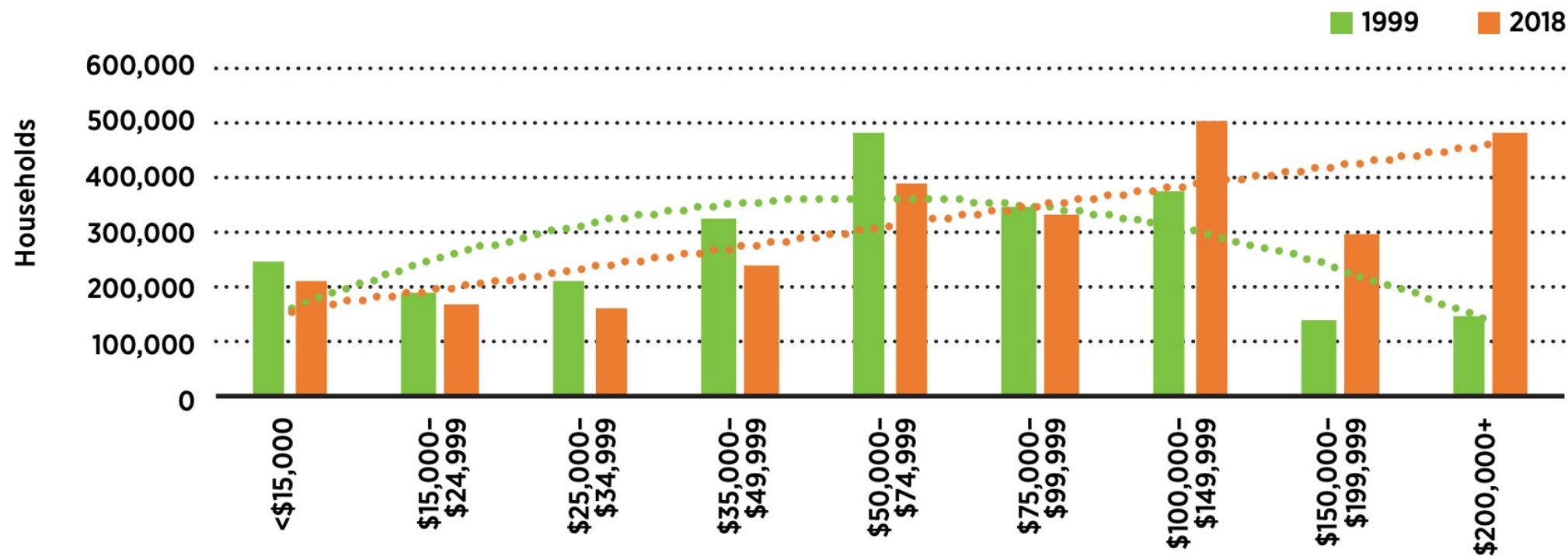


# Ratio of Jobs to Housing in Bay Area Counties

COUNTY	JOB TO HOUSING RATIO 2004-2008	JOB TO HOUSING RATIO 2011-2017
San Francisco County	4.27	6.26
Alameda County	-0.05	3.86
Contra Costa County	0.66	3.04
San Mateo County	0.91	8.14
Santa Clara County	1.71	4.15
Marin County	0.27	4.82
Napa County	1.88	8.41
Sonoma County	-0.63	5.15
Solano County	0.55	4.27

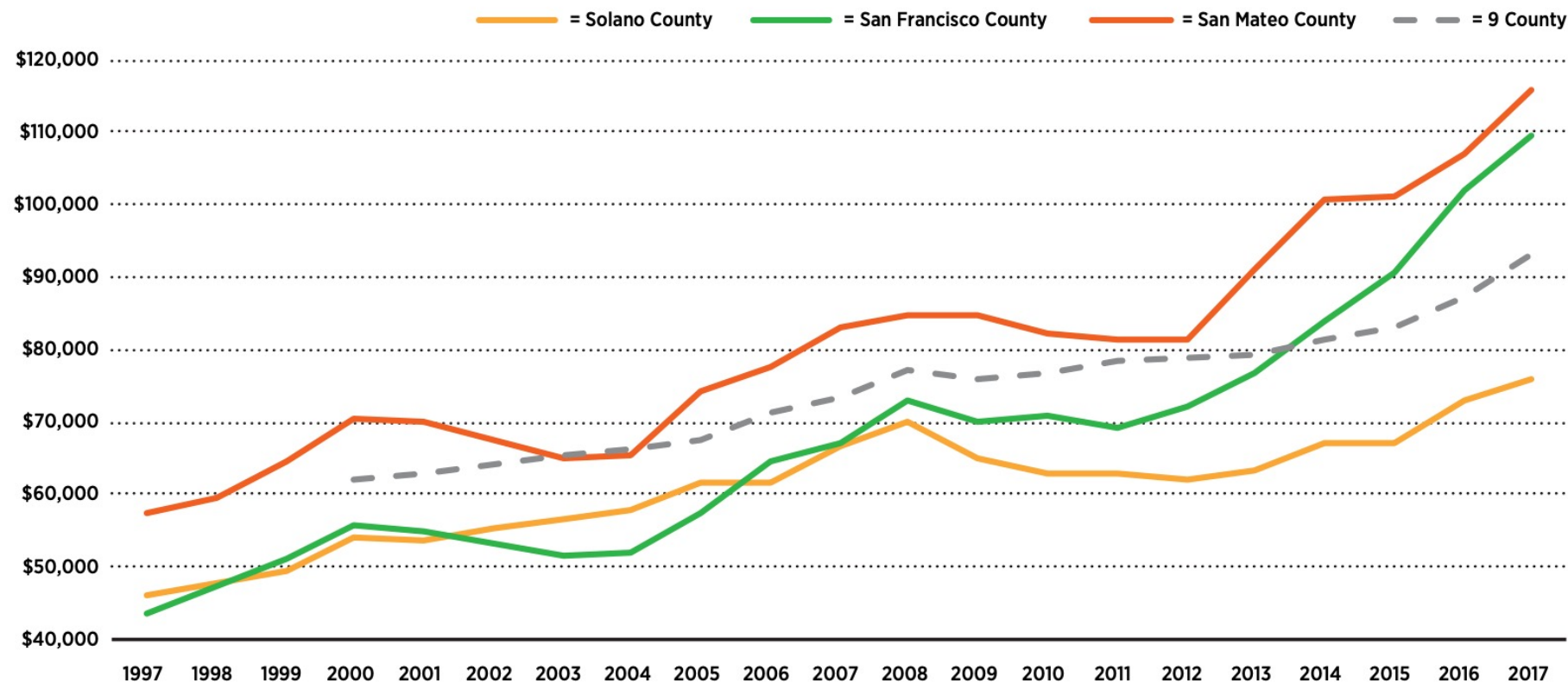
# Change in Bay Area Household Income Distribution

1999-2018

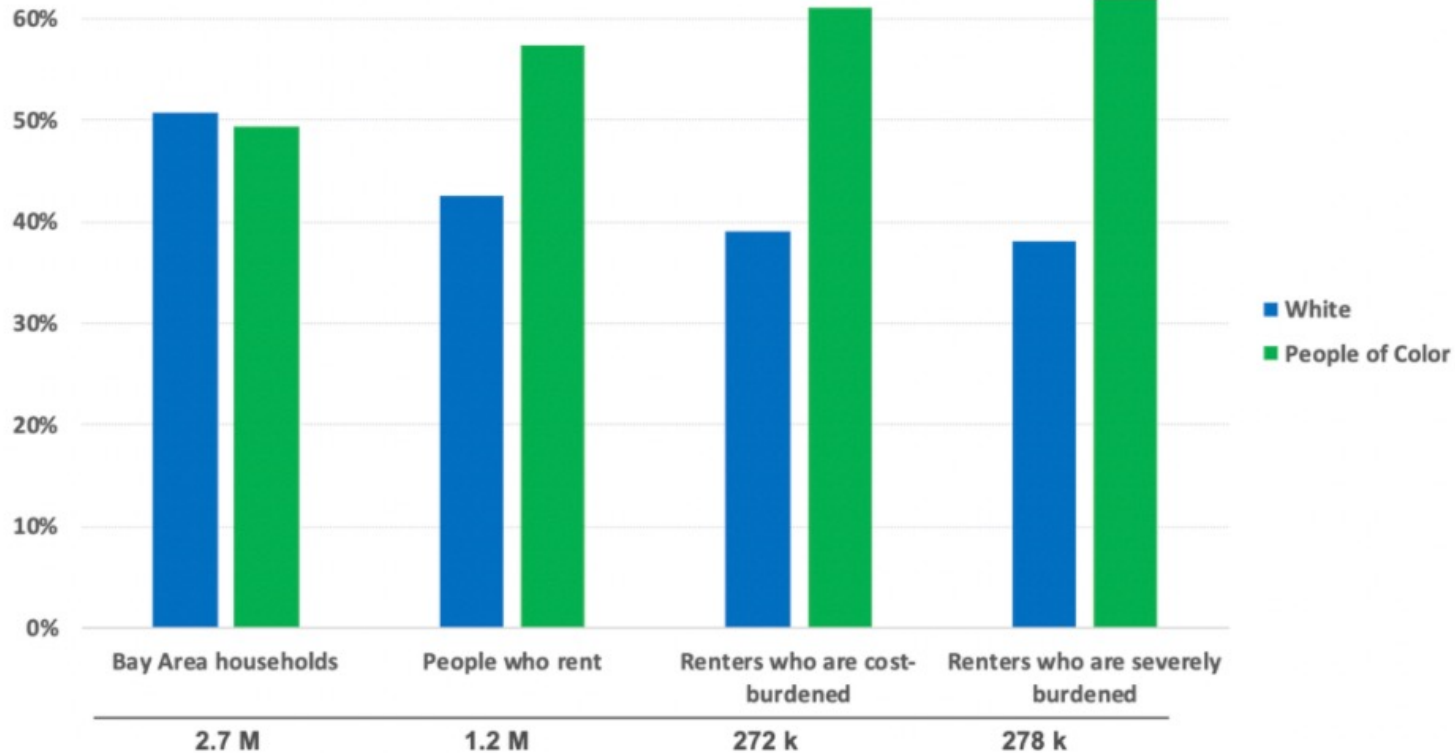


# Change in Bay Area Median Household Income

1997-2016



# People of color are more likely to rent and to struggle to pay it

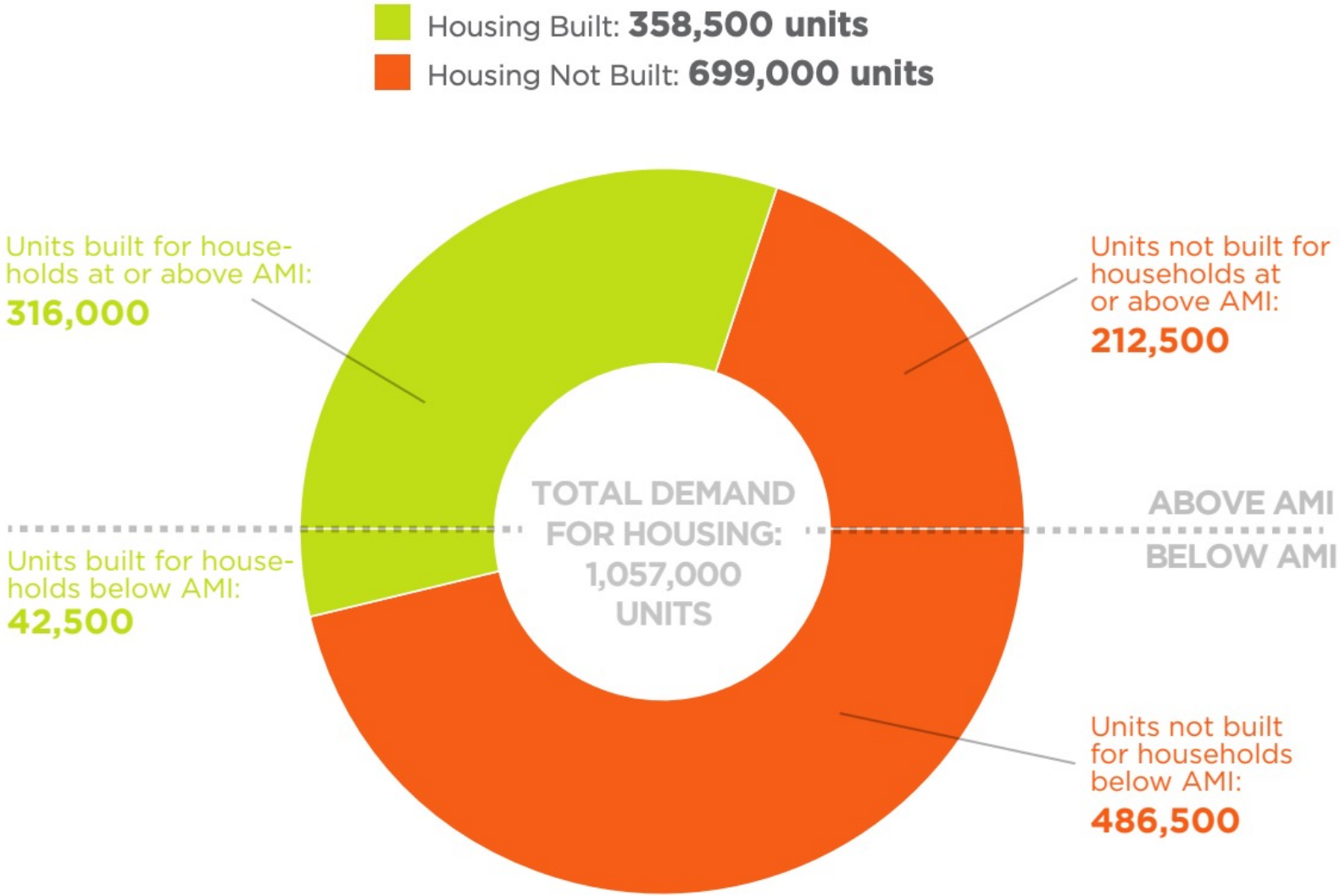


SPUR analysis using Comprehensive Housing Affordability Strategy data tabulated by the US Census Bureau for the US Dept. of Housing and Urban Development. Based on 2012-2016 American Community Survey estimates.



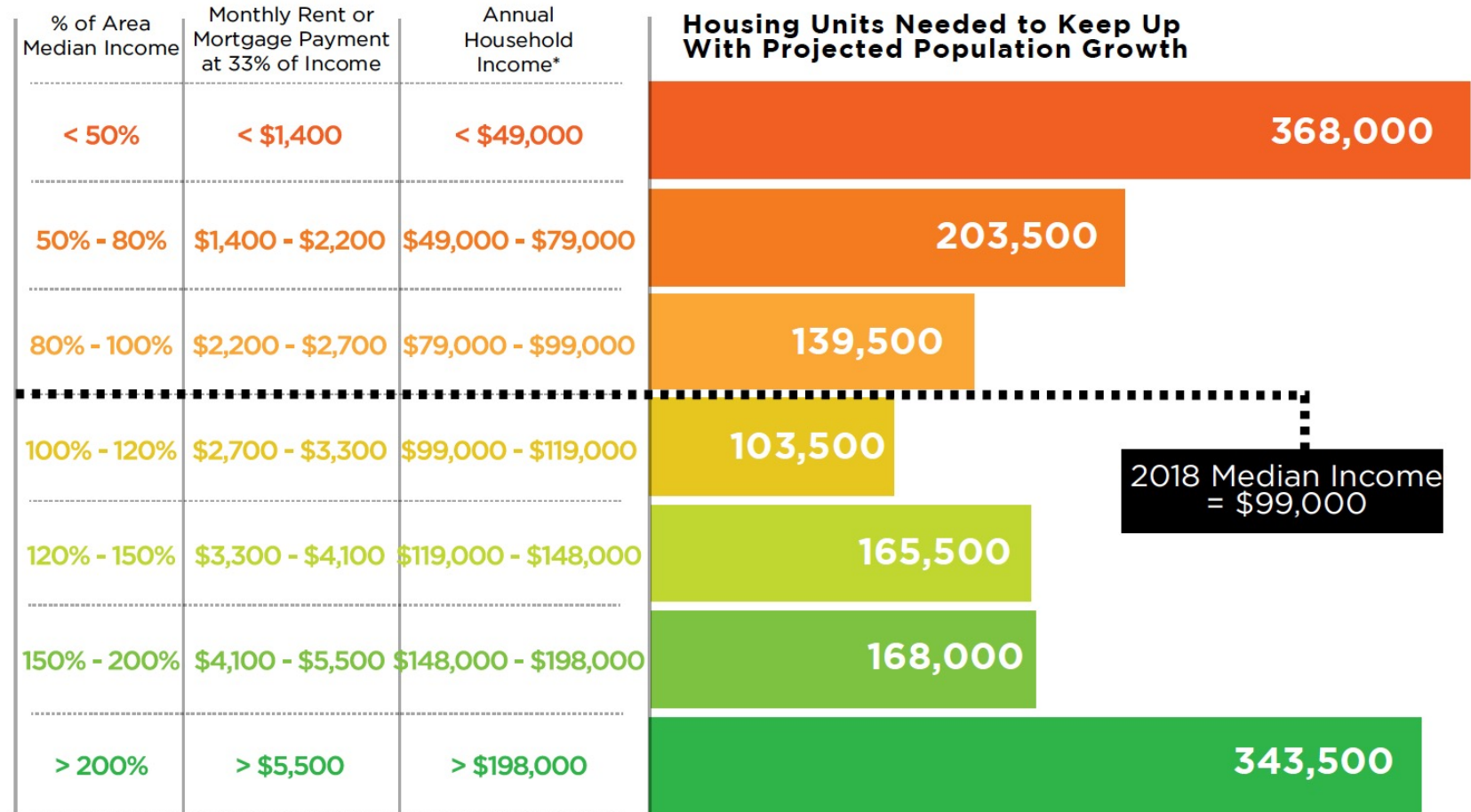
# Historic Housing Shortfall

Bay Area Housing Demand, 2000-2018



# How Much Housing Does the Region Need to Build?

Projected Bay Area Housing Demand at all Income Levels, 2018–2070



\*Assumes 2.75 people per household

1,492,000 units needed by 2070

# SPUR's 2070 Housing Target

Total Bay Area Housing Demand, 2000-2070

