



San Francisco Housing DataBook

Commissioned by:
San Francisco Board of Supervisors

Study Moderator:
Joe Grubb

Consultant:
Bay Area Economics



2002

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Introduction & Summary of Findings



Introduction

The San Francisco Affordable Housing Study

The San Francisco Affordable Housing Study is a comprehensive analysis of current housing issues based on both published and primary data. The Study is composed of three parts as follows:

- San Francisco DataBook
- Citywide Tenant and Landlord Survey
- Special Topic Studies Per Direction of Study Moderator

The San Francisco Affordable Housing Study was commissioned by resolution of the Board of Supervisors of the City and County of San Francisco in 2000. It is structured to be “neutral and fact-based” as per Ordinance No. 55-00. The designated Study Moderator is Mr. Joe Grubb, Executive Director of the San Francisco Rent Arbitration and Stabilization Board. It is important to note that the Study focuses on a myriad of housing issues present in San Francisco, and is not intended to be a study of rent control or the specific regulations and policies of the Rent Arbitration and Stabilization Board.

Framework for the Study

The Study approach is based on a compilation of issues, questions, and research topics specified during a series of meetings of housing stakeholders convened in 2000. The notes from these meetings, along with subsequent written requests for study topics, were compiled by the Study Moderator into the “Study Protocol.” After selection of the Study Consultant, Bay Area Economics (BAE), the Study Protocol was converted into a database of issues and sorted according to those that could be addressed through published data collection and analysis, those that require primary research in the form of a citywide tenant and landlord survey, and those that require special in-depth topical analysis.

The DataBook

This DataBook represents the first step in the Study process, and responds to requested Study Protocol items that can be analyzed through available data. The DataBook has also been structured to be a compendium of useful information about San Francisco residents, housing supply, and related topics that will serve as a resource to a wide variety of interested parties including housing developers, neighborhood organizations, social service providers, planners, and policy makers. The DataBook brings together, in a single publication, a snapshot of historical trends and current conditions, incorporating recently released 2000 Census data as available. It has been organized with the express purpose of establishing a dynamic resource that can be updated as new data are released from sources such as the decennial Census, the American Housing Survey (AHS), the American Community Survey (ACS), the San Francisco Planning Department’s Annual Housing Inventory, and other sources.

The DataBook is organized as follows:

- Summary – key findings of the DataBook
- Livability – indicators of overall livability of San Francisco
- Residents – demographic and economic data about residents
- Housing Supply – description of unit type, mix, production
- Cost & Affordability – for-sale and rent trends
- Neighborhoods – breakdowns of key indicators by neighborhood
- Resources – San Francisco’s key housing programs and organizational structure of public agencies with housing functions, as compared to other cities

Summary of Findings

Livability

Among major metro regions in the U.S., San Francisco had the second highest cost of ownership housing in 2000, topped only by San Jose. Only 7.3% of San Francisco households earned enough to afford the median sale price of housing sold in early 2001, compared to 56.9% of households nationally. These dramatic house price statistics underscore the price paid by many residents to live in a beautiful and economically vibrant city like San Francisco.

San Francisco is a city of many renters – 65% of San Francisco's occupied units were rented in 2000, compared with only 34% nationally.

With more than 16,600 residents per square mile, San Francisco is one of the densest large cities in the U.S.; in comparison New York City has over 26,400 residents per square mile, while Oakland has about 7,100. Even with San Francisco's extensive mass transit services, 90% of homeowners and 62% of renters own a car, truck or van. Despite San Francisco's relatively high household income levels, 11.7 % of San Francisco's children live in poverty, compared to only 8.4% in Oakland.

Residents

San Francisco's population has grown relatively slowly since 1990, with fewer births, more deaths, and more in-migration than statewide. Although San Francisco's population remains ethnically diverse, the City lost 17,600 African-American residents, a decline of 23%, between 1990 and 2000.

Today, San Francisco's population has proportionately far fewer children, more adults 25 to 34, more seniors, and more residents in smaller households than California as a whole.

San Francisco incomes have risen dramatically since 1990, with per capita income now estimated at nearly 40% higher than statewide. In 1998, more than one-third of owner households and almost one-fourth of renter households earned \$100,000 or more. At the same time, almost one-fourth of renter households earned less than \$15,000.

San Francisco renter households move frequently. For example, in 2000, almost 10% of all renter households had moved into their unit that year, compared to only 3% of owners.

The number of jobs in San Francisco increased by 7% from 1990 to 2000, a faster rate than population growth. These trends mean that the ratio of jobs to employed residents has risen from 1.46 to 1.57 jobs per resident. For the Bay Area, even with rapid job growth during the 1990s, the ratio of jobs to employed residents has grown from 1.02 to just 1.06. Slightly more than half of the people working in San Francisco also live in San Francisco, while 47% of workers commute into the City each day from elsewhere. Nearly 80% of San Francisco's employed residents work in San Francisco.

Housing Supply

Based on the City's Housing Inventory, the pace of housing unit production in San Francisco is relatively limited. From 1980 through 2000, the City added 23,444 new units. The average rate of production per decade has also slowed; during the 1980s, the City averaged 1,224

units per year, but during the 1990s, the average production declined to only 964 units per year.

Today, only 18% of San Francisco's housing stock is classified as single family detached. Even though San Francisco is densely populated, 35% of the housing stock is in small multifamily buildings of 9 units or less, and nearly 40% of all renter households live in buildings with 1 to 4 units.

Despite increased housing costs and limited additions to supply, the average number of persons per room showed little change during the 1990s for either owners or renters, indicating little of the "doubling up" thought typical of expensive housing markets with strong demand.

The owners of San Francisco's rental housing overwhelmingly live or operate locally, with over 95% of rental unit owners of record showing a Bay Area address. Also, 35% of owners live in units within their San Francisco rental property.

Several types of changes to San Francisco's housing supply caused substantial controversy during the past decade. For example, a surge in live/work unit production led to a total of 2,324 live/work units completed from 1987 through 2000, making up 10% of all housing units added to supply. In addition, 2,937 rental units were converted to condominiums from 1990 through 2000, and 1,144 Single Room Occupancy (SRO) units have been lost to fire (at least temporarily) since 1988. Although the total number of renter evictions surged during the strong economy of the late 1990s and into 2000/01, the rate of owner move-in evictions has declined in the last few years.

At the same time, affordable housing production has grown. The City reports that from 1990 through 2000, 3,492 affordable housing units were produced, 28% of total unit production for the period. The added affordable housing includes 2,417 rental units funded by the federal Low Income Housing Tax Credit (LIHTC) serving low income renters.

Another major source of affordable housing is the Section 8 program funded by the U.S. Department of Housing and Urban Development (HUD). A total of 20,779 San Francisco renter households, or almost 10% of all renter households, are assisted through this program, which generally limits tenants' rent payments to 30% of household income. This form of assistance can be used in new as well as existing units.

Cost & Affordability

For the first 9 months of 2001, San Francisco's median house sale price was \$520,000, with only 6% of sold units priced below \$300,000. Rents have risen faster than overall inflation; from 1990 to 2000, inflation-adjusted median rents as reported by tenants on the U.S. Census rose \$89, an inflation-adjusted increase of 10%. During recent years, rents increased dramatically - between 1999 and 2000, the average market rent rose more than 30%, but the 2001 average market rent declined 2.7% from the 2000 peak. It is important to note that despite news reports of a drastically slowing rental market, market rents declined far less from 2000 to 2001 than the prior one-year increase.

Notwithstanding perceptions regarding the impact of rapidly rising rents rates, comparison of "rent burdened households" (households paying 30% or more of their income in rent) suggests a more complex trend. Overall in San Francisco, nearly 43% of renter households paid 30% or more of their income in rent in 1990, declining to 35% of all renters in 2000. This decline in the proportion of rent burdened households during the 1990s may be the result of a combination of rising incomes, shifts in the demographic composition of renters, and rent control.

Neighborhoods

The housing picture for San Francisco overall becomes much more variable when individual neighborhoods are analyzed. For example, new housing unit production between 1990 and 2000 was concentrated in neighborhoods such as South of Market, Western Addition, and

Downtown, which together accounted for 57% of all units produced. In contrast, neighborhoods such as Buena Vista, Bernal Heights, Inner Sunset, and Outer Sunset have experienced very limited new unit production during the decade, with less than 200 units built in each of these areas.

Today, the concentration of renter households varies dramatically by neighborhood, ranging from 32.4% in South Central to 48.1% in Inner Sunset to 97.8% in Downtown. Household incomes also vary dramatically, with the highest estimated median household income in the Excelsior, and the lowest in the Tenderloin. Concentrations of lower income households earning less than \$25,000 in 2000 occurred in the highest proportions in the Tenderloin, SoMa, Western Addition, and Chinatown.

Tenants and Units Subject to Rent Control

Although most of this DataBook broadly describes San Francisco's housing demand and supply, a series of in-depth analyses were conducted for rent controlled units based on data from the 1998 American Housing Survey. For this analysis, raw data was sorted into three categories: rent controlled units, market rate units not subject to the rent restriction sections of the Rent Ordinance, and other units, including subsidized units and units with insufficient data to classify as rent controlled or market rate (see Appendix for details).

Key Findings:

- There was no discernable difference between rent controlled and market rate units in terms of quality ratings by tenants.
- Average household size for rent controlled units was smaller, at 1.94, than for market rate, at 2.26.
- Rent control households are less likely to have children present than market rate units.
- Very few rent controlled or market rate tenants received rental income from real estate (including boarders in their unit).

- About 11% of rent control tenants are age 65 or older, compared to 5% of market rate tenants.
- The median household income for rent control tenants is lower than for market rate tenants. However, both groups have similar proportion of households with incomes of \$100,000 or more.
- Even with rent control, many tenants have excessive rent burdens (defined as more than 30% of income paid for rent), including almost 69% of rent control tenants age 65 and older. In contrast, only 23% of rent control tenants aged 25 to 34 have excessive rent burdens.

Resources

Major cities across the U.S. have organized their housing agencies and implemented housing programs in a variety of ways. This DataBook profiles public resources in terms of agency organizational structure and key initiatives for 11 large cities including San Francisco. Further study is needed to determine the impact of different agency structures and key initiatives on house price, affordability, and other measures of the housing market.

The profiled cities have experienced population growth for 1990 to 2000 of 2.6% (Boston, MA) to 41.0% (Austin, TX), and 1992 to 1997 job growth of 4.6% (New York City) to 34.9% (Austin, TX).

One of the most striking differences among the cities analyzed is the pattern of centralization/decentralization of housing agencies. In some cities, almost all housing-related functions report to the Mayor/City Council, including the Housing Authority, while other cities operate under more independent structures. Inclusionary zoning requirements tend to follow the more expensive markets, with the exception of Portland. Several cities such as Austin, San Antonio, and San Diego, have special purpose corporations devoted to affordable housing and/or development in targeted subareas.



Livability

Most Expensive For-Sale Housing Markets in U.S., 2000

Indicator Description: Describes median sale price for entire year of home sales per metropolitan area.

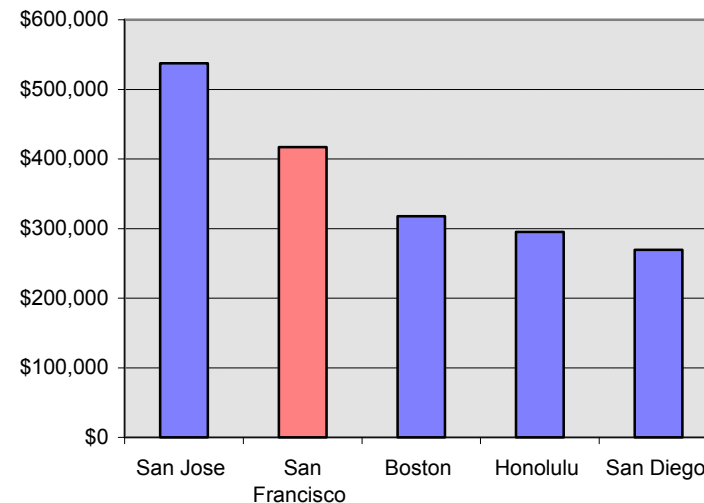
Geographic Areas Covered: Five U.S. Metropolitan Statistical Areas (MSAs) with the highest median home sale price in 2000: San Jose, San Francisco, Boston, Honolulu, and San Diego. "San Francisco" includes San Francisco, Marin, San Mateo Counties.

Key Findings:

- San Jose had the highest median home sale price for year 2000, and also by far the greatest change from 1998, reflecting the strength of Silicon Valley economy during that period.
- The San Francisco metropolitan area had the second-highest median home sale price in the U.S. for year 2000, although rate of change is slower than for San Jose and San Diego.

Limitations of the Data: Does not reflect changes in economy and house prices in 2001. Also may not reflect all new home sales, as data are from Realtors, using their listing services, which typically do not include new home sales. Data are for metropolitan San Francisco as noted above, not just the City.

U.S. Metropolitan Areas with the Highest Median Home Sale Price, 2000



Metro Area	Home Price 2000 (a)	% Change in Home Price 1998-2000
San Jose	\$537,550	47.4%
San Francisco	\$417,180	29.6%
Boston	\$317,800	23.0%
Honolulu	\$295,000	-0.7%
San Diego	\$269,410	30.1%

Notes:

(a) Represents median sale prices for existing single-family homes by Primary Metropolitan Statistical Area (PMSA). The San Francisco PMSA consists of San Francisco, San Mateo, and Marin Counties. The San Jose PMSA consists of Santa Clara County only.

Sources: National Association of Realtors and California Association of Realtors, 2000; BAE, 2001.

Housing Affordability in Selected Metro Areas, 2001

Indicator Description: These data show the percent of all homes sold that would be affordable to the median household income in the same region.

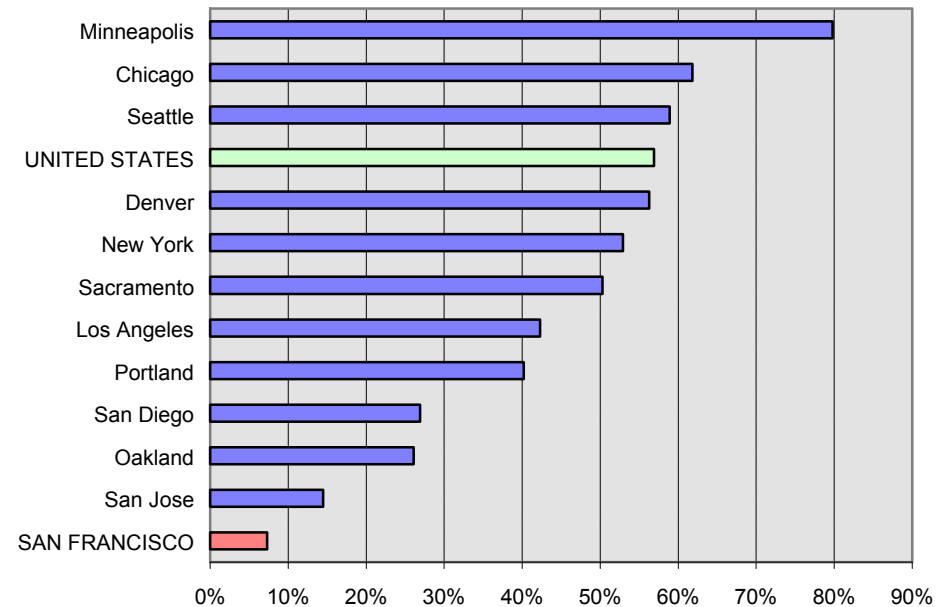
Geographic Areas Covered: Twelve selected U.S. metropolitan areas and the United States. "San Francisco" includes San Francisco, Marin, San Mateo Counties.

Key Findings:

- Only 7.3% of homes sold in First Quarter 2001 were affordable to median household income in San Francisco region.
- In contrast, 56.9% of homes sold across the U.S. were affordable to U.S. median household.
- Even San Jose had a slightly greater percentage than San Francisco of home sales affordable to median household income.

Limitations of the Data: This indicator relies on home sales from recorded sale data. Some recorded sales do not include sales price. The median income data used to compare to sales are based on an estimate by the U.S. Department of Housing and Urban Development (HUD), which may not capture true rising household incomes accurately. This comparison also does not account for home equity from previously owned units, which assists move up buyers with affordability. Data are for metropolitan San Francisco as noted above, not just the City.

**% of Affordable Homes for Sale in Selected Metropolitan Areas
First Quarter 2001**



Metro Area	Share of Homes Affordable for Median Income Family, 1st Quarter 2001 (a)
Minneapolis	79.8%
Chicago	61.8%
Seattle	58.9%
UNITED STATES	56.9%
Denver	56.3%
New York	52.9%
Sacramento	50.3%
Los Angeles	42.3%
Portland	40.2%
San Diego	26.9%
Oakland	26.1%
San Jose	14.5%
San Francisco	7.3%

Notes: (a) Based the Housing Affordability Index, a quarterly measure of the percentage of homes that a family earning a median income can afford to buy. Longitudinal data extremely variable due to changes in interest rates. Median income derived from HUD; home sales from First American Real Estate Solutions.

Sources: National Association of Homebuilders; BAE, 2001.

Percentage of Renter Households in Selected Cities, 2000

Indicator Description: Shows percent of all occupied units that were occupied by renter households in 2000.

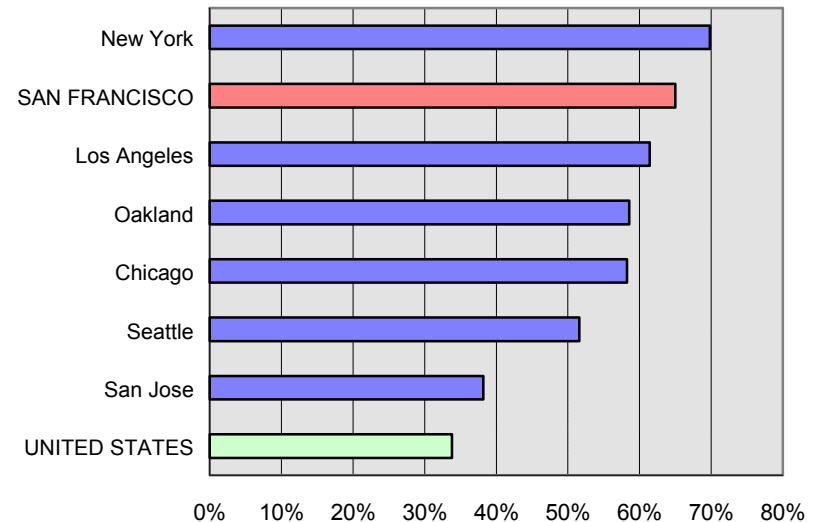
Geographic Areas Covered: Seven major U.S. cities, including San Francisco, and the U.S.

Key Findings:

- San Francisco is a city with a high proportion of renters; among these seven cities, only New York has a higher percentage of renters than San Francisco.
- San Francisco has nearly twice the percentage of renters as nationwide.
- San Francisco's ownership rate in 2000 was only 35%, compared to an ownership rate of 62% for San Jose.

Limitations of the Data: Relies on accurate count and categorization of total occupied units by Census takers.

% of Households that Rent in Selected Cities, 2000



City	Rental Units	Total Occupied Units (Owners and Renters)	Rental Units as % of Occupied Units
New York	2,109,292	3,021,588	70%
San Francisco	214,309	329,700	65%
Los Angeles	783,530	1,275,412	61%
Oakland	88,301	150,790	59%
Chicago	597,063	1,025,174	58%
Seattle	133,334	258,499	52%
San Jose	105,648	276,598	38%
United States	35,664,348	105,480,101	34%

Source: 2000 U.S. Census SF1; BAE, 2001.

Population Density in Selected Cities

Indicator Description: Shows a comparison of the population density of San Francisco, three other cities in California, and three other cities elsewhere in the United States.

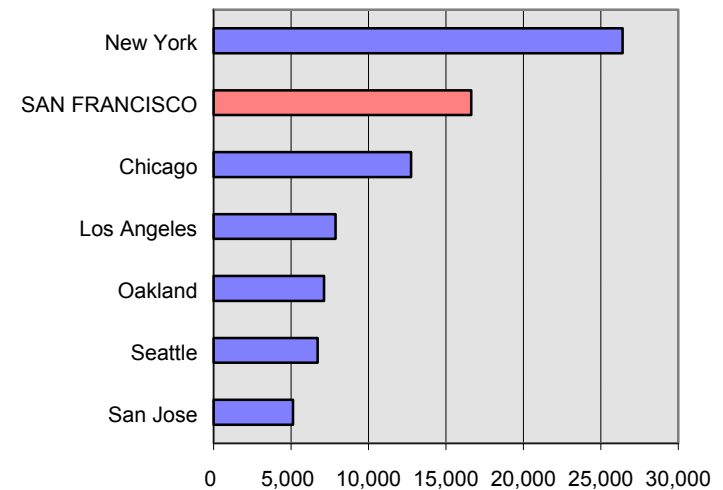
Geographic Areas Covered: Seven major U.S. cities, including San Francisco.

Key Findings:

- Among the seven selected cities, San Francisco has the second-highest population density.
- Los Angeles is only about half as densely populated as San Francisco.
- When these data are considered in combination with median home sale prices, high density does not necessarily appear to be associated with low property values.

Limitations of the Data: Population density can be affected by factors not directly related to housing density or population, such as the prevalence of other land uses (e.g., manufacturing, office, retail) or a large amount of preserved open space (e.g., parkland).

Persons per Square Mile in Selected Cities, 2000



City	Population	Land Area (Square Miles)	Persons per Square Mile
New York	8,008,278	303	26,403
San Francisco	776,733	47	16,634
Chicago	2,896,016	227	12,750
Los Angeles	3,694,820	469	7,877
Oakland	399,484	56	7,127
Seattle	563,374	84	6,717
San Jose	894,943	175	5,118

Source: 2000 U.S. Census SF1; BAE, 2001.

Automobile Ownership in Selected Metro Areas

Indicator Description: Percent of households without ownership of an automobile (includes car, truck, or van).

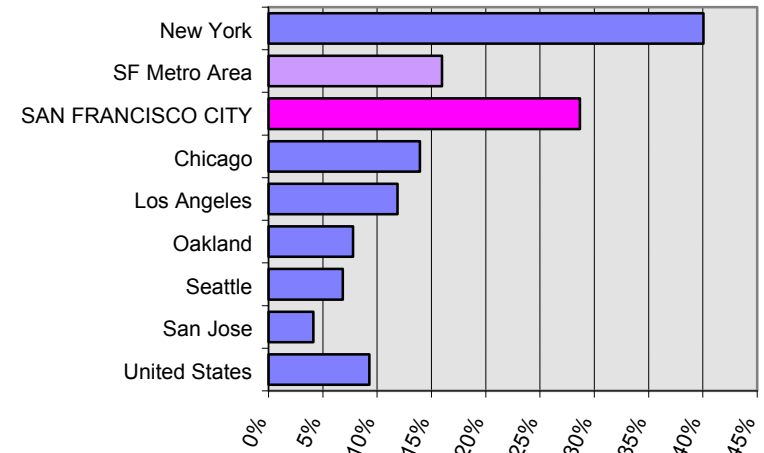
Geographic Areas Covered: Seven selected major cities including San Francisco, the San Francisco metropolitan area, and the U.S.

Key Findings:

- Thirty-eight percent of San Francisco renter households do not own an automobile, compared to only 20% nationwide.
- Among the seven cities San Francisco, at 29%, is second only to New York in total households not owning an automobile, where 40% of households do not own an automobile.
- In San Francisco, as in all the other cities and nationwide, homeowners have a higher rate of automobile ownership.

Limitations of the Data: American Housing Survey data rely on a sample of households for each area. For example, the San Francisco metropolitan area data are based on a sample of 3,865 total households.

Percent of Households without a Car, Truck, or Van



City/Metro Area	Owners	Renters	All Occupied Units
New York	15%	60%	40%
SF Metro Area	5%	26%	16%
SAN FRANCISCO CITY	10%	38%	29%
Chicago	5%	31%	14%
Los Angeles	3%	20%	12%
Oakland	2%	16%	8%
Seattle	2%	15%	7%
San Jose	2%	16%	4%
United States	4%	20%	9%

Note: Uses most recent data available from America Housing Survey. Seattle from 1996; San Francisco, Oakland, and San Jose from 1998; New York, Chicago, Los Angeles, and United States from 1999. All data by Primary Metropolitan Statistical Area (PMSA), except as indicated. San Francisco PMSA includes Marin, San Francisco, and San Mateo Counties.

Source: *American Housing Survey*, U.S. Bureau of the Census.

Children Living in Poverty

Indicator Description: Describes percent of all children living in poverty, as defined by a formula devised by the U.S. government for use by Federal Agencies.

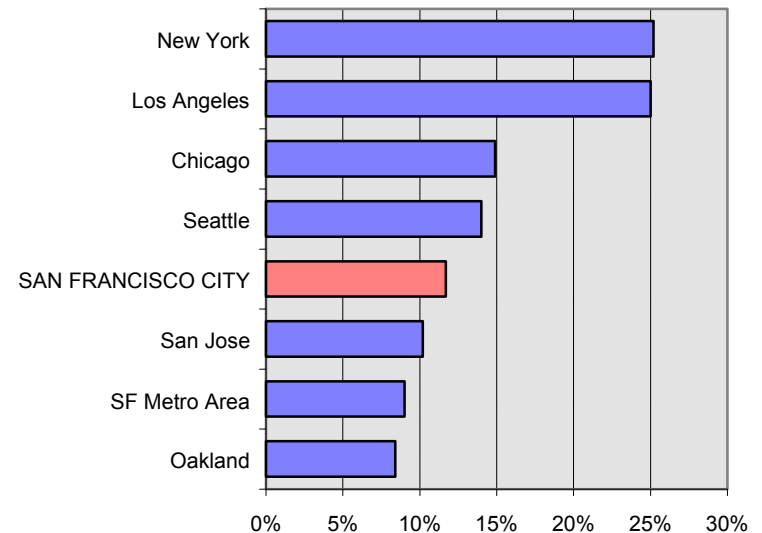
Geographic Areas Covered: Seven selected major metropolitan areas including San Francisco, as defined by Primary Metropolitan Statistical Area, and the City of the San Francisco.

Key Findings:

- The City of San Francisco has a lower percentage of children living in poverty than New York, Los Angeles, Chicago, or Seattle metropolitan areas.
- The City of San Francisco has a higher percentage of children living in poverty than the Oakland or San Jose metropolitan areas.
- Nearly 12% of the City of San Francisco's children live in poverty, compared to 9% for the entire San Francisco metropolitan area.

Limitations of the Data: Data based the limited sample used for the 2000 Census *Supplemental Survey*. More complete data from 2000 Census long-form data, which relies on a sample of one in six households nationwide to be released in 2002. Poverty status is calculated based on income, household size, presence of seniors, and presence of related children under 18 years of age. For details, see documentation for Summary Tape File 3 (STF3) for the 1990 Census. For a description of the *Supplemental Survey*, see Appendix

Percent of Children in Poverty, 2000



Metro Area/City (a)	Children in Poverty (b)	
	Number	Percent
New York	561,357	25.2%
Los Angeles	646,654	25.0%
Chicago	326,351	14.9%
Seattle	79,226	14.0%
SAN FRANCISCO CITY	12,864	11.7%
San Jose	41,594	10.2%
SF Metro Area	28,494	9.0%
Oakland	48,814	8.4%

Notes:

(a) All data for Primary Metropolitan Statistical Areas except as noted (i.e., San Francisco City).

(b) Based on children under 18 in households who are related to householder. Excludes children not in households. Percent is the number shown divided by the total number of children under 18 in households who are related to householder.

Source: U.S. Census 2000 *Supplementary Survey*; BAE 2001



Residents

Population and Household Growth, 1970-2000

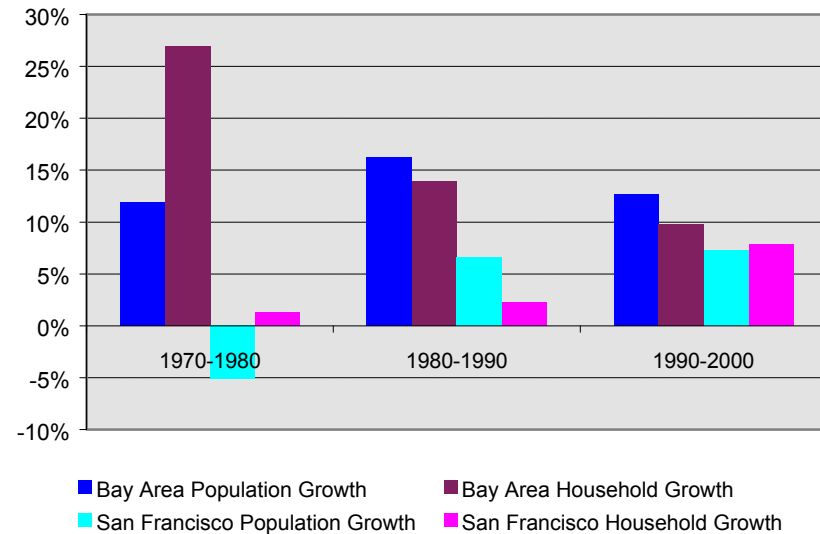
Indicator Description: Growth in total population and households for San Francisco and the Bay Area since 1970. Differences between population and household growth rates usually indicate changes in household size.

Geographic Areas Covered: City of San Francisco and Bay Area region, comprising Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma Counties.

Key Findings:

- Between 1970 and 1980, the Bay Area grew much more rapidly than San Francisco (both population and households). Households grew at a faster rate than population in the region.
- Since 1980, population growth has been more rapid than household growth.
- San Francisco lost population between 1970 and 1980, while the number of households increased slightly.
- Between 1980 and 1990, San Francisco's population started to grow again, but at a slower rate than for Bay Area.
- During 1990s, the pace of population and housing growth picked up in San Francisco, but was still slightly slower than for Bay Area overall. Household growth was slightly more rapid than population growth in the City during the decade.

Population & Household Growth, 1970-2000



Year	SF BAY AREA		SAN FRANCISCO	
	Population	Households	Population	Households
1970	4,628,199	1,552,373	715,674	295,174
1980	5,179,784	1,970,549	678,974	298,965
% Change 1970-1980	11.9%	26.9%	-5.1%	1.3%
1990	6,020,147	2,245,865	723,959	305,584
% Change 1980-1990	16.2%	14.0%	6.6%	2.2%
2000	6,783,760	2,466,019	776,733	329,700
% Change 1990-2000	12.7%	9.8%	7.3%	7.9%

Sources: ABAG; U.S. Census; BAE, 2001.

Limitations of the Data: Relies on accurate enumeration by the Census.

Components of Population Change, 1990-1999

Indicator Description: Population growth and components of change, California and San Francisco.

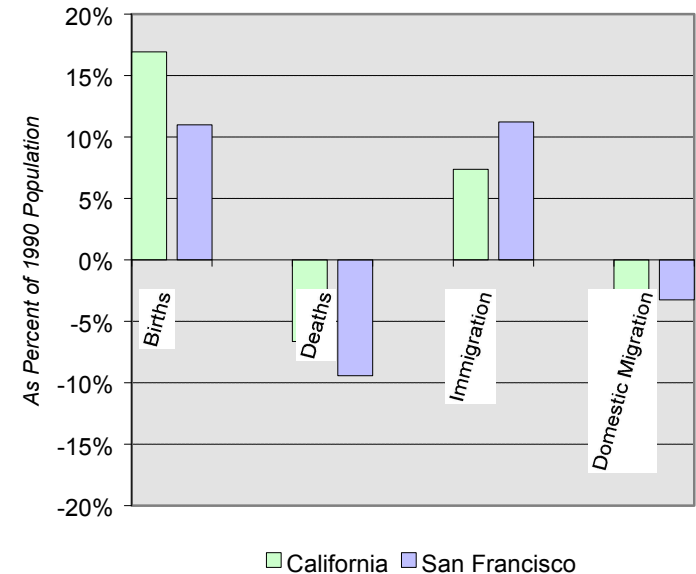
Geographic Areas Covered: City of San Francisco and State of California.

Key Findings:

- Overall, California grew at more than twice the rate of San Francisco during the 1990s.
- San Francisco's population growth included proportionately fewer births, more deaths, and more immigration than California.
- Net domestic out-migration occurred at similar rates for both San Francisco and California.

Limitations of the Data: Components of change are estimated using a model based on a variety of governmental data sources, and as estimates may be subject to error. See <http://www.dof.ca.gov/html/Demograp/e-2text.htm> for details on methodology and data sources.

Components of Population Change, 1990-1999



	San Francisco	California
Population, July 1990	744,400	30,652,000
Net Change, 1990-1999	31,900	3,282,000
Percent Increase, 1990-1999	4%	11%
Components of Population Change, July 1990- July 1999		
<i>Births</i>	80,119	5,063,226
<i>Deaths</i>	68,708	1,987,311
Natural Increase	11,411	3,075,915
<i>Net Immigration</i>	81,684	2,205,030
<i>Net Domestic Migration</i>	(61,195)	(1,998,945)
Net Migration	20,489	206,085

Note: Estimates take into account estimated undercounts in decennial census. As a result, totals shown here may vary somewhat from other sources.

Sources: California State Department of Finance; BAE, 2001.

Population by Age

Indicator Description: Age of residents of San Francisco, compared to California.

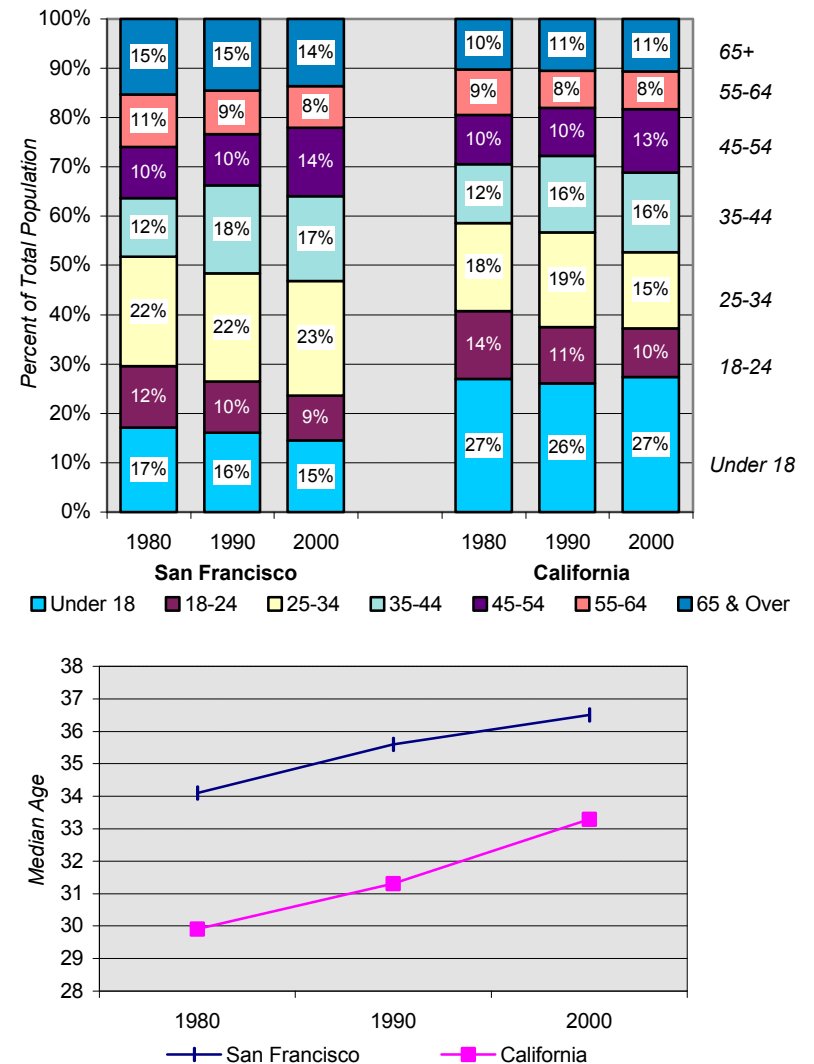
Geographic Areas Covered: City of San Francisco and State of California.

Key Findings:

- San Francisco's median age is older than the state's, with a median of 36.5 years compared to 33.3 years for California in 2000.
- The population of both the City and the State has been aging gradually; San Francisco's median age was 34.1 in 1980.
- San Francisco has a far lower proportion of children under 18 than California as a whole, and the number of children in the City has decreased even though the overall population has increased over the last two decades.
- San Francisco has a higher proportion of seniors 65 and older than the State.

Limitations of the Data: See Appendix for detail on age distribution for San Francisco and California.

**Age Distribution for San Francisco and California
1980-2000**



Source: U.S. Bureau of the Census, 1980, 1990, 2000.

Ethnicity, 1990-2000

Indicator Description: Ethnic and racial composition of San Francisco population, 1990 and 2000.

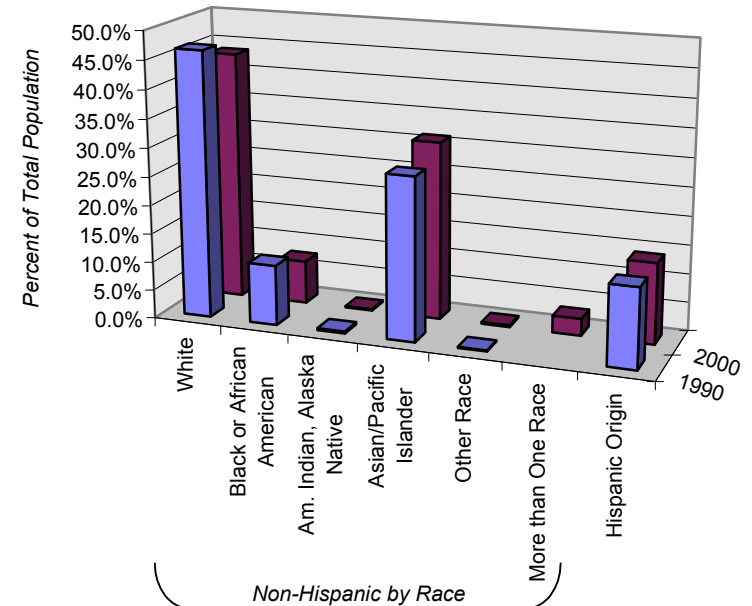
Geographic Areas Covered: City of San Francisco.

Key Findings:

- San Francisco has a racially diverse population, with Whites and Asian/Pacific Islanders being the two largest groups.
- The City's African American population declined by approximately 18,000, or nearly one-fourth, between 1990 and 2000.
- The White population increased slightly, although its share of the total decreased. Asian/Pacific Islanders increased by over 36,000, and the Latino population increased by almost 8,800.

Limitations of the Data: In 2000, individuals were able to specify more than one race, an option not available in 1990; this amounted to 3% of the 2000 population. Persons of Hispanic Origin may report any race; many select the "Other Race" category.

Change in Racial Composition, 1990-2000



CATEGORY	1990 Number	% of Total	2000 Number	% of Total
Non-Hispanic by Race				
White	337,118	46.6%	338,909	43.6%
Black or African American	76,343	10.5%	58,791	7.6%
Am. Indian, Alaska Native	2,635	0.4%	2,020	0.3%
Asian/Pacific Islander	205,686	28.4%	241,775	31.1%
Other Race	1,460	0.2%	2,580	0.3%
More than One Race	NA	NA	23,154	3.0%
Total Non Hispanic	623,242	86.1%	667,229	85.9%
Persons of Hispanic Origin	100,717	13.9%	109,504	14.1%
Total Persons	723,959	100.0%	776,733	100.0%

Note:

In 1990, there was no option to choose more than one race.

Sources: U.S. Census 1990 and 2000; BAE, 2001.

Household Size & Composition

Indicator Description: Size and family status of households.

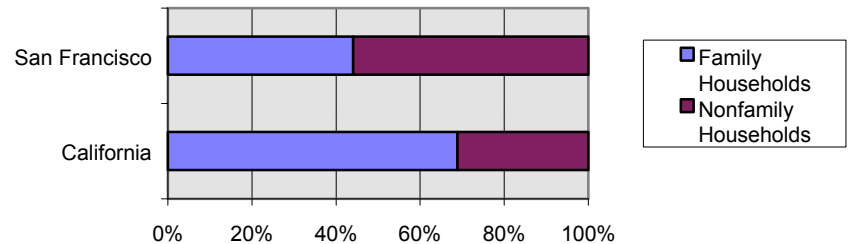
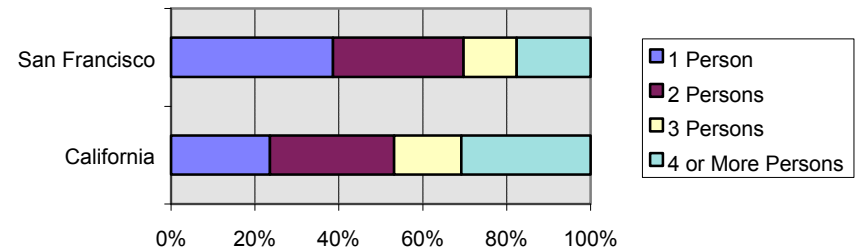
Geographic Areas Covered: City of San Francisco and State of California.

Key Findings:

- San Francisco has a high proportion of single-person and non-family households.
- Conversely, San Francisco has a small proportion of households of 3 or more persons.
- San Francisco's average household size is 2.30 persons, compared with 2.87 persons statewide. This is in part due to the high percentage of renter households, which tend to be smaller.
- By tenure, San Francisco's owner households tend to be slightly smaller than for all of California, while its renter households tend to be considerably smaller than statewide.

Limitations of the Data: Household size is dictated in large part by the size of the units available. Data on persons per room and overcrowding from the 2000 Census are not yet available.

Household Size and Household Type



	San Francisco		California	
	Number	% of Total	Number	% of Total
1-Person Household	127,376	39%	2,708,308	24%
2-Person Household	102,564	31%	3,408,296	30%
3-Person Household	41,725	13%	1,841,968	16%
4-or-More Person Household	58,035	18%	3,544,298	31%
Total Households	329,700	100%	11,502,870	100%
Average Household Size				
All Households	2.30		2.87	
Owner Households	2.73		2.93	
Renter Households	2.06		2.79	
Total Family Households	145,186	44%	7,920,049	69%
Total Nonfamily Households	184,514	56%	3,582,821	31%

Source: U.S. Census 2000; BAE 2001

Household and Per Capita Income, 1989 - 2000

Indicator Description: Income of households and persons, 1989 and 2000.

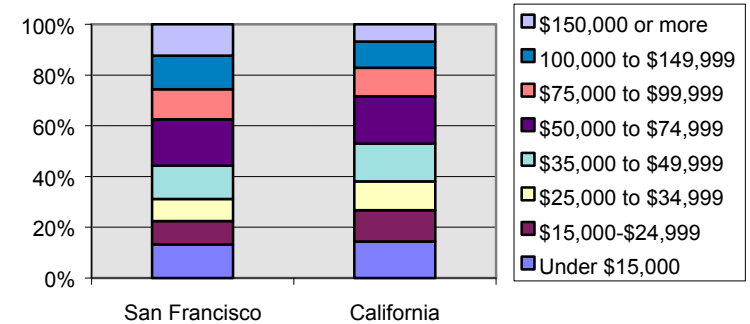
Geographic Areas Covered: City of San Francisco and State of California.

Key Findings:

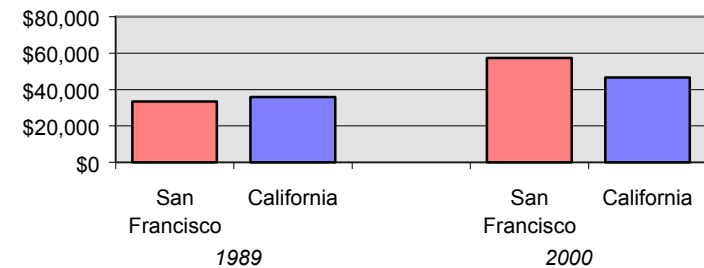
- Incomes in San Francisco are rising more rapidly than statewide. Household income in the City rose 71 percent between 1989 and 2000, over twice California's rate.
- The City's median household income in 2000 was above statewide levels, a reversal of 1989, when the statewide level was higher.
- Per capita income is over 40 percent higher in San Francisco than for California.
- Despite San Francisco's overall relative affluence, the proportion of households with incomes under \$15,000 is about the same as statewide.

Limitations of the Data: Household income data from 2000 are estimates from the 2000 Census Supplementary Survey; final Census data based on a larger sample are not yet available. Per capita income data for 2000 may be overstated because of exclusion of group quarters population.

Household Income Distribution, 2000



Median Annual Household Income, 1989-2000



	San Francisco		California	
	1989	2000	1989	2000
Under \$15,000	22%	13%	19%	14%
\$15,000-\$24,999	15%	9%	15%	12%
\$25,000 to \$34,999	15%	9%	15%	11%
\$35,000 to \$49,999	17%	13%	18%	15%
\$50,000 to \$74,999	17%	18%	18%	19%
\$75,000 to \$99,999	7%	12%	8%	11%
\$100,000 to \$149,999	5%	13%	5%	10%
\$150,000 or more	3%	12%	2%	7%
Total	100%	100%	100%	100%
Median HH Income	\$33,481	\$57,259	\$35,833	\$46,543
% Change, 1989-2000	71%		30%	
Per Capita Income	\$19,580	\$36,328	\$16,346	\$22,785
% Change, 1989-2000	86%		39%	

Note: All 1989 income data from 1990 Census. 2000 income data from Census 2000 Supplementary Survey, which covers only population in households, excluding population in group quarters.
Source: 1990 U.S. Census STF3; 2000 Census *Supplementary Survey*; BAE 2001

Household Income by Tenure

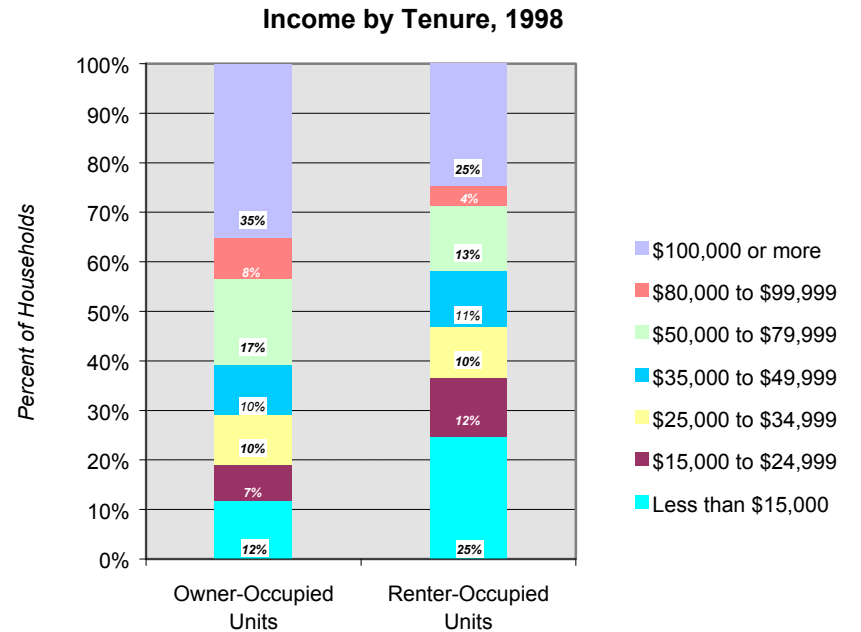
Indicator Description: Shows household income by owner or renter status in 1998.

Geographic Areas Covered: City of San Francisco.

Key Findings:

- The median household income of owner households is higher than city median, while renter median income is lower than city overall.
- Almost 12% of owners and 25% of renters earned less than \$15,000 in 1998.
- For the income categories between \$25,000 and \$49,999, the share of all owners and all renters is very similar.
- Although few renters fall into the \$80,000 to \$99,999 income category, the highest income category, of \$100,000 or more, has a substantial proportion of renters in it (almost 1/4 of all renter households).

Limitations of the Data: American Housing Survey data based on a sample of only 1,842 households for San Francisco and thus have a wider margin of error than decennial Census data. In addition, data are weighted based on 1990 Census, which introduces additional potential for error; note that as a result, total household counts differ from other sources.



Household Income	All Occupied Units	Owner-Occupied Units	Percent of Total	Renter-Occupied Units	Percent of Total
Less than \$15,000	62,800	12,000	11.8%	50,600	24.7%
\$15,000 to \$24,999	31,700	7,300	7.1%	24,400	11.9%
\$25,000 to \$34,999	31,500	10,300	10.1%	21,000	10.2%
\$35,000 to \$49,999	33,800	10,500	10.3%	23,200	11.3%
\$50,000 to \$79,999	45,000	17,600	17.2%	27,300	13.3%
\$80,000 to \$99,999	16,500	8,600	8.4%	7,900	3.9%
\$100,000 or more	86,300	35,800	35.1%	50,600	24.7%
Total	307,600	102,100	100.0%	205,000	100.0%
Median	\$47,334	\$66,862		\$38,999	

Note: Some totals may not add due to independent rounding. All numbers rounded to nearest 100. Totals may vary from other sources due to sampling error.

Sources: American Housing Survey for the San Francisco Metropolitan Area, HUD and U.S. Bureau of the Census; BAE, 2001

Tenure and Length of Residency

Indicator Description: Year household moved into unit by tenure (renter vs. owner occupancy). Based on a survey with responses spread throughout 2000.

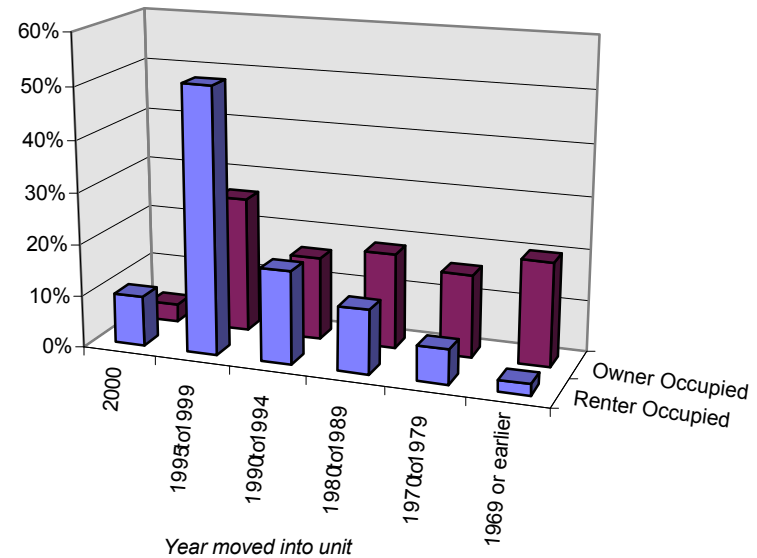
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Nearly 10% of renter households in 2000 had moved into their unit that year. Over 50% more had moved into their units during the previous five calendar years. Less than 10% had been in their units more than 20 years.
- In contrast, over one-third of owners had been in their unit for more than 20 years. Over one-half had been in their unit over 10 years.

Limitations of the Data: Data are from the Census 2000 *Supplementary Survey* – data from 2000 Census, which is based on a larger sample (one-in-six households) not yet available. See Appendix for details on the *Supplementary Survey*.

Length of Residency by Tenure, 2000



Year Householder Moved into Unit	Renter Occupied		Owner Occupied	
	Number	% of Total	Number	% of Total
2000	20,267	9.7%	3,973	3.4%
1995 to 1999	106,836	51.1%	30,581	26.2%
1990 to 1994	37,423	17.9%	18,681	16.0%
1980 to 1989	25,782	12.3%	21,525	18.4%
1970 to 1979	13,998	6.7%	18,630	16.0%
1969 or earlier	4,582	2.2%	23,327	20.0%
Total (a)	208,888	100.0%	116,717	100.0%

(a) Totals may differ from other sources due to Supplementary Survey sampling error.

Source: 2000 Census *Supplementary Survey*; BAE, 2001.

Household Size by Rent Control Status

Indicator Description: Comparison of household size for occupied rent controlled units and market rate units.

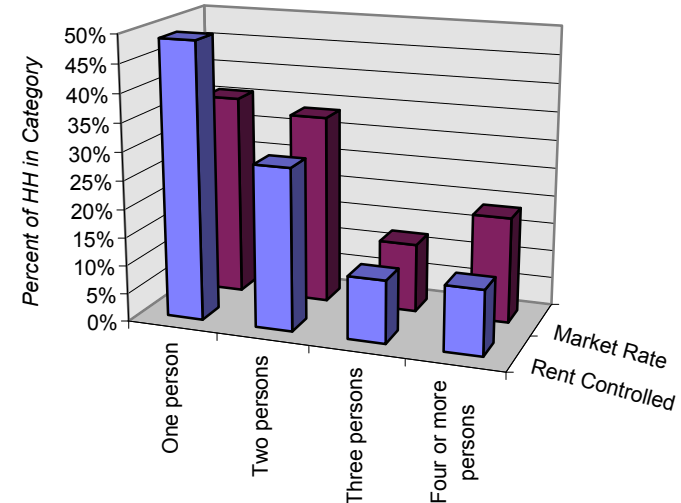
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Average household size for market rate units in San Francisco is 2.26 persons, compared with 1.94 for rent controlled units.
- Nearly half of rent controlled units are occupied by one person. Only 36% of market rate units have only one occupant.
- 19% of market rate units contain households of four or more persons, compared with only 11% of rent controlled units.

Limitations of the Data: AHS sample size is relatively limited (895 rent controlled units and 265 market rate units) and weighted based on 1990 census data, leading to potential margin of error. See Appendix for methodology for classification as rent controlled or market rate units. Note that some units do not fall in either category (e.g., public housing), and are not shown here.

Household Size by Rent Control Status, 1998



Household Size	Rental Unit Type			
	Rent Controlled (a)		Market Rate (a)	
	Number	Percent	Number	Percent
One person	71,100	49%	8,200	36%
Two persons	41,700	29%	7,700	33%
Three persons	16,100	11%	2,800	12%
Four or more persons	16,700	11%	4,300	19%
Total	145,600	100%	23,000	100%
Average Household Size	1.94		2.26	

Notes:

Totals may not add due to independent rounding. Numbers should be considered in light of potential sampling error of weighted sample. Sample size = 895 rent-controlled units and 265 market rate units.

(a) See Appendix for methodology regarding how units were typed as rent controlled and market rate. Rent controlled excludes units subject to eviction control only.

Source: BAE, 2001, based on microdata analysis of the 1998 *American Housing Survey for the San Francisco Metropolitan Area*, from the U.S. Department of the Census.

Age of Householder by Rent Control Status

Indicator Description: Comparison of age of householder for occupied rent controlled units and market rate units.

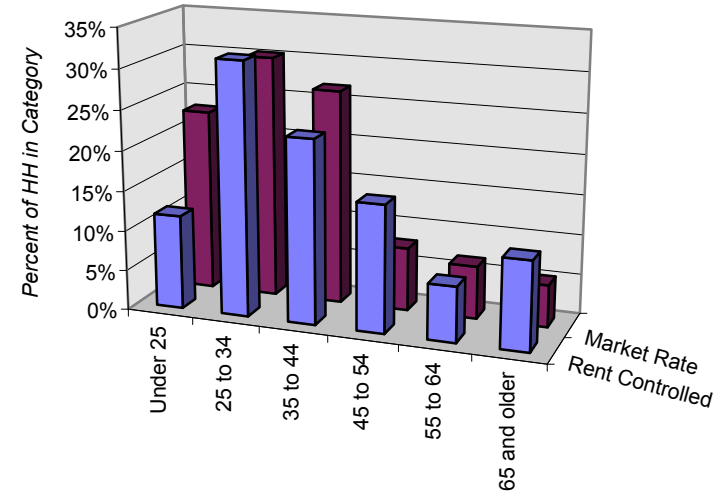
Geographic Areas Covered: City of San Francisco.

Key Findings:

- There is a higher concentration of younger householders in market rate rental units than in rent controlled rental units.
- There is a higher concentration of householders aged 45 to 54 in rent controlled units as compared to market rate units.
- There is a higher concentration of senior householders aged 65 and older in rent controlled units as compared to market rate units.

Limitations of the Data: AHS sample size is relatively limited (895 rent controlled units and 265 market rate units) and weighted based on 1990 census data, leading to potential margin of error. See Appendix for methodology for classification as rent controlled or market rate units. Note that some units do not fall in either category (e.g., public housing), and are not shown here.

Age of Householder by Rent Control Status, 1998



Age Category	Rental Unit Type			
	Rent Controlled (a)		Market Rate (a)	
	Number	Percent	Number	Percent
Under 25	17,000	12%	5,200	23%
25 to 34	45,600	32%	6,900	30%
35 to 44	33,100	23%	6,100	27%
45 to 54	22,900	16%	1,800	8%
55 to 64	10,000	7%	1,500	7%
65 and older	16,000	11%	1,200	5%
Total (b)	144,600	100%	22,800	100%
Median Age	37.0		32.0	

Notes:

Totals may not add due to independent rounding. Numbers should be considered in light of potential sampling error of weighted sample. Sample size = 895 rent-controlled units and 265 market rate units.

(a) See Appendix for methodology regarding how units were typed as rent controlled and market rate. Rent controlled excludes units subject to eviction control only.

(b) Data not reported for all surveyed households.

Source: BAE, 2001, based on microdata analysis of the 1998 American Housing Survey for the San Francisco Metropolitan Area, from the U.S. Department of the Census.

Presence of Children by Rent Control Status

Indicator Description: Comparison of presence of children in occupied rent controlled units and market rate units.

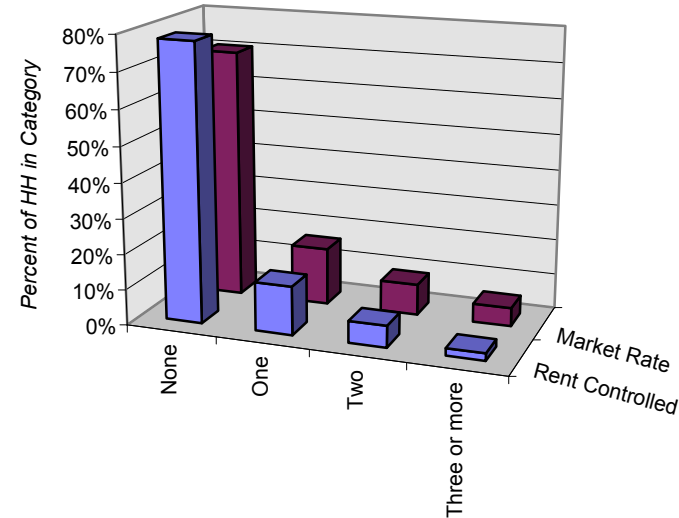
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Market rate units appear to be more likely to have two or more children in their households than rent controlled units, but less than one third of either unit type has children present.
- Rent controlled units appear to be more likely to have no children in their households.

Limitations of the Data: 1998 American Housing Survey sample size is relatively limited (895 rent controlled units and 265 market rate units) and weighted based on 1990 census data, leading to potential margin of error. See Appendix for methodology for classification as rent controlled or market rate units. Note that some units do not fall in either category (e.g., public housing), and are not shown here.

Presence of Children by Rent Control Status, 1998



Number of Children Under 18 in Household	Rental Unit Type			
	Rent Controlled (a)		Market Rate (a)	
	Number	Percent	Number	Percent
None	113,700	78%	16,200	70%
One	20,000	14%	3,700	16%
Two	8,900	6%	2,000	9%
Three or more	3,000	2%	1,200	5%
Total	145,600	100%	23,000	100%

Notes:

Totals may not add due to independent rounding. Numbers should be considered in light of potential sampling error of weighted sample. Sample size = 895 rent-controlled units and 265 market rate units.

(a) See Appendix for methodology regarding how units were typed as rent controlled and market rate. Rent controlled excludes units subject to eviction control only.

Source: BAE, 2001, based on microdata analysis of the 1998 American Housing Survey for the San Francisco Metropolitan Area, from the U.S. Department of the Census.

Household Income by Rent Control Status

Indicator Description: Comparison of annual household incomes for occupied rent controlled units and market rate units.

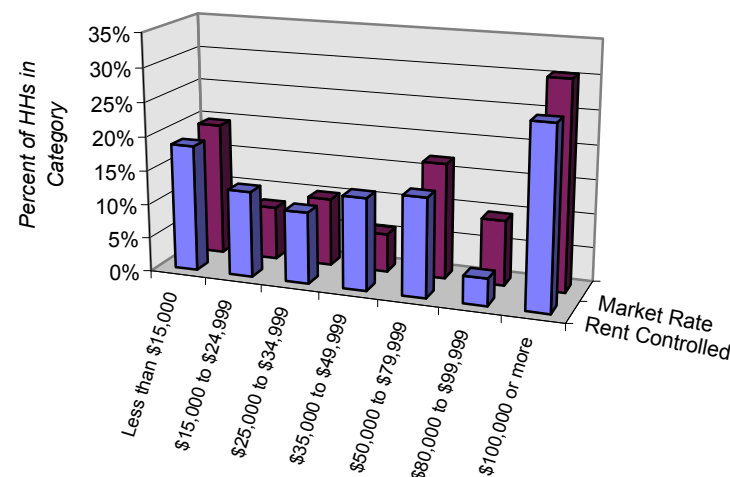
Geographic Areas Covered: City of San Francisco.

Key Findings:

- The median annual household income for households living in rent controlled units is lower than that for market rate units.
- Households in rent-controlled units are more likely to have annual incomes below \$50,000 than households in market rate units.
- Approximately one-fourth of all households in rent controlled units have incomes of \$100,000 or more.

Limitations of the Data: 1998 American Housing Survey sample size is relatively limited (895 rent controlled units and 265 market rate units) and weighted based on 1990 census data, leading to potential margin of error. See Appendix for methodology for classification as rent controlled or market rate units. Note that some units do not fall in either category (e.g., public housing), and are not shown here.

Annual Household Income by Rent Control Status, 1998



Household Income	Rental Unit Type			
	Rent Controlled (a)		Market Rate (a)	
	Number	Percent	Number	Percent
Less than \$15,000	27,000	19%	4,500	20%
\$15,000 to \$24,999	18,400	13%	1,800	8%
\$25,000 to \$34,999	15,300	11%	2,300	10%
\$35,000 to \$49,999	19,700	14%	1,300	6%
\$50,000 to \$79,999	21,100	14%	3,900	17%
\$80,000 to \$99,999	5,800	4%	2,200	10%
\$100,000 or more	38,400	26%	7,000	30%
Total	145,600	100%	23,000	100%
Median	\$43,000		\$60,000	

Notes:

Totals may not add due to independent rounding. Numbers should be considered in light of potential sampling error of weighted sample. Sample size = 895 rent-controlled units and 265 market rate units. Reflects 1997 incomes of 1998 households.

(a) See Appendix for methodology regarding how units were typed as rent controlled and market rate. Rent controlled excludes units subject to eviction control only.

Source: BAE, 2001, based on microdata analysis of the 1998 American Housing Survey for the San Francisco Metropolitan Area, from the U.S. Department of the Census.

Household Income by Age for Rent Controlled Units

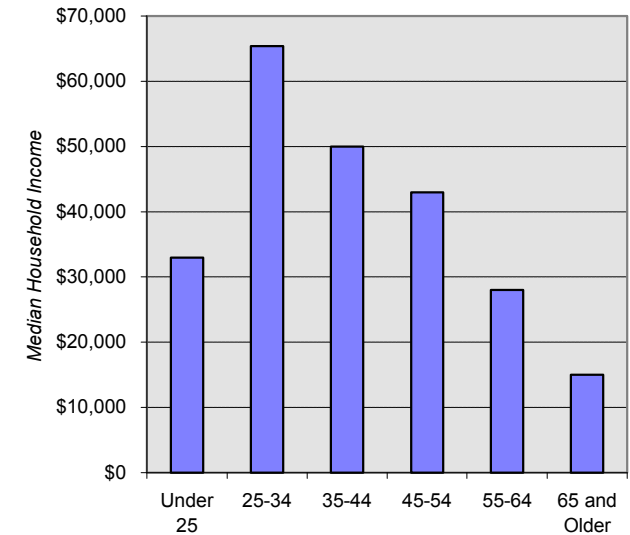
Indicator Description: Household income distributions by age category, for rent controlled units only, 1998.

Geographic Areas Covered: City of San Francisco.

Key Findings:

- There is considerable difference between the incomes of different age groups in rent controlled units.
- Elderly renters in most places tend to have lower incomes than other renters, and this pattern holds for San Francisco's rent controlled units. The median 1997 household income of elderly renter households is very low, at \$15,000.
- The age group with the highest incomes is the 25 to 34 age group, with a median 1997 household income of \$65,400.

Household Income by Age for Rent Controlled Units, 1998



Household Income	Under 25		25-34		35-44		45-54		55-64		65 and Older	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Less than \$25,000	5,500	32%	8,400	18%	9,400	28%	5,600	24%	4,800	48%	10,900	68%
\$25,000 to \$49,999	5,300	31%	10,000	22%	7,100	21%	7,900	34%	2,300	23%	2,300	14%
\$50,000 to \$99,999	3,800	22%	8,000	18%	7,600	23%	3,800	17%	1,700	17%	1,600	10%
\$100,000 or more	2,400	14%	19,100	42%	9,000	27%	5,600	24%	1,200	12%	1,200	8%
Total	17,000	100%	45,600	100%	33,100	100%	22,900	100%	10,000	100%	16,000	100%
Median	\$33,000		\$65,400		\$50,000		\$43,000		\$28,000		\$15,000	

Notes:

Sample size too limited to provide crosstabulated data for market rate units. Totals may not add due to independent rounding. Numbers should be considered in light of potential sampling error of weighted sample. Sample size = 895 rent-controlled units and 265 market rate units. Reflects 1997 incomes of 1998 households. See Appendix for methodology regarding how units were typed as rent controlled and market rate. Rent controlled excludes units subject to eviction control only.

Source: BAE, 2001, based on microdata analysis of the *1998 American Housing Survey for the San Francisco Metropolitan Area*, from the U.S. Census Bureau.

Limitations of the Data: 1998 American Housing Survey sample size is relatively limited (895 rent controlled units and 265 market rate units) and weighted based on 1990 census data, leading to potential margin of error. See Appendix for methodology for classification as rent controlled or market rate units. Note that some units do not fall in either category (e.g., public housing), and are not shown here.

Receipt of Rental Income by Rent Control Status

Indicator Description: Receipt of rental income by renters in rent controlled units and market rate units, 1998.

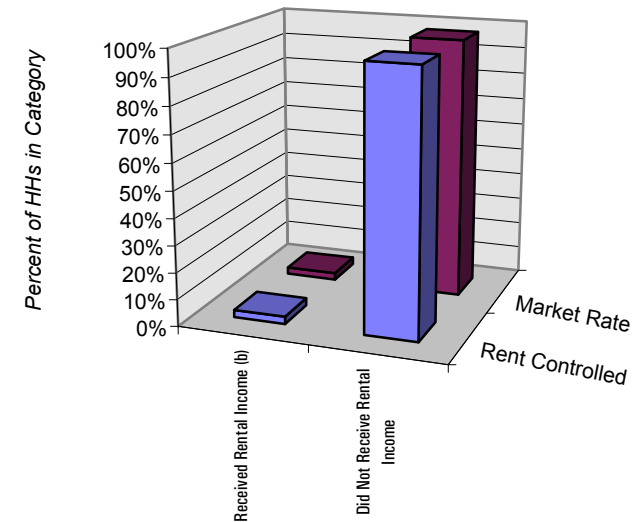
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Very limited numbers of renters in either category receive income from rental of real estate.
- There is no discernable difference between rent controlled and market rate households in the receipt of rental income.

Limitations of the Data: 1998 American Housing Survey sample size is relatively limited (895 rent controlled units and 265 market rate units) and weighted based on 1990 census data, leading to potential margin of error. See Appendix for methodology for classification as rent controlled or market rate units. Note that some units do not fall in either category (e.g., public housing), and are not shown here. Rental income includes income from lodgers in the renters' own housing unit. While survey respondents are supposed to report lodger rent as rental income, not all respondents necessarily do so.

Receipt of Rental Income by Rent Control Status



	Rental Unit Type			
	Rent Controlled (a)		Market Rate (a)	
	Number	Percent	Number	Percent
Received Rental Income (b)	4,000	3%	600	3%
Did Not Receive Rental Income	141,600	97%	22,400	97%
Total	145,600	100%	23,000	100%

Notes:

Totals may not add due to independent rounding. Numbers should be considered in light of potential sampling error of weighted sample. Sample size = 895 rent-controlled units and 265 market rate units. Reflects 1997 incomes of 1998 households.

(a) See Appendix for methodology regarding how units were typed as rent controlled and market rate. Rent controlled excludes units subject to eviction control only.

(b) Rental income includes the total money received from rental of property, rental from real estate, or from roomers or boarders, less all rental expenses.

Source: BAE, 2001, based on microdata analysis of the 1998 American Housing Survey for the San Francisco Metropolitan Area, from the U.S. Department of the Census.

Jobs per Employed Resident, 1990-2020

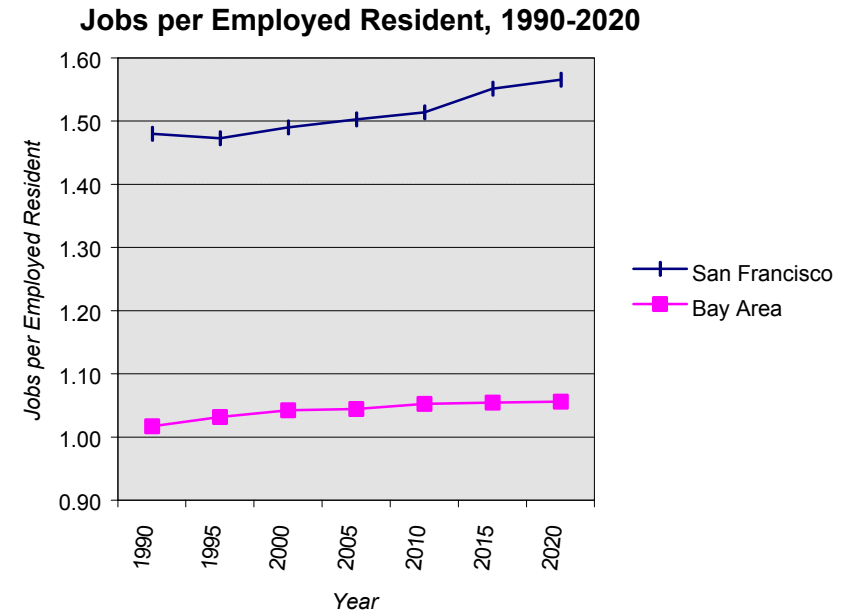
Indicator Description: Ratio of jobs to employed residents, 1990 through 2020 in five-year intervals.

Geographic Areas Covered: City of San Francisco and nine-county Bay Area region.

Key Findings:

- Between 1990 and 2020, the number of jobs to employed residents in San Francisco ranges from 1.47 in 1995 to 1.57 in 2020.
- For the Bay Area region as a whole, the ratio of jobs to employed residents is well below the City's, and more balanced, ranging from 1.02 in 1990 to 1.06 in 2020.
- The City's ratio of jobs to employed residents is projected to increase slightly more rapidly than the Bay Area region's.

Limitations of the Data: Data from 1995 forward are estimates and projections by the Association of Bay Area Governments (ABAG), last actual Census data from 1990.



Year	San Francisco			Bay Area		
	Jobs	Employed Residents	Jobs per Employed Resident	Jobs	Employed Residents	Jobs per Employed Resident
1990	579,180	391,292	1.48	3,206,080	3,151,993	1.02
1995	559,300	379,800	1.47	3,227,390	3,127,800	1.03
2000	628,860	422,100	1.49	3,688,590	3,538,000	1.04
2005	660,610	439,600	1.50	3,966,990	3,799,000	1.04
2010	687,350	454,100	1.51	4,227,560	4,017,500	1.05
2015	714,700	460,700	1.55	4,460,660	4,230,700	1.05
2020	731,660	467,300	1.57	4,687,950	4,438,300	1.06

Sources: ABAG Projections 2000; BAE 2001.

Residents' Occupation, 1990

Indicator Description: Occupation of working residents, 2000.

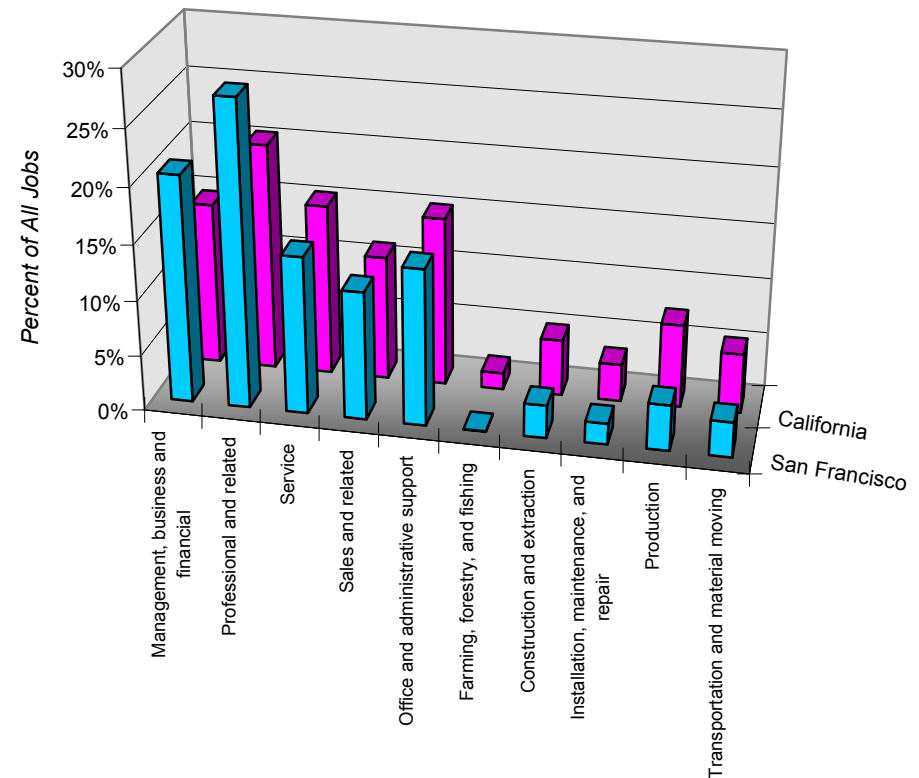
Geographic Areas Covered: City of San Francisco and State of California.

Key Findings:

- San Francisco has considerably higher concentrations of workers in management and professional occupations than California, with nearly half of the City's residents in these types of occupations.
- The City has lower concentrations of workers in production-related occupations than the State.

Limitations of the Data: Data are from the Census 2000 *Supplementary Survey* – data from 2000 Census, which is based on a larger sample (one-in-six households) not yet available. See Appendix for details on the *Supplementary Survey*.

Residents' Occupation, 2000



Occupation	San Francisco		California	
	Number	% of Total	Number	% of Total
Management, business and financial	88,340	20.5%	2,223,214	14.7%
Professional and related	118,490	27.4%	3,105,809	20.5%
Service	61,291	14.2%	2,341,005	15.5%
Sales and related	49,924	11.6%	1,701,922	11.2%
Office and administrative support	60,862	14.1%	2,307,022	15.2%
Farming, forestry, and fishing	197	0.0%	226,896	1.5%
Construction and extraction	12,884	3.0%	772,252	5.1%
Installation, maintenance, and repair	8,194	1.9%	511,813	3.4%
Production	17,815	4.1%	1,139,511	7.5%
Transportation and material moving	13,675	3.2%	817,833	5.4%
Total Employment	431,672	100.0%	15,147,277	100.0%

Sources: Census 2000 *Supplementary Survey*; BAE, 2001.

Residents' Place of Work

Indicator Description: Place of work by county for employed residents of San Francisco, 1990 through 2020.

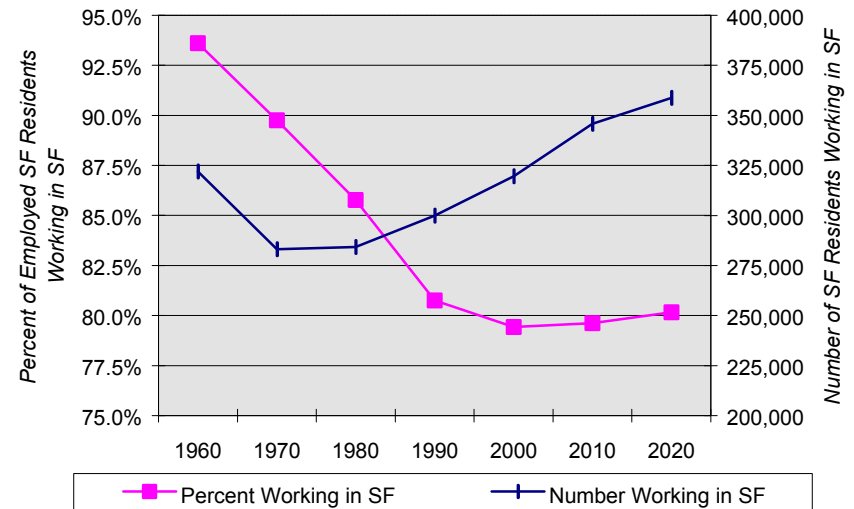
Geographic Areas Covered: City of San Francisco (for residents).

Key Findings:

- The percentage of employed San Franciscans working in the City has been in decline since 1990, but is expected to stabilize at approximately 80% from 2000 through 2020.
- Even though the proportion has declined, the absolute number of San Franciscans working in the City has increased since 1970, and is expected to continue to grow over the next two decades.

Limitations of the Data: See Appendix for detail on San Francisco residents' place of work. Data from 2000 forward are estimates and projections by MTC, last actual Census data from 1990.

San Francisco Residents by Place of Work, 1990-2020



Distribution of San Francisco Employed Residents by Place of Employment

County of Work	1960	1970	1980	1990	2000	2010	2020
San Francisco	93.6%	89.8%	85.8%	80.8%	79.4%	79.6%	80.2%
San Mateo	3.5%	5.8%	6.5%	8.7%	9.8%	9.5%	9.3%
Santa Clara	0.3%	0.9%	1.1%	2.2%	2.9%	2.8%	2.4%
Alameda	1.7%	2.5%	4.6%	5.1%	4.9%	5.0%	4.9%
Contra Costa	0.3%	0.4%	0.7%	1.5%	1.4%	1.4%	1.4%
Solano	0.0%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%
Napa	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sonoma	0.0%	0.0%	0.1%	0.1%	0.1%	0.1%	0.2%
Marin	0.6%	0.4%	1.0%	1.3%	1.3%	1.3%	1.5%
Elsewhere	NA	NA	0.1%	0.2%	0.2%	0.1%	0.1%
TOTAL	100%	100%	100%	100%	100%	100%	100%

Number of SF Residents Working in SF

Year	1960	1970	1980	1990	2000	2010	2020
Number	322,000	283,184	284,297	299,926	319,546	345,726	358,700

Note: Historic data (1960-1990) from U.S. Census, projections (2000-2020) by MTC.

Sources: Metropolitan Transportation Commission (MTC), 2001, BAE 2001

Travel Time to Work

Indicator Description: Number of minutes reported by Census respondents for their travel time to work. Range of times for 2000 and mean travel time for 1990 and 2000.

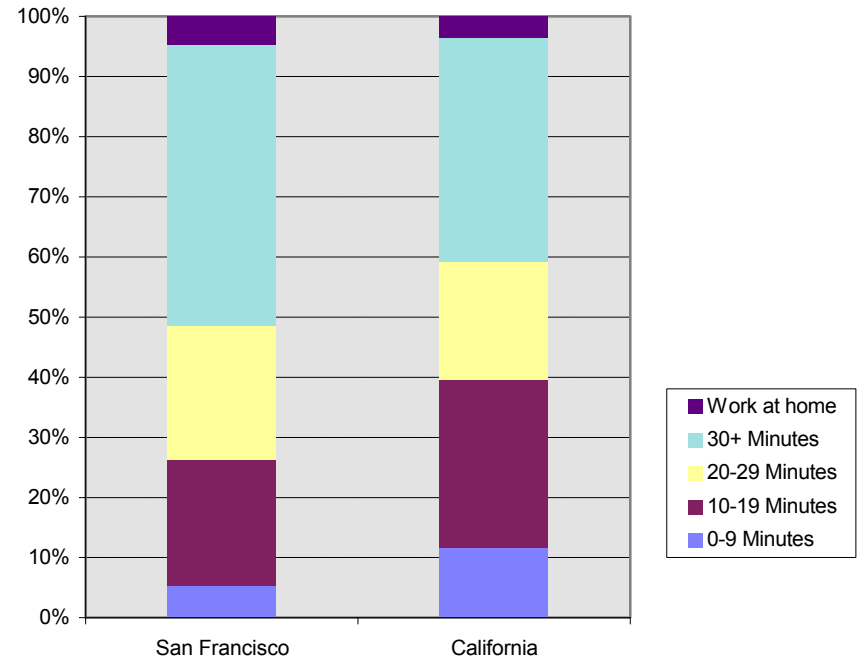
Geographic Areas Covered: City of San Francisco and State of California.

Key Findings:

- Counting those working at home, 31% of employed San Francisco residents traveled less than 20 minutes to work in 2000.
- The largest category is those traveling 30 or more minutes to work. These workers may still work within San Francisco – time of travel may account for lengthy time but short distance commutes.
- San Francisco has a longer mean travel time to work than statewide.
- On average, employed residents of San Francisco and California had longer commute times in 2000 than in 1990.

Limitations of the Data: 2000 data are from the Census 2000 *Supplementary Survey* – data from 2000 Census, which is based on a larger sample (one-in-six households) not yet available. See Appendix for details on the *Supplementary Survey*.

Travel Time to Work



2000 Journey to Work (Minutes)	San Francisco		California	
	Number	% of Total	Number	% of Total
0-9 Minutes	22,159	5%	1,715,576	12%
10-19 Minutes	88,181	21%	4,137,535	28%
20-29 Minutes	93,249	22%	2,898,386	20%
30+ Minutes	195,836	47%	5,487,668	37%
Work at home	20,176	5%	541,002	4%
Total	419,601	100%	14,780,167	100%
1990 Mean Travel Time to Work (Minutes)	26.9		24.6	
2000 Mean Travel Time to Work (Minutes)	29.6		26.7	
% Change in Mean Commute Time, 1990-2000	10%		9%	

Sources: 1990 U.S. Census STF3; Census 2000 *Supplementary Survey*; BAE, 2001.

Trends in Total Employment, 1990 - 2000

Indicator Description: Total annual average nonfarm employment in each geographic area, 1990 through 2000.

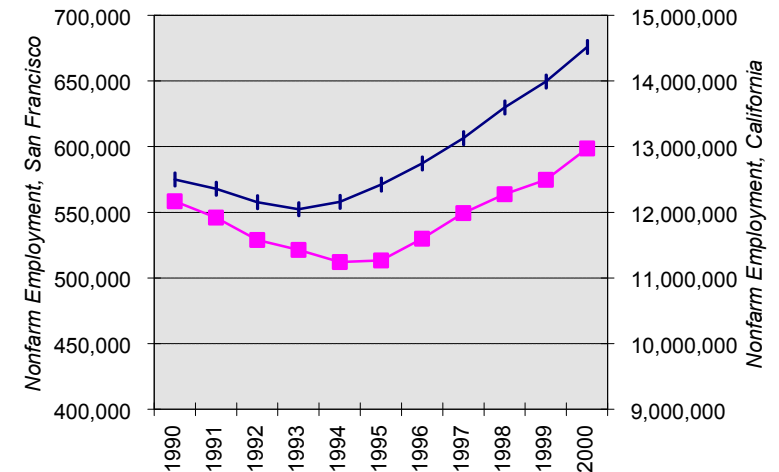
Geographic Areas Covered: City of San Francisco and State of California.

Key Findings:

- For the whole decade, employment in San Francisco grew by seven percent, less than half of the growth rate for California.
- Employment in San Francisco declined more proportionally than did the State's during the recession of the early 1990s, and did not recover as quickly even with the regional boom of the late 1990s.
- In 2000, there were approximately 600,000 wage and salary jobs in San Francisco.

Limitations of the Data: Excludes self-employed workers and sole proprietors. These data are for all persons employed in the City, not just those also living in the City. Comparisons should be considered in light of the higher rate of population growth statewide.

Total Annual Average Nonfarm Employment



Year	San Francisco		California	
	Nonfarm Employment	as % of 1990	Nonfarm Employment	as % of 1990
1990	558,400	100%	12,499,900	100%
1991	546,100	98%	12,359,000	99%
1992	528,900	95%	12,153,500	97%
1993	521,300	93%	12,045,300	96%
1994	512,200	92%	12,159,500	97%
1995	513,300	92%	12,422,200	99%
1996	529,800	95%	12,743,400	102%
1997	549,300	98%	13,129,700	105%
1998	563,800	101%	13,596,100	109%
1999	574,700	103%	13,991,900	112%
2000	598,700	107%	14,518,600	116%

Note: Includes only wage and salary workers working in area.

Sources: CA State Employment Development Department, 2001; BAE, 2001

Employment by Industry 1990 - 2000

Indicator Description: Total annual average nonfarm employment by major industry sector, 1990 and 2000.

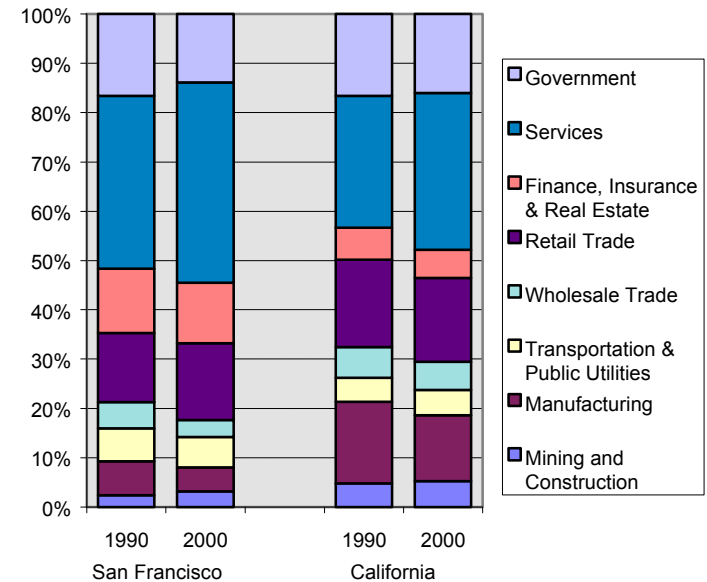
Geographic Areas Covered: City of San Francisco and State of California.

Key Findings:

- The largest industry sector in San Francisco in 2000, providing over 40 percent of all employment, was services, including both personal and business-related services.
- Manufacturing and wholesale trade both suffered substantial declines in employment over the decade in San Francisco, while retail trade and services showed strong growth.
- Relative to California, San Francisco is strong in FIRE (finance, insurance, and real estate) and services, and weak in manufacturing and wholesale trade.

Limitations of the Data:
Does not include self-employed workers and sole proprietors. Does not reflect downturn in economy in 2001.

Employment by Major Sector, 1990-2000



Industry	1990				2000				Change, 1990-2000			
	San Francisco		California		San Francisco		California		San Francisco		California	
	Number of Employees	% of Total	Number of Employees	% of Total	Number of Employees	% of Total	Number of Employees	% of Total	Number of Employees	% Change	Number of Employees	% Change
Mining and Construction	13,500	2.4%	599,500	4.8%	18,600	3.1%	756,900	5.2%	5,100	37.8%	157,400	26.3%
Manufacturing	38,300	6.9%	2,068,800	16.6%	29,300	4.9%	1,944,200	13.4%	(9,000)	-23.5%	(124,600)	-6.0%
Transportation & Public Utilities	37,300	6.7%	612,200	4.9%	37,100	6.2%	745,600	5.1%	(200)	-0.5%	133,400	21.8%
Wholesale Trade	29,600	5.3%	768,900	6.2%	20,500	3.4%	830,800	5.7%	(9,100)	-30.7%	61,900	8.1%
Retail Trade	78,400	14.0%	2,223,800	17.8%	93,300	15.6%	2,470,000	17.0%	14,900	19.0%	246,200	11.1%
Finance, Insurance & Real Estate	73,000	13.1%	808,800	6.5%	73,500	12.3%	823,200	5.7%	500	0.7%	14,400	1.8%
Services	195,500	35.0%	3,343,100	26.7%	243,500	40.7%	4,626,800	31.9%	48,000	24.6%	1,283,700	38.4%
Government	92,800	16.6%	2,074,800	16.6%	83,000	13.9%	2,321,200	16.0%	(9,800)	-10.6%	246,400	11.9%
Total Nonfarm Employment	558,400	100.0%	12,499,900	100.0%	598,700	100.0%	14,518,600	100.0%	40,300	7.2%	2,018,700	16.1%

Note: Some numbers may not sum to total due to independent rounding.

Source: California Employment Development Department 2001; BAE 2001

Workers' Place of Residence

Indicator Description: Place of residence of persons working in the City of San Francisco, 1990 through 2020.

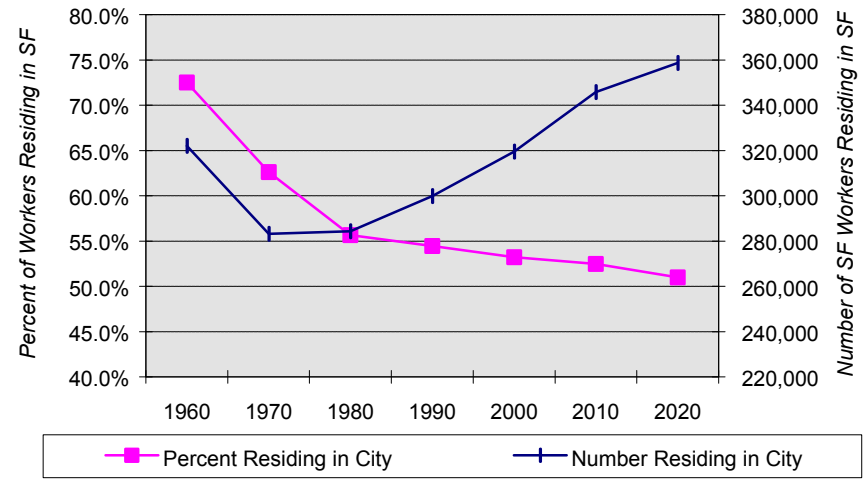
Geographic Areas Covered: City of San Francisco (for workers).

Key Findings:

- The proportion of San Francisco workers who reside in the City declined from almost three-quarters of all workers in 1960 to 54 percent in 1990. This decline is projected to continue at a much slower pace through 2020, when about half of the City's workers are projected to live there also.
- The actual number of the City's workers also living in the City declined sharply from 322,000 in 1960 to 283,000 in 1970. Then, despite the continuing proportional decline, the number began to increase again, reaching nearly 300,000 workers in 1990, and projected to increase to 358,700 in 2020.

Limitations of the Data: See Appendix for detail on San Francisco workers' place of residence. Data from 2000 forward are estimates and projections by MTC, last actual Census data from 1990.

San Francisco Workers by Place of Residence, 1990-2020



Distribution of San Francisco Workers by Place of Residence

County of Residence	1960	1970	1980	1990	2000	2010	2020
San Francisco	72.5%	62.6%	55.6%	54.4%	53.2%	52.5%	51.0%
San Mateo	13.3%	15.0%	15.4%	14.3%	13.3%	13.7%	14.2%
Santa Clara	1.6%	2.0%	1.5%	1.4%	1.1%	1.1%	1.3%
Alameda	5.6%	7.8%	10.0%	11.0%	10.4%	10.2%	10.9%
Contra Costa	2.3%	4.5%	7.5%	8.7%	9.6%	10.1%	10.3%
Solano	0.2%	0.3%	0.9%	1.8%	2.5%	2.5%	2.6%
Napa	0.0%	0.1%	0.1%	0.2%	0.2%	0.2%	0.2%
Sonoma	0.2%	0.8%	1.3%	1.5%	1.8%	1.6%	1.4%
Marin	4.3%	6.9%	7.4%	6.1%	6.2%	6.1%	5.9%
Elsewhere	NA	NA	0.5%	0.6%	1.6%	1.9%	2.1%
TOTAL	100%	100%	100%	100%	100%	100%	100%

Number of SF Workers Residing in SF

1960	1970	1980	1990	2000	2010	2020
322,000	283,184	284,297	299,926	319,546	345,726	358,700

Note: Historic data (1960-1990) from U.S. Census, projections (2000-2020) by MTC.

Source: Metropolitan Transportation Commission (MTC), 2001; BAE 2001.



Housing Supply

Trends in Housing Production, 1980-2000

Indicator Description: Net change in housing units, built vs. demolished, 1980-1999. Includes new units built, and units added or lost through demolitions and alterations.

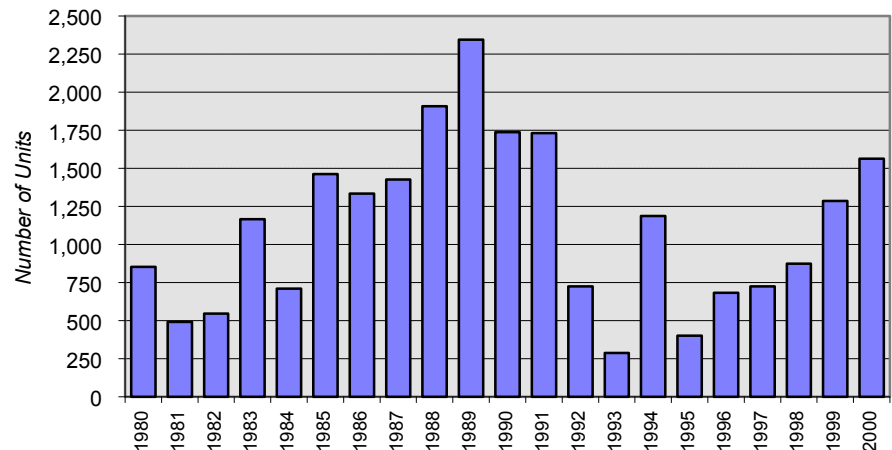
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Between 1980 and 1989, the pace of housing production rose in most years.
- The largest increase during the 1980 to 1999 period occurred in 1989, when 2,345 units were added to the existing housing stock.
- In the early 1990s, the number of net new units each year declined from the 1989 peak, but a period of gradual increase in production began in 1995, reaching 1,564 net new units in 2000.
- Overall the 1980s averaged 1,224 net new units added per year, while the 1990s averaged only 964 net new units per year.

Limitations of the Data: Alterations of existing units were only tracked for 1990 and after. Since the beginning of 1990, these alterations resulted in a net gain of 306 housing units. Census data for 1990 and 2000 indicate a significantly larger increase in housing units between 1990 and 2000.

Annual Net Change in Housing Units



Year	New Units Constructed	Units Demolished	Net Gain (Loss) by Alteration	Net Change
1980	980	128	-	852
1981	780	288	-	492
1982	589	42	-	547
1983	1,400	233	-	1,167
1984	790	79	-	711
1985	1,568	105	-	1,463
1986	1,507	173	-	1,334
1987	1,553	127	-	1,426
1988	2,011	104	-	1,907
1989	2,573	228	-	2,345
1990	2,065	433	105	1,737
1991	1,882	90	(60)	1,732
1992	767	76	34	725
1993	379	26	(65)	288
1994	1,234	25	(23)	1,186
1995	532	55	(76)	401
1996	909	278	52	683
1997	906	344	163	725
1998	909	54	19	874
1999	1,225	98	158	1,285
2000	1,626	61	(1)	1,564
Total	26,185	3,047	306	23,444

Source: 1999 & 2000 San Francisco Housing Inventory; BAE, 2001.

Housing by Structure Type

Indicator Description: Housing stock by number of units in structure.

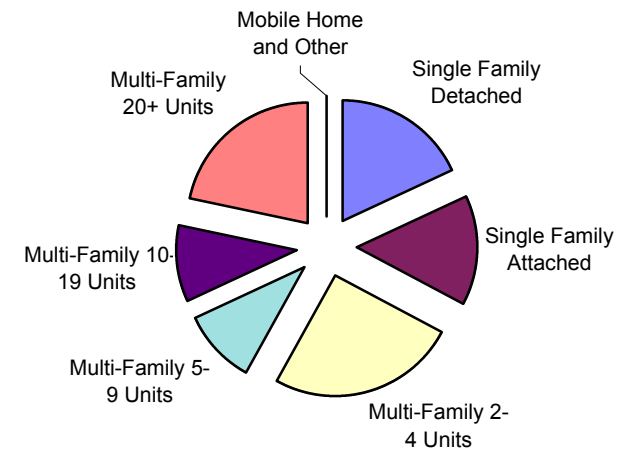
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Single-family units make up slightly less than 1/3rd of all housing units.
- Small multifamily units (2 to 4 units) make up around 1/4th of the housing stock.
- Units in large building of 20 or more units constitute slightly over 20% of total housing units.
- While data are not directly comparable to older Census data, the mix of units by type has not changed much in the last 20 years, due in large part to the limited additions to the large existing stock since 1980.

Limitations of the Data: Estimates for 2000 from the Census 2000 *Supplementary Survey*, and are based on a limited sample. More complete data from the larger sample used in the Census itself not yet available. See Appendix for definition of housing unit types and detail on the Census 2000 *Supplementary Survey*. Because of differences in how units were counted, data not directly comparable to data from other years and should not be compared directly to other tables.

San Francisco Housing Units by Structure Type, 2000



Structure Type	Units	
	Number	Percent
Single Family Detached	62,455	18.0%
Single Family Attached	51,143	14.8%
Multi-Family 2-4 Units	87,122	25.1%
Multi-Family 5-9 Units	35,267	10.2%
Multi-Family 10-19 Units	35,638	10.3%
Multi-Family 20+ Units	74,555	21.5%
Mobile Home and Other	347	0.1%
Total Units	346,527	100.0%

Sources: Census 2000 *Supplementary Survey*; BAE, 2001.

Job Growth and Housing Growth, 1970-2000

Indicator Description: Comparison of the change in the number of jobs (i.e., employment) and housing units over a 30-year period.

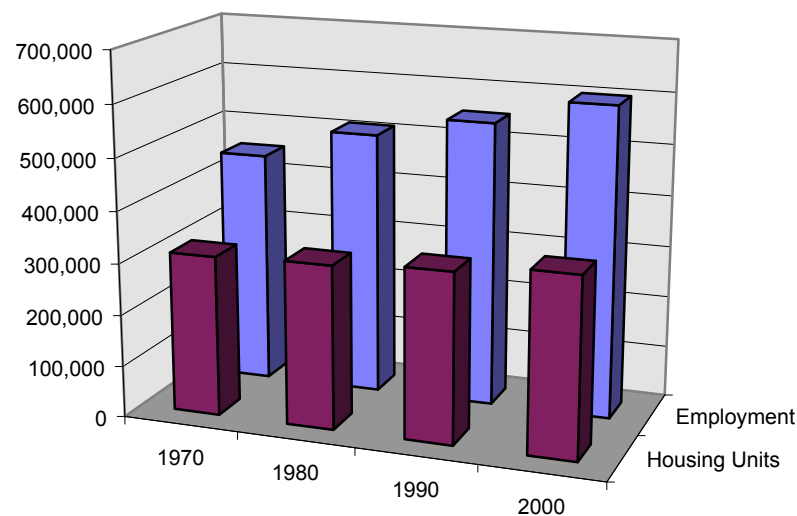
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Job growth has outpaced construction of new housing in San Francisco over the last thirty years.
- The number of persons working in San Francisco has grown at nearly three times the rate of housing over the thirty-year period.
- By decade, job growth was most rapid and housing growth was slowest during the 1970s.

Limitations of the Data: Data from 2000 estimated, since data on employment and commuting characteristic from the 2000 Census are not available until 2002. Some of the more rapid growth in jobs may be absorbed by an increase in the number of workers per household, e.g., the increase in the number of married women in the labor force.

Employment and Housing Growth, 1970-2000



SAN FRANCISCO		
Year	Employment (a)	Housing
1970	452,197	310,402
1980	510,988	316,608
% Change 1970-1980	13.0%	2.0%
1990	550,835	328,471
% Change 1980-1990	7.8%	3.7%
2000	600,408	346,527
% Change 1990-2000	9.0%	5.5%
% Change 1970-2000	32.8%	11.6%

Notes:

(a) 1970, 1980 and 1990 Census data was derived from journey-to-work datasets, summarized by MTC staff. 2000 data are commuter forecasts prepared by MTC staff using the Association of Bay Area Government's Projections 2000 data, and 1990 Census journey-to-work data. Accounts only for primary place of work, some workers may hold additional jobs.

Sources: Metropolitan Transportation Commission, 2000; 1970, 1980, and 1990 U.S. Census; BAE, 2001.

Year Structure Built

Indicator Description: Age of housing unit.

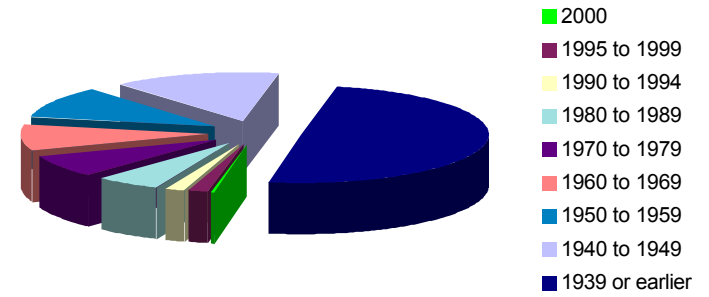
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Nearly half of San Francisco housing units are over sixty years old.
- Less than 4% of all San Francisco housing units have been built since 1990.

Limitations of the Data: Estimates for 2000 from the Census 2000 *Supplementary Survey*, and are based on a limited sample. More complete data from the larger sample used in the Census itself not yet available. See Appendix for detail on the Census 2000 *Supplementary Survey*. Data by tenure not available from *Supplementary Survey*.

Year Structure Built, 2000



Year Structure Built	Estimate	% of Total
2000	763	0.2%
1995 to 1999	5,494	1.6%
1990 to 1994	6,434	1.9%
1980 to 1989	18,721	5.4%
1970 to 1979	26,213	7.6%
1960 to 1969	29,804	8.6%
1950 to 1959	37,091	10.7%
1940 to 1949	49,999	14.4%
1939 or earlier	172,008	49.6%
Total	346,527	100.0%

Note: Data based on 12 monthly samples during 2000.

Sources: Census 2000 *Supplementary Survey*; BAE, 2001.

Changes in Unit Mix by Building Size, 1990-2000

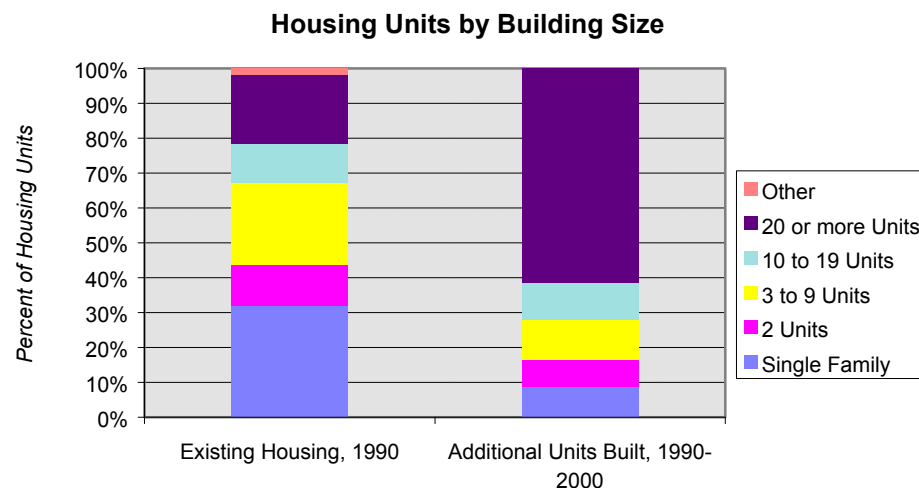
Indicator Description: Existing 1990 housing units by number of units in structure, compared to mix of units added during 1990s.

Geographic Areas Covered: City of San Francisco.

Key Findings:

- The scale of structures built during the 1990s varied substantially from the 1990 existing housing stock.
- More than 60% of new units built during the 1990s were in structures of 20 units or more, compared to existing 1990 stock with only 20% of all units in these larger structures.
- Single-family units comprised 37% of existing stock in 1990, but only 9% of new units built from 1990 through 2000.
- Small multifamily unit construction lagged behind the existing stock mix. Only 19% of units built during 1990s were in these type of structures, compared to 36% of existing stock.

Limitations of the Data: Number of units in structure does not necessarily indicate tenure of occupants; larger structures may contain ownership units. Data have not been adjusted to match housing unit counts or unit mix from 2000 Census, which seem to indicate a larger increase in the number of units and a larger proportion of the increase in smaller buildings. See Appendix for definition of unit types.



Existing Housing Stock as of April 1, 1990

	Number of Units in Building					Total
	Single Family	2 Units	3 to 9 Units	10 to 19 Units	20 or More Units	
	105,150	38,054	77,816	36,211	64,777	328,471
As % of Total (a)	32%	12%	24%	11%	20%	

Additions to Housing Stock

Year	Number of Units in Building					Total
	Single Family	2 Units	3 to 9 Units	10 to 19 Units	20 or More Units	
1990	89	48	190	156	1,582	2,065
1991	79	62	129	87	1,525	1,882
1992	111	100	96	79	381	767
1993	51	74	56	36	162	379
1994	63	62	121	16	972	1,234
1995	69	54	89	89	231	532
1996	84	142	159	241	283	909
1997	165	100	127	110	404	906
1998	117	60	96	190	446	909
1999	181	106	160	162	616	1,225
2000	99	122	217	141	1,047	1,626
Total	1,108	930	1,440	1,307	7,649	12,434
As % of Additions	9%	7%	12%	11%	62%	100%

(a) Total includes 6,463 units classified as mobile home and other, not shown in subcategories.
Sources: 1990 U.S. Census STF1A; 1999 & 2000 Housing Inventory; BAE, 2001.

Units in Structure by Tenure, 1990

Indicator Description: Shows distribution of renters and owners by type of building structure, as described by number of total units.

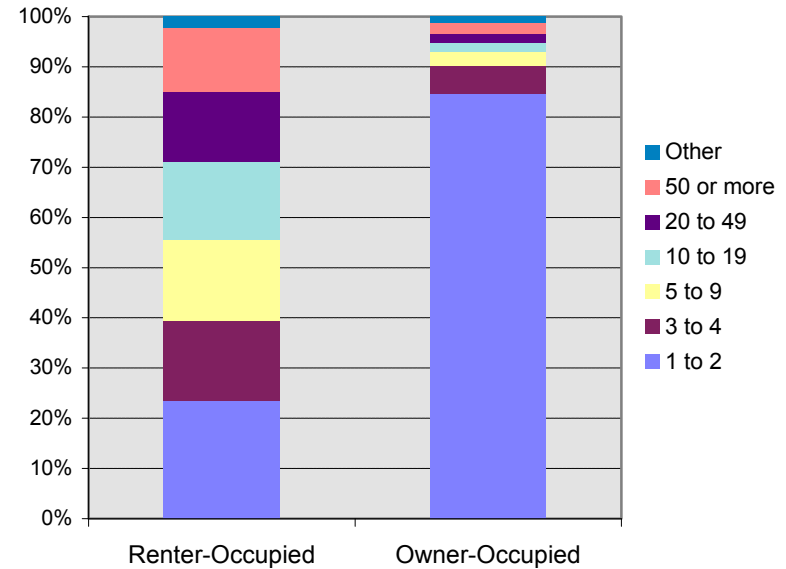
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Owners generally live in buildings of few units, while renters are distributed more evenly among a mix of building types.
- Owner households overwhelmingly lived in one- and two-unit structures.
- Only 15.4% of owner households lived in multifamily structures with more than two units.
- Renter households lived in a broad range of structure sizes.
- More than 1/5th of San Francisco renter households lived in buildings with one or two units.
- Almost 40% of renters lived in buildings with one to four units.
- Fewer than 13% of San Francisco's rental units were in large structures with 50 units or more.

Limitations of the Data: These data are more than 10 years old; 2000 Census data to be released in 2002.

Occupied Households by Number of Units in Structure, 1990



Units in Structure	Renter-Occupied		Owner-Occupied	
	Number	Percentage	Number	Percentage
1 to 2	46,870	23.4%	89,284	84.6%
3 to 4	32,163	16.1%	6,013	5.7%
5 to 9	31,993	16.0%	2,707	2.6%
10 to 19	31,433	15.7%	2,019	1.9%
20 to 49	27,566	13.8%	1,879	1.8%
50 or more	25,628	12.8%	2,218	2.1%
Other	4,434	2.2%	1,377	1.3%
Total	200,087	100.0%	105,497	100.0%

Source: 1990 U.S. Census STF1; BAE, 2001.

Units by Number of Bedrooms by Tenure, 1990

Indicator Description: Housing supply by number of bedrooms by tenure, 1990.

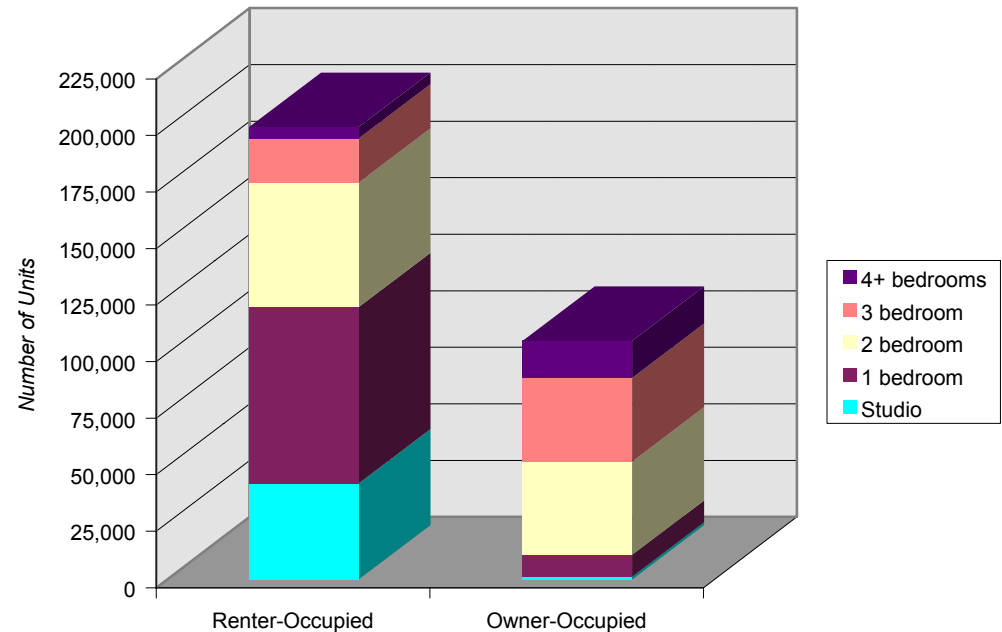
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Owners tend to live in larger housing units than renters.
- For renter-occupied units, one bedroom units were the most prevalent, at 39.0% of total rental supply.
- For owner-occupied units, two-bedroom units were most prevalent, at 39.1% of total owner housing supply. Over half of owner-occupied units had three or more bedrooms.
- Only 2.5% of renter-occupied units had 4 or more bedrooms, indicating a potential lack of supply for large renter households.

Limitations of the Data: 2000 U.S. Census data for household tenure by unit type are not yet available. Tenure rates and unit mix may have changed since 1990 as new units are constructed, older units are modified or demolished, and ownership type of older units changes. Overall tenure rate data from 2000 (currently available) indicate little overall change, however.

Units by Number of Bedrooms and Tenure



Number of Bedrooms	Total Units	% of Total Units	Renter-Occupied	% of Rental Units	Owner-Occupied	% of Owner Units
Studio	49,178	15.0%	42,452	21.2%	1,292	1.2%
1 bedroom	94,522	28.8%	77,931	39.0%	9,568	9.1%
2 bedroom	102,964	31.3%	55,049	27.5%	41,293	39.1%
3 bedroom	59,387	18.1%	19,555	9.8%	36,971	35.0%
4+ bedrooms	22,420	6.8%	5,083	2.5%	16,390	15.5%
Total	328,471	100.0%	200,070	100.0%	105,514	100.0%

Sources: 1990 U.S. Census STF3; 2000 SF Consolidated Plan; BAE 2001.

Persons per Room by Tenure

Indicator Description: Number of occupants per room by tenure, 1990 and 2000. More than one person per room is considered to be an indicator of overcrowding in a housing unit.

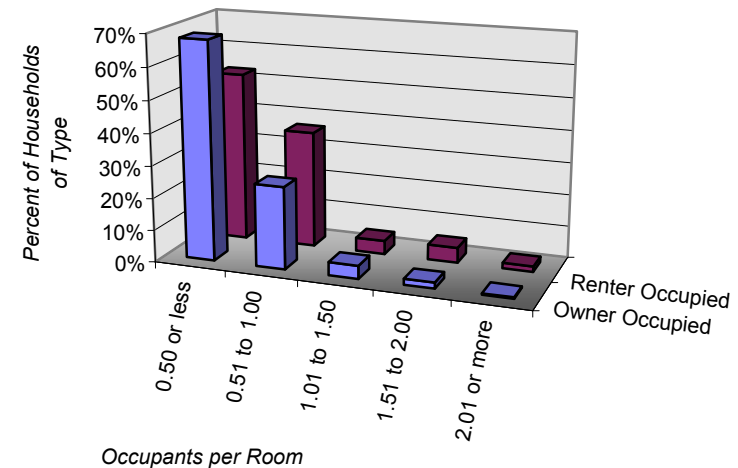
Geographic Areas Covered: City of San Francisco.

Key Findings:

- There was little change in the patterns for the number of persons per room between 1990 and 2000. This held true for both owners and renters.
- Owner households tend to have fewer occupants per room than renter households, with a lower incidence of overcrowding;
- In 2000, 6% of owner households and 11% of renter households had over one person per room, indicating overcrowding in those units. For renters, this was approximately 22,000 households.

Limitations of the Data: Estimates for 2000 from the Census 2000 *Supplementary Survey*, and are based on a limited sample. More complete data from the larger sample used in the Census itself not yet available. See Appendix for detail on the Census 2000 *Supplementary Survey*. 1990 data based on 100% sample, subject to ability of Census to locate and enumerate all units.

Persons per Room by Tenure, 2000



	1990		2000	
	Number	Percent	Number	Percent
<i>Owner occupied:</i>				
0.50 or less occupants per room	72,408	69%	79,369	68%
0.51 to 1.00 occupants per room	25,154	24%	29,909	26%
1.01 to 1.50 occupants per room	4,304	4%	4,756	4%
1.51 to 2.00 occupants per room	2,382	2%	2,153	2%
2.01 or more occupants per room	1,249	1%	530	0.5%
1.01 or more occupants per room	7,935	8%	7,439	6%
Total Owner Occupied	105,497	100%	116,717	100%
<i>Renter occupied:</i>				
0.50 or less occupants per room	105,385	53%	110,592	53%
0.51 to 1.00 occupants per room	69,799	35%	75,971	36%
1.01 to 1.50 occupants per room	8,541	4%	8,792	4%
1.51 to 2.00 occupants per room	9,629	5%	9,971	5%
2.01 or more occupants per room	6,733	3%	3,562	2%
1.01 or more occupants per room	24,903	12%	22,325	11%
Total Renter Occupied	200,087	100%	208,888	100%

Sources: 1990 Census STF1; Census 2000 *Supplementary Survey*; BAE, 2001.

Ownership of Multifamily Rental Units

Indicator Description: Location of owners of units in multifamily rental properties, and number of these properties with at least one owner-occupied unit reported.

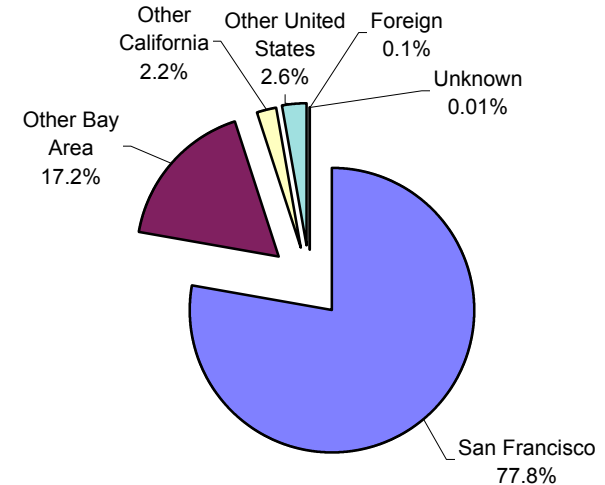
Geographic Areas Covered: Properties in City of San Francisco, and owners worldwide.

Key Findings:

- Over three-fourths of the units in San Francisco multifamily rental properties are owned by entities based in San Francisco.
- Over 95% are owned by entities based in the nine-county Bay Area.
- Over one-third of the multifamily rental properties show at least one unit occupied by an owner.

Limitations of the Data: Based on owner mailing address from assessor's data. Actual ownership entity (e.g., corporation or partnership) may be headquartered elsewhere, and owners may also reside elsewhere.

Multifamily Rental Units by Owner Location



Owner Mailing Address:	Multifamily Units	
	Number	Percent
San Francisco	148,796	77.8%
Other Bay Area	32,960	17.2%
Other California	4,232	2.2%
Other United States	5,049	2.6%
Foreign	131	0.1%
Unknown	25	0.01%
Total Units	191,193	100.0%

Total Properties 36,922

With at least One Homeowner Exemption

Number of Properties	12,885
Percent of Total Properties	35%

Notes:

Includes units on all San Francisco properties classified as multiunit residential, with at least one more unit than homeowner's exemption. Total number of units includes those with homeowner's exemption. Most properties with any homeowner's exemption had only one such exemption, but available data did not allow an accurate count of total units with exemptions. Mailing address of owner may not indicate actual place of residence of owner(s).

Source: City of San Francisco, 2001; FARES, 2000; BAE, 2001.

Live/Work Units Built, 1987-2000

Indicator Description: Number of live/work units completed each year.

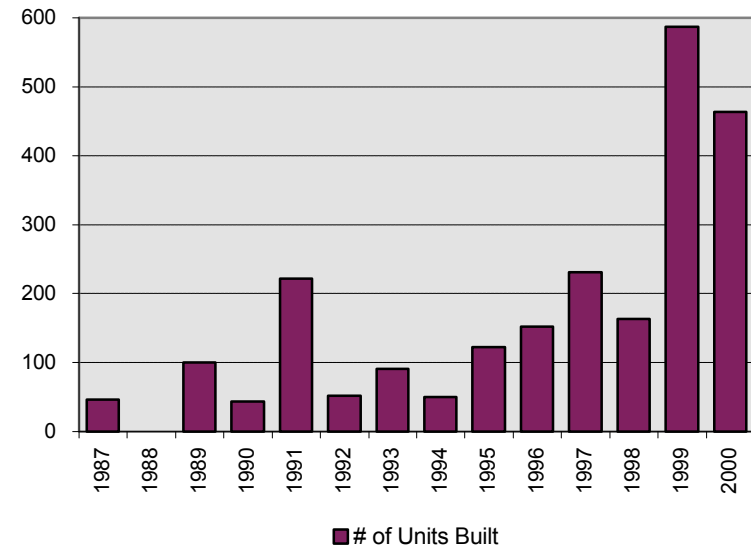
Geographic Areas Covered: City of San Francisco.

Key Findings:

- The annual rate of production of live/work units has generally increased over the last decade.
- A total of 2,324 live/work units were completed during the 14-year period from 1987 through 2000.
- In 1987, only 46 live/work units were completed, compared to 587 units in 1999.
- The production in 1999 was more than twice that of any previous year during the period, representing approximately one-fourth of units completed.
- The one-year increase of live/work units between 1998 and 1999 was 360%. Production declined slightly from 1999 to 2000.
- Live/work units made up 10% of all units added during the 14-year period.

Limitations of the Data: Data only account for live/work units in projects with four or more units. Likely undercounting of actual number of live/work units completed. Proportion of live/work units actually used as residences is unknown.

New Live/Work Units Constructed, 1987-2000



Year	# of Live/Work Units Completed in Projects of 4 Units or More (a)
1987	46
1988	-
1989	100
1990	44
1991	222
1992	52
1993	91
1994	50
1995	122
1996	152
1997	231
1998	163
1999	587
2000	464
Total	2,324

Notes: Data only available from live/work projects that have four or more units.

Sources: 1999 & 2000 *Housing Inventory*, City of San Francisco Planning Department; BAE, 2001.

Condominium Conversions by Year, 1990-2000

Indicator Description: Number of units converted to condominiums.

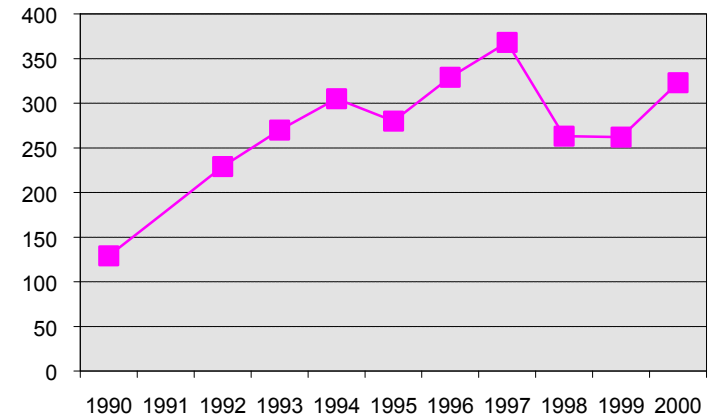
Geographic Areas Covered: City of San Francisco.

Key Findings:

- The number of condominium conversions from 1990 through 2000 is limited compared to total rental units in 2000. In 2000, there were approximately 220,000 rental units, and for the period, slightly over 2,500 total units converted to condominiums. Despite these conversions, there was a net increase in the number of rental units during the decade.
- The peak year for condo conversions was 1997, when 368 conversions occurred.
- In 2000, there were 323 conversions, a slight increase from recent years but still below the 1997 peak.

Limitations of the Data: Does not include buildings converted to tenancy in common (TICs). While the condominium conversion ordinance has limited conversions to a total of 200 per year, more conversions may be recorded in any given year because units approved for conversion in a previous year may be recorded in a subsequent year.

Condominium Conversions by Year



Year	# of Condominium Conversion Units
1990	129
1991	(a)
1992	229
1993	270
1994	305
1995	280
1996	329
1997	368
1998	263
1999	262
2000	323
Total	2,937

(a) Insufficient data available.

Sources: 1999 and 2000 San Francisco Housing Inventory; BAE, 2001.

Condominium Conversions by Unit Type

Indicator Description: Number of units in buildings converted to condominiums vs. overall multifamily housing stock in 1999 and 2000.

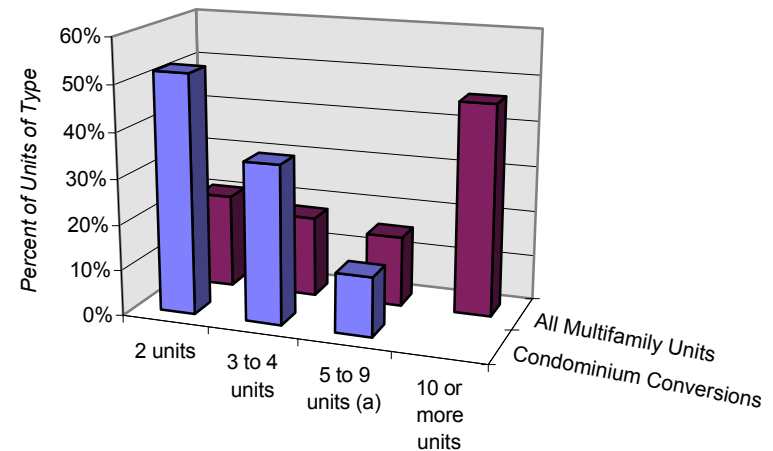
Geographic Areas Covered: City of San Francisco

Key Findings:

- Condominium conversions occurred in smaller buildings more often than overall share of small buildings in housing stock, suggesting that rental duplexes may be at greatest risk of conversion.
- Total conversions over the two-year period represent less than three-tenths of one percent of the total multifamily housing stock.

Limitations of the Data: Total multifamily stock includes all owner and rental units in buildings with more than one unit. Conversions are limited to buildings of six units or less. The data for total multifamily housing stock comes from the American Community Survey, which is a new Census program still in development and in an “experimental” phase prior to full implementation nationwide. Data for 1999 will be re-weighted and reissued following comparison with the 2000 Census. Sample size for San Francisco was approximately 10,000 households.

Condominium Conversions by Unit Type, 1999-2000



Building Type	Condominium Conversions		All Multifamily Units (b)	
	Number	Percent	Number	Percent
2 units	306	52%	44,512	21%
3 to 4 units	203	35%	38,159	18%
5 to 9 units (a)	76	13%	33,369	15%
10 or more units	NA		99,814	46%
Total	585	100%	215,854	100%

(a) Conversions limited to buildings of six units or less.

(b) Estimated from American Community Survey, 1999.

Sources: 1999 and 2000 *San Francisco Housing Inventory*; 1999 American Community Survey, U.S. Census Bureau; BAE, 2001.

New Affordable Housing Construction by Housing Type

Indicator Description: Affordable housing units by target population served.

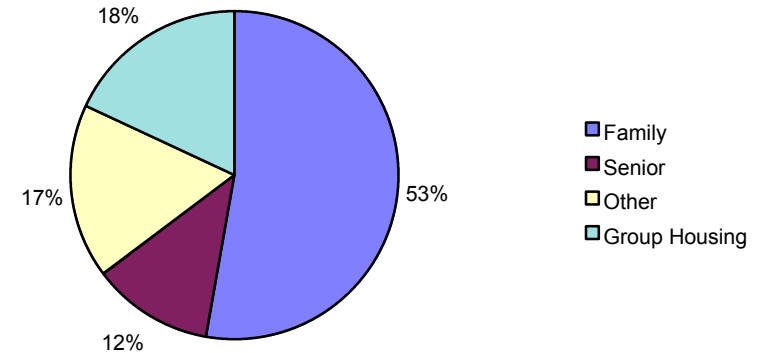
Geographic Areas Covered: City of San Francisco.

Key Findings:

- The majority of affordable housing built in San Francisco from 1990 through 2000 was for family households.
- Only 12% of new affordable housing built during 1990s was for seniors.
- The mix of affordable housing target populations served fluctuates year to year.

Limitations of the Data: Overall data from 2000 Census seem to indicate a larger increase in the number of total units.

New Affordable Housing Construction by Housing Type, 1990-2000



Year	Housing Type				Total
	Family	Senior (a)	Other Units (b)	Group Housing (c)	
1990	-	101	357	-	458
1991	251	-	96	42	389
1992	228	-	10	12	250
1993	68	40	-	-	108
1994	350	123	-	303	776
1995	134	-	38	-	172
1996	308	-	36	-	344
1997	112	-	-	257	369
1998	115	84	35	-	234
1999	186	54	-	-	240
2000	92	12	27	21	152
Total	1,844	414	599	635	3,492
% of Total	53%	12%	17%	18%	100%

(a) Senior units may be dwelling units, group housing or single-room occupancy (SRO) residential hotel units.

(b) Units such as affordable live/work units, inclusionary affordable units, and special user group units.

(c) Group Housing includes SROs, residential care facilities, shelters and transitional housing.

Source: 1995 and 2000 San Francisco Housing Inventory; BAE 2001

New Affordable Housing by Income Level

Indicator Description: Comparison of the number of affordable and market-rate housing units constructed in San Francisco from 1980 through 2000.

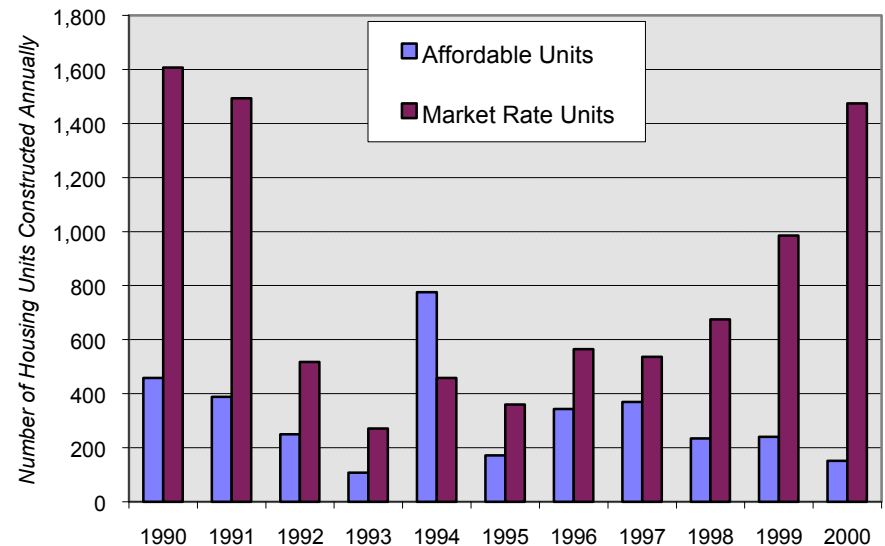
Geographic Areas Covered: City of San Francisco.

Key Findings:

- New affordable housing build during 1990s slightly exceeded amount build during 1980s.
- Mix of new affordable housing build during 1990s shifted to more very low income and less moderate income units.
- Overall, approximately 28% of units built in San Francisco from 1990 through 2000 were affordable units.
- The fewest proportion of affordable units build out of total built was in 2000 (only 9% of all units build were affordable).

Limitations of the Data: Data have not been adjusted to match housing unit counts from 2000 Census, which seem to indicate a larger overall increase in the number of units.

New Construction of Affordable and Market Rate Housing, 1990-2000



Year	Income Level (a)			Number of Units Constructed Annually			
				Total Affordable	Total Market Rate	Total Units	Percent Affordable
	Very Low	Low	Moderate				
1980-1989	1,518	1,013	793	3,324	10,427	13,751	24%
1990	278	180	-	458	1,607	2,065	22%
1991	203	154	32	389	1,493	1,882	21%
1992	16	180	54	250	517	767	33%
1993	108	-	-	108	271	379	28%
1994	686	86	4	776	458	1,234	63%
1995	82	80	10	172	360	532	32%
1996	83	198	63	344	565	909	38%
1997	287	46	36	369	537	906	41%
1998	213	21	-	234	675	909	26%
1999	136	41	63	240	985	1,225	20%
2000	67	54	31	152	1,474	1,626	9%
Total, 1990-2000	2,159	1,040	293	3,492	8,942	12,434	28%

(a) See Appendix for definitions of income levels.

Source: 1995 and 2000 San Francisco Housing Inventory; BAE 2001

Low Income Housing Tax Credit Units

Indicator Description: Number of Low Income Housing Tax Credit (LIHTC) units placed in service from 1988 through 2000. Units rent to households up to 60% Area Median Income.

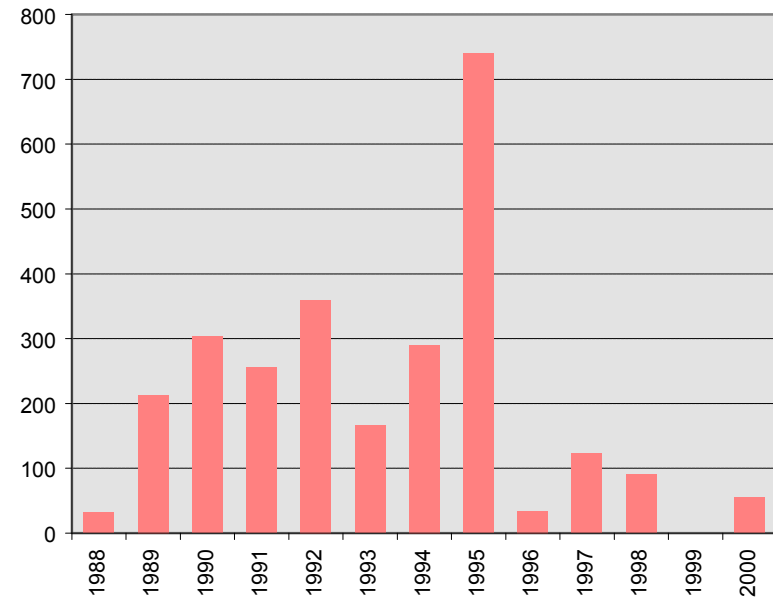
Geographic Areas Covered: City of San Francisco

Key Findings:

- The LIHTC regulations were passed in 1986, so early years showed relatively limited construction.
- In 1995, program reached the highest year of period shown.
- Because of increases in the per capita allocation for the Federal Tax Credit, production may increase in future years.

Limitations of the Data: Units are not usually placed in service in the same year in which tax credits are awarded; additional tax credits have been awarded for later years for units not yet placed in service. Units placed in service include both newly constructed and rehabilitated units. Steep decline in unit count from 1995 to 1996 due to a change in how the state Tax Credit Allocation Committee awarded tax credits by location.

**Low Income Housing Tax Credit Units Placed in Service
1988-2000**



Year	Total Units
1988	32
1989	213
1990	303
1991	255
1992	360
1993	166
1994	290
1995	740
1996	34
1997 (a)	123
1998 (a)	91
1999 (a)	-
2000 (a)	55

Notes: (a) Excludes units that have been awarded credits but have not yet been placed in service.

Sources: California Tax Credit Allocation Committee; BAE, 2001.

Federally Assisted Public Housing Units

Indicator Description: Section 8 housing units in City. Residents of units in the Section 8 program pay 30% of their income to rent, with the U.S. government subsidizing the difference up to a HUD-determined fair-market rent.

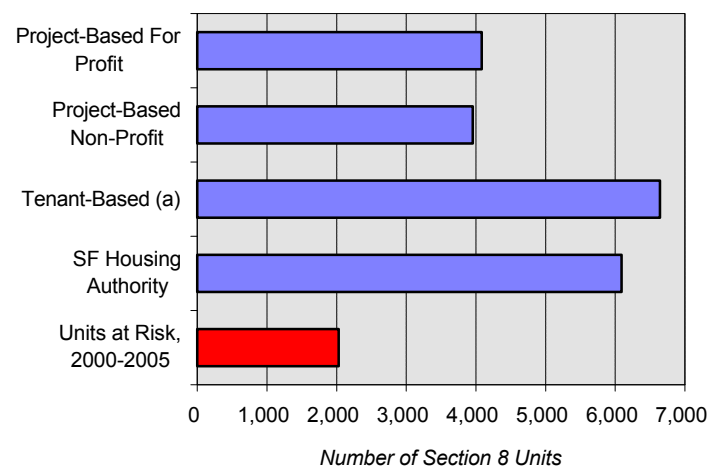
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Approximately one-fourth of project-based Section 8 units are at risk of loss over the next few years.
- The number of project-based units exceeds the number of tenant-based units.
- SFHA housing projects make up substantial percentage of the Section 8 housing stock.
- The total number of Section 8 units in 2001 is slightly under 10% of rental housing stock.

Limitations of the Data: The number of Section 8 recipients will fluctuate somewhat over time. See Appendix for detail on Section 8 units at risk of conversion to market-rate.

Section 8 Housing in San Francisco



	Section 8 Units		
	Total	Elderly	Family
Project-Based Section 8			
For Profit	4,085	n/a	n/a
Non-Profit	3,957	n/a	n/a
Tenant-Based Section 8	6,641 (a)	n/a	n/a
SF Housing Authority	6,096	2,025	4,071
Totals	20,779	n/a	n/a
Project-Based Units at Risk (b)	2,025		

Notes:

(a) Total includes 909 project-based units administered by SFHA.

(b) Units at risk of conversion to market-rate. See Appendix for details.

Sources: San Francisco Housing Authority (SFHA), Planning Department, and Redevelopment Agency, 2001.

SFRA-Subsidized Units Completed, 1991-2005

Indicator Description: Number of units/beds receiving a subsidy from San Francisco Redevelopment Agency (SFRA) Tax Increment Housing Program, amount of subsidy, and total development costs, by year.

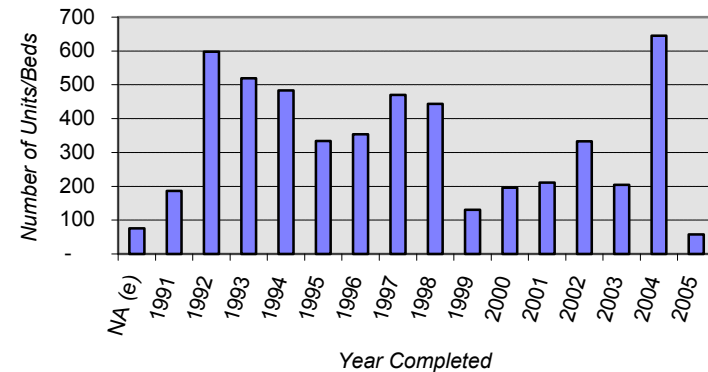
Geographic Areas Covered: City of San Francisco.

Key Findings:

- From 1991 through 2001, SFRA funds assisted in the construction, acquisition, or rehabilitation of over 4,000 affordable housing units/beds.
- Total SFRA subsidies for the period total over \$88 million, or approximately \$8 million annually.
- These SFRA subsidies leveraged over \$495 million in total development costs, or approximately \$45 million annually.
- SFRA funds are projected to contribute to the construction of an additional 1,240 affordable housing units or beds from 2002 through 2005.

Limitations of the Data: Includes rehabilitation and acquisition of existing units, so total number of units/beds shown does not necessarily represent additions to the overall housing stock. Completion dates from 2002 forward are estimates; some projects may not be completed as scheduled.

SFRA-Subsidized Units/Beds by Year of Project Completion



Year Completed (a)	Total Units/Beds (b)	SFRA Subsidy (c)	Total Development Cost (d)
NA (e)	76	\$497,992	\$8,653,082
1991	186	\$3,837,919	\$8,365,032
1992	598	\$6,465,794	\$27,356,918
1993	519	\$7,864,025	\$82,161,257
1994	483	\$13,284,822	\$61,288,019
1995	334	\$4,748,844	\$18,866,963
1996	354	\$10,817,420	\$46,485,957
1997	470	\$8,522,176	\$57,464,257
1998	444	\$17,190,000	\$58,347,047
1999	131	\$5,941,506	\$49,170,894
2000	196	\$3,895,590	\$11,659,358
2001	211	\$5,003,590	\$66,128,525
Total	4,002	\$88,069,678	\$495,947,309
Projected Future Completions (a)			
2002	333	\$12,713,052	\$38,242,605
2003	204	\$5,992,471	\$26,915,238
2004	645	\$24,123,210	\$90,408,775
2005	58	\$50,000	\$25,000
Total	1,240	\$42,878,733	\$155,591,618

(a) Completion dates from 2002 onward are estimates. Projects with no information on funding year are not included.

(b) Data for six of 97 projects not available.

(c) SFRA Funding for two of 97 projects not available.

(d) Total development costs for seven of 97 projects not available.

(e) Completion date not available.

Sources: San Francisco Redevelopment Agency, December 2001; BAE 2002.

Housing Opportunities for Persons with AIDS Units/Beds Added

Indicator Description: Number of units/beds receiving a subsidy from San Francisco Redevelopment Agency's (SFRA) federally-funded Housing Opportunities for Persons with AIDS (HOPWA) Program, amount of subsidy, and total development costs, by year.

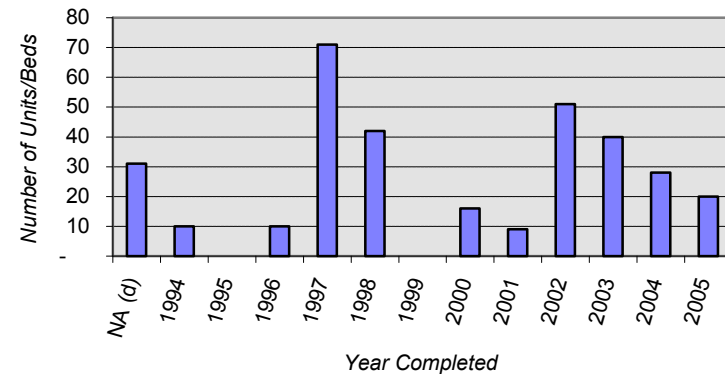
Geographic Areas Covered: City of San Francisco.

Key Findings:

- From 1994 through 2001 period, HOPWA funds assisted in the construction, acquisition, or rehabilitation of 189 housing units/beds serving both individuals and families.
- Total HOPWA subsidies for the period total nearly \$20 million, or approximately \$2.5 million annually.
- These HOPWA subsidies leveraged over \$40 million in total development costs, or approximately \$5 million annually.
- HOPWA funds are projected to contribute to the construction of an additional 139 affordable housing units or beds from 2002 through 2005.

Limitations of the Data: Includes rehabilitation and acquisition of existing units, so total number of units/beds shown does not necessarily represent additions to the overall housing stock. Completion dates from 2002 forward are estimates; some projects may not be completed as scheduled.

HOPWA Units/Beds by Year of Project Completion



Year Completed (a)	Total Units/Beds (b)	SFRA Subsidy	Total Development Cost (c)
NA (d)	31	\$2,434,147	\$7,612,244
1994	10	\$502,600	\$1,272,343
1995	-	\$0	\$0
1996	10	\$2,161,800	\$2,587,000
1997	71	\$9,395,777	\$6,564,253
1998	42	\$1,450,937	\$7,890,539
1999	-	\$0	\$0
2000	16	\$2,867,600	\$13,795,884
2001	9	\$991,315	\$991,315
Total	189	\$19,804,176	\$40,713,578
Projected Future Completions (a)			
2002	51	\$5,673,171	\$59,271,776
2003	40	\$10,588,487	\$34,784,073
2004	28	\$14,140,161	\$53,214,455
2005	20	\$2,885,395	\$55,368,034
Total	139	\$33,287,214	\$202,638,338

(a) Completion dates from 2002 onward are estimates.

(b) Data for five of 27 projects not available.

(c) These projects include fully licensed hospice care, independent living flats, and group homes for individuals with HIV/AIDS in recovery from substance abuse.

(d) Completion date not available; projects are complete and occupied.

Sources: San Francisco Redevelopment Agency, December 2001; BAE 2002.

SRO Units Lost to Fire, 1988-2001

Indicator Description: Number of Single Room Occupancy (SRO) units lost due to fire.

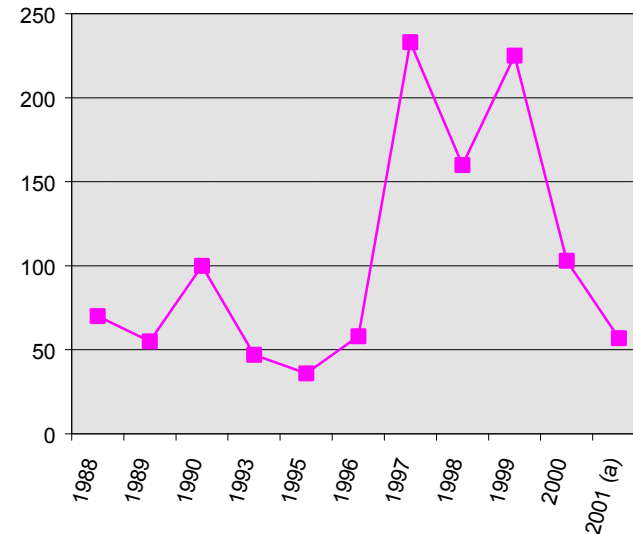
Geographic Areas Covered: City of San Francisco.

Key Findings:

- A total of more than 1,100 units SRO units have been lost due to fire since the beginning of 1988.
- The peak year for fire loss was 1997.
- This represents approximately 6% percent of total residential hotel units as inventoried by the City during the time period.
- While many units have been lost to fire in recent years, the overall inventory of residential hotel units has remained relatively stable at approximately 19,600 to 19,800 units (see San Francisco's annual *Housing Inventory*).

Limitations of the Data: Eventually, some of these units do return to the market as owners get insurance and other funding to rebuild. See Appendix for detail on units lost to fire.

SRO Units Lost to Fire, 1988-2001



<u>Year</u>	<u>Units</u>
1988	70
1989	55
1990	100
1993	47
1995	36
1996	58
1997	233
1998	160
1999	225
2000	103
<u>2001 (a)</u>	<u>57</u>
Total	1,144

Notes:

For detailed list of SROs by address, see Appendix.

(a) Data as of 11/20/01.

Sources: Mission SRO Collaborative, 2001; San Francisco Consolidated Plan, 2000; BAE, 2001.

Rent Control Status of San Francisco Rental Units

Indicator Description: Mix of rental units by rent control and subsidy status in 1998.

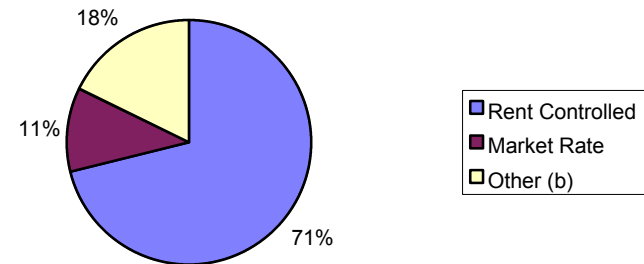
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Rent controlled units represent slightly less than 75% of the rental stock in San Francisco.
- Market rate units constitute approximately one-tenth of all rental units.
- A significant portion of units are of subsidized or unknown status based on this data source.

Limitations of the Data: This 1998 American Housing Survey sample size is relatively limited (1,842 units in San Francisco) and weighted based on data from the previous decennial Census, leading to potential margin of error. Small variations should be considered in light of these factors.

Rent Control Status of San Francisco Rental Units, 1998



Rent Control Status	Rental Units	
	Number (a)	Percent
Rent Controlled	145,600	71%
Market Rate	23,000	11%
Other (b)	36,500	18%
Total Rental Units	205,100	100%

Notes:

Totals may not add due to independent rounding. Numbers should be considered in light of potential sampling error of weighted sample.

Sample size = 895 rent-controlled units and 265 market rate units.

(a) 1998 sample was weighted by 1990 Census results, and may also be subject to sampling error. Counts based on BAE evaluation of data, not on rent control status as reported by occupants. See Appendix for methodology regarding how units were typed as rent controlled and market rate. Rent controlled excludes units subject to eviction control only.

(b) Includes units where the tenant receives some kind of rent reduction because of relationship with the owner, public housing, units where the household received a rent subsidy, voucher, or was subject to income verification, and units not otherwise classified.

Source: BAE, 2001, based on the *1998 American Housing Survey for the San Francisco Metropolitan Area*, from the U.S. Department of the Census.

Quality of Unit by Rent Control Status

Indicator Description: Comparison of rent controlled and market rate units by quality of unit as measured by a combination of measures, 1998.

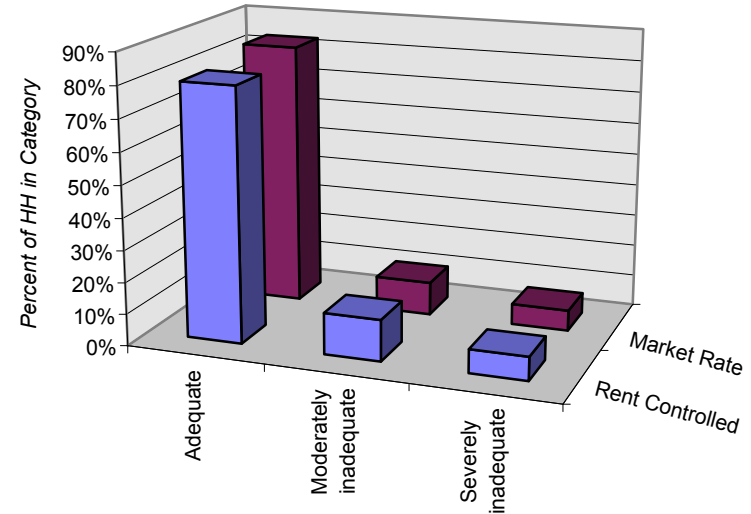
Geographic Areas Covered: City of San Francisco.

Key Findings:

- There is no discernable difference in the adequacy of unit conditions for rent controlled and market rate housing units in San Francisco.
- Over three-fourths of rent controlled and market rate units are rated as adequate.
- Less than 10% of either type are rated as severely inadequate.

Limitations of the Data: 1998 American Housing Survey sample size is relatively limited (895 rent controlled units and 265 market rate units) and weighted based on previous decennial Census, leading to potential margin of error. See Appendix for methodology for classification as rent controlled or market rate units. Note that some units do not fall in either category (e.g., public housing), and are not shown here. See Appendix for criteria used to define unit adequacy.

Quality of Unit by Rent Control Status



Unit Condition (b)	Rental Unit Type			
	Rent Controlled (a)		Market Rate (a)	
	Number	Percent	Number	Percent
Adequate	116,000	80%	19,100	83%
Moderately inadequate	18,900	13%	2,400	10%
Severely inadequate	10,700	7%	1,500	7%
Total	145,600	100%	23,000	100%

Notes:

Totals may not add due to independent rounding. Numbers should be considered in light of potential sampling error of weighted sample. Sample size = 895 rent-controlled units and 265 market rate units. Reflects 1997 incomes of 1998 households.

(a) See Appendix for methodology regarding how units were typed as rent controlled and market rate. Rent controlled excludes units subject to eviction control only.

(b) For complete definition of unit adequacy, see Appendix.

Source: BAE, 2001, based on microdata analysis of the *1998 American Housing Survey for the San Francisco Metropolitan Area*, from the U.S. Department of the Census.

Year Unit Built by Rent Control Status

Indicator Description: Comparison of rent controlled and market rate units by year built, as of 1998.

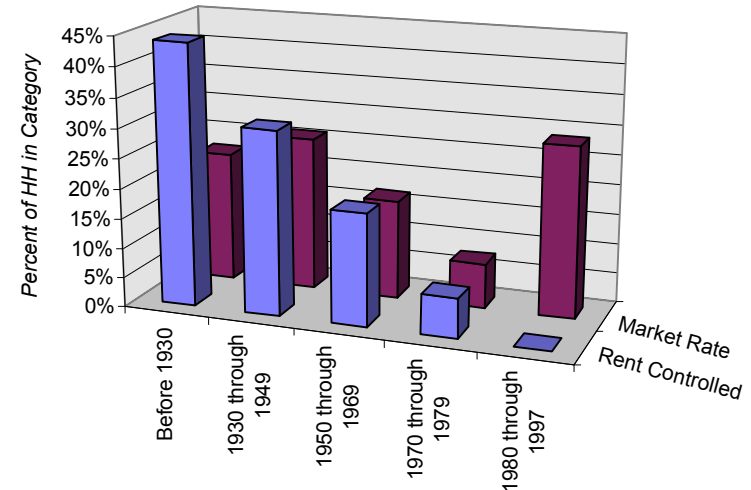
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Rent controlled housing is on average older than the market rate rental housing.
- Approximately 3/4th of rent controlled units were built prior to 1950.
- Over 1/4th of the market rate rental units were built in 1980 or later.
- Some units built prior to the inception of rent control were classified as market rate. These units were either single-family homes or condominiums first rented by the current occupant since January 1, 1996.

Limitations of the Data: 1998 American Housing Survey sample size is relatively limited (895 rent controlled units and 265 market rate units) and weighted based on previous decennial Census, leading to potential margin of error. See Appendix for methodology for classification as rent controlled or market rate units. Note that some units do not fall in either category (e.g., public housing), and are not shown here.

Year Unit Built by Rent Control Status, 1998



Year Built	Rental Unit Type			
	Rent Controlled (a)		Market Rate (a)	
	Number	Percent	Number	Percent
Before 1930	63,800	44%	5,000	22%
1930 through 1949	44,800	31%	5,900	26%
1950 through 1969	27,300	19%	3,800	17%
1970 through 1979	9,600	7%	1,700	7%
1980 through 1997	-	0%	6,500	29%
Total	145,600	100%	22,800	100%

Notes:

Totals may not add due to independent rounding. Numbers should be considered in light of potential sampling error of weighted sample. Sample size = 895 rent-controlled units and 265 market rate units.

(a) See Appendix for methodology regarding how units were typed as rent controlled and market rate. Rent controlled excludes units subject to eviction control only.

Source: BAE, 2001, based on microdata analysis of the 1998 American Housing Survey for the San Francisco Metropolitan Area, from the U.S. Department of the Census.

Units in Building by Rent Control Status

Indicator Description: Comparison of building size for rent controlled and market rate units, 1998.

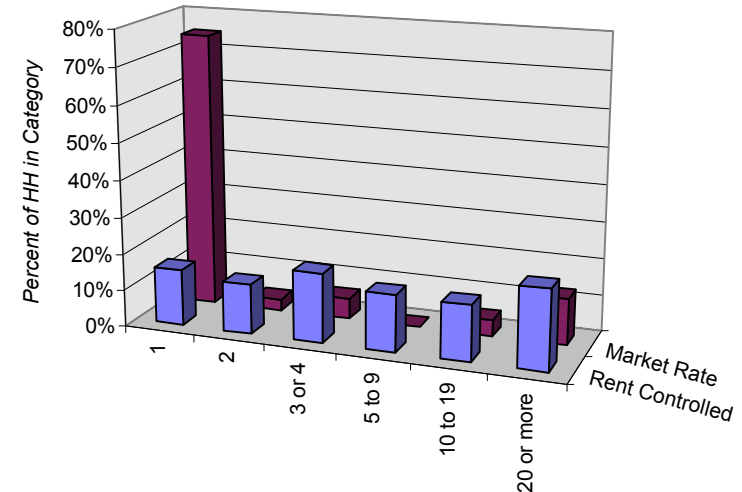
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Three-fourths of market rate units are single-family units. These are likely for the most part to be units where the tenant has moved in since the beginning of 1996, since those units are no longer covered by rent control.
- The other large cluster of market rate units is in large buildings; much of the housing stock built since 1980 has been in large buildings.
- Rent control covers a variety of unit sizes in similar proportions. As of 1998, the number of single-family homes covered by rent control was still larger than the number not covered, but this may change over time as long-time tenants move out.

Limitations of the Data: 1998 American Housing Survey sample size is relatively limited (895 rent controlled units and 265 market rate units) and weighted based on previous decennial Census, leading to potential margin of error. See Appendix for methodology for classification as rent controlled or market rate units. Note that some units do not fall in either category (e.g., public housing), and are not shown here.

Units in Building by Rent Control Status



Units in Building	Rental Unit Type			
	Rent Controlled (a)		Market Rate (a)	
	Number	Percent	Number	Percent
1	22,200	15%	17,200	75%
2	19,700	14%	700	3%
3 or 4	27,400	19%	1,300	6%
5 to 9	22,500	15%	-	0%
10 to 19	22,100	15%	1,000	4%
20 or more	31,700	22%	2,900	13%
Total	145,600	100%	23,000	100%

Notes:

Totals may not add due to independent rounding. Numbers should be considered in light of potential sampling error of weighted sample. Sample size = 895 rent-controlled units and 265 market rate units.

(a) See Appendix for methodology regarding how units were typed as rent controlled and market rate. Rent controlled excludes units subject to eviction control only.

Source: BAE, 2001, based on microdata analysis of the 1998 American Housing Survey for the San Francisco Metropolitan Area, from the U.S. Department of the Census.

Persons per Room by Rent Control Status

Indicator Description: Comparison of number of occupants per room by rent control status, 1998. More than one person per room is considered to be an indicator of overcrowding in a housing unit.

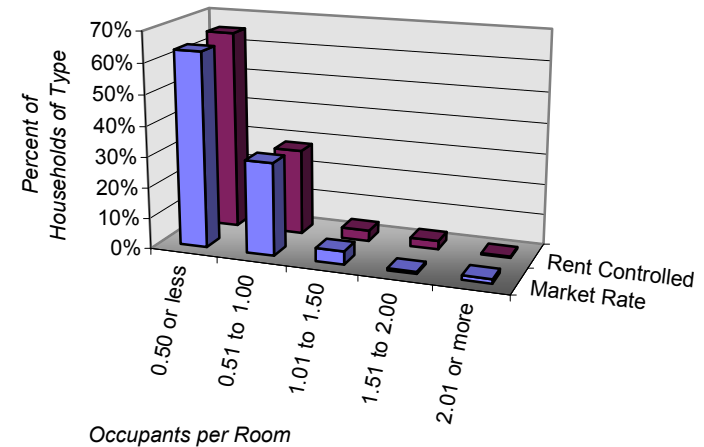
Geographic Areas Covered: City of San Francisco.

Key Findings:

- There is little difference in overcrowding status between rent controlled units and market rate units.
- Both rent controlled and market rate units show limited incidence of overcrowding with less than 10% of housing units overcrowded in either group.

Limitations of the Data: 1998 American Housing Survey sample size is relatively limited (895 rent controlled units and 265 market rate units) and weighted based on previous decennial Census, leading to potential margin of error. See Appendix for methodology for classification as rent controlled or market rate units. Note that some units do not fall in either category (e.g., public housing), and are not shown here.

Persons per Room by Rent Control Status



Persons per Room	Rent Controlled		Market Rate	
	Number	Percent	Number	Percent
0.50 or less occupants per room	94,923	65%	14,593	63%
0.51 to 1.00 occupants per room	40,786	28%	6,942	30%
1.01 to 1.50 occupants per room	5,096	4%	984	4%
1.51 to 2.00 occupants per room	4,037	3%	149	1%
2.01 or more occupants per room	751	1%	325	1%
1.01 or more occupants per room	9,884	7%	1,458	6%
Total Owner Occupied	145,593	100%	22,993	100%

Notes:

Totals may not add due to independent rounding. Numbers should be considered in light of potential sampling error of weighted sample. Sample size = 895 rent-controlled units and 265 market rate units.

(a) See Appendix for methodology regarding how units were typed as rent controlled and market rate. Rent controlled excludes units subject to eviction control only.

Source: BAE, 2001, based on microdata analysis of the *1998 American Housing Survey for the San Francisco Metropolitan Area*, from the U.S. Department of the Census.

Annual Eviction Notices by Cause, 1988-2001

Indicator Description: Annual evictions by reason for eviction, Fiscal Years 1988-89 to 2000-01.

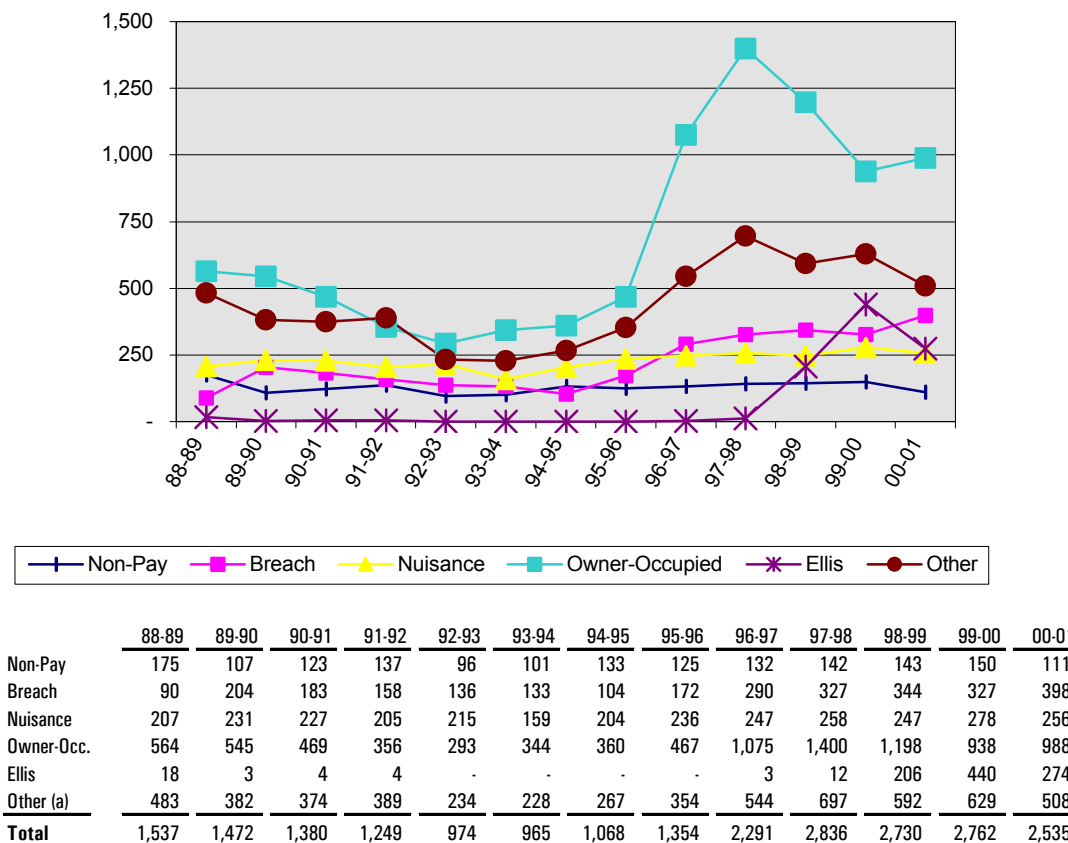
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Total evictions declined during early 1990s compared to late 1980s, but increased again in late 1990s, reaching a peak in 1997-1998.
- Evictions for non-payment and nuisance have been relatively constant over time.
- Breach evictions have more than tripled since 1988-89.
- OMI evictions jumped substantially between 1995-96 and 1997-98, but have declined somewhat since then as new restrictions have taken hold.
- Ellis Act eviction petitions jumped from a negligible number to more than 200 in 1998-99 and then to 440 in 1999-2000 as restrictions on OMI evictions were enacted. The decrease to 274 OMI evictions as well as the decrease in the total number of evictions in 2000-2001 may reflect the slowing economy.

Limitations of the Data: Does not include illegal or informal evictions. Eviction notices are subject to appeal.

Annual Eviction Notices by Cause, 1988-2000



Notes: (a) Includes Late-Pay, Illegal, Agreement, Access, Subtenant, Condo, Demolition, Capital Improvement, Rehab, and Roommate. No single eviction type makes up more than 31% of total "Other" in any year.

Sources: San Francisco Rent Board; BAE, 2001.

Owner Move-In Evictions, 1989-2001

Indicator Description: Number of evictions due to Owner Move-In (OMI) compared to total number of reported evictions, by Fiscal Year.

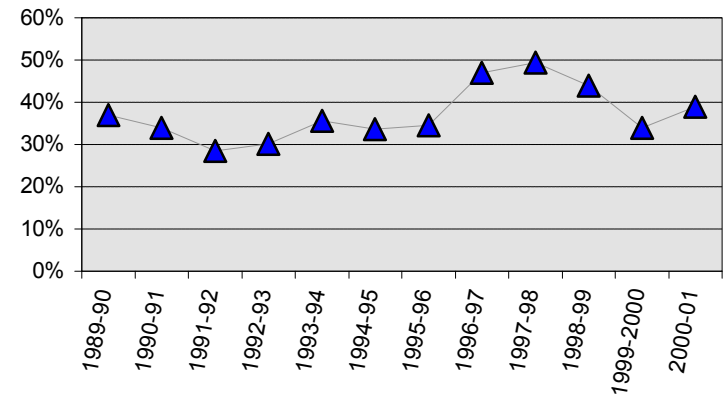
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Total eviction petitions have fluctuated from a low of 965 in 1993-94 to a peak of 2,836 in 1997-98.
- OMI evictions have fluctuated from a low of 293 in 1993 to a peak of 1,400 in 1998.
- OMI evictions as a proportion of total evictions have ranged from a low of 29% in 1992 to a high of 49% in 1998, and were at 39% of total in the most recent fiscal year (2000-01).
- In 2000-01, the 2,536 evictions of all types affected slightly over one percent of total renter households in San Francisco.
- In 2000-01, the 988 OMI evictions affected less than half of one percent of total renter households in San Francisco.

Limitations of the Data: Includes only official eviction petitions as reported to City; does not include illegal or informal evictions.

Owner Move-In Evictions as Percent of All Evictions, 1989-2001



Fiscal Year	Number of Eviction Petitions	Number of Owner Move-In Evictions	OMI % of Total Evictions
1989-90	1,472	545	37%
1990-91	1,380	469	34%
1991-92	1,249	356	29%
1992-93	974	293	30%
1993-94	965	344	36%
1994-95	1,068	360	34%
1995-96	1,354	467	34%
1996-97	2,291	1,075	47%
1997-98	2,836	1,400	49%
1998-99	2,730	1,198	44%
1999-2000	2,762	938	34%
2000-01	2,535	988	39%

Sources: San Francisco Rent Board Annual Report; BAE, 2001.

Comparison by Age of OMI Evicted Occupants & All Renters

Indicator Description: Age of owner move-in (OMI) evicted household heads, Jan.-Apr. 1999, as compared to age of all renter-occupied householders, 1990.

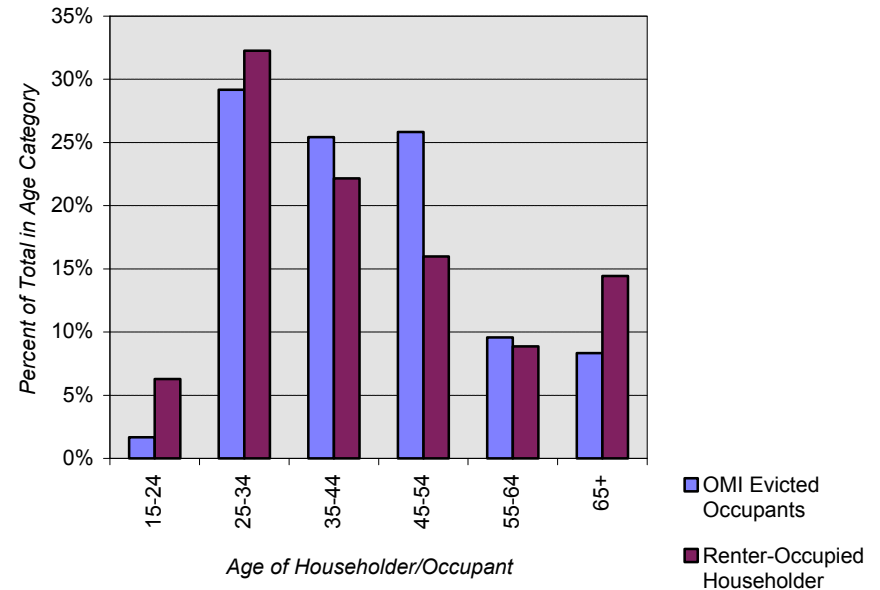
Geographic Areas Covered: City of San Francisco

Key Findings:

- The 45 to 54 age group appears to be disproportionately impacted by OMI evictions, with 26% of OMIs affecting this age group compared to 16% share of all rental householders.
- The 15 to 24 age group of renters was affected substantially less by OMI than their proportionate share of all renter householders.
- Most other age groups were affected less by OMI evictions than their share of all rental householders.
- Elderly were subject to OMI evictions at lower rate than their proportion of all renter households likely due to the restrictions in Proposition G. This appears to be a change from the mid-1990s, when a study by the San Francisco Tenants Union showed that nearly 1/3rd of OMI evictions were seniors.

Limitations of the Data: This analysis compares composition of renter householders by age in 2000 to OMI evictions by age in 1999. The 240 occupants shown are from a total of 277 OMI evictions during the study period.

Comparison of Age of OMI Evicted Occupants to All Renter-Occupied Householders



Age (Yrs.)	OMI Evicted Occupants (Jan.-Apr. 1999)		Renter Householders (2000)	
	Number	Percentage	Number	Percentage
15-24	4	2%	13,476	6%
25-34	70	29%	69,144	32%
35-44	61	25%	47,508	22%
45-54	62	26%	34,259	16%
55-64	23	10%	19,012	9%
65+	20	8%	30,910	14%
Total	240	100%	214,309	100%

Source: 2000 U.S. Census SF1; *San Francisco OMI Evictions*, Dyett & Bhatia, 2000; *Tenant Displacement in the 1990s*, San Francisco Tenants Union, 1996; BAE, 2001.

Percent of Total Housing Units Held Off Market, 2000

Indicator Description: Vacant housing units that are not available for sale or for rent, because they are being held vacant for a variety of reasons (see chart footnotes). Data as of April 1, 2000.

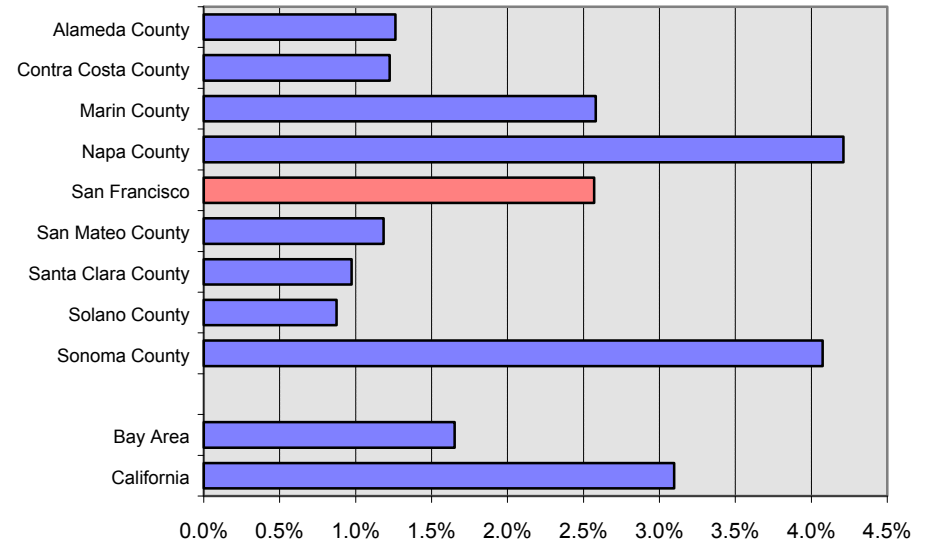
Geographic Areas Covered: City of San Francisco, eight other Bay Area Counties, and State of California.

Key Findings:

- As of April, 2000 San Francisco has approximately 8,900 units held off the market. This includes 3,800 held for occasional use, and an additional 5,100 held for a variety of reasons. These units comprise less than 3% of the housing stock.
- This proportion of units held off market is higher than for the other large urbanized counties in the Bay Area, but lower than for the more rural counties, which have high proportions of units held for occasional use (e.g., recreational use).
- San Francisco's proportion of units held off the market is higher than for the Bay Area overall but lower than for California.

Limitations of the Data: Market conditions may have changed since these data were collected (April 1, 2000). Vacancy by type of unit not yet available from 2000 Census.

Unavailable Vacant Units as Percent of Total Housing Units, 2000



	Total Housing Units	Occasional Use (a)	Other Vacant (b)	Units Not Available for Sale or Rent	
				Number	Percent of Total Units
Alameda County	540,183	1,669	5,143	6,812	1.3%
Contra Costa County	354,577	1,849	2,490	4,339	1.2%
Marin County	104,990	1,902	808	2,710	2.6%
Napa County	48,554	1,574	471	2,045	4.2%
San Francisco	346,527	3,762	5,142	8,904	2.6%
San Mateo County	260,576	1,626	1,458	3,084	1.2%
Santa Clara County	579,329	2,507	3,130	5,637	1.0%
Solano County	134,513	357	819	1,176	0.9%
Sonoma County	183,153	5,965	1,499	7,464	4.1%
Bay Area	2,552,402	21,211	20,960	42,171	1.7%
California	12,214,549	236,857	141,458	378,315	3.1%

(a) Includes units held for seasonal and recreational use.

(b) Includes units vacant for other reasons, such as personal reasons of the owner, use by a caretaker or janitor, boarded-up units not available for occupancy, and units held for migrant workers.

Sources: 2000 U.S. Census SF1; BAE, 2001.

Bay Area Rental Vacancy Rates, 2000

Indicator Description: Vacancy rate for rental units at time of 2000 Census (April 1, 2000). Useful for comparison purposes.

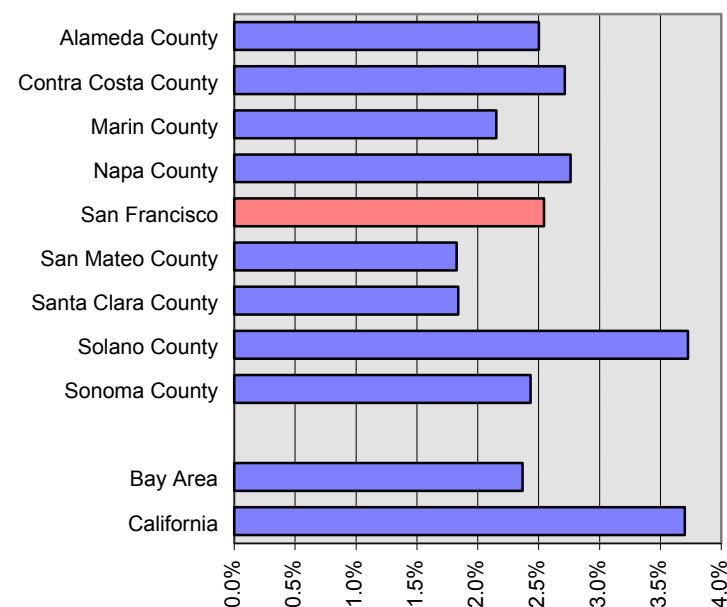
Geographic Areas Covered: City of San Francisco, eight other Bay Area Counties, and State of California.

Key Findings:

- San Francisco did not have the lowest Bay Area rental vacancy rate at 2000 Census time. Marin, San Mateo, Santa Clara, and Sonoma Counties had lower vacancy rates.
- The Bay Area overall had substantially lower rental vacancy rates than California.
- All vacancy rates shown are lower than healthy vacancy rates, typically considered to be 4% to 5% to allow for normal rental turnover.

Limitations of the Data: Market conditions may have changed since these data were collected (April 1, 2000).

Rental Vacancy Rates in the Bay Area, 2000



	Rental Vacancy Rate
Alameda County	2.5%
Contra Costa County	2.7%
Marin County	2.2%
Napa County	2.8%
San Francisco	2.5%
San Mateo County	1.8%
Santa Clara County	1.8%
Solano County	3.7%
Sonoma County	2.4%
Bay Area	2.4%
California	3.7%

Sources: 2000 U.S. Census SF1; BAE, 2001.

Bay Area Homeowner Vacancy Rates, 2000

Indicator Description: Number of ownership units deemed vacant by 2000 Census (collected in April, 2000).

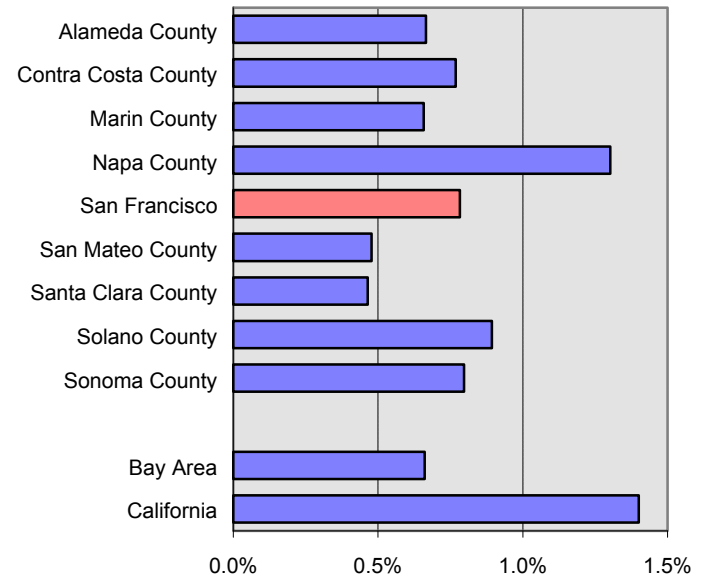
Geographic Areas Covered: City of San Francisco, eight other Bay Area Counties, and State of California.

Key Findings:

- San Francisco and the surrounding region both have an extremely tight for-sale housing market.
- Several Bay Area counties had a lower homeowner vacancy rate than San Francisco: Alameda, Marin, San Mateo, and Santa Clara Counties.
- The statewide homeowner vacancy rate (1.4%) is about twice the Bay Area rate (0.7%).

Limitations of the Data: Market conditions may have changed since these data were collected (April 1, 2000).

Homeowner Vacancy Rates in the Bay Area, 2000



	Homeowner Vacancy Rate
Alameda County	0.7%
Contra Costa County	0.8%
Marin County	0.7%
Napa County	1.3%
San Francisco	0.8%
San Mateo County	0.5%
Santa Clara County	0.5%
Solano County	0.9%
Sonoma County	0.8%
Bay Area	0.7%
California	1.4%

Sources: 2000 U.S. Census SF1; BAE, 2001.



Cost &
Affordability

Median Sale Price for Three-Bedroom Home, 1990-2000

Indicator Description: Trends in for-sale housing costs as indicated by median price of a three-bedroom home.

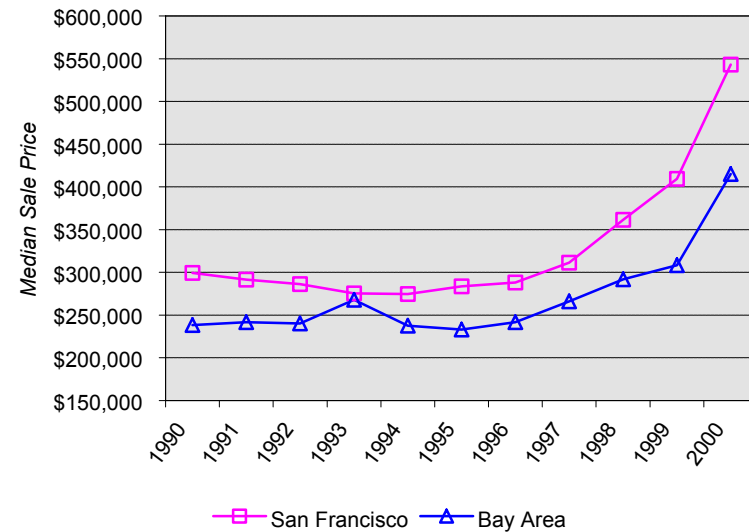
Geographic Areas Covered: City of San Francisco and Bay Area, including Alameda, Contra Costa, Marin, San Francisco, San Mateo, Santa Clara, and Solano Counties.

Key Findings:

- San Francisco has had consistently higher prices than the Bay Area overall.
- San Francisco's median sale price declined slightly in early to mid-1990s, only exceeding 1990 levels again in 1997.
- Between 1990 and 2000, San Francisco median sale prices increased by over 80%.

Limitations of the Data: Based on resales as reported by participating Realtors' Associations; excludes most new home sales and some resales.

3 BR House Median Sale Price



Year	MEDIAN SALE PRICE 3 Bedroom House		SF as % of Bay Area
	San Francisco	Bay Area (a)	
1990	\$299,340	\$238,510	126%
1991	\$291,600	\$241,830	121%
1992	\$286,420	\$240,120	119%
1993	\$275,380	\$268,100	103%
1994	\$274,690	\$237,660	116%
1995	\$283,700	\$233,280	122%
1996	\$288,240	\$241,870	119%
1997	\$311,240	\$266,180	117%
1998	\$361,410	\$291,780	124%
1999	\$409,570	\$308,477	133%
2000	\$543,059	\$414,918	131%

Notes: (a) Does not include Napa and Sonoma Counties.

Sources: S.F. Property Report; California Association of Realtors; BAE, 2001.

Recent Condo & Single-Family Home Sales

Indicator Description: Recorded full-price home sale prices for January through September 2001.

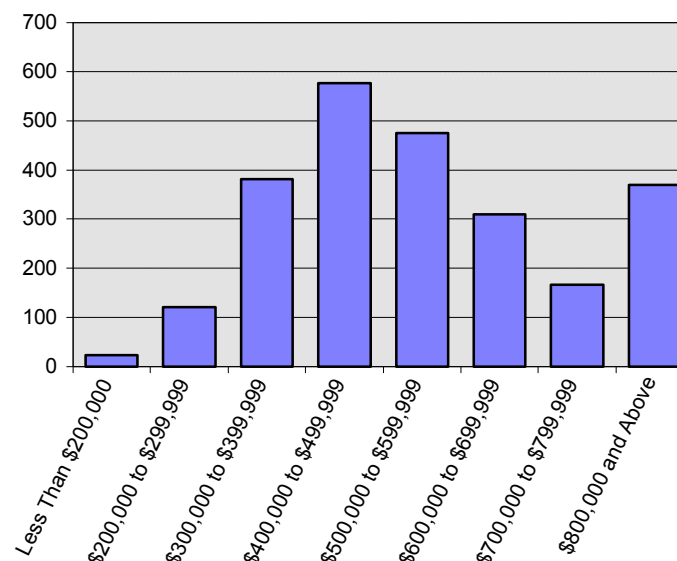
Geographic Areas Covered: City of San Francisco.

Key Findings:

- Median sales price for all units was \$520,000. For condos, the median was \$499,000, and for single-family homes, \$525,000.
- Only one percent of sales priced below \$200,000 (11 condos and 13 single family units).
- Fifteen percent of sales were for \$800,000 or more.
- Slightly less than three-fourths of all sales were single-family homes.
- Slightly over one-fourth of all sales were for condominiums.

Limitations of the Data: Only includes sales for which a sale price was directly disclosed. Houses that sold more than once during period are only shown for most recent sale.

Condominium and Single-Family Home Sales by Price Category, January - September 2001



Sale Price	Condo-	Single-Family	Combined	
	miniums	Homes	Number	Percent
Less Than \$200,000	11	13	24	1%
\$200,000 to \$299,999	64	57	121	5%
\$300,000 to \$399,999	123	258	381	16%
\$400,000 to \$499,999	135	441	576	24%
\$500,000 to \$599,999	107	368	475	20%
\$600,000 to \$699,999	82	228	310	13%
\$700,000 to \$799,999	44	123	167	7%
\$800,000 and Above	97	273	370	15%
Total (a)	663	1,761	2,424	100%
Median Sale Price	\$499,000	\$525,000	\$520,000	

Note (a): Represents all available condominium and single-family residence sales showing market-rate sales prices from January 2001 through September 2001.

Sources: First American Real Estate Solutions, 2001; BAE, 2001

Median Two-Bedroom Rent, 1979-2001

Indicator Description: Rough measure of median rental rate increases for two bedroom units in San Francisco.

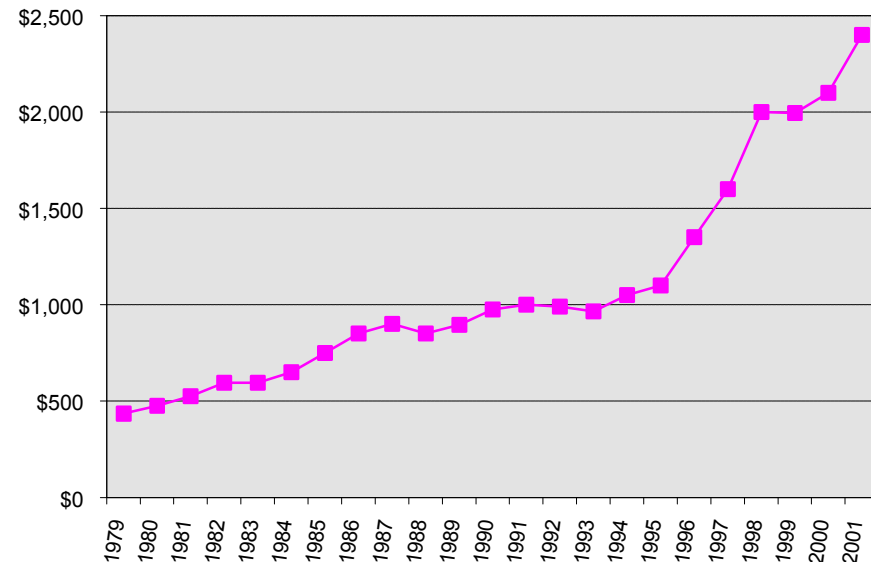
Geographic Areas Covered: City of San Francisco, as advertised in San Francisco Chronicle newspaper.

Key Findings:

- Median rent for two bedroom units in San Francisco has risen steadily since 1979 at a compound annual average rate of 8.1%, for an overall increase of 452% for the period.
- In comparison, the Consumer Price Index for the Bay Area (all items, all urban consumers) during the same period increased at a compound annual average rate of only 4.8%, for an overall increase of 178%
- Median rent increased an average of \$89 annually for the time period.

Limitations of the Data: Data represent median of asking rents (per Chronicle classifieds), which may differ from actual rents paid by new tenants. Data are not adjusted for inflation or differences in utility payments. Source of data also not necessarily systematic or comprehensive (i.e., only from advertisements, not complete pool of asking rents).

Median 2 Bedroom Rent, 1979-2001



Year	Rent	Year	Rent
1979	\$435	1991	\$1,000
1980	\$475	1992	\$990
1981	\$525	1993	\$965
1982	\$595	1994	\$1,050
1983	\$595	1995	\$1,100
1984	\$650	1996	\$1,350
1985	\$750	1997	\$1,600
1986	\$850	1998	\$2,000
1987	\$900	1999	\$1,995
1988	\$850	2000	\$2,100
1989	\$895	2001	\$2,400
1990	\$975		

Notes: Rent data on two-bedroom units gathered from San Francisco Chronicle classifieds. Data for 1990, 1991, and 1992 are from first Sunday in January; all other years from first Sunday in April.

Sources: San Francisco Property Report; BAE, 2001.

Changes in Gross Rent, 1990-2000

Indicator Description: Median and distribution of gross monthly rent in 1990 and 2000. Gross monthly rent includes contract rent and utilities for heating, cooking, and lighting.

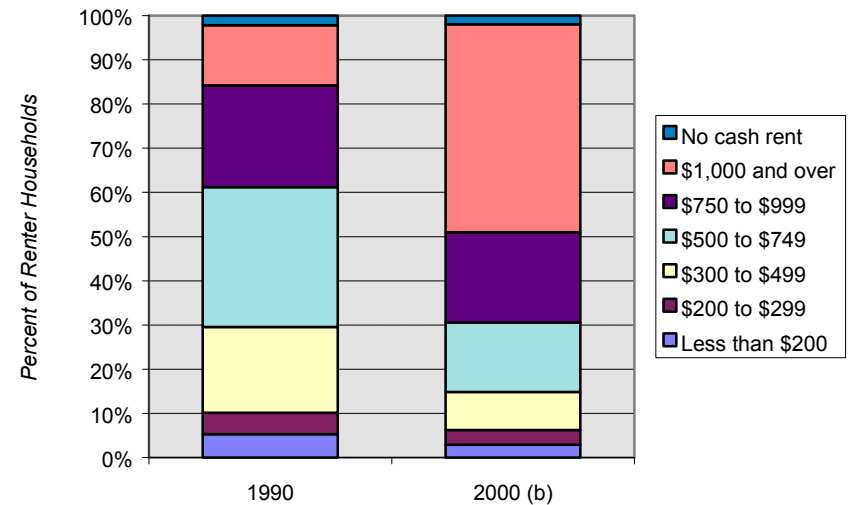
Geographic Areas Covered: City of San Francisco.

Key Findings:

- The proportion of units renting for more than \$1,000 per month increased dramatically between 1990 and 2000.
- The continued presence of units showing gross rents below market may be due to both rent control and the presence of subsidized units, e.g., public housing.
- The median gross rent has seen an increase of approximately 10% after adjusting for overall inflation, indicating a real increase in occupancy costs.

Limitations of the Data: 1990 data based on an approximately one in six sample. Estimates for 2000 from the Census 2000 *Supplementary Survey*, and are based on a limited sample. More complete data from the larger sample used in the Census itself not yet available. See Appendix for detail on the Census 2000 *Supplementary Survey*. Data for 1990 and 2000 represent all rental units, including subsidized housing and rent-controlled units.

Distribution of Gross Rent, 1990 and 2000



Gross Rent (a)	1990	2000
Less than \$200	5.3%	2.9%
\$200 to \$299	4.9%	3.3%
\$300 to \$499	19.4%	8.6%
\$500 to \$749	31.7%	15.7%
\$750 to \$999	23.0%	20.4%
\$1,000 and over	13.6%	47.1%
No cash rent	2.2%	1.9%
Total (c)	100.0%	100.0%
Median Rent	\$653	\$977
Median Rent (2000 \$)	\$888 (d)	\$977

Note:

- (a) Based on specified renter-occupied housing units, which excludes single-family houses on 10 or more acres.
 (b) Estimate.
 (c) Total unit counts may vary from other sources due to sampling error.
 (d) Based on Bay Area All Urban Consumers Price Index. Inflation factor = 1.36

Sources: 1990 U.S. Census STF3; Census 2000 Supplementary Survey; U.S. Bureau of Labor Statistics, 2001; BAE, 2001.

Average Monthly Rents, 1999-2001

Indicator Description: Average monthly rents from 1999 through 3rd Quarter 2001 based on a survey of large multifamily rental properties.

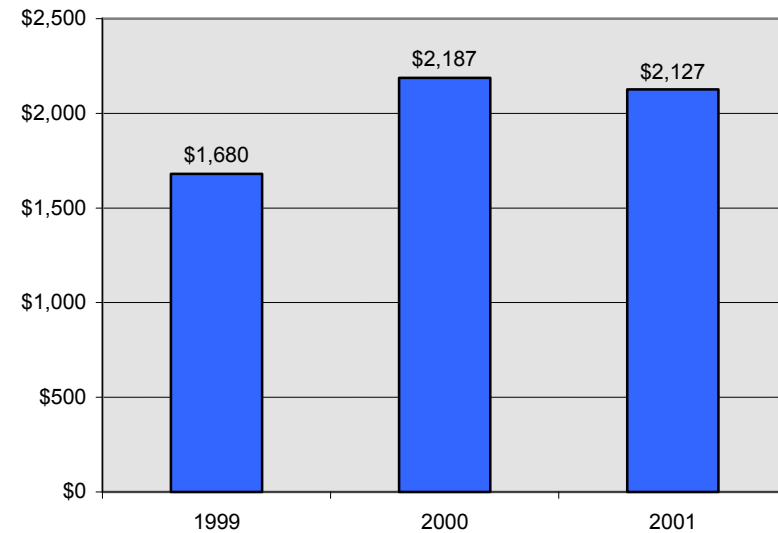
Geographic Areas Covered: City of San Francisco.

Key Findings:

- The upward trend in rents has abated in 2001, as the regional and national economy slow down.
- While slightly below 2000 levels, rents are still substantially above 1999 levels.
- The average rent for 2001 for all units surveyed is just above \$2,100 monthly.
- 2001 average monthly rents range from \$1,505 for a studio to \$4,397 for a 3-bedroom townhouse.

Limitations of the Data: Data from RealFacts, Inc., based on a survey of 14,753 San Francisco rental units in 37 buildings of 50 or more units. As such, the information may not be representative of market-rate rents for all unit types and neighborhoods in San Francisco.

Average Monthly Rent, 1999-2001



Unit Type	Average Rent				
	1999	2000	1999-2000 Change	2001	2000-2001 Change
Studio	\$1,252	\$1,546	23.5%	\$1,505	-2.7%
1 BR/1 BA	\$1,604	\$2,042	27.3%	\$1,989	-2.6%
2 BR/1 BA	\$1,658	\$2,328	40.4%	\$2,309	-0.8%
2 BR/2 BA	\$2,047	\$2,710	32.4%	\$2,601	-4.0%
2 BR Twnhse	\$3,725	\$4,222	13.3%	\$3,912	-7.3%
3 BR/2 BA	\$2,334	\$3,255	39.5%	\$3,230	-0.8%
3 BR Twnhse	\$3,832	\$3,942	2.9%	\$4,397	11.5%
All	\$1,680	\$2,187	30.2%	\$2,127	-2.7%

Sources: RealFacts, Inc.; BAE, 2001.

Gross Rent as a Percentage of Income, 1990-2000

Indicator Description: Compares gross rent paid to renter household income. This indicator (often called rent burden or housing cost burden) is one measure of affordability, with not more than 30% of household income paid toward gross rent considered the appropriate affordable amount.

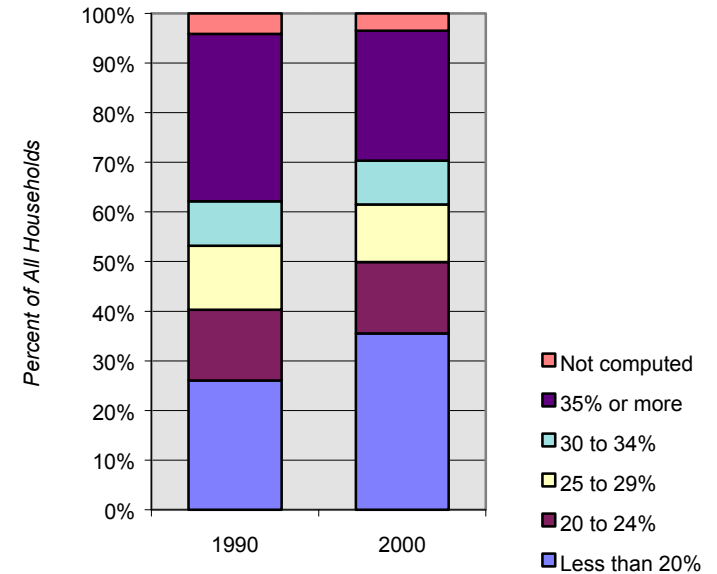
Geographic Areas Covered: City of San Francisco.

Key Findings:

- In 1990, slightly more than half of renter households paid less than 30% of their income for rent, suggesting that these units were affordable to these households.
- In 2000, 35% of renter households paid 30% or more of their income for rent, a rent burden level greater than that usually considered “affordable.”
- The overall distribution in 2000 showed some improvement in the affordability picture, with a decrease in the proportion of households with high housing costs relative to income, and a significant increase in the proportion paying less than 20% of their income to gross rent.

Limitations of the Data: 1990 data based on an approximately one in six sample. Estimates for 2000 from the Census 2000 *Supplementary Survey*, and are based on a limited sample. More complete data from the larger sample used in the Census itself not yet available. See Appendix for detail on the Census 2000 *Supplementary Survey*. Data for 1990 and 2000 represent all units, including subsidized housing and rent-controlled units.

Gross Rent as % of Household Income, 1990-2000



Gross Rent as Percent of Household Income	% of All Renter Households	
	1990	2000
Less than 20%	26.0%	35.5%
20 to 24%	14.2%	14.3%
25 to 29%	12.9%	11.6%
30 to 34%	8.9%	8.8%
35% or more	33.7%	26.2%
Not computed	4.1%	3.5%

Sources: 1990 U.S. Census, STF3; Census 2000 Supplementary Survey; BAE, 2001.

Housing Cost Burden by Rent Control Status

Indicator Description: Comparison of housing costs as percent of income for households (housing cost burden) in rent controlled units and market rate units in 1998.

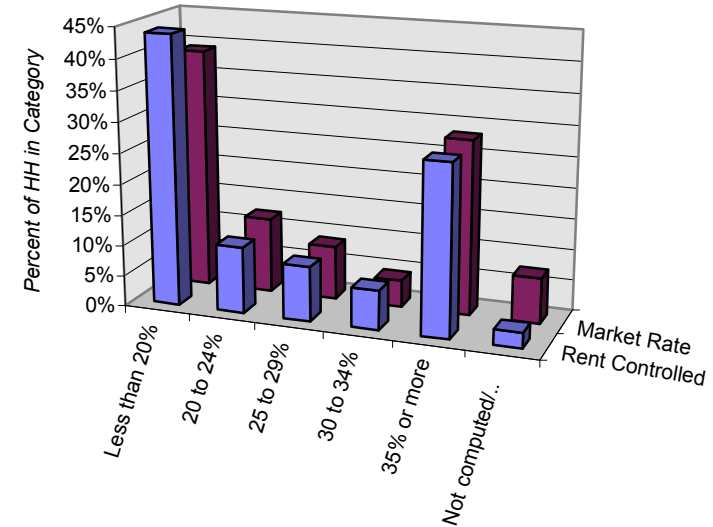
Geographic Areas Covered: City of San Francisco.

Key Findings:

- There appears to be no significant difference between the housing cost burdens of households in rent controlled and market rate units.
- Over one-third of households in each unit type have housing costs that are less than 20% of income.
- Approximately one-fourth of households in each unit type have housing costs that are 35% or more of income.

Limitations of the Data: AHS sample size is relatively limited (609 rent controlled units and 331 market rate units) and weighted based on 1990 census data, leading to potential margin of error.

Housing Cost Burden by Rent Control Status



Gross Rent as Percent of Household Income	Rental Unit Type			
	Rent Controlled (a)		Market Rate (a)	
	Number	Percent	Number	Percent
Less than 20%	63,800	44%	9,000	39%
20 to 24%	15,700	11%	2,800	12%
25 to 29%	12,900	9%	2,000	9%
30 to 34%	9,300	6%	1,000	4%
35% or more	40,100	28%	6,500	28%
Not computed/No cash rent	3,700	3%	1,700	7%
Total	145,600	100%	23,000	100%
Median Housing Cost Burden	21%		21%	

Notes:

Totals may not add due to independent rounding. Numbers should be considered in light of potential sampling error of weighted sample. Sample size = 895 rent-controlled units and 265 market rate units.

(a) See Appendix for methodology regarding how units were typed as rent controlled and market rate. Rent controlled excludes units subject to eviction control only.

Source: BAE, 2001, based on microdata analysis of the 1998 American Housing Survey for the San Francisco Metropolitan Area, from the U.S. Department of the Census.

Housing Cost Burden by Age for Rent Controlled Units

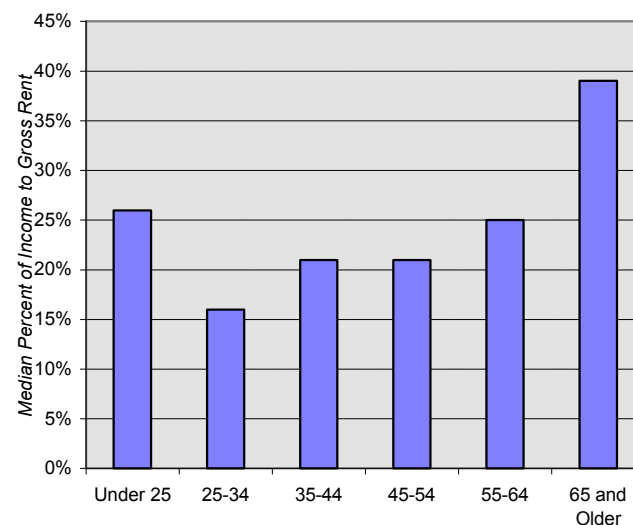
Indicator Description: Percent of household income paid for gross rent (includes utilities) by age category, for rent controlled units only, 1998. Percentage of income paid for gross rent (often referred to as rent burden or housing cost burden) is one measure of affordability, with not more than 30% of household income paid toward gross rent considered the appropriate affordable amount.

Geographic Areas Covered: City of San Francisco.

Key Findings:

- There is considerable difference between the rent burdens of different age groups in rent controlled units.
- Elderly renters in most places tend to have higher rent burdens than other renters, and this pattern holds for San Francisco's rent controlled units. The median rent burden of elderly renter households is 39%, well over the threshold of affordability.
- The age group with the lowest rent burden is the 25 to 34 age group, with a median rent burden of 16%.

Median Rent Burden by Age for Rent Controlled Units, 1998



Limitations of the Data: 1998 American Housing Survey sample size is relatively limited (895 rent controlled units and 265 market rate units) and weighted based on 1990 census data, leading to potential margin of error. See Appendix for methodology for classification as rent controlled or market rate units. Note that some units do not fall in either category (e.g., public housing), and are not shown here.

Household Income	Under 25		25-34		35-44		45-54		55-64		65 and Older	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Less than 20%	5,100	30%	26,900	59%	14,700	44%	10,200	45%	3,600	36%	3,000	19%
20 to 24%	2,300	14%	3,900	9%	4,100	12%	3,400	15%	1,000	10%	1,100	7%
25 to 29%	1,800	11%	2,800	6%	3,600	11%	2,300	10%	1,400	14%	1,000	6%
30 to 34%	900	5%	2,300	5%	2,800	8%	1,700	7%	500	5%	1,100	7%
35% or more	5,900	35%	8,400	18%	7,200	22%	5,100	22%	3,200	32%	9,900	62%
Not computed/No cash rent	1,000	6%	1,300	3%	700	2%	200	1%	300	3%	-	0%
Total	17,000	100%	45,600	100%	33,100	100%	22,900	100%	10,000	100%	16,000	100%
Median Rent Burden (a)	26%		16%		21%		21%		25%		39%	

Notes:

(a) Limited to households paying cash rent.

Sample size too limited to provide crosstabulated data for market rate units. Totals may not add due to independent rounding. Numbers should be considered in light of potential sampling error of weighted sample. Sample size = 895 rent-controlled units and 265 market rate units. Reflects 1997 incomes of 1998 households. See Appendix for methodology regarding how units were typed as rent controlled and market rate. Rent controlled excludes units subject to eviction control only.

Source: BAE, 2001, based on microdata analysis of the 1998 American Housing Survey for the San Francisco Metropolitan Area, from the U.S. Census Bureau.



Neighborhoods

Housing Units Built by Planning Area, 1990-2000

Indicator Description: Shows level of housing unit construction by Planning Area.

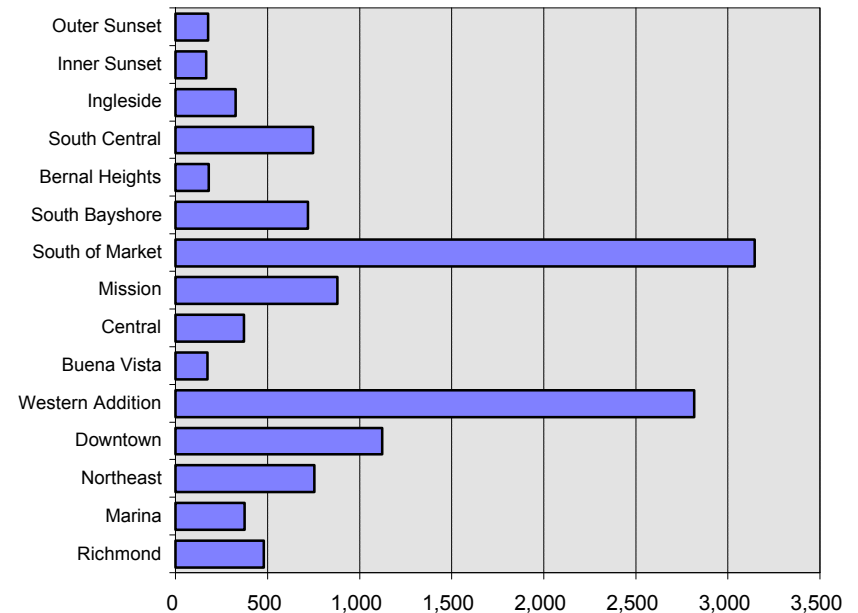
Geographic Areas Covered: Planning Areas of City of San Francisco.

Key Findings:

- For 1990 through 2000 period, more than 1/3 of all units built were in the South of Market area.
- Construction activity ranged from less than 200 units in Buena Vista, Bernal Heights, and Inner Sunset to over 3,100 units South of Market.
- These data show wide variability in location of new housing units; some neighborhoods have added few new units in last 10 years, while others have absorbed substantial numbers.
- Only South of Market showed an increase of more than 25% in total units; Downtown, Western Addition, the Mission, and South Bayshore were the other areas exceeding the Citywide proportional increase of 3.8%.

Limitations of the Data: Does not account for any units added without permits. 2000 Census data indicate a substantially greater increase in the number of units Citywide. See Appendix for list of Census tracts and map showing Planning Districts.

Housing Units Built, 1990-2000



Planning District	1990 Census Total Units	Units Completed 1990-2000	As % of Base	% of Total
Richmond	36,283	478	1.3%	3.8%
Marina	25,310	375	1.5%	3.0%
Northeast	35,843	752	2.1%	6.0%
Downtown	24,373	1,122	4.6%	9.0%
Western Addition	25,393	2,817	11.1%	22.7%
Buena Vista	16,107	174	1.1%	1.4%
Central	25,647	372	1.5%	3.0%
Mission	21,327	877	4.1%	7.1%
South of Market	10,363	3,147	30.4%	25.3%
South Bayshore	9,251	720	7.8%	5.8%
Bernal Heights	8,978	182	2.0%	1.5%
South Central	24,566	747	3.0%	6.0%
Ingleside	22,027	328	1.5%	2.6%
Inner Sunset	17,900	167	0.9%	1.3%
Outer Sunset	25,103	176	0.7%	1.4%
Total	328,471	12,434	3.8%	100.0%

Sources: 1999 & 2000 Housing Inventory; BAE, 2001.

Unit Mix by Planning Area

Indicator Description: Mix of housing units by number of units in building as estimated in 2000.

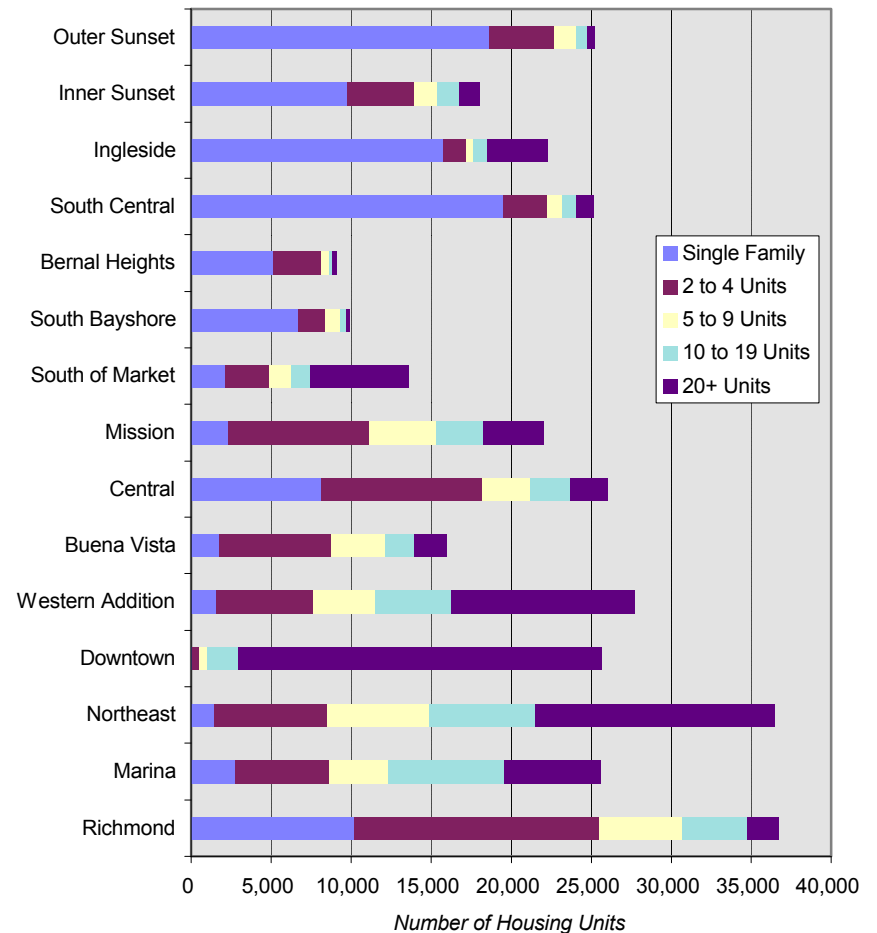
Geographic Areas Covered: City of San Francisco and its Planning Areas.

Key Findings:

- In six of the 15 Planning Areas, over half of all units were single-family units. These areas tended to be in the southern parts of the City.
- Nine Planning Areas had less than 25% of their units in single-family homes. These areas were concentrated in and around Downtown.
- Downtown was the only area with over half its units in buildings of 20 or more units, with 88% of its units in these largest building size. This was nearly twice the proportion of any other Planning Area.

Limitations of the Data: Data have not been benchmarked to 2000 Census data, which indicate a larger overall total of units. Unit mix from 2000 Census available in 2002. See Appendix for map showing Planning Districts.

Unit Mix by Planning Area, 2000



Notes: See Appendix for detailed table and for delineation of Planning Areas.

Sources: 2000 San Francisco Housing Inventory; BAE, 2001.

Concentration of Renter Households by Planning Area

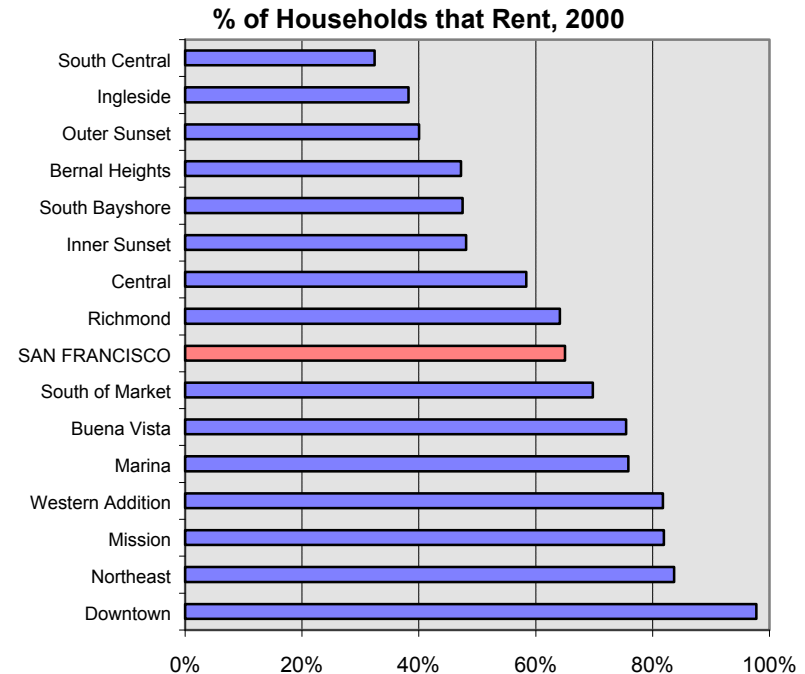
Indicator Description: Percentage of renter households by Planning Area for 2000.

Geographic Areas Covered: City of San Francisco and Planning Areas.

Key Findings:

- In 2000, nearly two-thirds of San Francisco households citywide rented their housing unit.
- The proportion of renters varied widely by Planning Area, ranging from only 32% of all households in the South Central Area to 98% Downtown.
- The highest percentages of renter households were found in or near Downtown. For Downtown, Northeast, the Mission, the Western Addition, the Marina, and Buena Vista, over 75 percent of households were renters.
- The lowest percentages of renters were found in neighborhoods located farthest from Downtown.

Limitations of the Data: Tenure patterns tend to change slowly, especially in areas with a large established base of housing units and limited new construction.



Planning Areas	% of Households that Rent	% of Households that Own
South Central	32.4%	67.6%
Ingleside	38.2%	61.8%
Outer Sunset	40.0%	60.0%
Bernal Heights	47.2%	52.8%
South Bayshore	47.5%	52.5%
Inner Sunset	48.1%	51.9%
Central	58.4%	41.6%
Richmond	64.1%	35.9%
SAN FRANCISCO	65.0%	35.0%
South of Market	69.7%	30.3%
Buena Vista	75.5%	24.5%
Marina	75.9%	24.1%
Western Addition	81.8%	18.2%
Mission	81.9%	18.1%
Northeast	83.7%	16.3%
Downtown	97.8%	2.2%

Note: Presented data for San Francisco Plan Areas reflect aggregations of Census Tracts (2000) as shown in Appendix. See map also.

Sources: U.S. Census SF1, 2000; San Francisco Consolidated Plan, 2000; BAE, 2001

Household Income by Neighborhood, 2000

Indicator Description: Median household income and percent of households with incomes below \$25,000.

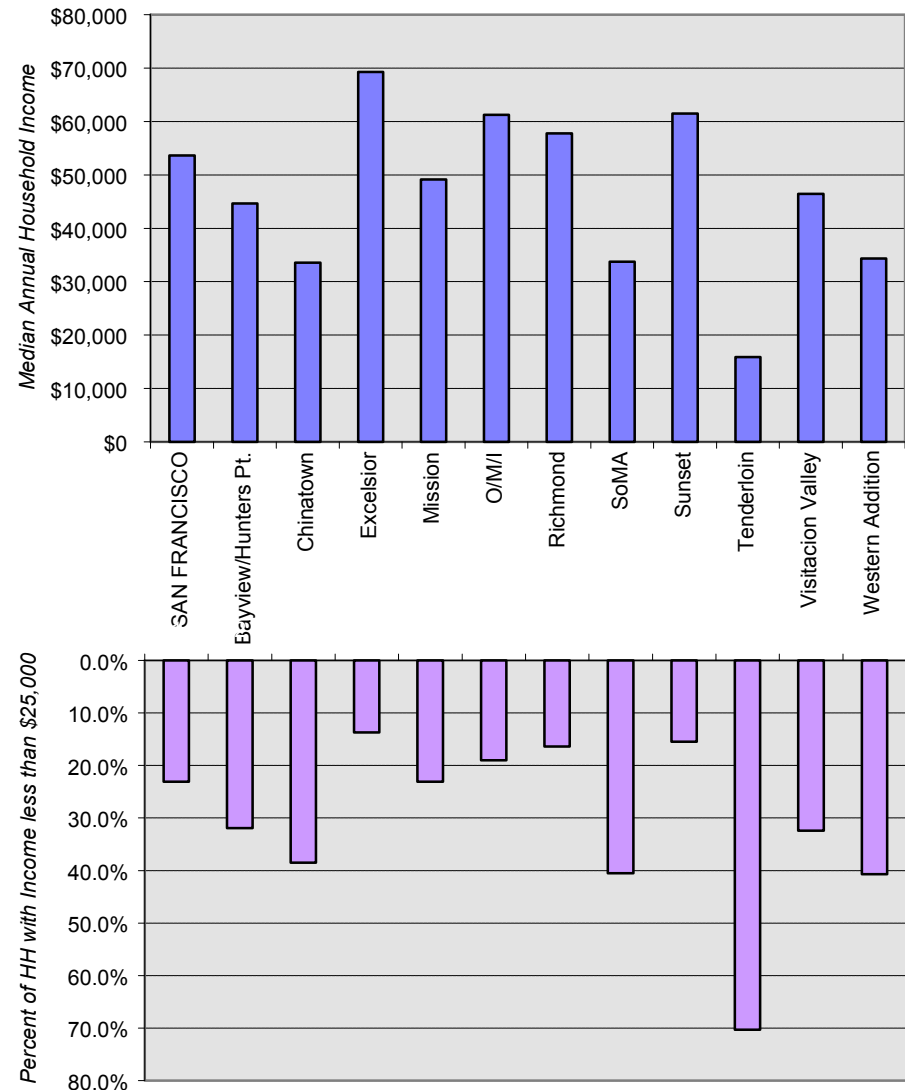
Geographic Areas Covered: City of San Francisco and 11 key neighborhoods.

Key Findings:

- Median 2000 household income ranged from \$15,908 in the Tenderloin to \$69,253 in the Excelsior neighborhood.
- Median household incomes tended to be higher in the neighborhoods in the southern and western parts of the City.
- The percent of households with 2000 incomes under \$25,000 ranged from 14% in the Excelsior neighborhood to 70% in the Tenderloin. SoMa and the Western Addition were the two additional neighborhoods with over 40% of households with incomes below \$25,000.

Limitations of the Data: Income data estimated by Claritas, a private vendor of demographic data. 2000 Census data will not be available until 2002. Neighborhoods shown do not comprise the entire City; they are key neighborhoods as defined by the Mayor's Office of Community Development. See Appendix for additional income data and a delineation of these neighborhoods.

Household Income by Neighborhood, 2000



Notes:

See Appendix for more complete income distribution and for delineation of neighborhoods.
Sources: Claritas, Inc.; BAE, 2001.

Home Sales by Neighborhood, 2000-2001

Indicator Description: Shows home sales by price range category for key neighborhoods.

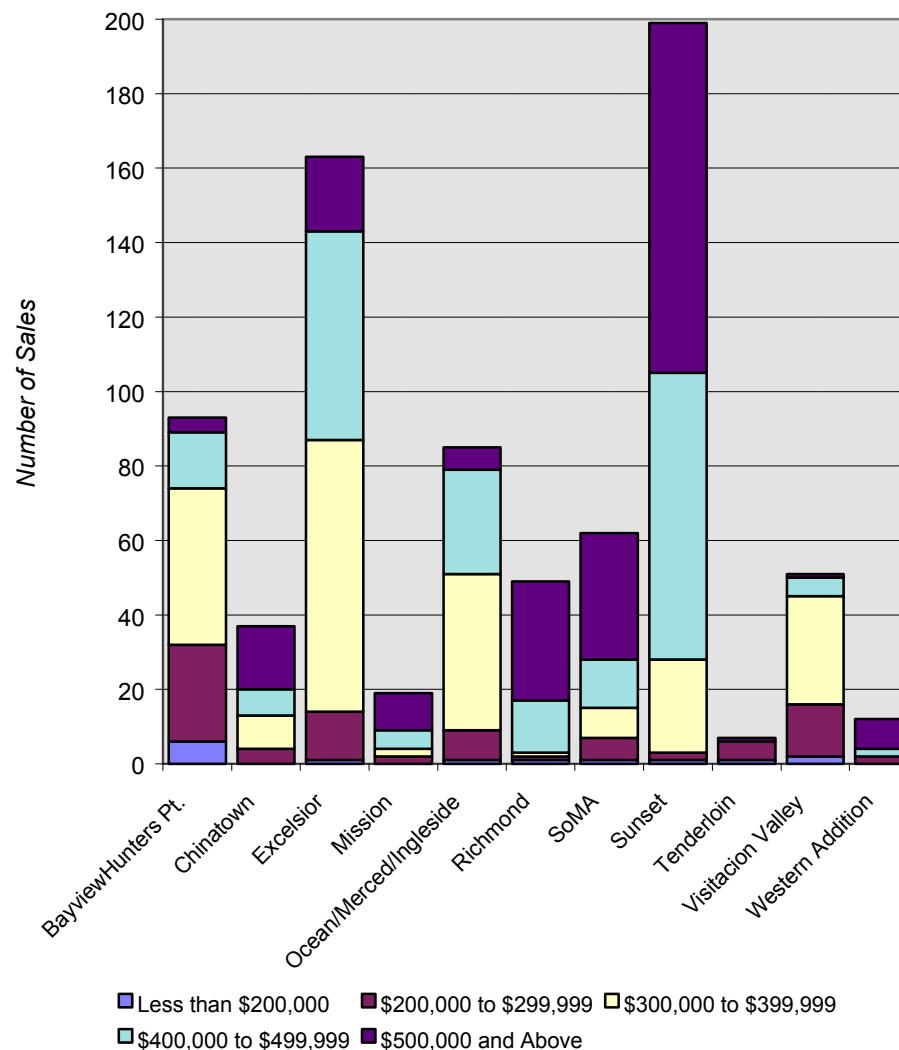
Geographic Areas Covered: 11 key neighborhoods of City of San Francisco.

Key Findings:

- Sunset neighborhood had greatest number of sales above \$500,000.
- Bayview had the greatest number of sales below \$200,000.

Limitations of the Data: Neighborhoods shown do not comprise the entire City; they are key neighborhoods as defined by the Mayor's Office of Community Development. See Appendix for detailed table and a delineation of these neighborhoods.

Home Sales by Neighborhood by Price, 2000-2001



Notes:

Represents all full, confirmed and verified single family residence and condominium sales from September 1, 2000 through March 1, 2001. See Appendix for delineation of neighborhoods.

Sources: First American Real Estate Solutions; BAE, 2001.



Resources

Organization of City Housing Agencies

This section looks at the structure of housing agencies for several major cities across the U.S. in order to gain an understanding of the various approaches to housing service delivery which municipal governments have taken.

Ten major U.S. cities were selected for this evaluation based on a variety of economic and housing market factors that most closely relate to San Francisco, such as job growth, population size, and/or housing prices. A summary of population, employment, and production data for the comparison cities is presented below. Each city's housing agencies and major initiatives are profiled on the following pages.

Comparison Cities					
City	Pop. 2000	Pop. Change 90-2000	Job Change 92-97	Median Home Price, 2000	Housing Permits 90-2000
New York, NY	8,008,278	9.4%	4.6%	\$230,900	95,048
Phoenix, AZ	1,321,045	34.3%	27.5%	\$134,400	94,984
San Diego, CA	1,223,400	10.2%	8.2%	\$269,410	52,167
San Antonio, TX	1,144,646	22.3%	23.4%	\$122,600	66,070
San Jose, CA	894,943	14.4%	20.4%	\$537,550	35,272
San Francisco, CA	776,733	7.3%	11.6%	\$417,180	16,878
Austin, TX	656,562	41.0%	34.9%	\$137,300	63,854
Boston, MA	589,141	2.6%	12.1%	\$317,800	4,729
Seattle, WA	563,374	9.1%	8.4%	\$220,100	32,248
Denver, Co	554,636	18.6%	8.8%	\$196,800	23,421
Portland, OR	529,121	21.0%	21.4%	\$170,100	22,998
Sources: US Census, 1990, 2000; County Business Patterns, 1992-1997; National Association of Realtors and California Association of Realtors, 2000; BAE, 2001.					

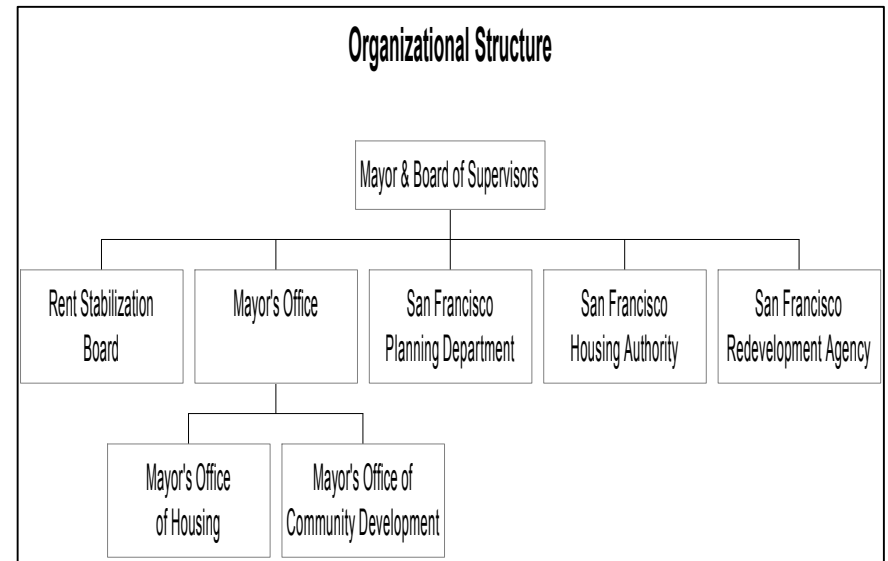
Organization of San Francisco Housing Agencies

Organization Description:

- ◆ The Mayor's Office of Housing administers housing funds including those collected from commercial development, and allocates Low Income Housing Tax Credits. Also responsible for Consolidated Plan.
- ◆ Mayor's Office Of Community Development – administers CDBG programs in neighborhoods, including housing rehabilitation funds.
- ◆ Planning Department oversees entitlements and Better Neighborhoods planning efforts. Also responsible for Housing Element of General Plan.
- ◆ Redevelopment Agency responsible for Redevelopment Project Areas, including construction of new rental and ownership affordable housing units.
- ◆ Rent Stabilization Board administers and oversees rent control legislation.
- ◆ Housing Authority manages public housing and Section 8 programs.

Key Innovations:

- ◆ The Better Neighborhoods Program – This Planning Department initiative is aimed at creating Specific Plans for several neighborhoods. The Program's plans will include identification of suitable new housing development sites. Current planning initiatives are underway in the Market/Octavia area, the Central Waterfront, and the area around Balboa Park Station.
- ◆ Inclusionary Housing Policy – The City currently requires 10% affordable housing in new housing developments, although this policy has been applied inconsistently. The Board of Supervisors is considering several policy refinements to enhance this requirement.
- ◆ Extra Credit Teacher Home Purchase Program (ECTHPP) – This program, available statewide, has been implemented by the Mayor's Office of Housing. Eligible teachers and principals will receive a teacher mortgage credit certificate (TMCC) which provides the income eligible buyer with an opportunity to reduce the amount of federal income tax otherwise due by an amount equal to 20% of the mortgage interest payments as a dollar for dollar credit. The remaining 80% of the mortgage interest can be taken as the usual allowable deduction on the federal itemized return. The result increases the household's overall income and the ability to qualify for a mortgage loan. In addition, eligible teachers or principals automatically receive a \$7,500 loan from the City to use toward their down payment. The loan is forgiven at the end of five years if the buyer fulfills the commitment to work in a low performing San Francisco public school.



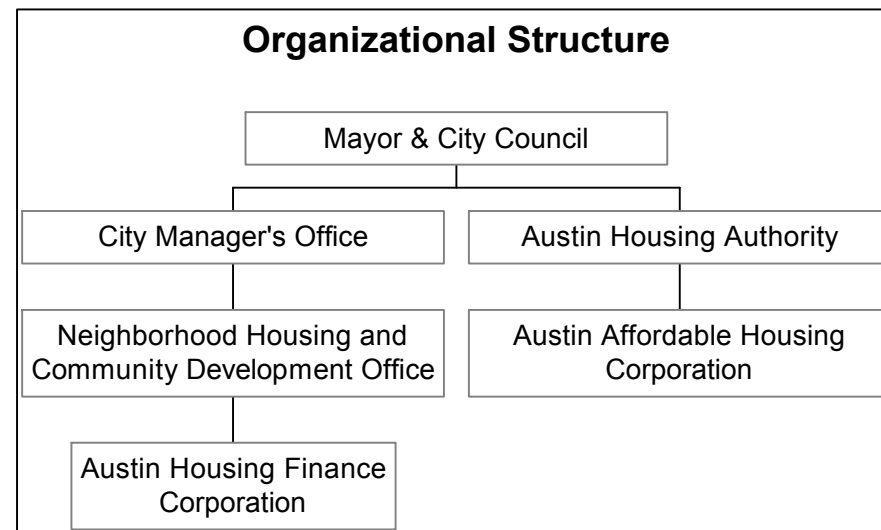
Major Housing Programs and Initiatives:

Regulatory Incentives	✓
Land Use Incentives	✓
Housing Trust Fund	✓
Inclusionary Zoning	✓
Public Outreach/Education	
Rent Control	✓

Organization of Austin Housing Agencies

Organization Description:

- ◆ **Neighborhood Housing and Community Development Office** provides low interest loans or grants to develop affordable housing, using HUD money (CDBG, HOME).
- ◆ **Austin Housing Finance Corporation (AHFC)** facilitates the financing and construction of rental and owner occupied affordable housing through loan programs, fee exemptions, and issuing bonds.
- ◆ **Housing Authority of the City of Austin (HACA)** is a successful non-profit government agency that uses public/private partnerships, such as federal grants (HOME, HOPE VI, etc.), tax credits or bond sales, to create and maintain affordable housing.
- ◆ **Austin Affordable Housing Corporation**, a non-profit organization created by HACA to administer the Federal Section 8 voucher program



Key Innovations:

- ◆ **Austin Housing Finance Corporation** issued \$10 million in Residual Value Bonds in 1988 to create a Housing Trust Fund.
- ◆ **Home Mortgage Assistance Program (Home MAP)** was created by the AHFC and the Austin Unified School District to encourage first-time homeownership for teachers by reducing the tax burden.
- ◆ **Austin Affordable Housing Corporation** is responsible for overseeing all Section 8 Project-based housing within the State of Texas after being selected through a competitive bid program.

Major Housing Programs and Initiatives:

Regulatory Incentives	✓
Land Use Incentives	✓
Housing Trust Fund	✓
Inclusionary Zoning	
Public Outreach/Education	
Rent Control	

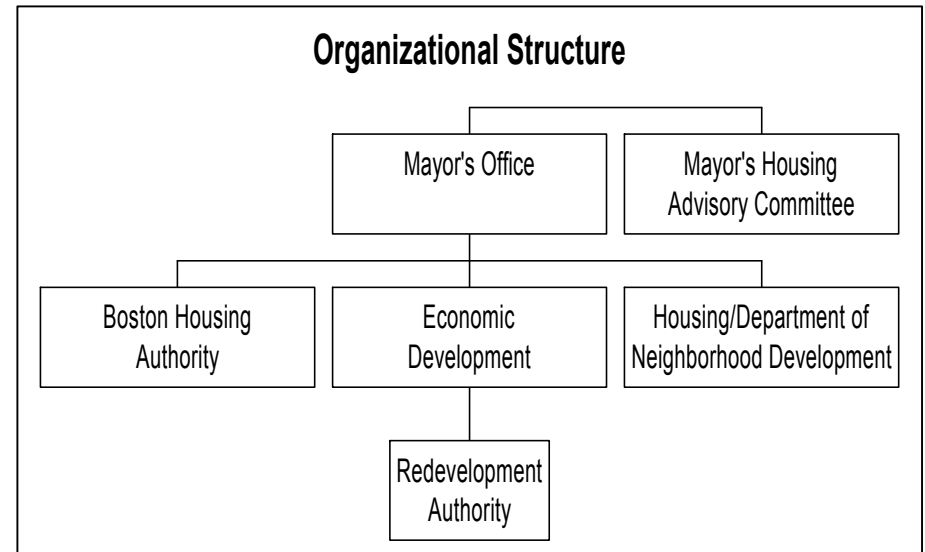
Organization of Boston Housing Agencies

Organization Description:

- ◆ **Housing Advisory Committee** was convened in 2000 by Mayor Tom Menino to develop a comprehensive housing strategy for all other housing agencies.
- ◆ **Department of Neighborhood Development** is responsible for creation of new units, rehabilitation of existing units, and facilitating home ownership. The department was elevated to cabinet level in 1999.
- ◆ **Boston Housing Authority** – Provides housing for low-income city residents.
- ◆ **Boston Redevelopment Authority** – Manages all city planning, zoning, and development functions.

Key Innovations:

- ◆ In 1999 Mayor Menino declared housing a priority of his administration.
- ◆ Boston is in the middle of a three-year campaign to unify and focus all city housing agencies around a comprehensive strategy.
- ◆ Mayor Menino meets weekly with the heads of the city's housing-related departments.



Major Housing Programs and Initiatives:

Regulatory Incentives	Ö
Land Use Incentives	Ö
Housing Trust Fund	Ö
Inclusionary Zoning	Ö
Public Education/Outreach	
Rent Control	

Organization of Denver Housing Agencies

Organization Description:

- ◆ **Planning Office** is the lead city agency in developing housing policies and plans for Denver. It also administers housing bond programs.
- ◆ **Community Planning & Development Agency** uses HUD money (CDBG, HOME, HPWA) to fund programs for special needs housing, provides financial assistance for first time homebuyers, rehabilitation loans, housing information, referral services and mortgage counseling through its **Housing and Neighborhood Development Services** department.
- ◆ **Denver Urban Renewal Authority** (DURA) administers home repair programs and facilitates larger development projects through Tax Increment Financing.
- ◆ **Denver Housing Authority** is responsible for developing, managing, and maintaining affordable housing for families of low and moderate income.

Key Innovations:

- ◆ **Affordable Housing Task Force** convened last fall to provide an open forum for residents, policy makers and private sector partners to discuss critical housing issues in Denver with the intention of developing strategies for the promotion of affordable housing.
- ◆ **Denver Neighborhood Housing Fund** was formed by the City of Denver, the Enterprise Foundation, the Fannie Mae Foundation and the U.S. Bank with \$6.25 million available to trigger production of affordable housing.



Major Housing Programs and Initiatives:

Regulatory Incentives

Land Use Incentives

Housing Trust Fund ✓

Inclusionary Zoning

Public Outreach/Education ✓

Rent Control

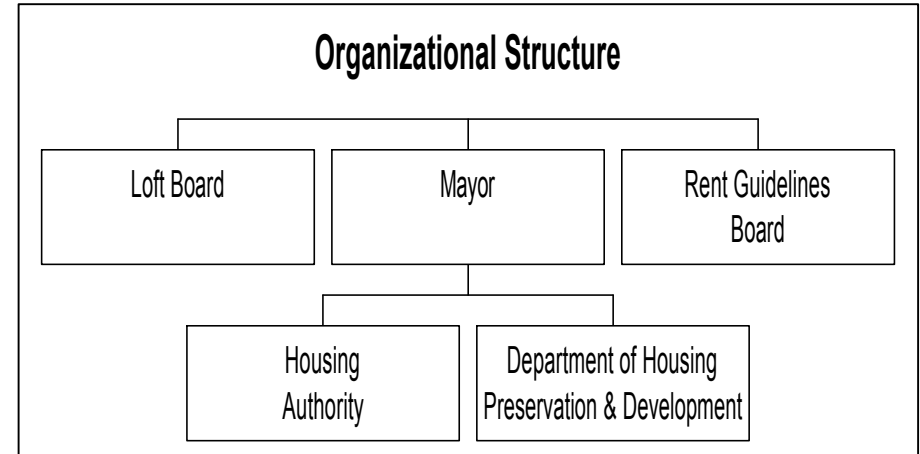
Organization of New York City Housing Agencies

Organization Description:

- ◆ **Department of Housing and Preservation** was established in 1977 as the primary city entity responsible for housing, neighborhood redevelopment, management of city-owned housing, code compliance, and community outreach and partnerships.
- ◆ **Rent Guidelines Board** establishes rent adjustments
- ◆ **Loft Board** was created in 1983 to regulate loft conversions
- ◆ **NYC Housing Authority** provides housing for low-income city residents.

Key Innovations:

- ◆ City housing agencies attempt to provide a coordinated array of services to building owners, tenants, homeowners, and housing developers.
- ◆ Housing preservation emphasized as a major goal of City Housing programs.
- ◆ Loft Board instituted to oversee the conversion of certain buildings to residential use and to preserve their affordability to artists.



Major Housing Programs and Initiatives:

Regulatory Incentives	ö
Land Use Incentives	ö
Housing Trust Fund	ö
Inclusionary Zoning	ö
Public Outreach/Education	ö
Rent Control	ö

Organization of Phoenix Housing Agencies

Organization Description:

- ♦ **Housing Department** oversees all housing programs, including the management of public housing & Section 8 units, homeownership training and support programs, funding future development, and administering the CDBG and HOME grant programs. The Housing Department also provides staffing for the **Phoenix Industrial Development Authority** to administer its housing bond programs.
- ♦ **The Planning Department** guides development in Phoenix through zoning & land use regulations, neighborhood planning and by updating the General Plan, including the housing element, land use element, and conservation, rehabilitation and redevelopment element.
- ♦ **Phoenix Housing Authority** develops, maintains, and manages public housing for the City of Phoenix.

Key Innovations:

- ♦ **The Infill Housing Program** is administered by the Business Customer Service Center to encourage the development of single-family housing on vacant, abandoned, or underutilized land with the goal of promoting neighborhood stability and fighting blight and decay. It provides incentives by waiving development fees.



Major Housing Programs and Initiatives:

Regulatory Incentives	✓
Land Use Incentives	✓
Housing Trust Fund	
Inclusionary Zoning	
Public Outreach/Education	
Rent Control	

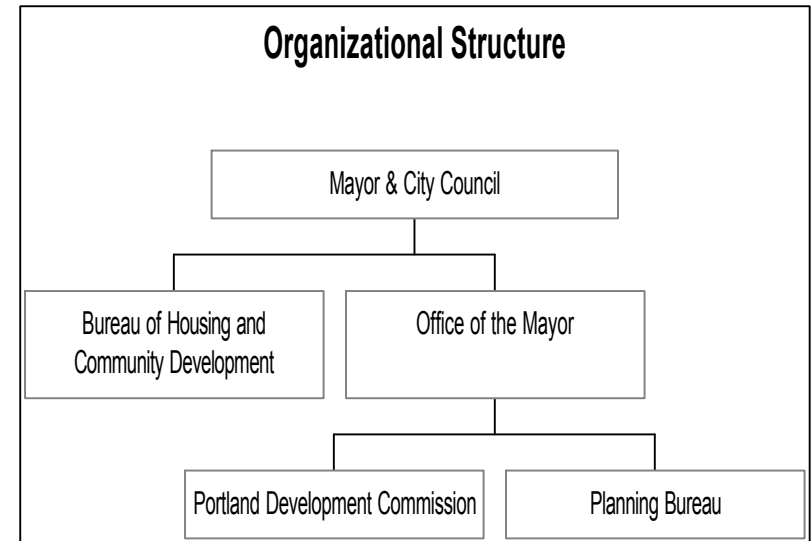
Organization of Portland Housing Agencies

Organization Description:

- ◆ **Bureau of Housing and Community Development** addresses housing need through financing housing development (in part with CDBG, HOME & HPWA funds) and the Housing Connections program.
- ◆ **Portland Development Commission** oversees housing programs to help homeowners rehabilitate their properties and to develop housing through tax exemptions, fee waivers, and available financing.
- ◆ **Planning Bureau & Planning Commission** address zoning changes (increasing densities, commercial areas to residential) that might encourage an increase in the development of affordable housing.

Key Innovations:

- ◆ **Housing Connections** -- A web-based center to assist low-income Portland area residents in accessing and retaining stable affordable housing. Includes functions to locate available, appropriate housing, housing services, and a databank to assess, track, and evaluate housing services.
- ◆ **Tax Exemption** Programs for Transit Oriented Development, Central City multifamily development, rental and limited owner-occupied rehabilitation, and limited new single family development.
- ◆ **Building Code Exemptions** allowing for more economical housing construction, and fee waivers for non-profit developers building affordable housing.



Major Housing Programs and Initiatives:

Regulatory Incentives	✓
Land Use Incentives	✓
Housing Trust Fund	✓
Inclusionary Zoning	✓
Public Outreach/Education	✓
Rent Control	

Organization of San Antonio Housing Agencies

Organization Description:

- ◆ **Department of Housing and Community Development** oversees distribution of funds from CDBG, HOME, HOPWA and other federal grants for housing programs.
- ◆ **Neighborhood Action Department (NAD)** works with other agencies to manage rehabilitation loan programs for rental and homeowner property, the Homeownership Incentive Program (HIP) and developer incentive programs.
- ◆ **San Antonio Development Agency (SADA)** also oversees rehabilitation and homeownership programs. San Antonio Affordable Housing, its subsidiary, is focusing specifically on redeveloping vacant housing in the inner city.
- ◆ **San Antonio Housing Authority (SAHA)** develops, manages and maintains public housing units and the Section 8 voucher program in the City of San Antonio.

Key Innovations:

- ◆ **San Antonio Housing Trust (SAHT)** was created by the City of San Antonio in 1988 to support the financing and implementation of city housing programs through reviewing and recommending development proposals, issuing bonds and other real estate activities.
- ◆ **Housing Asset Recovery Program** was created by the Special Projects Office of the City Managers Office (in partnership with NAD and SAHT) to use private sector rehabilitation strategies on underutilized public properties.
- ◆ **Tax Increment Financing** is one of a tiered system of incentives to revitalize inner city neighborhoods, particularly in designated Tax Increment Reinvestment Zones.



Major Housing Programs and Initiatives:

Regulatory Incentives

Land Use Incentives

✓

Housing Trust Fund

✓

Inclusionary Zoning

Public Outreach/Education

Rent Control

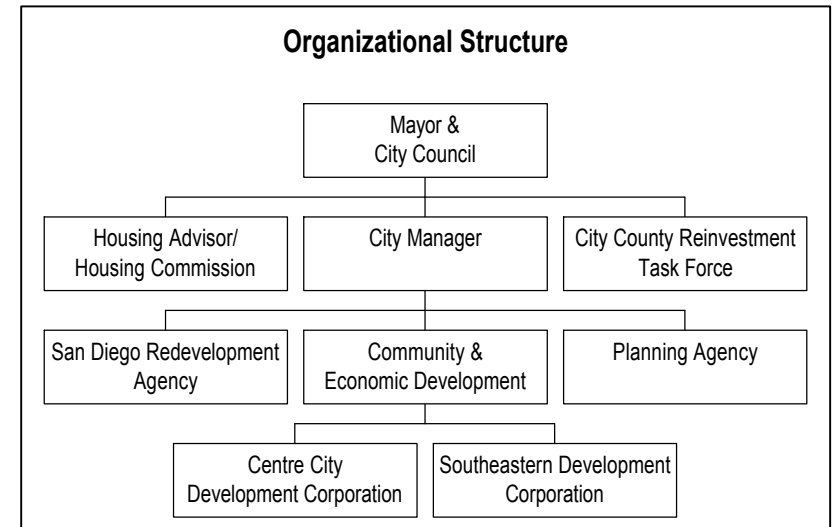
Organization of San Diego Housing Agencies

Organization Description:

- ♦ **San Diego Redevelopment Agency** was created as a separate legal entity in 1958 to eliminate blight in older urban areas. The Mayor chairs the agency, and the City Council acts as the legislative body.
- ♦ **Housing Commission** was established as lead agency for affordable housing in 1979. The commission's budget and programs are reviewed by the City Council, which sits as the Housing Authority.
- ♦ **City/County Reinvestment Task Force** facilitates the creation of permanent public/private partnerships to develop affordable housing.

Key Innovations:

- ♦ City Council appointed a Housing Commission to oversee the Housing Authority as well as a variety of other housing programs.
- ♦ Housing Commission is responsible for the allocation of tax credits.
- ♦ Housing Commission works closely with redevelopment and planning agencies to forward housing goals.



Major Housing Programs and Initiatives:

Regulatory Incentives	0
Land Use Incentives	0
Housing Trust Fund	0
Inclusionary Zoning	0
Public Outreach/Education	
Rent Control	

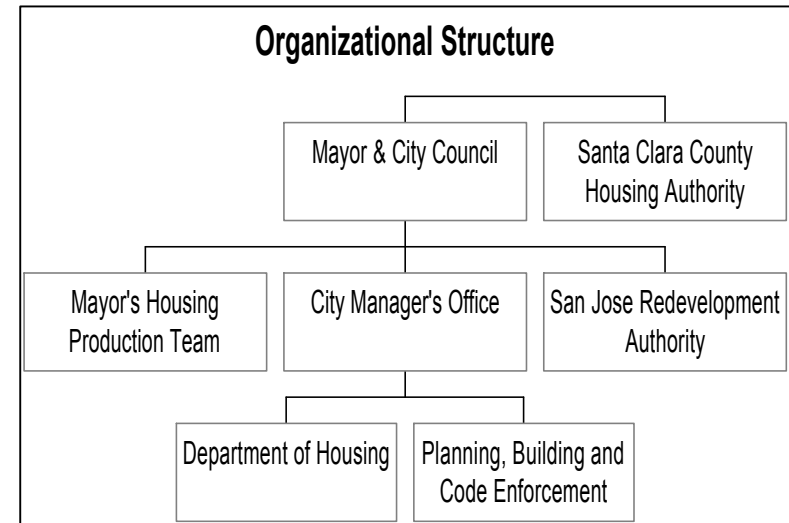
Organization of San Jose Housing Agencies

Organization Description:

- ◆ **Department of Housing** works to maintain and increase the affordable housing supply by making loans to developers for new properties, direct homebuyer assistance, and housing rehabilitation loans. It is responsible for administering CDBG and HOME monies, as well as tax increment financing for affordable housing.
- ◆ **San Jose Redevelopment Authority (SJRA)** is active in the production of affordable housing units through engaging the private sector, among other economic development and civic improvement projects in San Jose.
- ◆ **Planning, Building and Code Enforcement (PBCE)** sets regulations and zoning to encourage the production of more affordable housing.
- ◆ **Santa Clara County Housing Authority** administers all of the City of San Jose's Housing Authority Programs.

Key Innovations:

- ◆ **Mayor's Housing Production Team** was created by the Mayor to work with the different city offices involved in housing policy, has recommended policy and procedural changes to streamline the development process and encourage flexibility in land use regulations to increase the production and maintenance of affordable housing.
- ◆ **Teacher Housing Program** -- In 2000, the City increased the loan level to help San Jose teachers find affordable housing in San Jose.



Major Housing Programs and Initiatives:

Regulatory Incentives	✓
Land Use Incentives	✓
Housing Trust Fund	
Inclusionary Zoning	
Public Outreach/Education	
Rent Control	

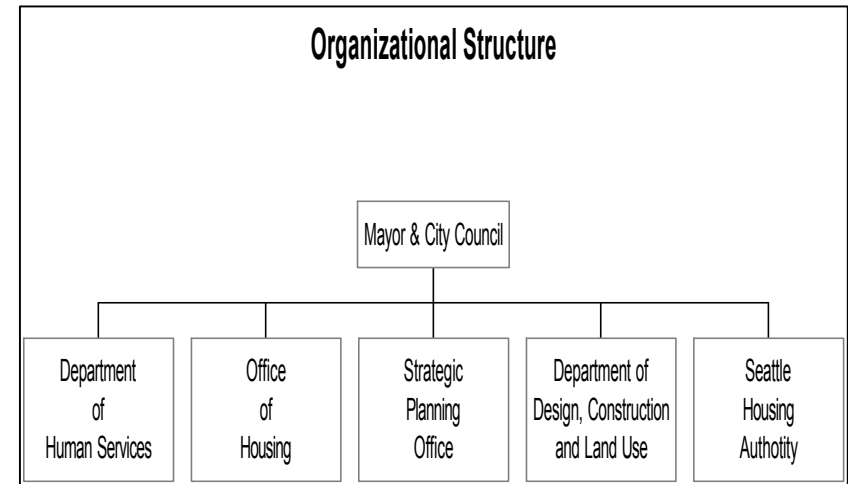
Organization of Seattle Housing Agencies

Organization Description:

- ◆ **Office of Housing** coordinates housing policy for all city departments, and with the Department of Human Services coordinates loan programs for homeownership, rehabilitation and new development using city, state and HUD monies.
- ◆ **Department of Design, Construction and Land Use** is responsible for regulating new development and major renovations on existing structures, including setting and modifying housing codes and development regulations.
- ◆ **Strategic Planning Office** develops the Comprehensive and Neighborhood plans, including adjusting land use ordinances to encourage the production and preservation of affordable housing.
- ◆ **Seattle Housing Authority** manages public housing units for the City of Seattle.

Key Innovations:

- ◆ **Seattle Housing Levy** was approved by votes in 1995, and added \$59.2 million in funding for affordable housing.
- ◆ **Bridge Loan Fund** was created to provide short-term loans for the preservation of “at risk” Section 8 units. Over \$3.8 million was loaned in 1999 and \$2 million in 2000. These loans earn interest, providing revolving funds for future projects.
- ◆ **Property Tax Exemption Program** in 9 “Community Revitalization” neighborhoods offer a 10-year tax exception to developers for setting aside a certain number of units for low and/or moderate income tenants. Property tax reductions and deferrals are also available for senior or disabled homeowners.
- ◆ **Land Use Ordinances and Housing Codes** are evaluated and adapted in specific areas to increase densities, modify parking requirements, or to reduce the financial burden on developers that inhibits the development of affordable housing.
- ◆ **Sale of TDRs or Housing Bonus Credits** to commercial developers in downtown Seattle continues to create and preserve affordable housing.



Major Housing Programs and Initiatives:

Regulatory Incentives	✓
Land Use Incentives	✓
Housing Trust Fund	✓
Inclusionary Zoning	
Public Outreach/Education	✓
Rent Control	



Appendices

AUTOMOBILE OWNERSHIP

	Owners			Renters			All Occupied Units		
	Total Households	Households without Car, Truck, or Van		Total Households	Households without Car, Truck, or Van		Total Households	Households without Car, Truck, or Van	
		Number	Percent		Number	Percent		Number	Percent
New York	1,924,600	292,900	15%	2,407,000	1,442,000	60%	4,331,700	1,734,800	40%
SF Metro Area	323,500	17,100	5%	339,800	88,800	26%	663,200	105,900	16%
SF City	102,200	10,100	10%	205,100	78,000	38%	307,300	88,100	29%
Chicago	1,856,700	92,200	5%	991,200	304,900	31%	2,847,900	397,100	14%
Los Angeles	1,442,100	38,400	3%	1,619,800	325,700	20%	3,062,000	364,100	12%
Oakland	508,600	10,700	2%	347,100	55,900	16%	855,700	66,600	8%
Seattle	563,200	12,200	2%	339,200	49,600	15%	902,400	61,800	7%
San Jose	508,600	10,700	2%	347,100	55,900	16%	565,900	23,300	4%
United States	68,796,000	2,674,000	4%	34,007,000	6,867,000	20%	102,803,000	9,542,000	9%

Note: Uses most recent data available from America Housing Survey. Seattle from 1996; San Francisco, Oakland, and San Jose from 1998; New York, Chicago, Los Angeles, and United States from 1999. All data by Primary Metropolitan Statistical Area (PMSA), except as indicated. San Francisco PMSA includes Marin, San Francisco, and San Mateo Counties.

Age Distribution for San Francisco and California, 1980-2000

2000				
	SAN FRANCISCO		CALIFORNIA	
	Total	% of Total	Total	% of Total
Under 18	112,802	14.5%	9,249,829	27.3%
18-24	70,596	9.1%	3,366,030	9.9%
25 - 34	180,418	23.2%	5,229,062	15.4%
35 - 44	133,804	17.2%	5,485,341	16.2%
45 - 54	107,718	13.9%	4,331,635	12.8%
55 - 64	65,284	8.4%	2,614,093	7.7%
<u>65 & Over</u>	<u>106,111</u>	<u>13.7%</u>	<u>3,595,658</u>	<u>10.6%</u>
Total	776,733	100.0%	33,871,648	100.0%
Median Age	36.5		33.3	

1990				
	SAN FRANCISCO		CALIFORNIA	
	Total	% of Total	Total	% of Total
Under 18	116,883	16.1%	7,750,725	26.0%
18-24	74,883	10.3%	3,412,257	11.5%
25 - 34	158,534	21.9%	5,686,371	19.1%
35 - 44	129,853	17.9%	4,639,321	15.6%
45 - 54	74,865	10.3%	2,902,569	9.8%
55 - 64	63,561	8.8%	2,233,226	7.5%
<u>65 & Over</u>	<u>105,380</u>	<u>14.6%</u>	<u>3,135,552</u>	<u>10.5%</u>
Total	723,959	100.0%	29,760,021	100.0%
Median Age	35.8		31.5	

1980				
	SAN FRANCISCO		CALIFORNIA	
	Total	% of Total	Total	% of Total
Under 18	116,611	17.2%	6,388,958	27.0%
18-24	83,812	12.3%	3,252,239	13.7%
25 - 34	151,222	22.3%	4,243,015	17.9%
35 - 44	81,143	12.0%	2,814,938	11.9%
45 - 54	70,025	10.3%	2,359,934	10.0%
55 - 64	71,876	10.6%	2,194,568	9.3%
<u>65 & Over</u>	<u>104,285</u>	<u>15.4%</u>	<u>2,414,250</u>	<u>10.2%</u>
Total	678,974	100.0%	23,667,902	100.0%
Median Age	34.1		29.9	

Source: U.S. Bureau of the Census.

Definitions of Rent Control Status

All of the tables directly regarding rent control status are based on an analysis of the sample of housing units generated in the 1998 *American Housing Survey for the San Francisco Metropolitan Area*. Raw data from individual records (edited to preserve confidentiality) are available for analysis from the U.S. Census Bureau.

The American Housing Survey is a survey conducted by the U.S. Census Bureau to provide up-to-date housing statistics for the U.S. Department of Housing and Urban Development (HUD). The survey is conducted in selected metropolitan areas, generally every four to five years, and is also conducted nationally. The American Housing Survey asks a multitude of questions regarding respondents' housing units, neighborhoods, and their households, including whether their unit's rent was restricted by local rent stabilization ordinances. In addition, the Survey asks questions regarding possible rent reductions and subsidies, including whether the respondent lives in public housing. With these variables, it was possible to sort the data for San Francisco into units covered by rent control, subsidized units, and units not covered by any kind of subsidy or other rent reduction from market-rate rents.

Initial analysis, though, showed far fewer rent controlled units than is indicated by other sources, likely due to confusion on the part of respondents regarding whether their unit was covered under the San Francisco Rent Ordinance. For instance, many renters are recent movers, and while they may currently be paying market-rate rents and thus think their rent is not covered by the ordinance, future increases for their unit are limited by the ordinance.

As a result, BAE used other variables in the data set to determine rent control status. Records were screened by the year unit was built, unit size, move-in date for single-family and condominium units, and subsidy status, including whether the unit was in public housing. Based on these

criteria, housing units were classified as rent controlled, market rate, or other.

Rent controlled units were those meeting the age criteria (built prior to 1980) which also were not single-family homes or condominiums where the respondent moved in on or after January 1, 1996. Units which met these above criteria were further sorted and excluded if they were in public housing, the respondent indicated presence of some other rent subsidy, such as Section 8 voucher, or the respondent did not respond to questions regarding subsidy status.

Market rate units were units constructed 1980 or later which also showed no subsidy, as well as all unsubsidized single-family homes and condominiums where the respondent moved in January 1, 1996 or later. It should be noted that this category includes some units subject to the eviction controls in the San Francisco Rent Ordinance, i.e., the single-family homes and condominiums where the respondent moved in on January 1, 1996 or later.

All remaining units were classified as *other*, and were excluded from the comparison. Many of these units are either public housing or units subsidized in other ways, but units where the respondent did not respond concerning the criteria above (e.g., subsidy status) were classified this way. Thus the *other* category may include units that are actually rent controlled or market rate. As a result, the analysis here should not be considered a definitive count of either rent controlled or market rate units, but instead as a comparative analysis of these two types of units.

San Francisco Residents by Place of Work

County of Work	1960		1970		1980		1990		2000		2010		2020	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
San Francisco	322,000	93.6%	283,184	89.8%	284,297	85.8%	299,926	80.8%	319,546	79.4%	345,726	79.6%	358,700	80.2%
San Mateo	12,000	3.5%	18,349	5.8%	21,443	6.5%	32,170	8.7%	39,541	9.8%	41,202	9.5%	41,557	9.3%
Santa Clara	1,000	0.3%	2,972	0.9%	3,721	1.1%	7,992	2.2%	11,489	2.9%	11,945	2.8%	10,574	2.4%
Alameda	6,000	1.7%	7,874	2.5%	15,181	4.6%	18,822	5.1%	19,512	4.9%	21,866	5.0%	21,845	4.9%
Contra Costa	1,000	0.3%	1,129	0.4%	2,430	0.7%	5,747	1.5%	5,453	1.4%	5,931	1.4%	6,365	1.4%
Solano	0	0.0%	362	0.1%	349	0.1%	377	0.1%	244	0.1%	299	0.1%	325	0.1%
Napa	0	0.0%	77	0.0%	14	0.0%	117	0.0%	104	0.0%	155	0.0%	169	0.0%
Sonoma	0	0.0%	120	0.0%	355	0.1%	468	0.1%	443	0.1%	630	0.1%	854	0.2%
Marin	2,000	0.6%	1,419	0.4%	3,332	1.0%	5,006	1.3%	5,272	1.3%	5,850	1.3%	6,519	1.5%
Elsewhere	NA	NA	NA	NA	348	0.1%	784	0.2%	675	0.2%	620	0.1%	508	0.1%
TOTAL	344,000	100%	315,486	100%	331,470	100%	371,409	100%	402,279	100%	434,224	100%	447,416	100%

Source: Metropolitan Transportation Commission 2001, BAE 2001

Definitions of Housing Unit Types

UNITS IN STRUCTURE

A structure is a separate building that either has open spaces on all sides or is separated from other structures by dividing walls that extend from ground to roof. In determining the number of units in a structure, all housing units, both occupied and vacant, are counted. Stores or office space are excluded. The statistics are presented for the number of housing units in structures of specified type and size, not for the number of residential buildings.

1-Unit, Detached--This is a 1-unit structure detached from any other structure, that is, with open space on all four sides. Such structures are considered detached even if they have an adjoining shed or garage. A one-family house which contains a business is considered detached as long as the building has open space on all four sides. Mobile homes or trailers to which one or more permanent rooms have been added or built are also included.

1-Unit, Attached--This is a 1-unit structure which has one or more walls extending from ground to roof separating it from adjoining structures. In row houses (sometimes called townhouses), double houses, or houses attached to nonresidential structures, each house is a separate, attached structure of the dividing or common wall goes from ground to roof.

2 or More Units--These are units in structures containing 2 or more housing units, further categorized as units in structures with 2, 3 or 4, 5 to 9, 10 to 19, 20 to 49, and 50 or more units.

Mobile Home or Trailer--Both occupied and vacant mobile homes to which no permanent rooms have been added are counted in this category. Mobile homes or trailers used only for business purposes or for extra sleeping space and mobile homes or trailers for sale on a dealer's lot, at the factory, or in storage are not counted in the housing inventory.

Other--This category is for any living quarters occupied as a housing unit that does not fit the previous categories. Examples that fit this category are houseboats, railroad cars, campers, and vans.

Comparability--Data on units in structure have been collected since 1940 and on mobile homes and trailers since 1950. In 1970 and 1980, these data were shown only for year-round housing units. In 1990, these data are shown for all housing units. In 1980, the data were collected on a sample basis.

The category, "Boat, tent, van, etc." was replaced in 1990 by the category, "Other." In some areas, the proportion of units classified as "Other" is far larger than the number of units that were classified as "Boat, tent, van, etc." in 1980.

Source: *Technical Documentation for Summary Tape File 3 on CD-ROM*, 1990 Census of Population and Housing.

San Francisco Workers by Place of Residence

County of Residence	1960		1970		1980		1990		2000		2010		2020	
San Francisco	322,000	72.5%	283,184	62.6%	284,297	55.6%	299,926	54.4%	319,546	53.2%	345,726	52.5%	358,700	51.0%
San Mateo	59,000	13.3%	67,723	15.0%	78,706	15.4%	78,832	14.3%	80,007	13.3%	90,322	13.7%	100,188	14.2%
Santa Clara	7,000	1.6%	9,052	2.0%	7,438	1.5%	7,536	1.4%	6,392	1.1%	7,304	1.1%	9,241	1.3%
Alameda	25,000	5.6%	35,197	7.8%	50,895	10.0%	60,505	11.0%	62,155	10.4%	67,197	10.2%	76,590	10.9%
Contra Costa	10,000	2.3%	20,491	4.5%	38,236	7.5%	47,678	8.7%	57,704	9.6%	66,751	10.1%	72,726	10.3%
Solano	1,000	0.2%	1,249	0.3%	4,371	0.9%	9,805	1.8%	14,803	2.5%	16,607	2.5%	18,503	2.6%
Napa	0	0.0%	458	0.1%	549	0.1%	1,044	0.2%	1,494	0.2%	1,391	0.2%	1,559	0.2%
Sonoma	1,000	0.2%	3,652	0.8%	6,489	1.3%	8,357	1.5%	11,028	1.8%	10,471	1.6%	9,537	1.4%
Marin	19,000	4.3%	31,191	6.9%	37,662	7.4%	33,656	6.1%	37,374	6.2%	40,473	6.1%	41,184	5.9%
Bay Area	444,000	100.0%	452,197	100.0%	508,643	99.5%	547,339	99.4%	590,503	98.4%	646,242	98.1%	688,228	97.9%
Elsewhere	NA	NA	NA	NA	2,345	0.5%	3,496	0.6%	9,905	1.6%	12,723	1.9%	15,048	2.1%
TOTAL	444,000	100%	452,197	100%	510,988	100%	550,835	100%	600,408	100%	658,965	100%	703,276	100%

Source: Metropolitan Transportation Commission 2001, BAE 2001

SROs Closed due to Fire

Year	Hotel Name	Address	Units
1988	Hacienda	580 O'Farrell	70
		Total	70
1989	Holland	1411 Stockton	55
		Total	55
1990	Vincent	457 Turk	100
		Total	100
1993	Folsom	1082 Folsom	47
		Total	47
1995	St. George	395 Eddy	36
		Total	36
1996	Grand Southern	1941 Mission	58
		Total	58
1997	Delta Star	88 6th	180
		2176 Mission	53
		Total	233
1998	Leland	1350 Polk	90
	Jerry	16th	20
	Thor	2084 Mission	50
		Total	160
1999	Hartland King	909 Geary	150
		633 Valencia	75
		Total	225
2000	Kinney Minna Lee	410 Edy St.	52
		149 6th St.	51
		Total	103
2001 (a)	Raymond	1011 Howard St.	57
		Total	57

Notes: (a) Data as of 11/20/01

Sources: Mission SRO Collaborative, 2001, San Francisco Consolidated Plan, 2000; BAE, 2001.

Section 8 Buildings At Risk of Conversion to Market-Rate, 2000 to 2005

Project	Owner	First Expire (2)	Units (3)	Flex (4)	LIHPRHA (5)	Rent Control
<u>Bayview Hunters Point</u>						
All Hallows Garden Apts	LD	9/30/96	155	Yes	No	Yes
Bayview Apartments	LD	9/30/96	146	Yes	No	Yes
Jackie Robinson Gardens	LD	8/31/96	130	Yes	No	Yes
La Salle Apartments	PM	10/14/97	145	No	No	Yes
Ridgeview Terrace	LD	9/10/96	101	No	No	Yes
Shoreview Apartments	PM	1/8/98	156	No	No	Yes
<u>Diamond Heights</u>						
Casa de Vida	PM	12/14/01	21	No	No	No
<u>Hayes Valley</u>						
Fair Oaks Apartments	LD	7/20/21	20	No	Yes	Yes
Mercy Terrace	PM	11/19/03	158	No	No	Yes
<u>Ingleside</u>						
Page Holloway Apartments	PM or LD	12/15/20	15	No	No	No
<u>Mission</u>						
Mariposa Garden Apartments	LD	9/19/03	63	No	No	No
Mission Bart Apartments	PM	10/20/13	13	No	No	No
Mission Plaza Apartments	PM	7/14/00	132	No	No	No
<u>North Beach</u>						
Wharf Plaza I	PM	4/5/02	116	No	No	No
Wharf Plaza II	PM	6/15/02	114	No	No	No
<u>Richmond</u>						
Ocean Beach Apartments	PM	4/25/04	85	No	No	No
<u>Tenderloin</u>						
Aspen Tenderloin	LD	12/1/03	82	No	Yes	Yes
Crescent Manor	LD	10/31/96	92	Yes	No	Yes
Lassen Apartments	PM	6/21/03	81	No	No	Yes
Padre Apartments -- NSA	LD	7/30/21	41	No	Yes	Yes
Serenity Apartments	PM	4/3/03	72	No	No	No
<u>Western Addition</u>						
Emeric-Goodman Building	LD	12/19/04	30	No	No	No
Namiki Apartments	PM	8/9/99	33	No	No	No
Univista Apartments	LD	8/31/97	24	Yes	No	Yes
Total			2,025			

(1) LD = Limited Divided, PM = Profit Motivated

(2) First Expiration of Section 8 Contract typically 20 years after originated. Contracts renewed annually each year thereafter

(3) Units with Project-based Section 8 subsidy.

(4) Flexible subsidy Use Agreement: HUD rehabilitation loan program that provided funds to owners in exchange for a no-prepayment provision, and increased Section 8 contract rent levels to cover new debt.

(5) Low Income Housing Preservation and Resident Homeownership Act: Provided federal funds to purchase at-risk properties and extend affordability requirements for an additional 30 years.

Source: San Francisco Redevelopment Agency; from *Draft Housing Element*, Planning Department, 2001.

2001 Income Limits for San Francisco

HUD/HCD (a)	Number of Persons in Family							
	1	2	3	4	5	6	7	8
Extremely low income (30%)	\$17,850	\$20,400	\$22,950	\$25,500	\$27,550	\$29,600	\$31,600	\$33,650
Very low income	\$29,750	\$34,000	\$38,250	\$42,500	\$45,900	\$49,300	\$52,700	\$56,100
Lower income	\$47,600	\$54,400	\$61,200	\$68,000	\$73,450	\$78,900	\$84,300	\$89,750
Median income	\$56,050	\$64,100	\$72,100	\$80,100	\$86,500	\$92,900	\$99,300	\$105,750
Moderate income	\$67,250	\$76,900	\$86,500	\$96,100	\$103,800	\$111,500	\$119,150	\$126,850
Area Median:	\$80,100							

Tax Credit Maximum Income Levels	Number of Persons in Family							
	1	2	3	4	5	6	7	8
35% income level	\$20,825	\$23,800	\$26,775	\$29,750	\$32,130	\$34,510	\$36,890	\$39,270
40% income level	\$23,800	\$27,200	\$30,600	\$34,000	\$36,720	\$39,440	\$42,160	\$44,880
50% income level	\$29,750	\$34,000	\$38,250	\$42,500	\$45,900	\$49,300	\$52,700	\$56,100
60% income level	\$35,700	\$40,800	\$45,900	\$51,000	\$55,080	\$59,160	\$63,240	\$67,320
100% income level	\$59,500	\$68,000	\$76,500	\$85,000	\$91,800	\$98,600	\$105,400	\$112,200

Notes:

(a) 30% income level from HUD only; moderate income level from HCD only.

Sources: U.S. Department of Housing and Urban Development (HUD); California Department of Housing and Community Development (HCD); California Tax Credit Allocation Committee; BAE.

Definition of Unit Adequacy for Analysis of American Housing Survey Data

A unit is severely inadequate if any of the following conditions exist:

1. The unit lacks complete plumbing facilities.
2. There were 3 or more heating equipment breakdowns lasting 6 hours or more in the last 90 days.
3. The unit has no electricity.
4. The electrical wiring is not concealed, working wall outlets are not present in every room, and fuses/breakers blew 3 or more times in the last 90 days.
5. 5 or more of the following exist: outside water leaks, inside water leaks, holes in the floor, cracks wider than a dime in the walls, areas of peeling paint or plaster larger than 8 1/2 x 11, rodents seen in the unit recently.
6. All 4 of the following exist: no working light fixtures or no light fixtures at all in public hallways, loose, broken, or missing steps in common stairways, stair railings not firmly attached or no stair railings on stairs at all, there are 3 or more floors between the unit and the main entrance to the building and there is no elevator.

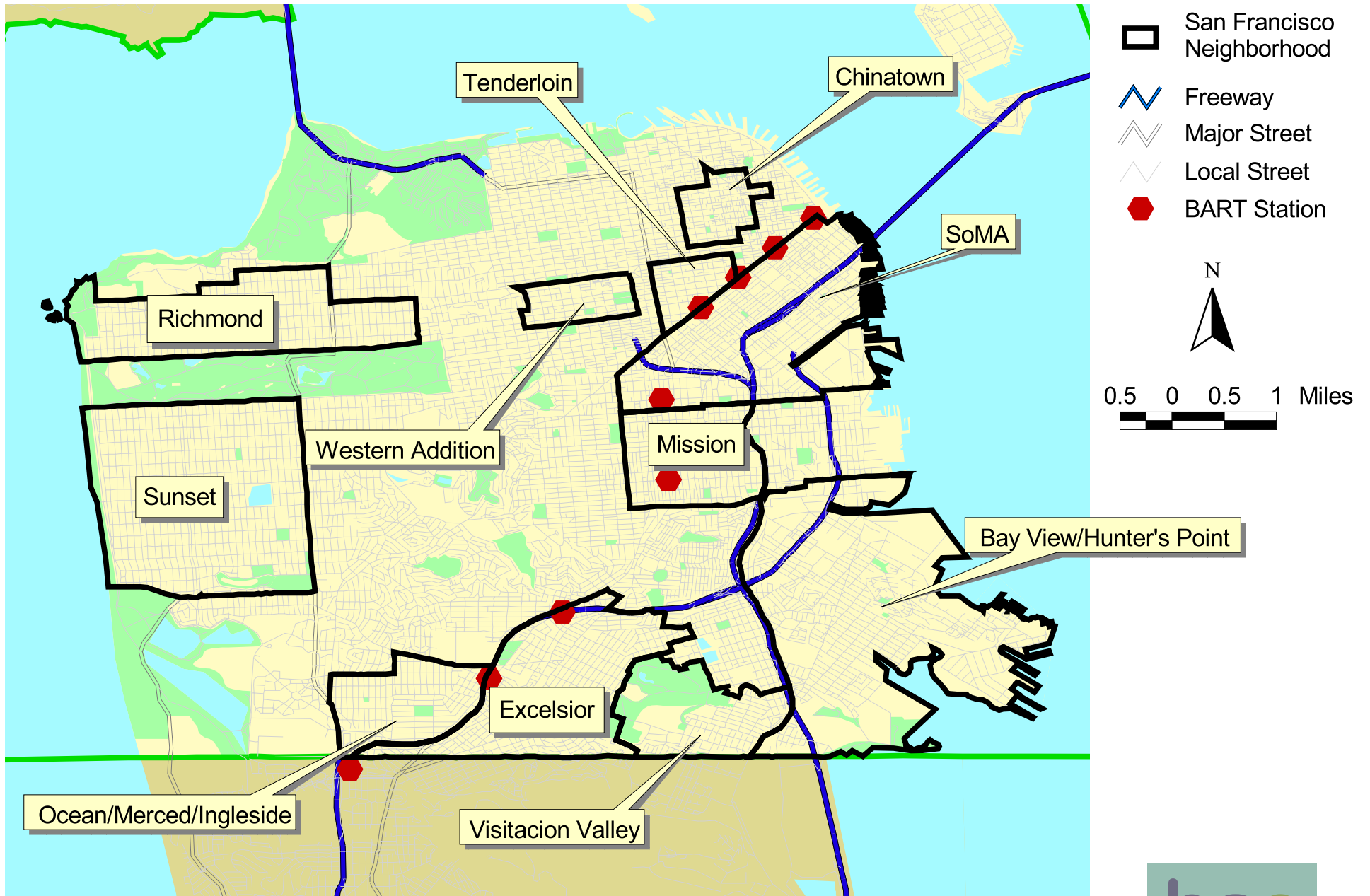
A unit is moderately inadequate if it is not severely inadequate and any of the following conditions exist:

1. The unit lacks complete kitchen facilities.
2. There were 3 or more toilet breakdowns lasting 6 hours or more in the last 90 days
3. An unvented room heater is the main heating equipment.
4. 3 or 4 of the following exist: outside water leaks, inside water leaks, holes in the floor, cracks wider than a dime in the walls, areas of peeling paint or plaster larger than 8 1/2 x 11, rodents seen in the unit recently.
5. 3 of the following exist: no working light fixtures or no light fixtures at all in public hallways, loose, broken, or missing steps in common stairways, stair railings not firmly attached or no stair railings on stairs at all, there are 3 or more floors between the unit and the main entrance to the building and there is no elevator.

A unit is adequate if it is neither severely nor moderately inadequate.

Source: *Draft Codebook for the American Housing Survey Public Use File, 1997 and Later*, ICF Consulting.

San Francisco Neighborhoods



Sources: Mayor's Office of Community and Environment, 2000; U.S. Census, 1990; BAE, 2001

Household Income by Neighborhood and Definitions of Neighborhoods

2000 HOUSEHOLD INCOME DISTRIB. (a)	SAN FRANCISCO	Bayview/ Hunters Pt.	Chinatown	Excelsior	Mission	Ocean/Merced/ Ingleside	Richmond	SoMA	Sunset	Tenderloin	Visitacion Valley	Western Addition
Less than \$15,000	13.1%	18.6%	24.9%	5.9%	11.2%	9.7%	8.5%	25.7%	8.3%	47.6%	17.7%	25.3%
\$15,000 to \$24,999	10.0%	13.3%	13.6%	7.8%	11.9%	9.3%	7.9%	14.8%	7.2%	22.7%	14.7%	15.4%
\$25,000 to \$34,999	9.4%	10.9%	12.8%	6.6%	10.9%	9.2%	10.2%	10.3%	9.3%	13.7%	9.1%	9.9%
\$35,000 to \$49,999	13.7%	11.6%	14.4%	12.3%	16.5%	11.8%	14.3%	12.0%	14.1%	8.0%	11.3%	12.0%
\$50,000 to \$74,999	19.6%	16.5%	15.3%	22.6%	22.5%	21.3%	24.9%	14.4%	22.5%	5.6%	16.0%	16.7%
\$75,000 to \$99,999	13.0%	12.2%	8.9%	16.5%	11.5%	17.2%	14.4%	8.8%	16.8%	1.9%	11.6%	10.2%
\$100,000 and Over	21.2%	17.0%	10.1%	28.4%	15.4%	21.5%	19.9%	13.8%	21.6%	0.7%	19.7%	10.5%
Med. HH Income	\$53,630	\$44,626	\$33,563	\$69,253	\$49,127	\$61,267	\$57,792	\$33,714	\$61,463	\$15,908	\$46,429	\$34,323

Notes: (a) Estimates by Claritas.

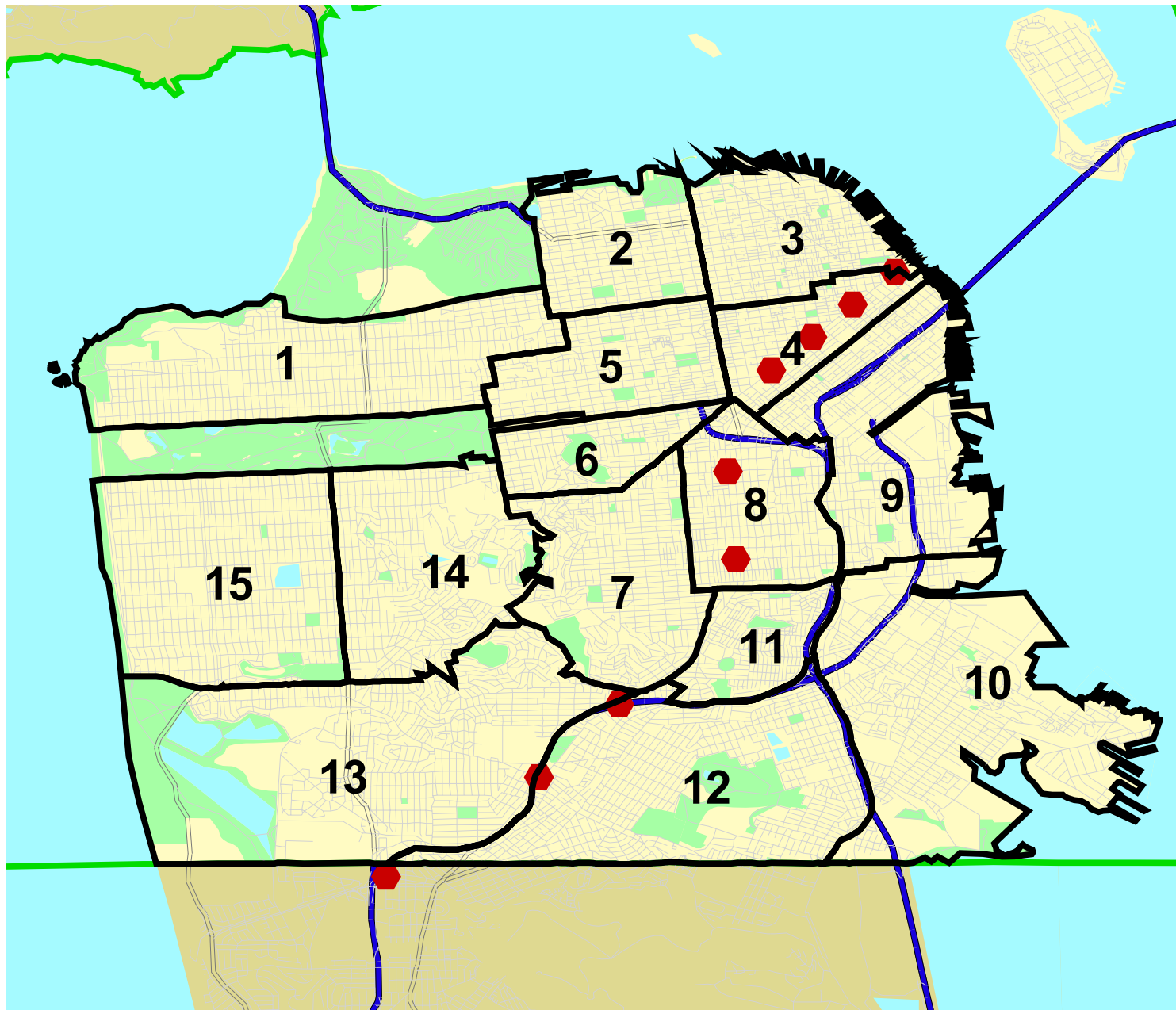
Neighborhoods were defined by the Mayor's Office of Community and Environment for use in San Francisco's *2000 Consolidated Plan*.

Neighborhoods are defined by the following 1990 Census Tracts. See accompanying map also.

Bay View/Hunters Point - 230, 231, 232, 233, 234, 606, 609, 610	SoMA - 176.02, 176.98, 177, 178, 179.01, 180, 201.98, 202.98, 607
Chinatown - 106, 107, 108, 112, 113, 114, 118, 119	Sunset - 326, 327, 328, 329, 330, 351, 352, 353, 354
Excelsior - 255, 256, 260, 261, 262, 263,	Tenderloin - 122, 123, 124, 125
Mission - 207, 208, 209, 210, 228, 229	Visitacion Valley - 264, 605
Ocean/Merced/Ingleside - 312, 313, 314	Western Addition - 158, 159, 161
Richmond - 426, 427, 451, 452, 476, 477, 478, 479	

Sources: *2000 Consolidated Plan* for San Francisco; SF Mayor's Office of Community and Environment; Claritas, Inc.; BAE, 2001.

San Francisco Planning Areas




Planning Area Names

1. Richmond
2. Marina
3. Northeast
4. Downtown
5. Western Addition
6. Buena Vista
7. Central
8. Mission
9. South of Market
10. South Bayshore
11. Bernal Heights
12. South Central
13. Ingleside
14. Inner Sunset
15. Outer Sunset

-  San Francisco Planning Area
-  Major Street
-  Freeway
-  Local Street
-  BART Station

0.5 0 0.5 1 Miles



Planning Area Census Tracts, 1990

Planning Area	1990 Tract ID	Planning Area	1990 Tract ID	Planning Area	1990 Tract ID	Planning Area	1990 Tract ID
Richmond	060750133.00	Northeast	060750101.00	Buena Vista	060750166.00	South Central	060750255.00
	060750154.00		060750102.00		060750167.00		060750256.00
	060750156.00		060750103.00		060750168.98		060750257.00
	060750401.00		060750104.00		060750169.00		060750258.00
	060750402.00		060750105.00		060750170.00		060750259.00
	060750426.00		060750106.00		060750171.00		060750260.00
	060750427.00		060750107.00				060750261.00
	060750428.00		060750108.00	Central			060750262.00
	060750451.00		060750109.00		060750203.00		060750263.00
	060750452.00		060750110.00		060750204.00		060750264.00
	060750476.00		060750111.00		060750205.00		060750605.00
	060750477.00		060750112.00		060750206.00	Ingleside	
	060750478.00		060750113.00		060750211.00		
	060750479.00		060750114.00		060750212.00		060750307.00
	060750602.00		060750115.00		060750213.00		060750309.00
			060750116.00		060750214.00		060750310.00
South Bayshore			060750118.00		060750215.00		060750311.00
	060750230.00		060750119.00		060750216.00		060750312.00
	060750231.00	Downtown			060750217.00		060750313.00
	060750232.00				060750218.00		060750314.00
	060750233.00		060750117.00	Mission			060750331.00
	060750234.00		060750120.00			Inner Sunset	060750332.00
	060750606.00		060750121.00		060750177.00		060750604.00
	060750609.00		060750122.00		060750201.98		
	060750610.00		060750123.00		060750202.98		
Bernal Heights			060750124.00		060750207.00		060750301.01
	060750251.00		060750125.00		060750208.00		060750301.02
	060750252.00	Western Addition	060750176.02		060750209.00		060750302.00
	060750253.00		060750176.98		060750210.00		060750303.00
	060750254.00				060750228.00		060750304.00
Marina			060750151.00	South of Market	060750229.00		060750305.00
			060750152.00			Outer Sunset	060750306.00
	060750126.00		060750153.00		060750178.00		060750308.00
	060750127.00		060750155.00		060750179.01		
	060750128.00		060750157.00		060750180.00		060750326.00
	060750129.00		060750158.00		060750226.00		060750327.00
	060750130.00		060750159.00		060750227.00		060750328.00
	060750131.00		060750160.00		060750607.00		060750329.00
	060750132.00		060750161.00				060750330.00
	060750134.00		060750162.98				060750351.00
	060750135.00		060750163.00				060750352.00
			060750164.00				060750353.00
			060750165.00				060750354.00

Source: San Francisco Planning Department; BAE 2001. See also accompanying map.

Planning Area Census Tracts, 2000

Planning Area	2000 Tract ID	Planning Area	2000 Tract ID	Planning Area	2000 Tract ID	Planning Area	2000 Tract ID
Richmond	133	Northeast	101	Central	203	South Central	255
	154		102		204		256
	156		103		205		257
	401		104		206		258
	402		105		211		259
	426		106		212		260.01
	427		107		213		260.02
	428		108		214		260.03
	451		109		215		260.04
	452		110		216		261
	476		111		217		262
	477.01		112		218		263.01
	477.02		113				263.02
	478		114	Mission	177		263.03
	479.01		115		201		264.01
	479.02		118		202		264.02
	602		119		207		264.03
					208		264.04
South Bayshore	230.01	Downtown	117		209	Inner Sunset	605.01
	230.02		120		210		605.02
	230.03		121		228.01		
	231.01		122		228.02		301.01
	231.02		123		228.03		301.02
	231.03		124		229.01		302.01
	232		125		229.02		302.02
	233		176.01		229.03		303.01
	234		176.02				303.02
	606			South of Market	178		304
	609	Western Addition	151		179.01		305
Bernal Heights	610		152		180		306
			153		226		308
	251	Buena Vista	155	Ingleside	227.01	Outer Sunset	
	252		157		227.02		326
	253		158		227.03		327
	254.01		159		607		328
	254.02		160				329
	254.03		161		307		330
			162		309		351
			163		310		352.01
Marina	126		164		311		352.02
	127		165		312		353
	128				313		354
	129				314		
	130		166		331		
	131		167		332.01		
	132		168		332.02		
	134		169				
	135		170		604		
			171				

Source: San Francisco Planning Department; BAE 2001.

Unit Mix by Planning Area, 1990 and 2000

Unit Building Type	PLANNING AREA														
	Richmond			Marina			Northeast			Downtown			Western Addition		
			% of			% of			% of			% of			% of
	1990	2000	2000	1990	2000	2000	1990	2000	2000	1990	2000	2000	1990	2000	2000
Single-Family	10,242	10,203	28%	2,770	2,737	11%	1,484	1,456	4%	87	90	0%	1,580	1,554	6%
2 to 4 Units	14,994	15,291	42%	5,874	5,885	23%	6,959	6,999	19%	389	402	2%	5,920	6,042	22%
5 to 9 Units	5,135	5,146	14%	3,669	3,690	14%	6,382	6,403	18%	529	507	2%	3,795	3,910	14%
10 to 19 Units	3,977	4,068	11%	7,168	7,256	28%	6,637	6,663	18%	1,900	1,956	8%	4,714	4,742	17%
20+ Units	1,935	2,020	5%	5,829	6,034	24%	14,381	14,957	41%	21,468	22,693	88%	9,384	11,487	41%
Planning Area Total	36,283	36,728	100%	25,310	25,602	100%	35,843	36,478	100%	24,373	25,648	100%	25,393	27,735	100%

Unit Building Type	PLANNING AREA														
	Buena Vista			Central			Mission			South of Market			South Bayshore		
			% of			% of			% of			% of			% of
	1990	2000	2000	1990	2000	2000	1990	2000	2000	1990	2000	2000	1990	2000	2000
Single-Family	1,784	1,743	11%	8,151	8,143	31%	2,342	2,333	11%	2,100	2,117	16%	6,264	6,654	67%
2 to 4 Units	6,995	7,015	44%	9,874	10,045	39%	8,664	8,775	40%	2,565	2,748	20%	1,581	1,754	18%
5 to 9 Units	3,346	3,360	21%	2,993	3,039	12%	4,206	4,255	19%	1,267	1,411	10%	879	913	9%
10 to 19 Units	1,901	1,823	11%	2,401	2,441	9%	2,776	2,875	13%	626	1,169	9%	323	341	3%
20+ Units	2,081	2,092	13%	2,228	2,348	9%	3,339	3,787	17%	3,805	6,125	45%	204	258	3%
Planning Area Total	16,107	16,033	100%	25,647	26,016	100%	21,327	22,025	100%	10,363	13,570	100%	9,251	9,920	100%

Unit Building Type	PLANNING AREA														
	Bernal Heights			South Central			Ingleside			Inner Sunset			Outer Sunset		
			% of			% of			% of			% of			% of
	1990	2000	2000	1990	2000	2000	1990	2000	2000	1990	2000	2000	1990	2000	2000
Single-Family	5,082	5,130	56%	19,352	19,491	77%	15,685	15,736	71%	9,687	9,717	54%	18,653	18,639	74%
2 to 4 Units	2,950	2,981	33%	2,623	2,712	11%	1,379	1,434	6%	4,152	4,212	23%	3,970	4,065	16%
5 to 9 Units	475	481	5%	1,005	1,032	4%	469	460	2%	1,484	1,484	8%	1,347	1,355	5%
10 to 19 Units	197	243	3%	696	844	3%	922	922	4%	1,327	1,341	7%	646	668	3%
20+ Units	274	274	3%	890	1,077	4%	3,572	3,757	17%	1,250	1,250	7%	487	487	2%
Planning Area Total	8,978	9,109	100%	24,566	25,156	100%	22,027	22,318	100%	17,900	18,004	100%	25,103	25,214	100%

Source: 1990 U.S. Census STF1; San Francisco 2000 Housing Inventory, San Francisco Planning Dept.; BAE, 2001

About Bay Area Economics (BAE)

Since 1986, BAE has focused on **The Economics of Place™**, providing comprehensive real estate analysis and urban development services to public, private, non-profit, and institutional clients throughout the U.S. BAE is headquartered in Berkeley, California, with additional offices in San Francisco, the Sacramento region, and Washington D.C.

Our services include:

- Development Feasibility
- Public/Private Transaction and Negotiations Support
- Economic Development, Redevelopment, and Revitalization
- Affordable Housing
- Strategic Land Use Planning
- Public Facilities Financing
- Economic Impacts and Trends Analysis
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