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DEPARTMENT OF HOUSING
AND URBAN DEVELOPMENT

Analysis of the

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SAN DIEGO, CALIFORNIA HOUSING MARKET

as of December 1, 1970

A Report by the
DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
FEDERAL HOUSING ADMINISTRATION
WASHINGTON, D. C. 20411

June 1971

FHA Housing Market Analysis

San Diego, California, as of December 1, 1970

Foreword

This analysis has been prepared for the assistance and guidance of the Federal Housing Administration in its operations. The factual information, findings, and conclusions may be useful also to builders, mortgagees, and others concerned with local housing problems and trends. The analysis does not purport to make determinations with respect to the acceptability of any particular mortgage insurance proposals that may be under consideration in the subject locality.

The factual framework for this analysis was developed by the Economic and Market Analysis Division as thoroughly as possible on the basis of information available on the "as of" date from both local and national sources. Of course, estimates and judgments made on the basis of information available on the "as of" date may be modified considerably by subsequent market developments.

The prospective demand or occupancy potentials expressed in the analysis are based upon an evaluation of the factors available on the "as of" date. They cannot be construed as forecasts of building activity; rather, they express the prospective housing production which would maintain a reasonable balance in demand-supply relationships under conditions analyzed for the "as of" date.

Department of Housing and Urban Development
Federal Housing Administration
Economic and Market Analysis Division
Washington, D. C.

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FHA HOUSING MARKET ANALYSIS - SAN DIEGO, CALIFORNIA
AS OF DECEMBER 1, 1970^{1/}

The San Diego Housing Market Area (HMA) is defined as San Diego County, California. This definition conforms to that of the Bureau of the Budget for the San Diego Standard Metropolitan Statistical Area. The population of the HMA was about 1,383,000 persons on December 1, 1970, including 292,200 (21 percent) military personnel and their dependents and civilian employees of the military and their dependents.

Military installations and defense-related industries are the most important element in the economy of the San Diego HMA. There are many Naval installations in and around the city of San Diego, and the Camp Pendleton Marine Base is located in the northwest corner of San Diego County near the city of Oceanside. Both military strength and the number of civilians employed by the military have increased during the past few years, and the economy as a whole has experienced a period of substantial growth.

Anticipated Housing Demand

In the San Diego HMA, an average annual demand for 16,200 new, unsubsidized housing units is anticipated for the two-year period ending December 1, 1972. Consideration has been given to such factors as the expected increase in the number of households, the present level of construction activity, current family income, and anticipated losses to the housing inventory as a result of demolitions and other causes. After taking into account additional factors such as current vacancy levels and an expected shift toward owner-occupancy, the most favorable market balance would be achieved through the construction of 9,300 single-family houses, 5,900 units in multifamily structures, and the addition of 1,000 mobile homes

^{1/} Data in this analysis are supplementary to a previous analysis as of October 1, 1967.

yearly. Qualitative distributions of demand for single-family houses by price classes and for multifamily units by gross monthly rents and unit sizes are shown in table I.

In view of the anticipated reduced rate of employment growth and the uncertainty of the level of military activity in the San Diego area during the next two years, proposals for construction of additional multifamily projects should be evaluated carefully to assure that they will provide units that cannot be supplied by the existing inventory. Occupancy of new units should be observed closely for signs of slow absorption or the creation of vacancies in competitive projects. If the level of military and civilian personnel at the military installations in the area are changed significantly, these demand estimates may need to be revised.

Occupancy Potential for Subsidized Housing

Federal assistance in financing costs for new housing for low- or moderate-income families may be provided through a number of different programs administered by FHA: monthly rent supplements in rental projects financed under Section 221(d)(3); partial payment of interest on home mortgages insured under Section 235; partial interest payment on project mortgages insured under Section 236; and federal assistance to local housing authorities for low-rent public housing.

The estimated occupancy potentials for subsidized housing are designed to determine, for each program, (1) the number of families and individuals who can be served under the program and (2) the proportion of these households that can reasonably be expected to seek new subsidized housing during the forecast period. Household eligibility for the Section 235 and Section 236 programs is determined primarily by evidence that household or family income is below established limits but sufficient to pay the minimum achievable rent or monthly payment for the specified program. Insofar as the income requirement is concerned, all families and individuals with income below the income limits are assumed to be eligible for public housing and rent supplement; there may be other requirements for eligibility, particularly the requirement that current living quarters be substandard for families to be eligible for rent supplements. Some families may be alternatively eligible for assistance under more than one of these programs or under other assistance programs using federal or state support. The total occupancy potential for federally assisted housing approximates the sum of the potentials for public housing and Section 236 housing. For the San Diego HMA, the total occupancy potential is estimated to be 5,475 units annually. Future approvals under each program should take into account any intervening approvals under other programs which serve the same families and individuals.

The annual occupancy potentials^{1/} for subsidized housing discussed in the following paragraphs are based upon 1970 incomes, the occupancy of substandard housing, income limits in effect as of December 1, 1970, and on available market experience.^{2/}

Rental Housing Under the Public Housing and Rent Supplement Programs.

These two programs serve households in essentially the same low-income group. The principal differences arise from the manner in which net income is computed for each program and from other eligibility requirements. For the San Diego HMA, the annual occupancy potential for public housing is estimated at 2,160 units for families and 1,500 units for the elderly. Approximately thirteen percent of the elderly also are eligible for housing under Section 236 (see table II). In the case of the more restrictive rent-supplement program, the potential for families would be about 15 percent of the figure above, but the potential among the elderly would be the same (1,500 units).

There are 800 units of low-rent leased public housing in the San Diego HMA at present. An additional 200 units, 99 of which are under construction, are under agreements to lease and will be occupied within the near future. There is a waiting list of over 1,500 active applications currently. As of December 1, 1970, there were 666 units of rent-supplement housing in the HMA for families; no additions to this inventory are presently planned. All existing public housing and rent-supplement units are occupied except for normal turnover.

Section 235 Sales Housing and Section 236 Rental Housing. Subsidized housing for households with low- to moderate-incomes may be provided under either Section 235 or Section 236. Moderately priced, subsidized sales housing for eligible families can be made available through Section 235. Subsidized rental housing^{3/} for the same families may be alternatively provided under Section 236; the Section 236 program contains additional provisions for subsidized rental units for elderly couples and individuals.

^{1/} The occupancy potentials referred to in this analysis are dependent upon the capacity of the market in view of existing vacancy strength or weakness. The successful attainment of the calculated market for subsidized housing may well depend upon construction in suitable accessible locations, as well as upon the distribution of rents and selling prices over the complete range attainable for housing under the specified programs.

^{2/} Families with incomes inadequate to purchase or rent nonsubsidized housing generally are eligible for one form or another of subsidized housing.

^{3/} Interest reduction payments may also be made for cooperative housing projects. Occupancy requirements under Section 236 are identical for tenants and cooperative owner-occupants.

In the San Diego HMA, it is estimated that for the December 1970-December 1972 period there is an occupancy potential for 1,730 subsidized family units annually using regular income limits under either Section 235 or Section 236 or a combination of the two programs. In addition, there is an annual potential for about 415 units of Section 236 rental housing for elderly couples and individuals. The potentials would be somewhat higher utilizing exception income limits. It is estimated that about 25 percent of the households which are prospective occupants of Section 235 housing are five or more person households.

As of December 1, 1970, the San Diego HMA had a total of 2,547 completed housing units which had been built under the provisions of either Section 235, Section 236, or Section 221(d)(3) BMIR (an inactive program similar to Section 236). This total consisted of 357 new units occupied under Section 235, 698 units built under Section 236, and 1,492 units built under Section 221(d)(3) BMIR. Vacancies in these units occur only through normal turnover, except for a 504 unit 221(d)(3) BMIR project presently in the initial rent-up stage. About one-third of the Section 236 units currently are occupied by military personnel and their families.

In December 1970, there were 2,096 units of Section 236 housing and 312 units of Section 221(d)(3) housing under construction in the San Diego area, which would satisfy over half of the two-year potential for the 235 and 236 programs.

Sales Market

The market for new and existing sales housing has improved since 1967, as evidenced by a decline in the homeowner vacancy rate from 2.2 percent in October 1967 to 1.6 percent in December 1970. Demand for new sales housing has strengthened significantly since 1967 and construction volume has increased substantially from 6,476 units in 1967 to 9,506 units in 1968, 10,837 units in 1969, and 8,746 units during the first 11 months of 1970. Single-family house construction activity is fairly widespread throughout the metropolitan area but the largest concentrations of subdivisions are located off Interstate 15 between the San Diego River and Escondido and in the area north of I-8 between I-15 and highway 67.

Although a large proportion of the homes built in the HMA during the last few years have been started on a speculative basis, most of them were sold before construction was completed, and those remaining were usually sold within one to three months after completion. Consequently, accumulations of unsold homes have been minimal. Some of the large volume contractors building in the \$20,000 to \$28,000 range report that during the last few months their rate of sales has increased substantially and they have sold an unusually large number of their houses before construction was started, indicating an especially strong market for new sales housing in that price range. Additional families have indicated plans to buy a house as soon as the interest rate is lowered. During the past few months, the opening of several new, well-located subdivisions and cluster developments offering a wide variety of sales housing, along with

the anticipation of a decline in interest rates, has attracted a substantial number of families now renting housing into the sales market. As high as 80 percent of the families buying new homes in some subdivisions were renting in the HMA at the time of the sale.

Rental Market

The market for unsubsidized rental housing in the HMA has improved since 1967, with the rental vacancy rate declining from 7.9 percent in October 1967 to 7.0 percent in December 1970. Although the level of multifamily construction increased dramatically during 1968 and 1969, the increase in the number of households generated by the accelerated economic growth exceeded the number of rental units completed. This trend continued into the first half of 1970, but during the last few months the declining level of employment growth, together with the completion of a large number of multifamily rental units and the recent tendency toward owner occupancy, has led to a small vacancy increase in many existing rental projects and a substantial slowdown in the absorption rate for new multifamily units. High-priced luxury units in the beach areas are still renting well, however. During the next several months the rental vacancy rate is expected to continue to increase, and the absorption of most new multifamily units will be slow.

There currently are about 5,800 navy and marine families living in housing owned by the military. An additional 900 housing units will be built by the military during the projection period, with an expected completion time of May 1972.

Rentals in garden-type multifamily projects completed in the last few years, excluding utilities, currently average \$125 to \$150 for a one-bedroom unit and \$145 to \$175 for a two-bedroom unit. Rents for units in luxury high-rise buildings range substantially higher.

Economic, Demographic, and Housing Factors

Employment. The economy of the San Diego area has expanded substantially since 1967, with nonagricultural wage and salary employment increasing steadily from 317,600 jobs in 1967 to 386,900 during the first nine months of 1970. This increase of 69,300 jobs in less than three years compares with an increase of only 57,500 for the entire 1960-1967 period. Nearly 90 percent of the job gains since 1967 have been in nonmanufacturing, principally in trade, services, and government.

The economy of the San Diego HMA is dependent to a large extent on the military installations in the area and on the production of aerospace and military equipment. When military personnel are included, over one-third of all nonagricultural workers are employed by the federal government. A large proportion of the workers employed in manufacturing in 1970 were engaged in the production of military goods or aerospace equipment for the government and much of the remaining manufacturing employment was in the commercial aircraft industry, which has recently been experiencing difficulties. Much of the nonmanufacturing employment in the area also is oriented toward providing goods and services for the military.

Most of the military installations in the San Diego HMA are of a relatively stable nature and thus have had a steadying influence on the economy of the area during peace times. At least partially as a result of the war in Southeast Asia, the number of military personnel assigned in the area grew from 137,500 in 1965 to over 204,000 during mid-1969, with more than half of the increase attributable to added ships homeported in San Diego. The number of civilians employed by the military increased from 17,330 to 26,129 during the same period. Mainly because of recent efforts by the Defense Department to cut spending, military strength and civilian civil service employment in the area were reduced to 156,324 and 23,794, respectively, by June 30, 1970 (see table V).

While precise data are not available for a more recent date, indications are that total military strength has increased to over 170,000 as of December 1970 with the assignment of additional commands to the HMA. Military sources in the San Diego area anticipate that the planned closing of some bases in foreign countries and the reduction of operations at others will result in an increase of personnel and ships stationed in San Diego, but no official announcement has as yet been made by the Department of Defense. The possibility also exists that additional cuts in the Defense Department budget may be made during the forecast period, which could result in a reduction of military strength and civilian civil service employment in the San Diego HMA. Any significant changes in military activity in the area should be carefully evaluated to determine if a change in the demand estimates made in this report is warranted.

Manufacturing wage and salary employment in the HMA, which is dominated by production under large government and private contracts, was unstable during the first half of the 1960 decade, but increased steadily from 49,900 in 1965 to 69,600 in 1969. Most of this recent growth was in durable goods industries, mainly in electrical and nonelectrical machinery, aircraft and ordnance, and shipbuilding, but nondurable goods industries also experienced steady increases. Almost solely because of job losses in the aircraft and ordnance industry, manufacturing employment decreased to 68,500 during the first nine months of 1970. Manufacturing employment is expected to remain approximately at its current level during the next two years.

Nonmanufacturing employment, which currently accounts for over eighty percent of all nonagricultural wage and salary employment, averaged 318,400 during the first nine months of 1970, a substantial increase over the 301,400 figure recorded for the first nine months of 1969. Employment in all nonmanufacturing categories increased during the 1969-1970 period except federal government, which declined by 1,400 employees. In addition to federal government employment, the San Diego HMA receives much basic economic support from other nonmanufacturing sources, mainly from tourism, trade and services, and education. Employment in the nonmanufacturing sector is expected to increase significantly during the forecast period, but the annual rate of growth will

be below that of recent years. Total nonagricultural employment growth is expected to approximate 15,000 annually during the next two years.

As of December 1970, the estimated median income of all families in the San Diego HMA was \$9,400, after deducting federal income tax. Renter households of two or more persons had an estimated median annual after-tax income of \$7,350. In 1967, the revised estimated median incomes for all families and for renter households were \$8,350 and \$6,550, respectively. Distributions of families and renter households by after-tax income are presented in table VI.

Demographic Factors. According to final 1970 Census data, the population of the San Diego HMA was 1,357,854 on April 1, 1970, including 696,769 persons living in the city of San Diego. Total population in the San Diego HMA was an estimated 1,383,000 on December 1, 1970, including 222,800 military personnel and their dependents and 69,400 military-connected civilian workers and their dependents (see table VII). The HMA total represents an average annual increase of approximately 42,060 persons (3.4 percent) since October 1, 1967, compared to an average yearly increase of 28,900 persons (2.5 percent) between April 1, 1960 and October 1, 1967. Much of the increase in the population growth rate during the last few years was the result of an expansion of military and defense-related activities in the area during the 1967-1969 period. Although military and military-connected population declined somewhat during the first 11 months of 1970, overall population of the area continued to grow, although at a reduced rate. On the basis of an anticipated reduced rate of employment growth during the next two years and assuming a relatively stable level of military activity in the area, the population of the HMA should increase by 36,000 persons annually during the forecast period to a total of 1,455,000 by December 1, 1972.

There were an estimated 437,100 households in the HMA as of December 1, 1970, an increase of approximately 52,700 since October 1967 (see table VII). Household growth has averaged 16,640 annually since 1967, compared with an average of only about 10,560 between 1960 and 1967. During the 1970-1972 forecast period, the number of renter households is expected to increase by about 7,000 annually and owner households by about 7,500 annually, for a total household growth during the two-year projection period of about 14,500 annually.

Housing Factors. The housing inventory in the San Diego HMA totaled 464,800 units on December 1, 1970, including about 245,100 owner-occupied units, 192,000 renter-occupied units, and 27,700 vacant units (see table IX). The increase in the housing inventory of about 125,400 units since April 1960 resulted from the construction of approximately 141,300 units, the loss of about 25,500 units through demolition and other causes, and the addition of about 9,600 mobile homes. There were an additional

14,700^{1/} housing units under construction on December 1, 1970, of which 4,800 were single-family houses and 9,900 were units in multifamily structures. Of the multifamily units under construction, 312 were in a Section 221(d)(3) project and 2,096 were in 13 Section 236 projects in varying stages of completion.

Residential construction activity in the San Diego HMA expanded substantially during the past few years in response to the rapidly growing population and despite rising interest rates and construction costs. Building permit authorizations (less cancellations) increased from 12,363 in 1967 to 21,710 in 1968 and 25,006 in 1969.^{2/} A total of 19,436 units were authorized during the first eleven months of 1970, including 8,746 single-family houses and 10,690 units in multifamily structures. Trends in residential construction activity in the San Diego HMA between 1960 and 1970 are presented in Table VIII.

There are about 18,500 vacant, nondilapidated, nonseasonal housing units available in the HMA as of December 1, 1970. About 4,100 were available for sale and 14,400 were for rent, indicating homeowner and renter vacancy rates of 1.6 percent and 7.0 percent, respectively. Both homeowner and renter vacancy rates have declined since October 1967 when they were 2.2 percent and 7.9 percent, respectively (see table IX).

^{1/} Includes units actually under construction and units for which building permits had been issued but on which construction had not yet started.

^{2/} Building permits are required in all of the land area of the HMA.

Table I

Estimated Annual Demand for New, Nonsubsidized Housing
San Diego, California, Housing Market Area
December 1970 to December 1972

A. Single-Family Houses

<u>Sales price</u>		<u>Number of units</u>	<u>Percent of total</u>
Under	\$20,000	835	9
\$20,000 -	22,499	1,860	20
22,500 -	24,999	1,675	18
25,000 -	27,499	1,025	11
27,500 -	29,999	650	7
30,000 -	34,999	1,400	15
35,000 -	39,999	835	9
40,000 -	44,999	460	5
45,000 and over		560	6
Total		9,300	100

B. Multifamily Units

<u>Gross monthly rent^{a/}</u>		<u>Efficiency</u>	<u>One bedroom</u>	<u>Two bedrooms</u>	<u>Three or more bedrooms</u>
Under	\$130	135	-	-	-
\$130 -	149	130	760	-	-
150 -	169	50	830	495	-
170 -	189	20	455	535	80
190 -	209	5	260	520	75
210 -	229	-	105	490	70
230 -	249	-	45	270	70
250 -	279	-	5	210	65
280 -	309	-	-	80	50
310 -	339	-	-	40	30
340 and over		-	-	10	10
Total		340	2,460	2,650	450

Source: Estimated by Housing Market Analyst.

Table II

Estimated Annual Occupancy Potential for Subsidized Housing
San Diego, California, Housing Market Area
December 1, 1970 to December 1, 1972

A. Families

	<u>Section 236^{a/}</u> <u>exclusively</u>	<u>Eligible for</u> <u>both programs</u>	<u>Public housing</u> <u>exclusively</u>	<u>Total for</u> <u>both programs</u>
One bedroom	340	15	410	765
Two bedrooms	710	80	860	1,650
Three bedrooms	420	15	515	950
Four bedrooms or more	130	20	245	395
Total	1,600	130 ^{b/}	2,030 ^{b/}	3,760

B. Elderly

Efficiency	125	130	1,130	1,385
One bedroom	90	70	170	330
Total	215	200 ^{c/}	1,300 ^{c/}	1,715

^{a/} Estimates are based upon regular income limits.

^{b/} About fifteen percent of these families also are eligible under the rent supplement program.

^{c/} All of these elderly couples and individuals also are eligible for rent supplements.

Source: Estimated by Housing Market Analyst.

Table III

Labor Force Trends
San Diego, California, Housing Market Area
1960-1970
(annual averages) a/

Work Force Component	1960	1961	1962	1963	1964	1965	1966	1967	1968	1969	9 months 1969	1970
Civilian work force	330,100	339,500	339,500	337,500	339,800	349,000	366,900	389,800	415,200	447,000	442,600	468,800
Unemployment	21,100	25,300	26,900	25,800	25,400	24,900	18,900	18,100	16,200	16,700	16,600	24,900
Percent of work force	6.4	7.5	7.9	7.6	7.5	7.1	5.1	4.7	3.9	3.7	3.8	5.3
Total employment	309,000	314,200	312,600	311,700	314,400	324,100	348,100	371,700	399,000	430,300	426,100	443,900
Nonag. wage & salary employment	260,100	264,400	261,300	260,400	263,700	272,100	294,900	317,600	343,600	374,500	370,600	386,900
Manufacturing	67,800	70,700	62,000	56,500	51,100	49,900	57,000	60,100	64,900	69,600	69,200	68,500
Durable goods	58,300	60,900	52,100	46,600	41,300	39,800	45,900	48,800	52,900	57,100	56,700	55,700
Lumber, furn. & fixtures	900	900	900	900	900	900	900	900	1,200	1,200	1,200	1,300
Stone, clay, & glass	1,300	1,200	1,300	1,000	800	900	1,000	1,300	1,400	1,600	1,600	1,700
Primary & fab. metals	400	500	500	700	1,500	1,800	2,000	2,500	3,500	5,800	5,500	6,300
Nonelectrical machinery	3,700	4,500	5,000	5,200	4,600	5,200	6,000	6,800	7,500	8,600	8,400	8,600
Electrical machinery	48,200	49,900	40,500	34,800	29,300	25,900	30,200	32,100	32,800	32,000	32,300	29,100
Aircraft & ordnance	1,900	2,100	2,200	2,100	2,100	2,900	3,500	2,900	4,100	5,100	4,900	5,600
Shipbuilding	1,000	1,000	900	1,000	1,000	1,100	1,200	1,300	1,300	1,600	1,600	1,900
Other durable goods	9,500	9,800	9,900	9,900	9,800	10,100	11,100	11,300	12,000	12,500	12,500	12,800
Non-durable goods	4,200	4,200	4,200	4,100	3,800	3,700	4,000	4,000	3,900	3,900	3,900	3,900
Food & kindred products	1,500	1,600	1,700	1,800	2,000	2,100	2,500	2,600	3,000	3,000	3,000	2,900
Apparel & textiles	3,100	3,100	3,000	3,100	3,000	3,200	3,400	3,400	3,700	4,100	4,000	4,500
Printing & publishing	500	600	600	500	600	600	600	700	700	800	800	900
Chemicals	200	300	400	400	400	500	600	600	700	700	700	800
Other non-durable goods	192,300	193,700	199,300	203,900	212,600	222,200	237,900	257,500	278,700	304,900	301,400	318,400
Nonmanufacturing	600	500	500	400	400	400	400	400	500	500	500	500
Mining	19,200	16,200	16,300	15,400	16,300	15,600	14,600	15,000	18,100	21,300	21,000	21,700
Contract construction	13,800	13,800	13,900	13,900	14,300	15,000	16,100	17,300	18,500	19,700	19,600	20,300
Trans., comm., & pub. util.	52,800	53,000	53,700	54,900	57,400	59,800	63,900	67,600	73,200	81,500	80,000	85,600
Trade	8,800	8,500	8,700	8,800	9,300	9,900	10,600	11,300	12,100	12,800	12,700	13,100
Wholesale	44,000	44,500	45,000	46,100	48,100	49,900	53,300	56,300	61,100	68,700	67,200	72,400
Retail	10,800	10,800	11,000	11,700	12,600	12,900	13,200	13,500	14,900	16,500	16,400	17,500
Fin., ins., & real estate	38,500	40,100	42,100	44,200	47,200	50,100	54,000	59,900	63,900	69,900	69,300	75,700
Services b/	56,600	59,300	61,800	63,400	64,400	68,400	75,700	83,800	89,600	95,500	94,600	97,100
Government	25,500	26,000	26,200	25,700	24,800	25,500	27,700	31,700	33,500	34,500	34,500	33,100
Federal	31,100	33,300	35,600	37,700	39,600	42,900	48,000	52,100	56,100	61,000	60,100	64,000
State & local	36,700	37,300	38,300	38,500	39,500	40,400	41,100	41,500	43,900	45,300	45,200	45,900
All other nonag. employment	12,200	12,500	13,000	12,800	11,200	11,600	12,000	12,600	11,600	10,400	10,300	11,000
Agriculture c/												

a/ Annual averages may not add to totals due to rounding.

b/ Includes fishing, includes agricultural services 1968-1970.

c/ Includes agricultural services 1960-1967.

d/ Includes self-employed, unpaid family and domestic workers.

Source: California Department of Human Resources Development.

Table IV

Shore Based Military Strength and Civilian Civil Service Employment Trends^{a/}
San Diego, California, Housing Market Area
1960-1970

San Diego Naval Complex

	<u>Military</u>	<u>Civilian</u>	<u>Total</u>
June 1960	38,866	16,121	54,987
June 1961	34,739	16,139	50,878
June 1962	38,590	16,509	55,099
June 1963	36,832	16,262	53,094
June 1964	39,955	15,077	55,032
June 1965	38,303	15,386	53,689
June 1966	50,563	16,911	67,474
June 1967	45,016	19,979	64,995
June 1968	57,692	21,541	79,233
June 1969	58,375	23,546	81,921
June 1970	48,091	21,445	69,536

Camp Pendleton^{b/}

	<u>Military</u>	<u>Civilian</u>	<u>Total</u>
June 1960	25,579	2,178	27,757
June 1961	27,361	2,177	29,538
June 1962	31,789	2,170	33,959
June 1963	31,591	2,215	33,806
June 1964	29,606	2,201	31,807
June 1965	26,530	2,212	28,742
June 1966	32,953	2,415	35,368
June 1967	36,115	2,594	38,709
June 1968	37,976	2,609	40,585
June 1969	40,093	2,583	42,676
June 1970	29,323	2,349	31,672 ^{c/}

a/ Data in this table may differ from that in table V because of slightly differing dates and methods of enumeration.

b/ Marines.

c/ This number has increased to about 44,000 since June as a result of the redeployment of military personnel from Southeast Asia.

Source: U.S. Department of Defense.

Table V

Military Strength and Civilian Civil Service Employment Trends^{a/}
San Diego, California, Housing Market Area
1965, 1967, 1969, and 1970

<u>Installation</u>	<u>June 30, 1965</u>		<u>June 30, 1967</u>		<u>June 30, 1969</u>		<u>June 30, 1970</u>	
	<u>Military</u>	<u>Civilian</u>	<u>Military</u>	<u>Civilian</u>	<u>Military</u>	<u>Civilian</u>	<u>Military^{b/}</u>	<u>Civilian</u>
Amphibious Base-Coronado	1,200	121	2,612	232	2,791	365	3,287	329
Camp Pendleton Marine Base	25,542	1,944	36,115	2,594	40,093	2,583	29,323	2,349
Communication Station	349	116	380	151	410	173	452	702
Electronics Laboratory	209	1,707	315	1,857	1,446	1,564	1,297	1,661
Fleet Anti-Aircraft Warfare Training Center	<u>c/</u>	<u>c/</u>	<u>c/</u>	<u>c/</u>	154	6	446	6
Fleet Anti-Submarine Warfare School	<u>c/</u>	<u>c/</u>	<u>c/</u>	<u>c/</u>	457	96	447	84
Headquarters-11th Naval District	<u>c/</u>	<u>c/</u>	<u>c/</u>	<u>c/</u>	95	145	116	127
Marine Corps Recruiting Depot	8,537	322	12,273	388	18,326	387	13,092	351
NAS-Imperial Beach	318	42	346	83	770	145	729	142
NAS-Miramar	995	489	991	574	928	691	1,069	632
NAS-North Island	2,453	7,768	2,111	10,022	1,677	10,668	2,141	9,051
Naval Hospital	2,374	591	3,577	805	3,438	861	3,372	773
Naval Station	2,392	304	2,556	581	2,074	541	2,210	526
Naval Supply Center	48	1,021	42	1,088	36	1,060	31	906
Naval Training Center	15,215	93	15,938	319	17,345	431	12,503	440
Public Works Center	11	1,180	11	1,339	11	1,430	15	1,422
Misc. Installations	4,202	1,632	3,864	2,540	8,117	4,983	6,884	4,293
Total shore-based	63,845	17,330	81,131	22,573	98,168	26,129	77,414	23,794
Homeported-mobile/afloat	73,678	-	90,649	-	106,619	-	78,910 ^{d/}	-
Grand Total	137,523	17,330	171,780	22,573	204,787	26,129	156,324	23,794

^{a/} Data in this table may differ from that in table IV because of slightly differing dates and methods of enumeration.

^{b/} While complete, precise data are not available for a more recent date, indications are that total military strength has increased to over 170,000 as of December 1970 with the assignment of additional commands to the San Diego area.

^{c/} Included in "Misc. Installations" category.

^{d/} Had increased to 81,442 by September 30, 1970.

Source: U.S. Department of Defense.

Table VI

Percentage Distribution of all Families and Renter Households
by Estimated Annual Income After Deduction of Federal Income Tax
San Diego, California, Housing Market Area
1967 and 1970

<u>Annual income</u>	<u>1967</u>		<u>1970</u>	
	<u>All families</u>	<u>Renter households^{a/}</u>	<u>All families</u>	<u>Renter households^{a/}</u>
Under - \$2,000	5	6	3	4
2,000 - 2,999	4	8	4	6
3,000 - 3,999	5	9	4	8
4,000 - 4,999	6	10	6	9
5,000 - 5,999	8	11	6	10
6,000 - 6,999	8	11	7	10
7,000 - 7,999	10	10	7	9
8,000 - 8,999	10	9	10	9
9,000 - 9,999	8	6	8	8
10,000 - 12,499	16	11	17	13
12,500 - 14,999	9	5	11	7
15,000 and over	11	4	17	7
Median	\$8,350	\$6,550	\$9,400	\$7,350

^{a/} Excludes one-person renter households.

Source: Estimated by Housing Market Analyst.

Table VII

Population and Household Trends
San Diego, California, Housing Market Area
April 1, 1960-December 1, 1970

	<u>April 1,</u> <u>1960</u>	<u>October 1,</u> <u>1967</u>	<u>December 1,</u> <u>1970</u>	<u>Average annual change^{a/}</u>	
				<u>1960-1967</u>	<u>1967-1970</u>
<u>Population</u>					
Military ^{b/}	180,000	213,800	222,800	4,500	2,840
Military-connected civilian ^{c/}	53,800	68,600	69,400	1,975	250
Nonmilitary-connected civilian	<u>799,211</u>	<u>967,400</u>	<u>1,090,800</u>	<u>22,425</u>	<u>38,970</u>
Total	<u>1,033,011</u>	<u>1,249,800</u>	<u>1,383,000</u>	<u>28,900</u>	<u>42,060</u>
<u>Households</u>					
Military	33,000	39,000	43,000	800	1,260
Military-connected civilian	16,800	21,600	22,800	640	380
Nonmilitary-connected civilian	<u>255,401</u>	<u>323,800</u>	<u>371,300</u>	<u>9,120</u>	<u>15,000</u>
Total	<u>305,201</u>	<u>384,400</u>	<u>437,100</u>	<u>10,560</u>	<u>16,640</u>

^{a/} Rounded; may not add to totals.

^{b/} Includes military personnel and their dependents.

^{c/} Includes civilian employees of the military and their dependents.

Sources: 1960 Censuses of Population and Housing and estimates by Housing Market Analyst.

Table VIII

Residential Construction Activity^{a/}
San Diego, California, Housing Market Area
1960-1970

	<u>1960</u>	<u>1961</u>	<u>1962</u>	<u>1963</u>	<u>1964</u>	<u>1965</u>	<u>1966</u>	<u>1967</u>	<u>1968</u>	<u>1969</u>	<u>11 mo.</u> <u>1970</u>
Single-family											
Carlsbad	104	92	180	57	139	128	106	86	105	152	96
Chula Vista	541	137	233	491	642	534	397	483	597	566	436
Coronado	18	15	25	13	9	13	6	7	14	103	11
El Cajon	481	127	133	145	145	109	144	143	185	129	86
Escondido	574	76	157	124	173	184	199	413	504	420	419
Imperial Beach	101	86	49	53	47	45	39	49	45	36	21
La Mesa	328	97	143	187	155	59	130	219	97	74	90
National City	71	416	30	8	36	12	12	21	39	8	9
Oceanside	251	496	273	539	607	448	201	254	399	472	239
San Diego	4,324	4,361	2,673	3,421	2,398	1,580	1,703	3,075	4,806	4,869	4,145
San Diego County											
Rem. Area	4,862	1,924	1,810	1,897	1,693	1,644	1,281	1,642	2,492	3,780	2,962
Vista	-	-	-	127	71	100	54	84	223	228	232
Total single-family	11,655	7,827	5,706	7,062	6,115	4,856	4,272	6,476	9,506	10,837	8,746
Multifamily											
Carlsbad	36	152	38	133	216	154	57	32	115	76	8
Chula Vista	42	353	164	885	596	585	106	317	747	727	180
Coronado	59	11	46	62	88	38	21	23	46	582	177
El Cajon	227	33	187	768	359	139	396	420	819	1,230	836
Escondido	94	35	64	356	438	208	207	334	306	223	505
Imperial Beach	80	6	56	85	85	62	36	98	267	85	157
La Mesa	72	70	61	384	322	166	28	304	583	610	644
National City	54	48	302	265	65	24	10	401	397	327	654
Oceanside	137	61	111	275	543	341	68	214	199	347	310
San Diego	1,800	2,371	2,032	1,660	3,863	2,141	2,072	3,056	7,786	8,470	5,867
San Diego County											
Rem. Area	392	141	334	334	745	359	205	388	831	1,402	1,344
Vista	-	-	-	115	149	51	42	300	108	90	8
Total multifamily	2,993	3,281	3,395	5,322	7,469	4,268	3,248	5,887	12,204	14,169	10,690
Combined total	14,648	11,108	9,101	12,384	13,584	9,124	7,520	12,363	21,710	25,006	19,436

^{a/} Data for years 1960-1969 include building permits issued less cancellations; 1970 figures include building permits only.

Sources: San Diego County Planning Commission and local building inspectors.

Table IX

Housing Inventory, Tenure, and Vacancy Trends
San Diego, California, Housing Market Area
April 1, 1960 - December 1, 1970

<u>Housing inventory components</u>	<u>April 1, 1960</u>	<u>October 1, 1967</u>	<u>April 1, 1970</u>	<u>December 1, 1970</u>
Total housing inventory	339,442	412,500	450,798	464,800
Total occupied units	305,201	384,400	432,513	437,100
Owner occupied	179,900	219,500	238,887	245,100
Percent owner occupied	58.9	57.1	56.4	56.1
Renter occupied	125,301	164,900	184,626	192,000
Percent renter occupied	41.1	42.9	43.6	43.9
Total vacant units	34,241	28,100	27,285	27,700
Available vacant units	23,834	19,000	18,137	18,500
For sale	7,504	4,900	4,450	4,100
Homeowner vacancy rate	4.0%	2.2%	1.8%	1.6%
For rent	16,330	14,100	13,687	14,400
Renter vacancy rate	11.5%	7.9%	6.9%	7.0%
Other vacant units ^{a/}	10,407	9,100	9,148	9,200

^{a/} Includes dilapidated units, units rented or sold and awaiting occupancy, vacant seasonal units, and units held off the market.

Sources: April 1, 1960 and April 1, 1970 from U.S. Census of Housing.
 October 1, 1967 and December 1, 1970 estimated by Housing Market Analyst.

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