

# San Leandro Housing and Rental Data Summary

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Prepared by MIG, Inc.  
for the City of San Leandro

April 2024

# Introduction

# Overview

## Introduction

- The City of San Leandro Rules Committee requested a review of relevant housing and rental data to inform ongoing deliberations on local housing protections
- The focus of data review is to gain greater insight into rental trends in San Leandro, changes to trends over time, and trends compare to other Bay Area locations

## Methodology

Data points were compiled through review of publicly available datasets from sources, including:

- U.S. Census Bureau
- U.S. Dept. of Housing and Urban Development (HUD),
- California Office of Finance
- Zillow
- RentCafe
- City of San Leandro

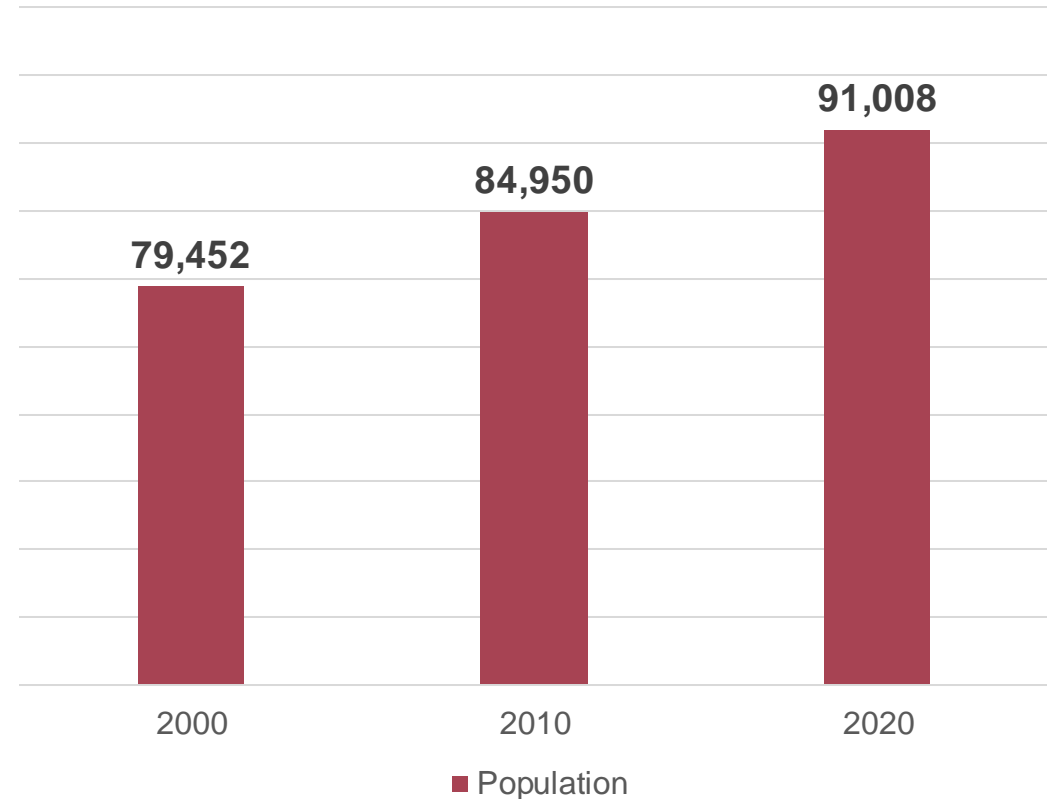
*When possible, data with margin of error over 50% has been suppressed*

# Demographic Trends

# Population

Between 2000 and 2020: San Leandro has experienced a steady population increase, growing 14.5%

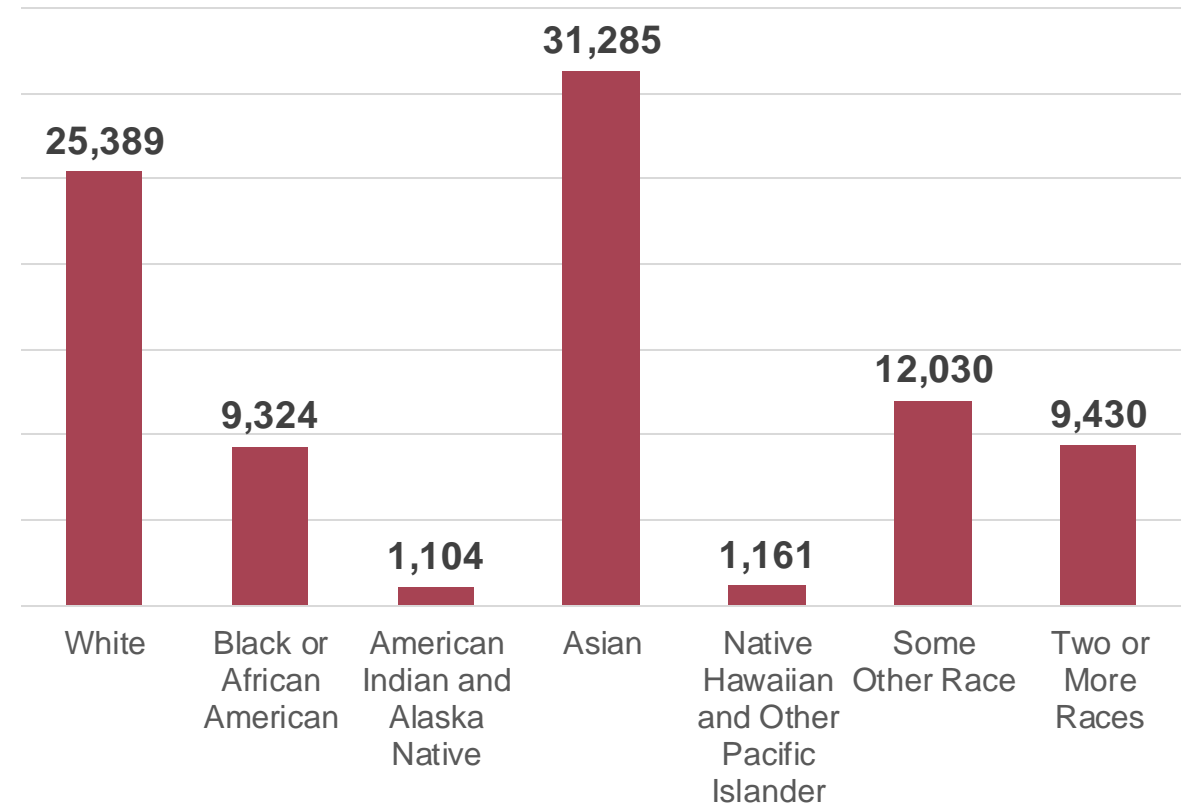
San Leandro Population Trend



# Race

- San Leandro is a diverse City, home to people from many different races, ethnicities and countries of origin.
- The largest racial group is Asian, representing more than 1/3 of the City's population (34.9%), the majority of whom are Chinese (16.9% of total population) and Filipino (9.7% of the total population)

Race in San Leandro

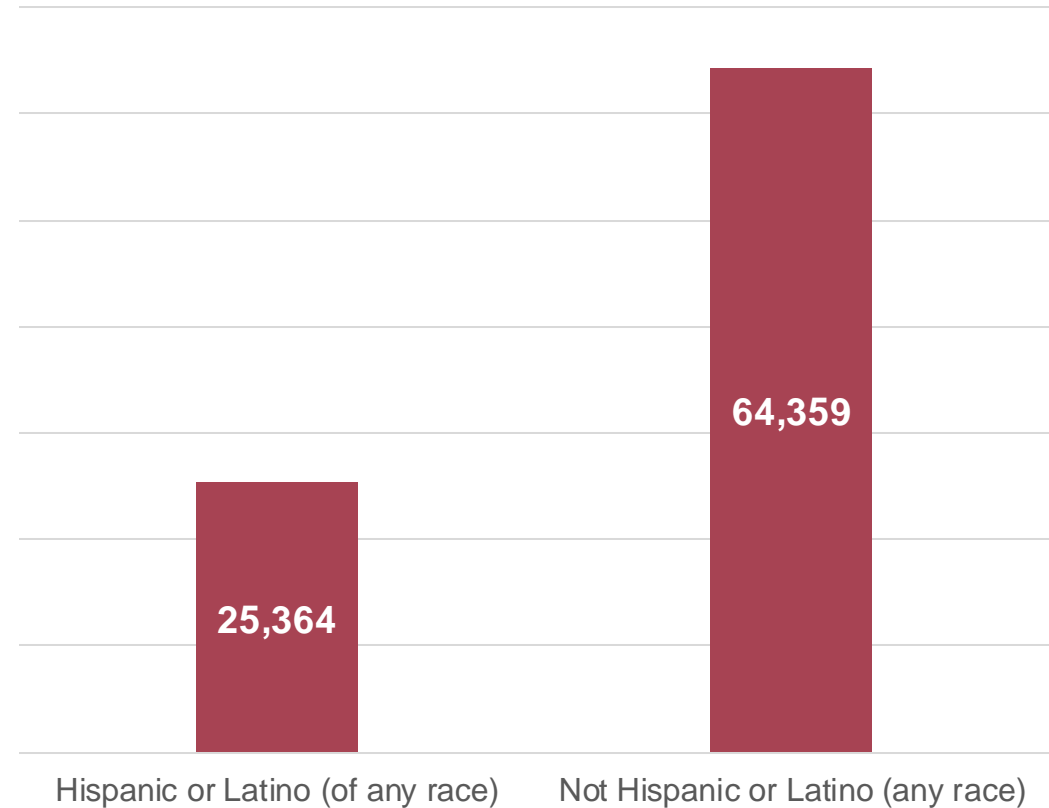


Sources: U.S. Census Bureau, "ACS Demographic and Housing Estimates," 2022.  
American Community Survey, ACS 5-Year Estimates Data Profiles, Table DP05, 2022

# Ethnicity

- The Census designates Hispanic or Latino as an ethnicity, rather than a race
- More than 1/4 of the population identified as Hispanic or Latino (28.3%), the majority of whom are Mexican (21% of the total population)

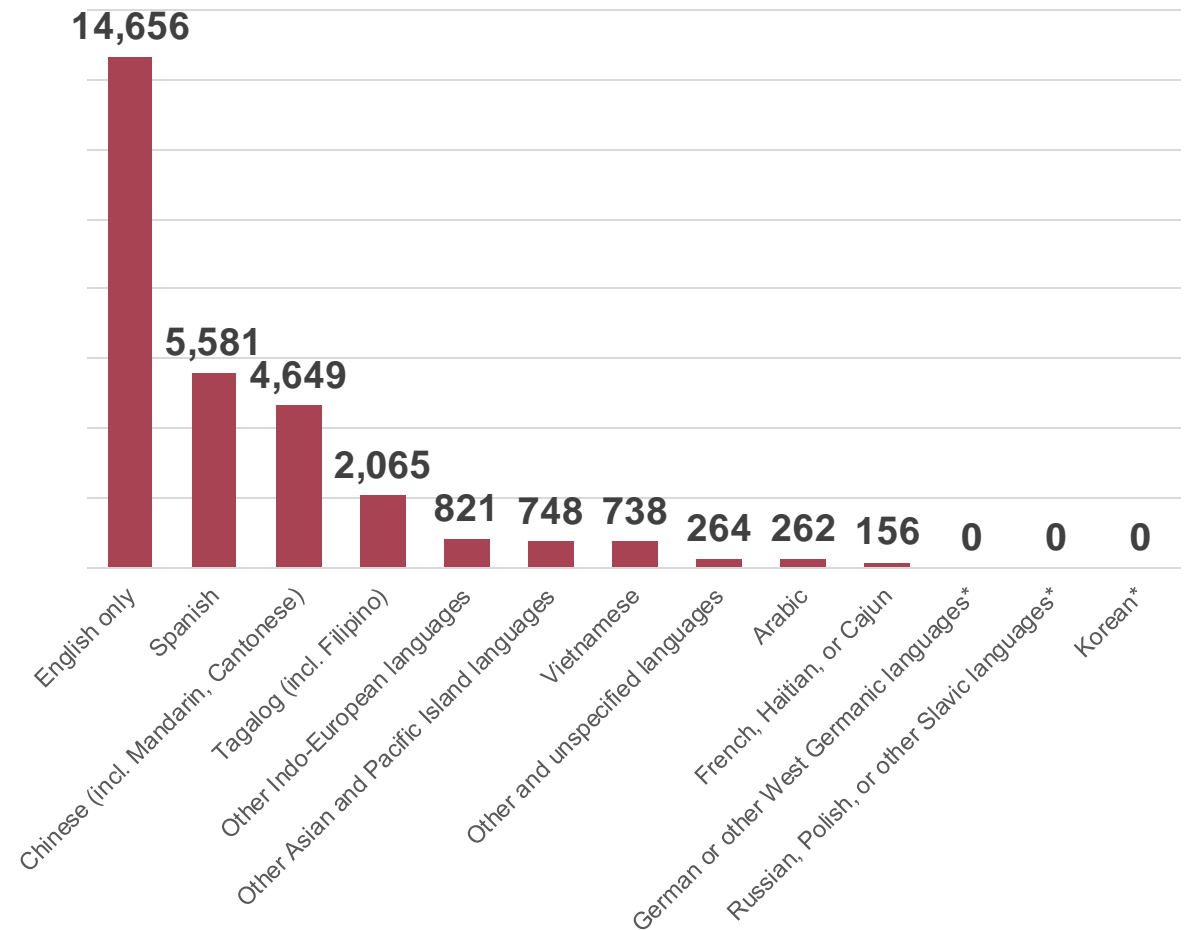
Hispanic or Latino Population in San Leandro



# Language

- Nearly ½ of San Leandro households are English only speaking (48.1%), followed by Spanish (18.3%) and Chinese, including Mandarin and Cantonese (15.3%)
- Chinese-speaking households were the most likely to be limited English speaking households (approx. 2,110 households)

Household Languages in San Leandro



\* Data suppressed due to high margin of error (over 50%)

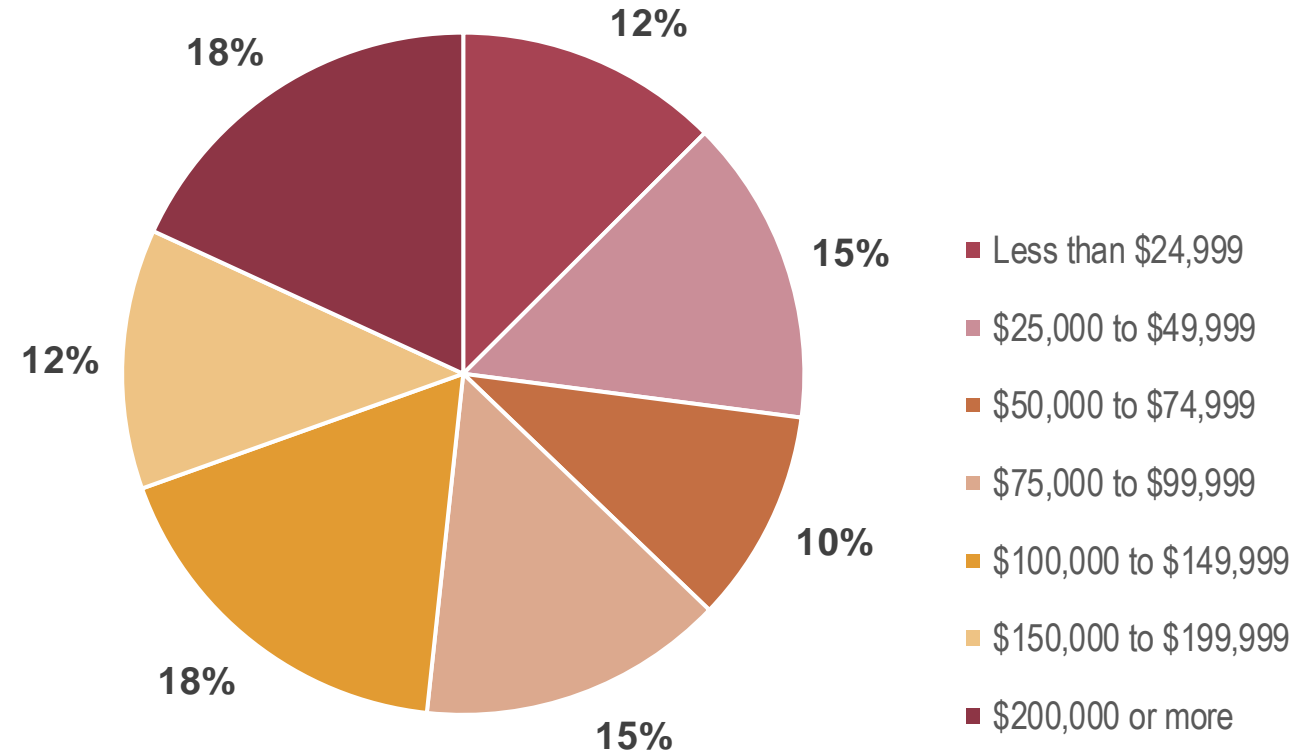
Sources: U.S. Census Bureau, "Detailed Household Language by Household Limited English Speaking Status," 2022. American Community Survey, ACS 5-Year Estimates Detailed Tables, Table B16002, 2022



# Income

- Approx. 48.2% of San Leandro households earned \$100,000+
- The top 1/5 of households earned \$200,000+ (18%), while the bottom 18.7% of households earned \$34,999 or less
- In Alameda County, 28.9% of households earn more than \$200,000 per year
- The median household income in San Leandro was \$97,141
- The median household income in Alameda County was \$122,488
  - \$20,000 higher than San Leandro

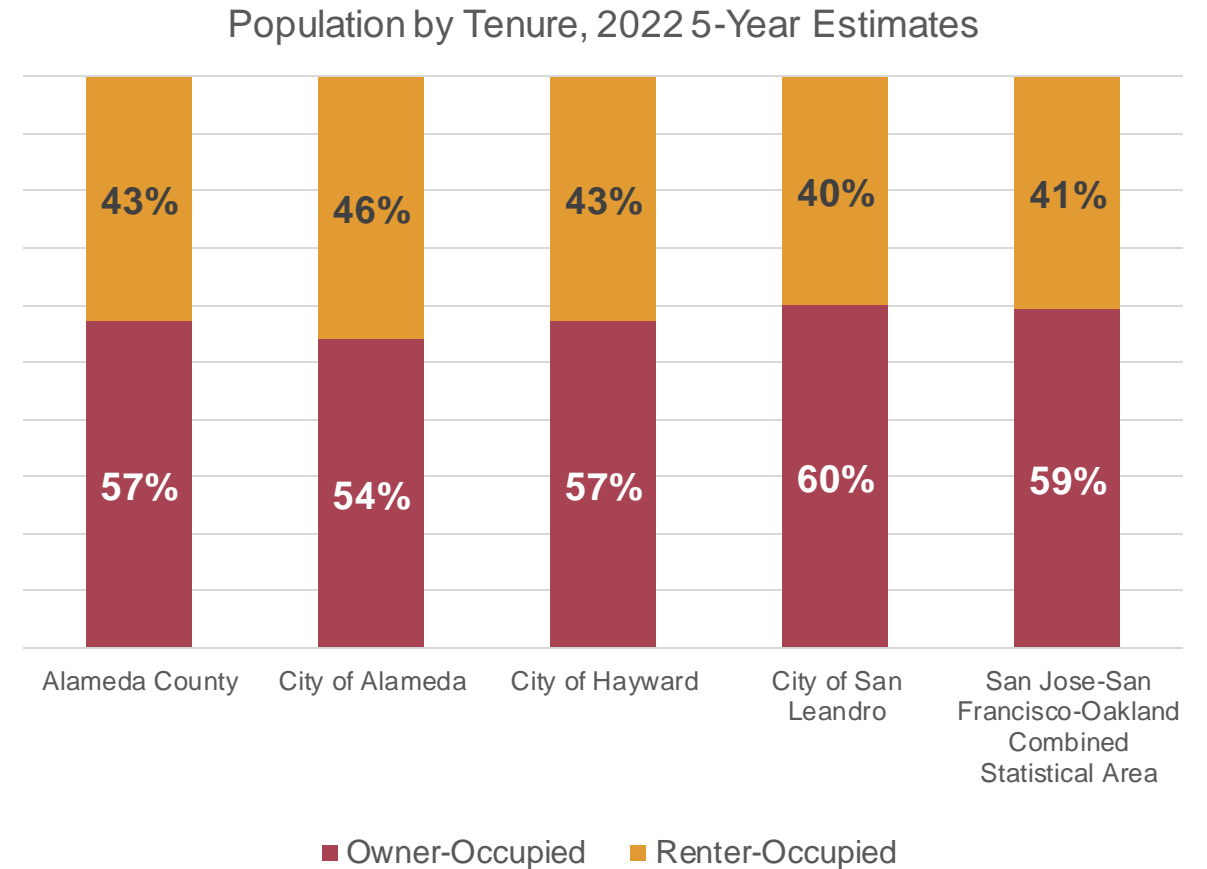
Household Income in San Leandro



# Profile of Renter Households

# Renter Households vs. Bay Area Region

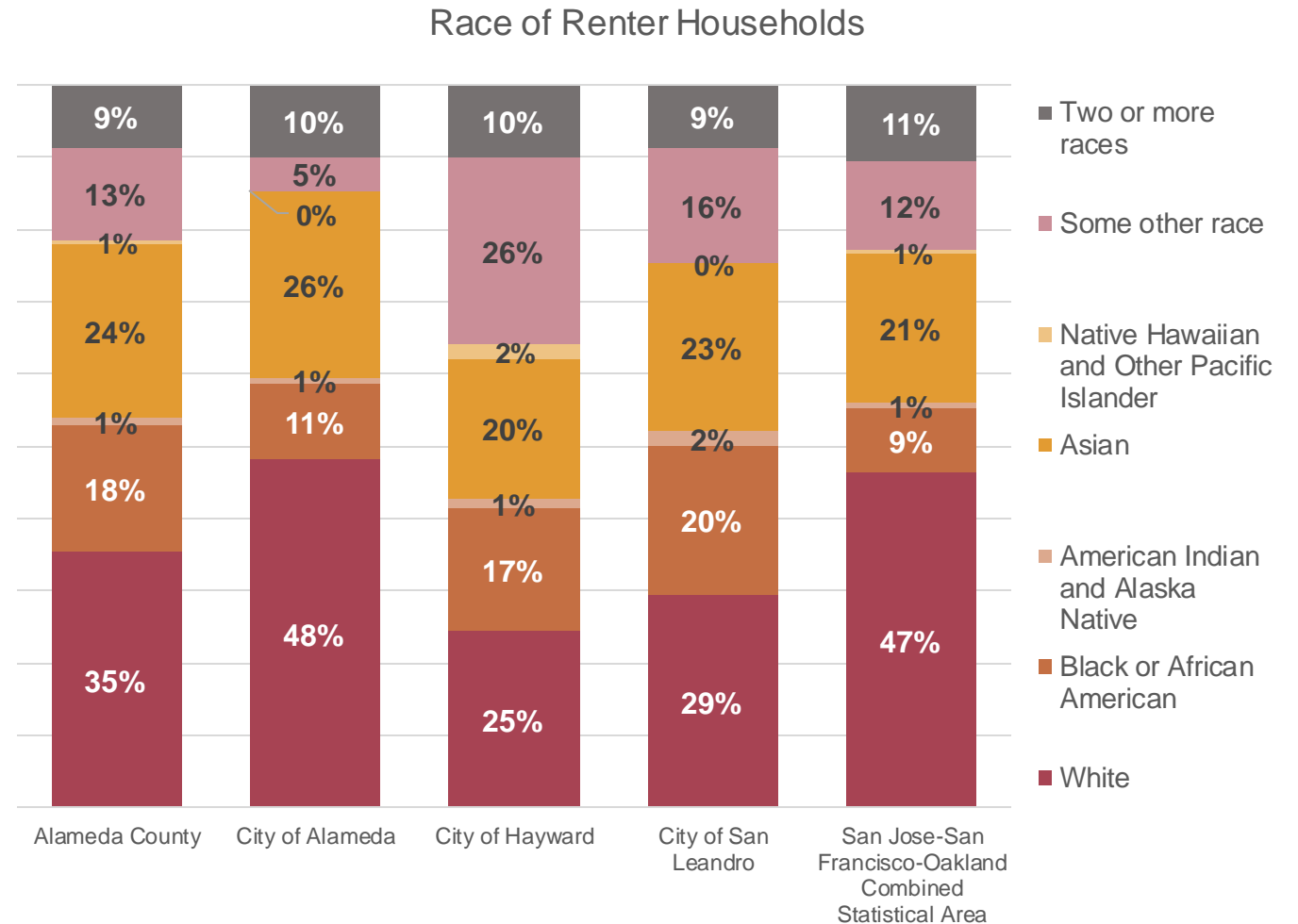
- There are a total of 12,080 renter households in San Leandro
- Compared with other local areas, San Leandro has a slightly smaller share of renter households (40%)



Source: U.S. Census Bureau, "Total Population in Occupied Housing Units by Tenure," 2022. American Community Survey, ACS 5-Year Estimates Detailed Tables, Table B25008, 2022

# Race of Renter Households vs. Bay Area Region

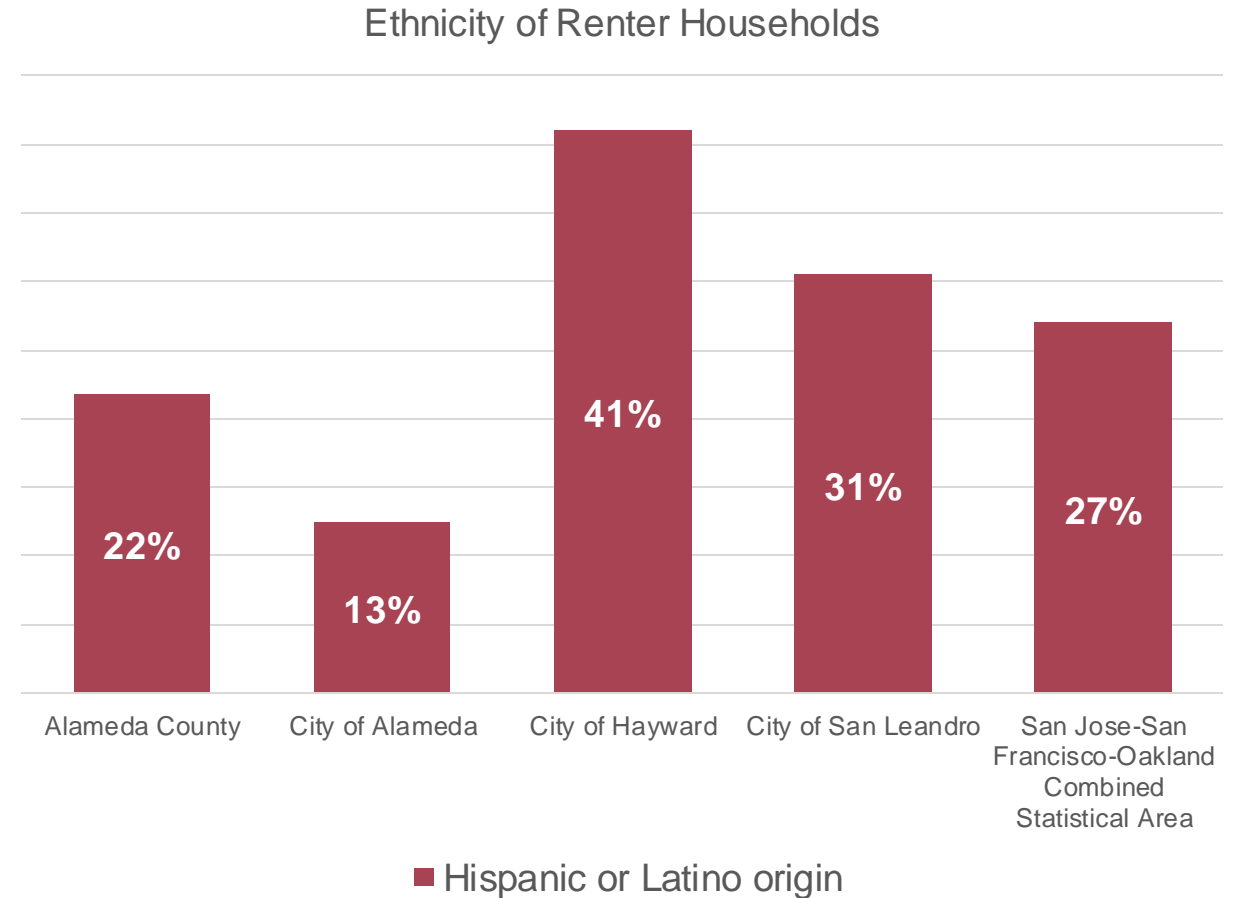
- San Leandro has the highest proportion of renter households that are Black or African American (20%) compared with other local areas. This is nearly double their share of the total population (10.4%).



Source: U.S. Census Bureau, "Demographic Characteristics for Occupied Housing Units," 2022. American Community Survey, ACS 5-Year Estimates Subject Tables, Table S2502, 2022

# Ethnicity of Renter Households vs. Bay Area Region

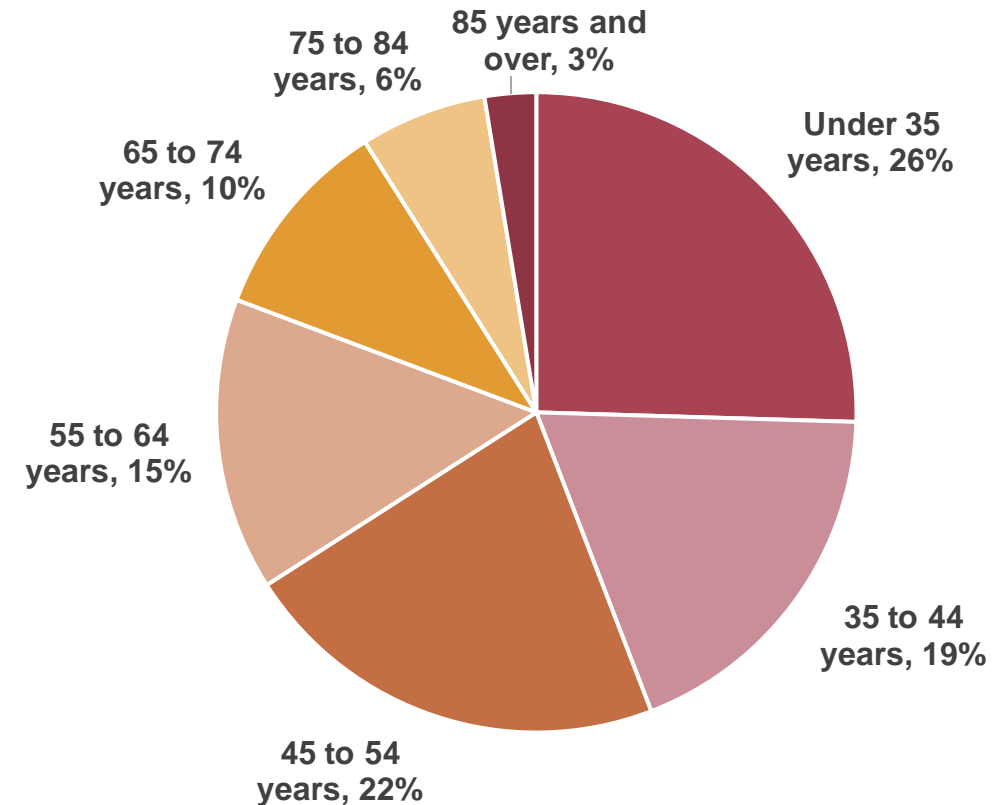
- San Leandro has the second highest proportion of Hispanic or Latino renter households (31%) compared to other local areas
- People of Hispanic or Latino origin make up approx. 28.3% of the total San Leandro population



# Age of Renter Households

- The majority of renter households are under age 65 (80.8%)
- Nearly 1/5 of renter households are seniors age 65 and older (19.3%)
- The largest age group of renters is under 35 years old (26%)

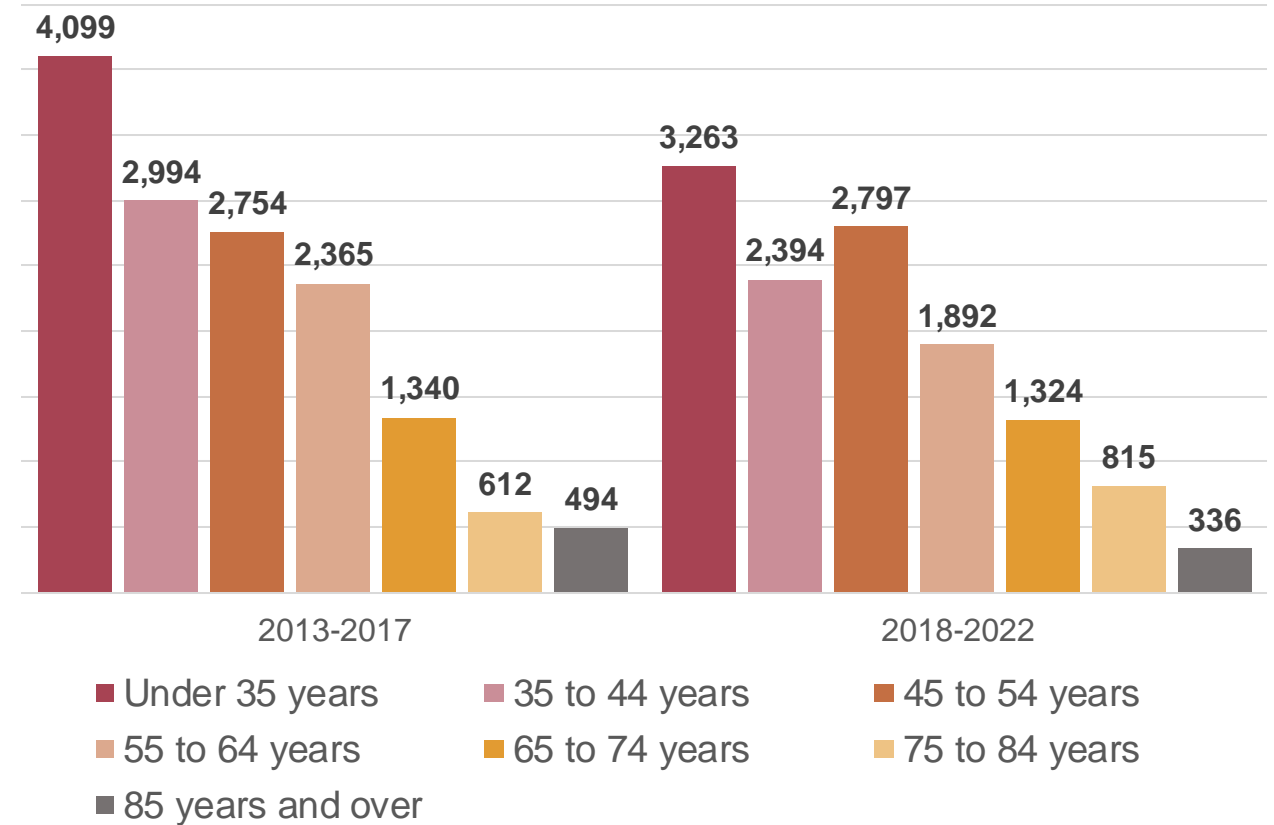
San Leandro renter-occupied housing units, by Age



# Age of Renter Households

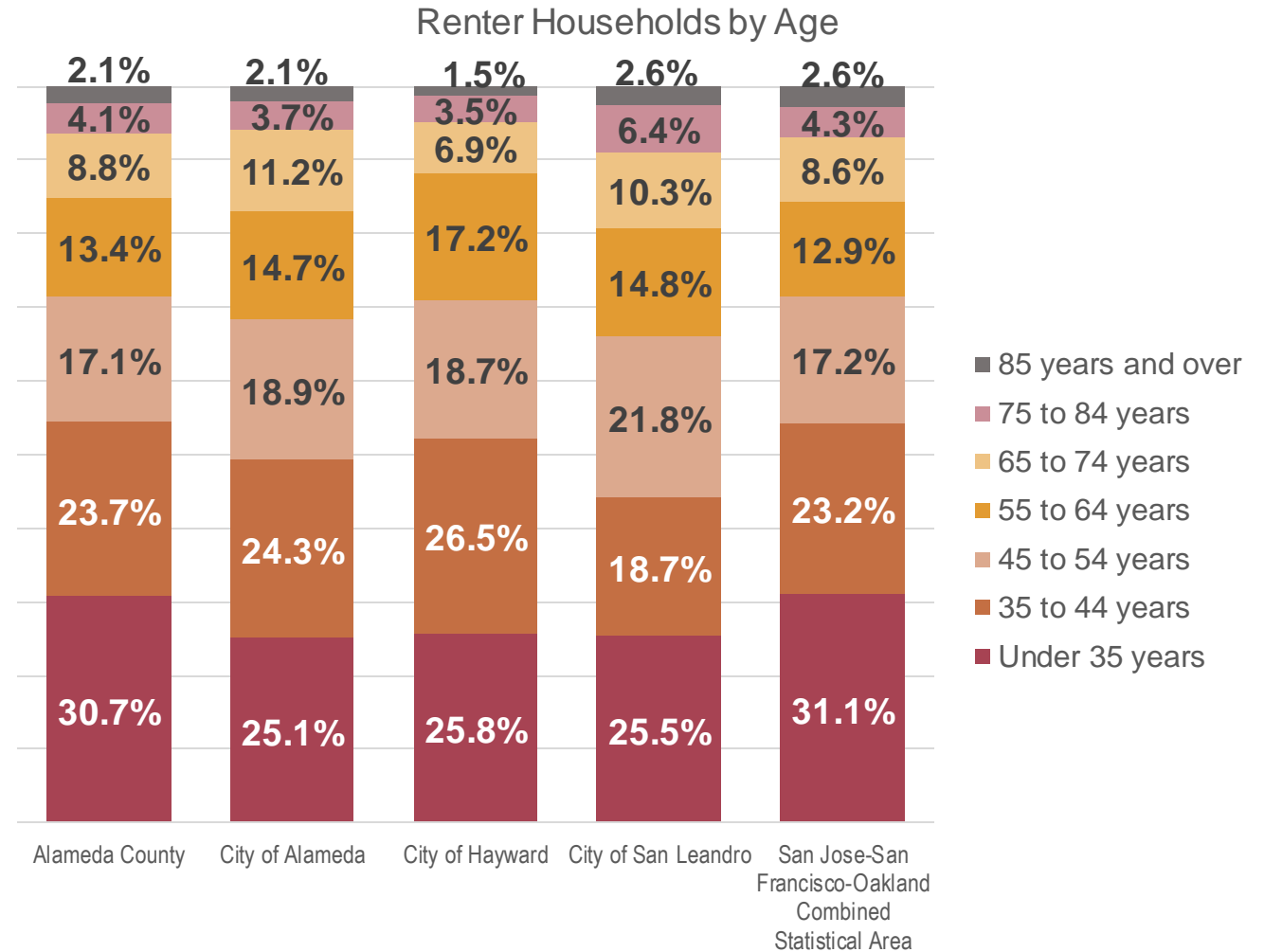
- The number of households under age 35 has decreased over time, from 4,099 in 2013-2017 to 3,263 in 2018-2022. The total number of households has decreased from 14,658 to 12,821.
- Note: this does not reflect a decline in overall population, as the decrease could be due to combined households
- Note: 5-year estimates are used to minimize margins of error

San Leandro Renter Households by Age, Over Time, 5-Year Estimates



# Age of Renter Households vs. Bay Area Region

- San Leandro has the highest percentage of renter households over 65 years old (19.3%) compared to other local areas, representing a total of 2,475 households over 65 years old
- San Leandro has a smaller percentage of renter households aged 34 - 44 years old (18.7%), compared to other local areas (23.7% in Alameda County, 24.3% in Alameda, 26.5% in Hayward, and 23.2% in the Bay Area)



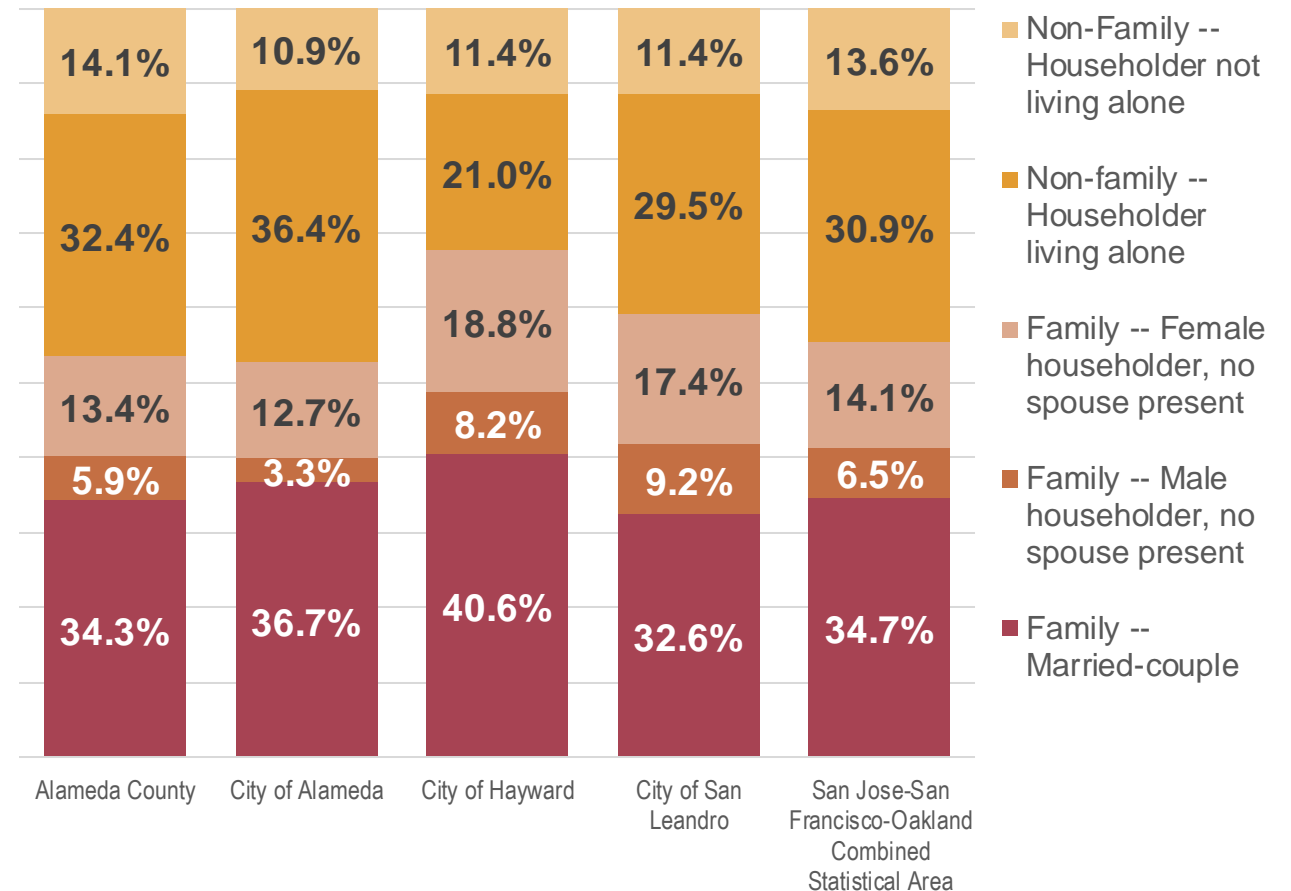
Source: U.S. Census Bureau, "Demographic Characteristics for Occupied Housing Units," 2022. American Community Survey, ACS 5-Year Estimates Subject Tables, Table S2502, 2022



# Renter Household Families vs. Bay Area Region

- San Leandro has a similar distribution of renter household family types compared with other local areas
- Lower percentage of family households with a married couple (32.6%) than other local areas

Renter Households by Family Type

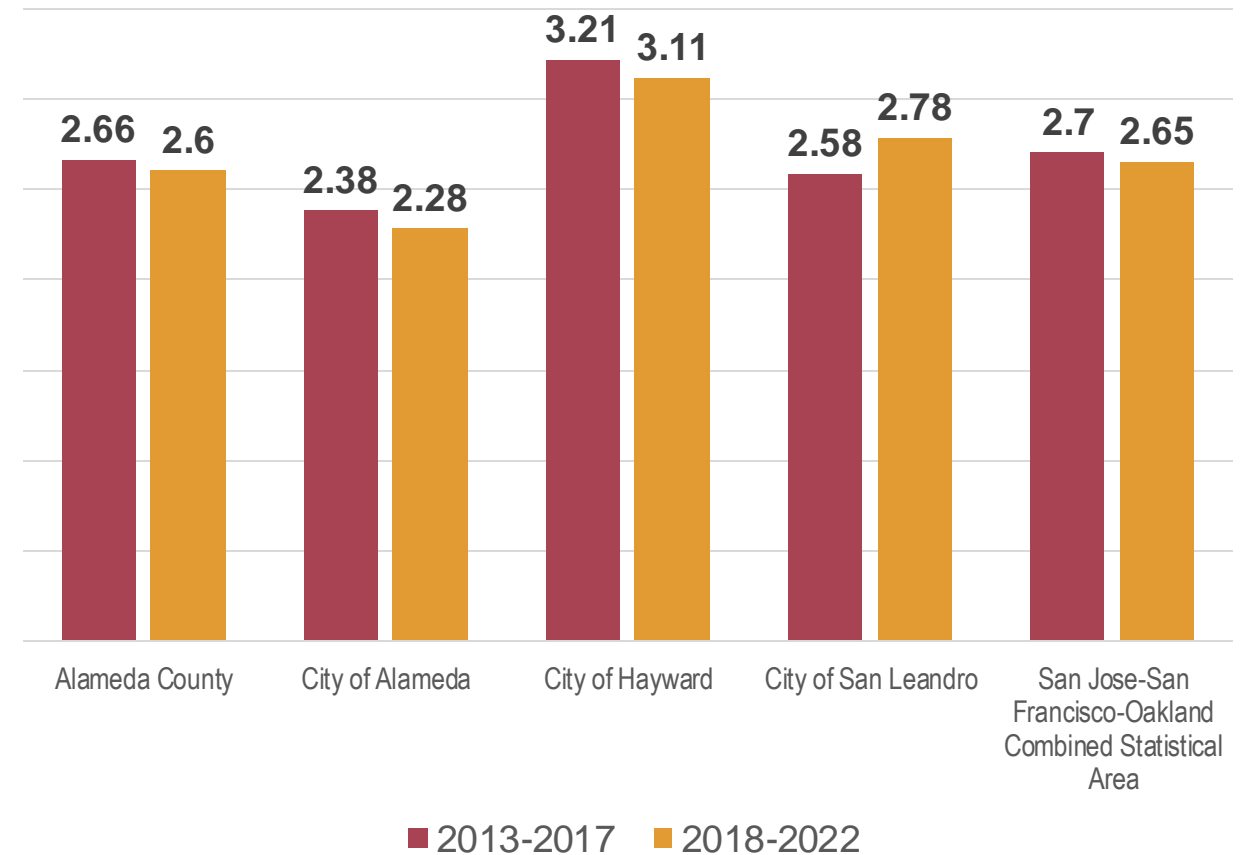


Source: U.S. Census Bureau. "Tenure by Household Type (Including Living Alone) and Age of Householder." American Community Survey, ACS 5-Year Estimates Detailed Tables, Table B25011, 2022

# Renter Household Size vs. Bay Area Region

- The average household size for renter-occupied units is slightly higher in San Leandro (2.78) than several other local areas, though still lower than Hayward (3.11)
- The average household size for renter-occupied units has risen from 2.58 in 2013-2017 to 2.78 in 2018-2022, while it has fallen in other local areas

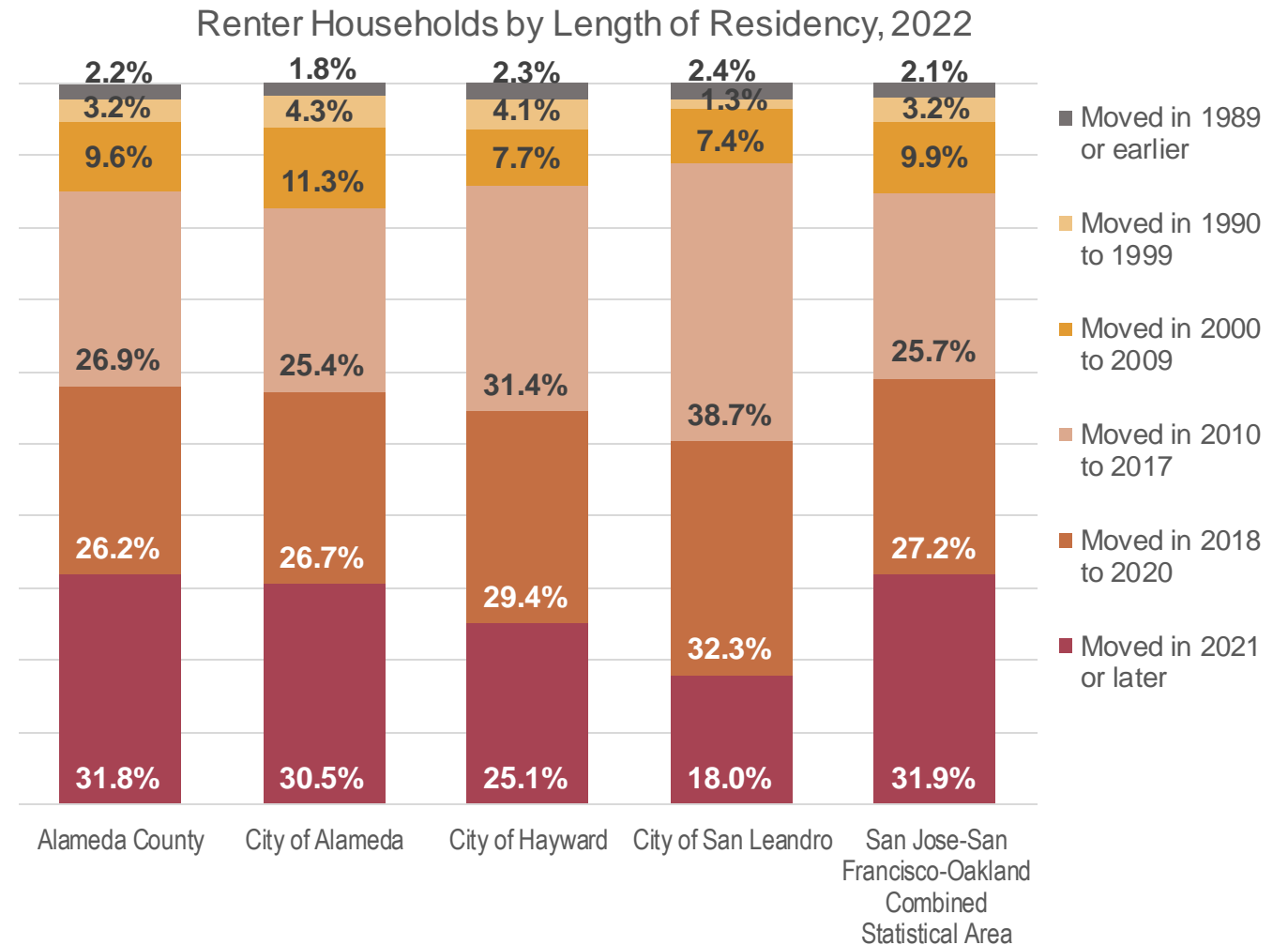
Average Household Size, Renter-Occupied, Over Time



Source: U.S. Census Bureau, "SELECTED HOUSING CHARACTERISTICS," 2017, 2022. American Community Survey, ACS 5-Year Estimates Data Profiles, Table DP04, 2017, 2022

# Length of Residency of Renter Households vs. Bay Area Region

- Compared with other neighboring areas, San Leandro has a higher share of renters who moved in between 2010 and 2020

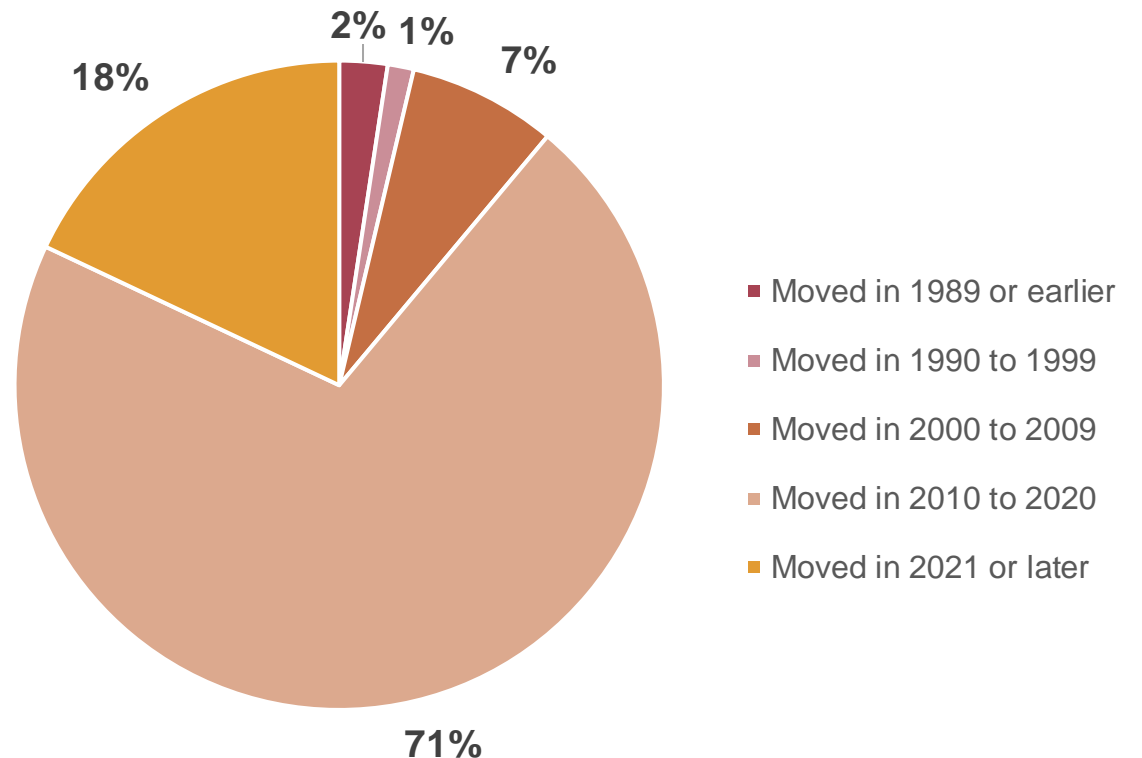


Source: U.S. Census Bureau, "Demographic Characteristics for Occupied Housing Units," 2022. American Community Survey, ACS 1-Year Estimates Subject Tables, Table S2502, 2022

# Length of Residency of Renter Households

- The majority of San Leandro renters moved in since 2010 (89%)

San Leandro Renter Households by Length of Residency, 2022 (Percentage)

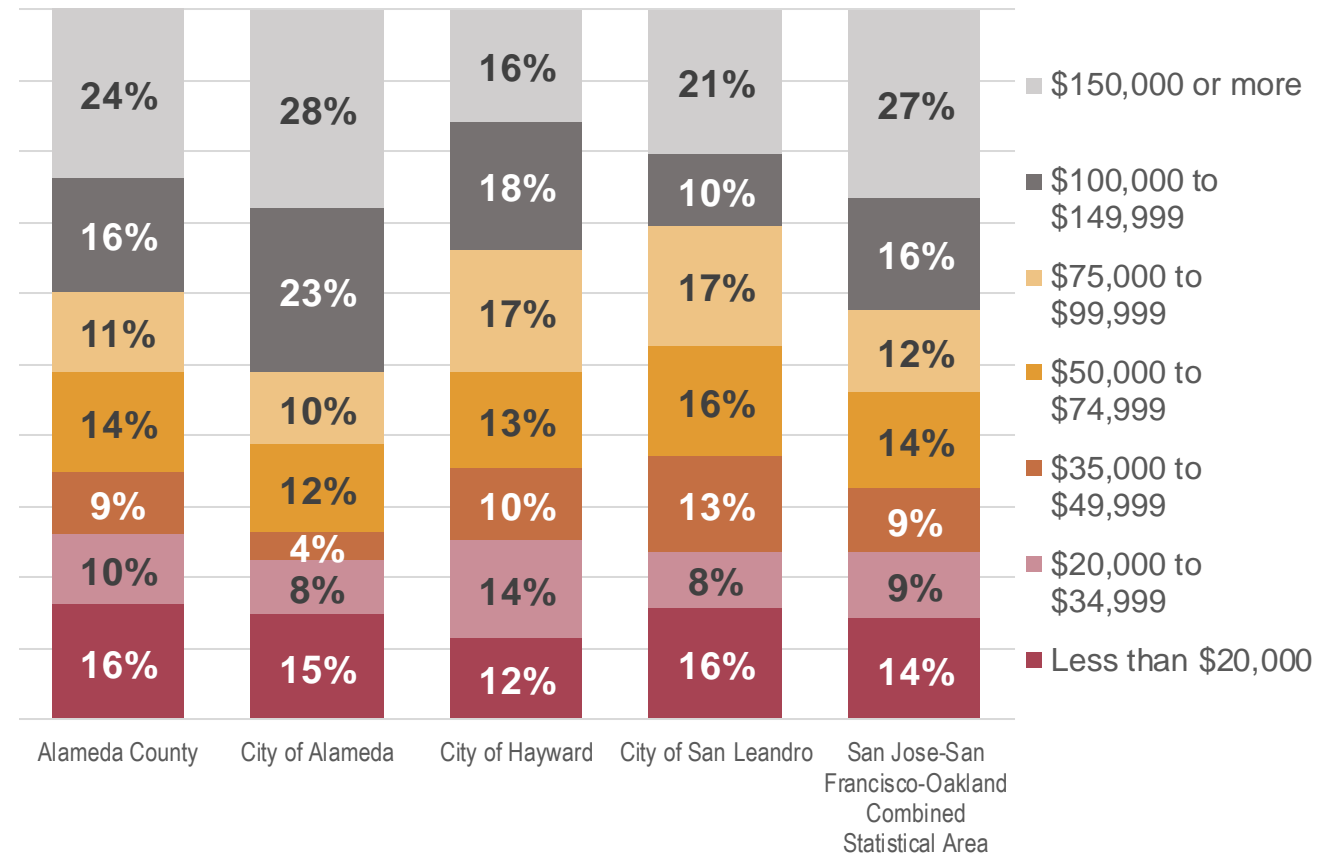


Source: U.S. Census Bureau, "Demographic Characteristics for Occupied Housing Units," 2022. American Community Survey, ACS 1-Year Estimates Subject Tables, Table S2502, 2022, accessed on December 20, 2023, <https://data.census.gov/table/ACSST1Y2022.S2502?q=s2502&g=160XX00US0668084>.

# Income of Renter Households vs. Bay Area Region

- San Leandro has a smaller share (31%) of renter households earning \$100,000 per year or more compared with other local areas

Household Income In The Past 12 Months, Renter-Occupied, 2022

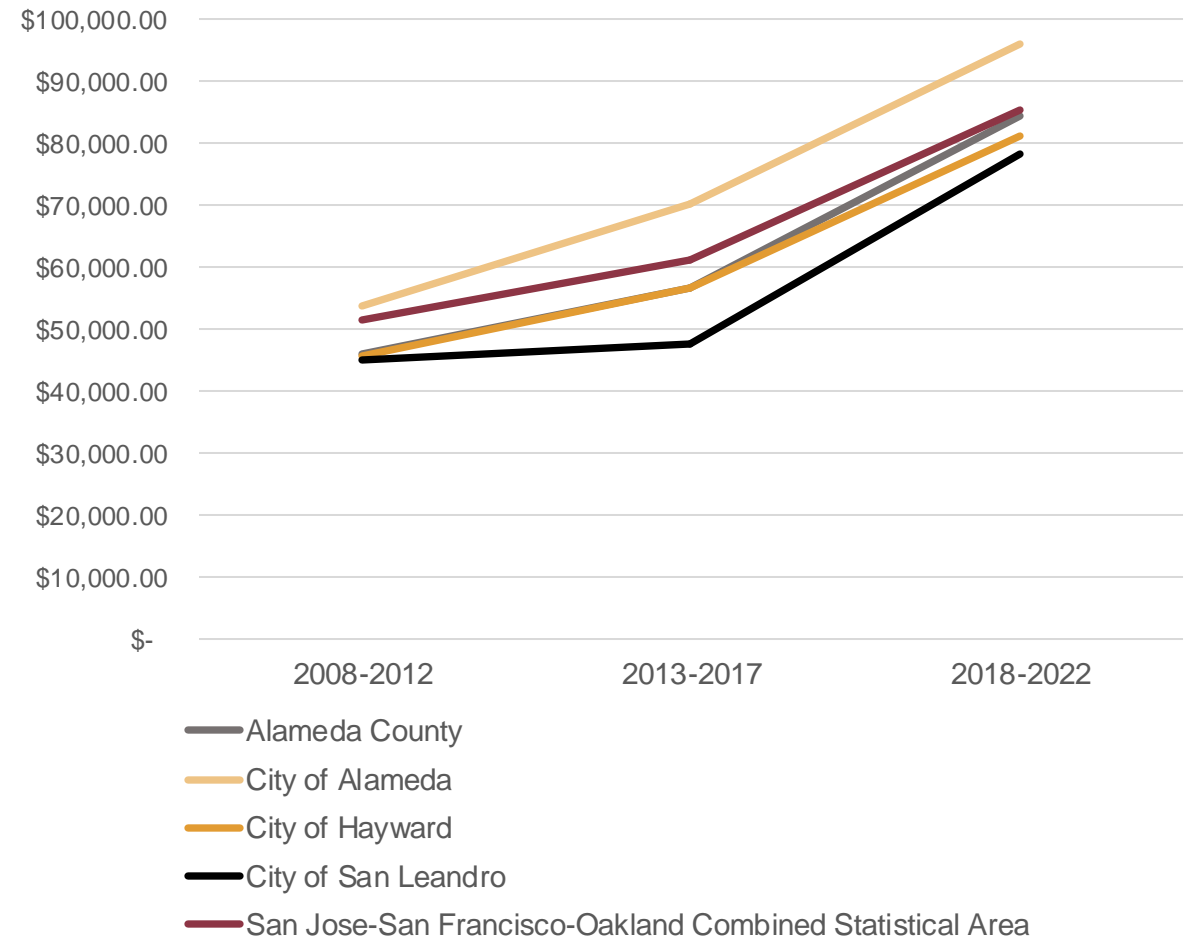


Source: U.S. Census Bureau, "Financial Characteristics," 2022. American Community Survey, ACS 1-Year Estimates Subject Tables, Table S2503, 2022, accessed on December 20, 2023, <https://data.census.gov/table/ACSST1Y2022.S2503?t=Families and Living Arrangements:Housing&g=160XX00US0668084>.

# Income of Renter Households vs. Bay Area Region

- Lower median household income for renter households in San Leandro than other local areas over time

Median Household Income, Renter Occupied, Over Time

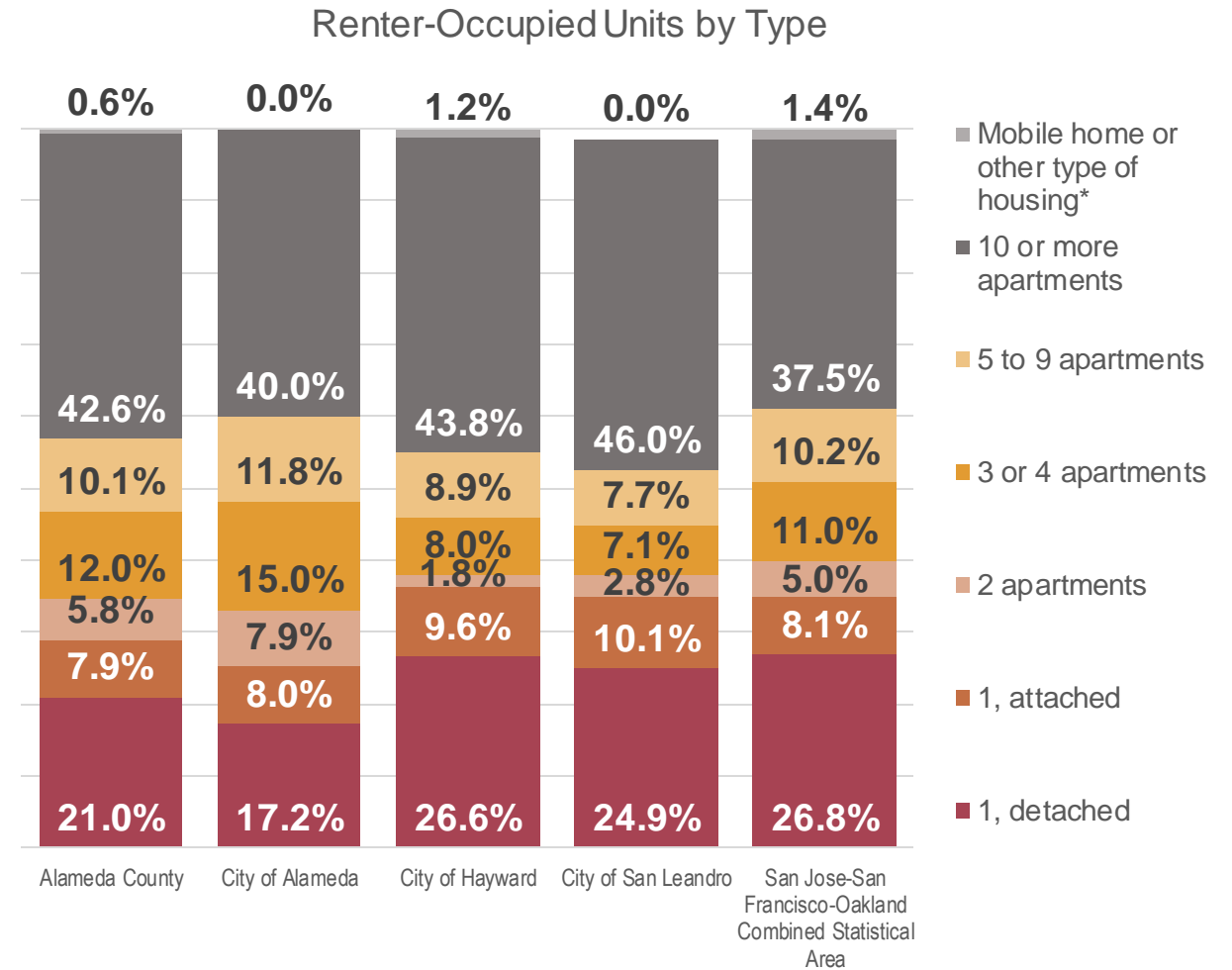


Source: U.S. Census Bureau, "Median Household Income in the Past 12 Months (in 2022 Inflation-Adjusted Dollars) by Tenure," 2022. American Community Survey, ACS 5-Year Estimates Detailed Tables, Table B25119, 2022

# Rental Housing Supply and Cost

# Rental Housing Units vs. Bay Area Region

- More 1/2 of renter-occupied units (54%) in San Leandro are in complexes of 5 or more apartments, higher than other local areas



Note: Mobile home or other type of housing numbers are suppressed for City of Alameda and City of San Leandro due to margin of error over 50%

Source: U.S. Census Bureau, "Physical Housing Characteristics for Occupied Housing Units," 2022. American Community Survey, ACS 5-Year Estimates Subject Tables, Table S2504



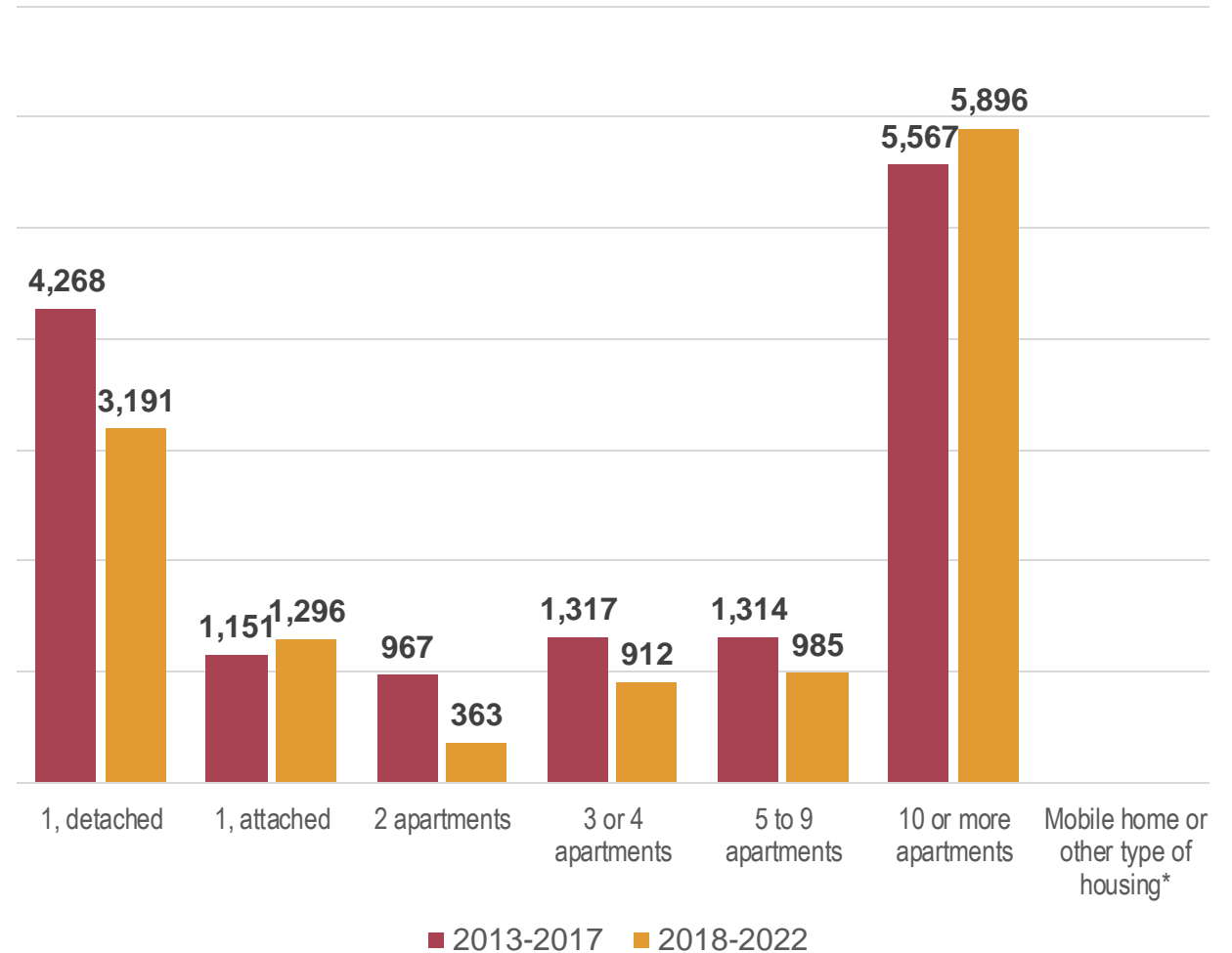
# Rental Housing Units

- San Leandro has experienced a decline in renter-occupied 1-unit detached rentals and 2 apartment rentals between 2013-2017 and 2018-2022
- Other changes fall within the margin of error and therefore should not be used to draw conclusions

\*Number suppressed due to margin of error over 50%

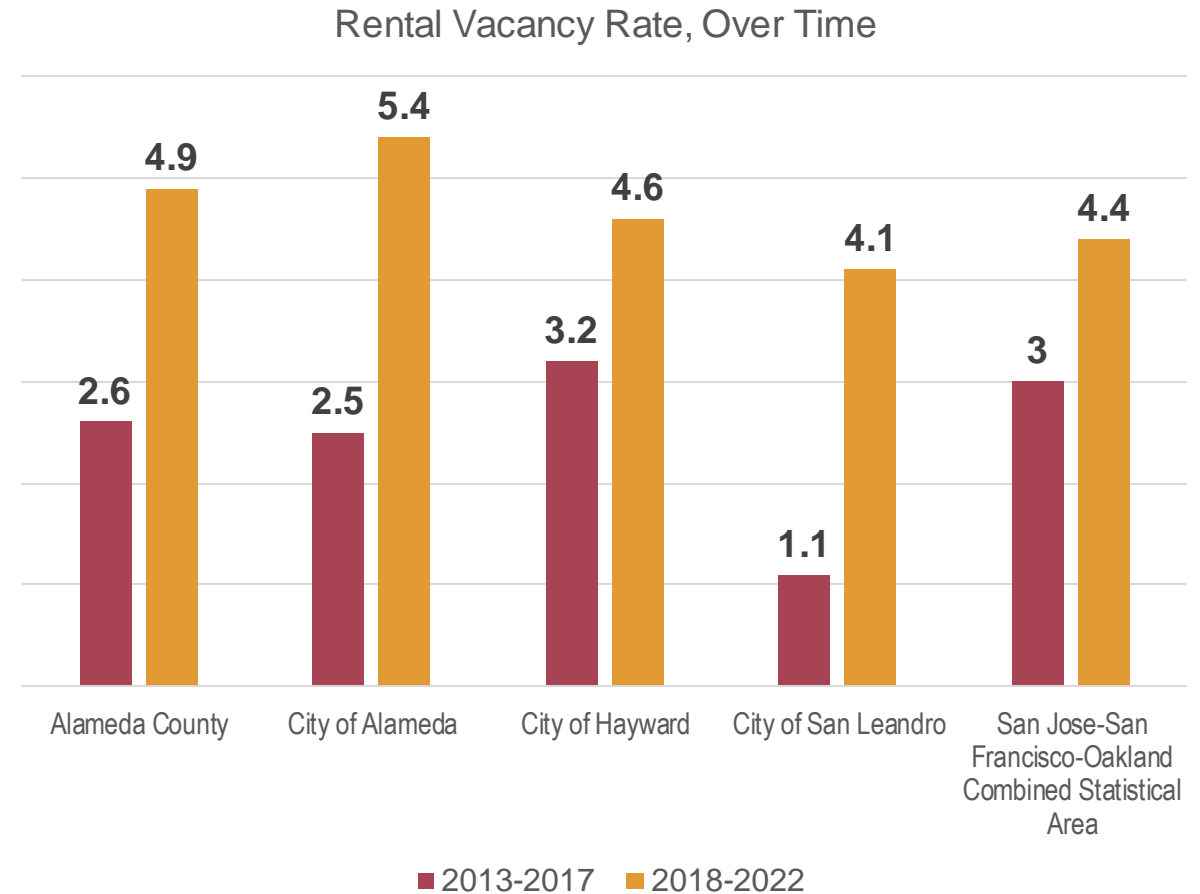
Source: U.S. Census Bureau, "Physical Housing Characteristics for Occupied Housing Units," 2017, 2022. American Community Survey, ACS 5-Year Estimates Subject Tables, Table S2504

San Leandro Renter-Occupied Housing Units by Type, Over Time



# Rental Housing Units vs. Bay Area Region

- San Leandro had a lower rental vacancy rate in 2013-2017 than other local areas
- In 2018-2022, vacancy rate was closer to that of neighbors



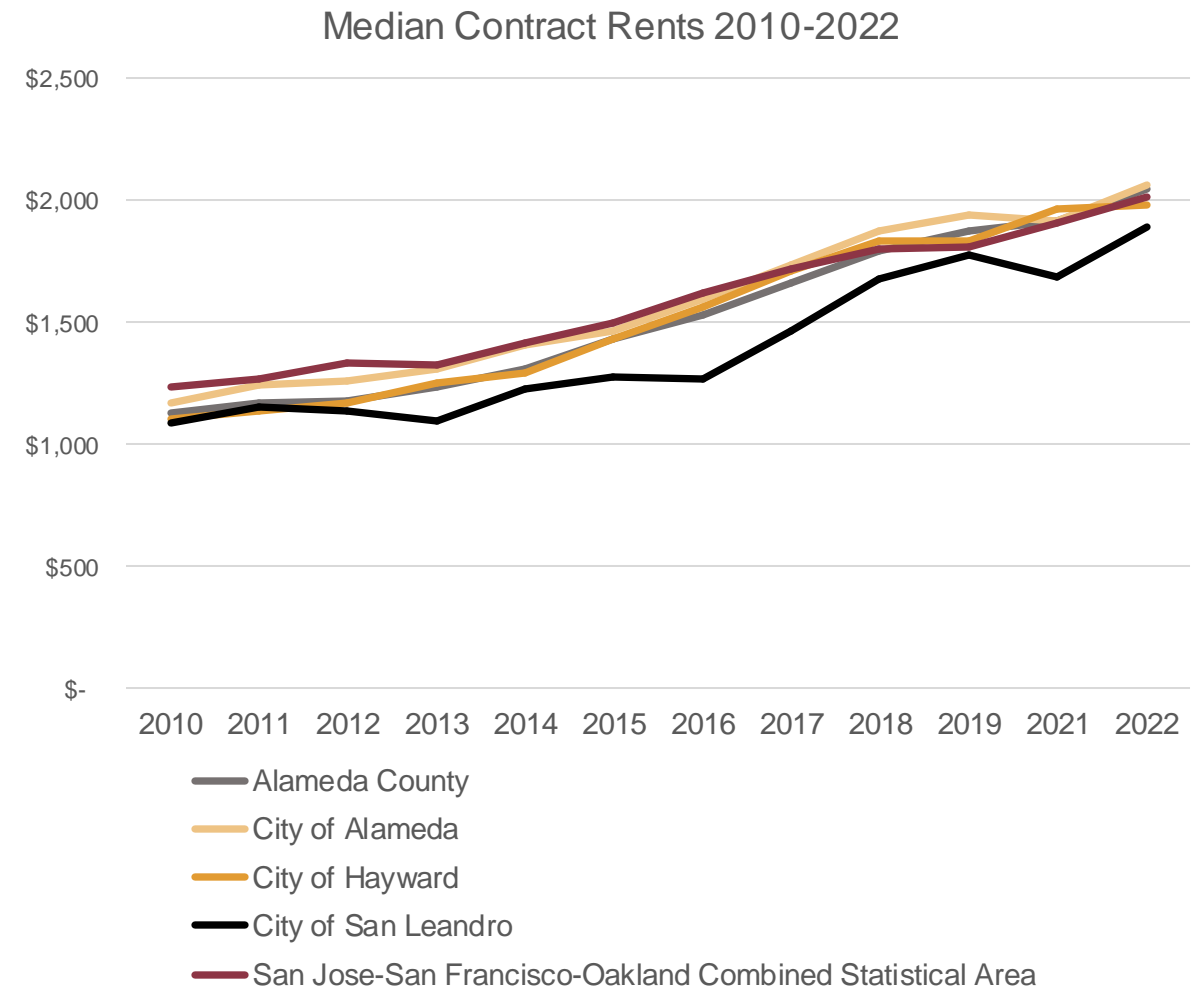
Sources: U.S. Census Bureau, "Selected Housing Characteristics," 2017, 2022. American Community Survey, ACS 5-Year Estimates Data Profiles, Table DP04

# Cost of Rent vs. Bay Area Region

- Median contract rents in the region have been relatively comparable in San Leandro have generally been slightly lower than other local areas since 2010
- Differences have been small, for example, median rent in San Leandro was approximately \$278 lower than Hayward and \$228 lower than Alameda County in 2021
- Other differences fall within the margin of error

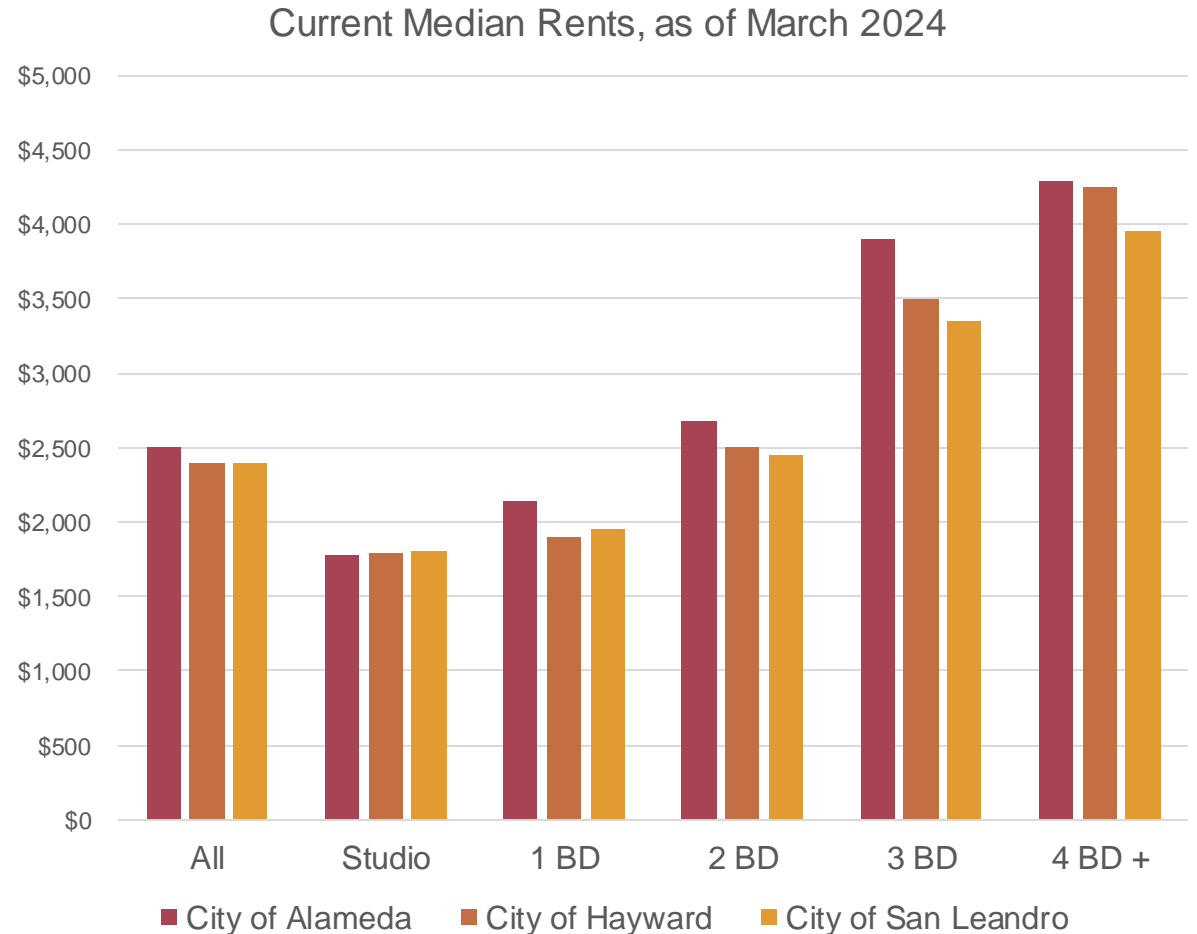
Note: The U.S. Census Bureau defines contract rent as “The monthly rent agreed to or contracted for, regardless of any furnishings, utilities, fees, meals, or services that may be included. For vacant units, it is the monthly rent asked for the rental unit at the time of interview.”

Source: U.S. Census Bureau, "Median Contract Rent (Dollars)," 2010-2022. American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B25058, 2010-2022



# Cost of Rent vs. Bay Area Region

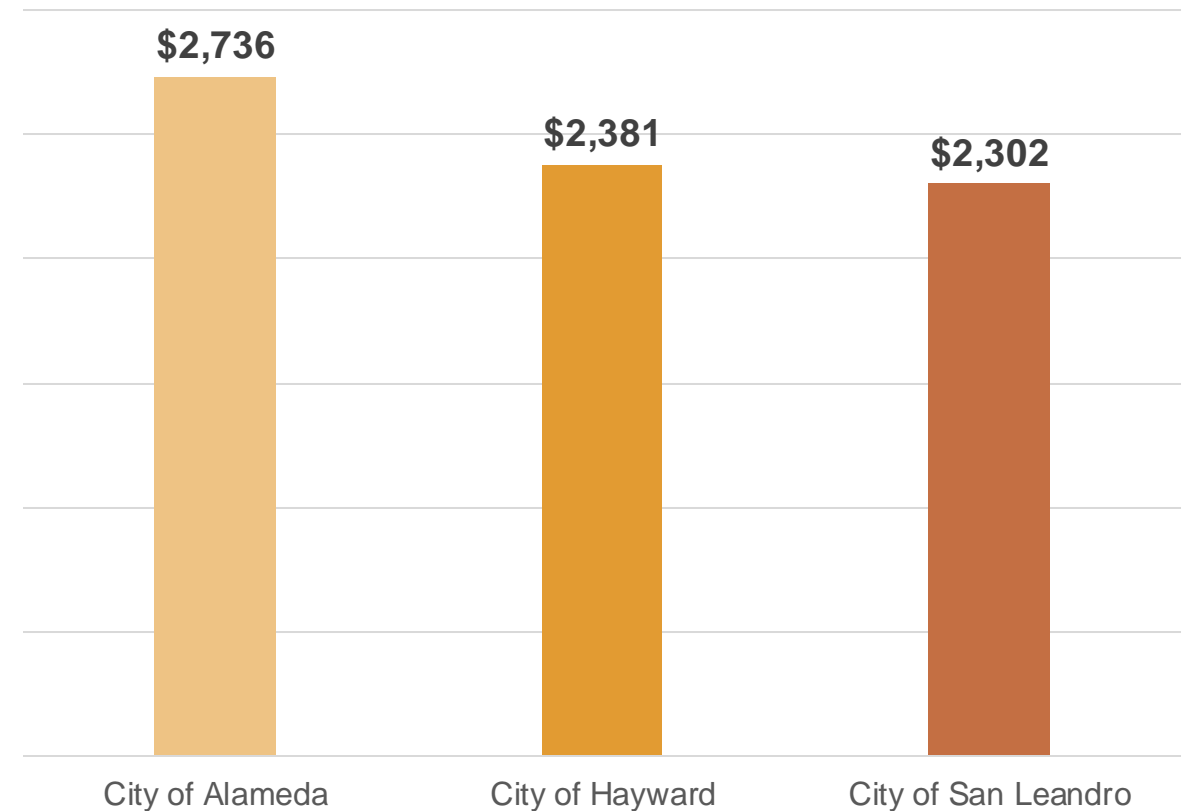
- Current median rent in San Leandro is the same as Hayward and slightly lower than Alameda, with slight variations depending on number of bedrooms



# Cost of Rent vs. Alameda and Hayward

- Average rents in San Leandro are slightly lower than Hayward and about \$400 lower Alameda

Average Rents, as of November 2023



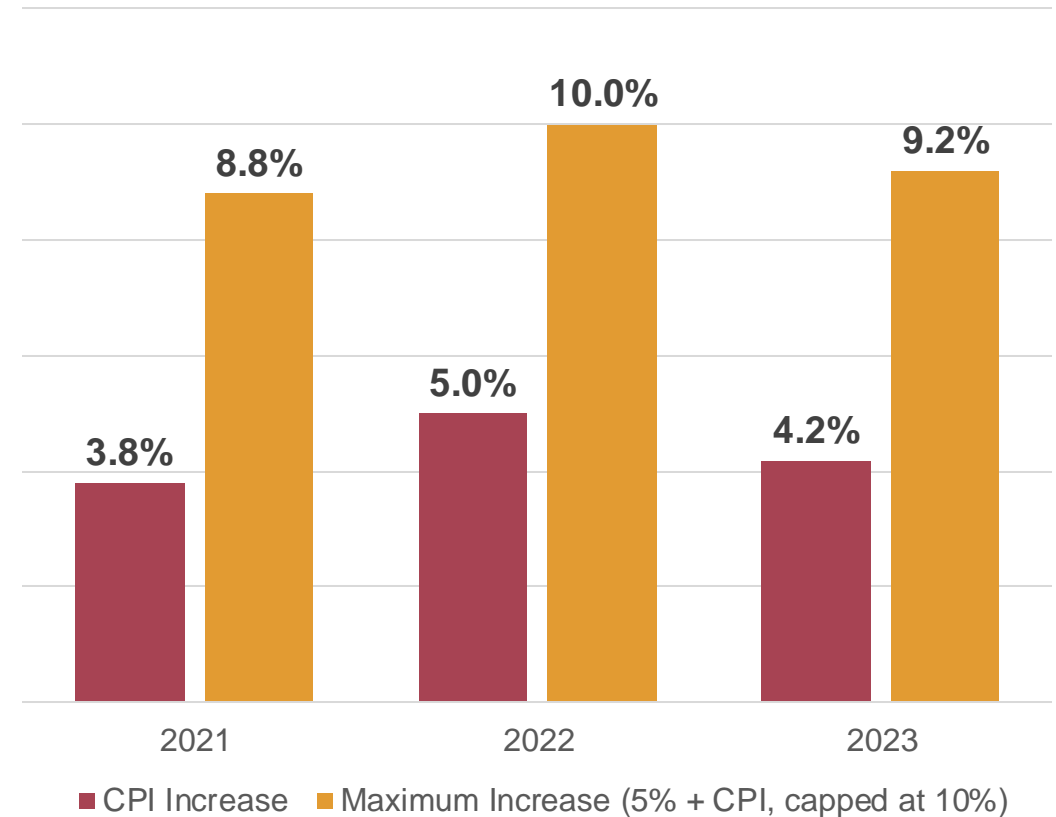
Note: This measure uses average rents, not median rents.

Source: RentCafe, "Rental Market Trends," updated as of November 2023,  
<https://www.rentcafe.com/average-rent-market-trends/us/ca/hayward/>

# Cost of Rent Bay Area Region

- According to the Tenant Protection Act, rental increases are limited to the increase in Consumer Price Index (CPI) + 5% maximum, not to exceed a total of 10%/year
- Rent increase limitations under AB 1482 might vary depending on the type of unit and exemptions

Maximum Rental Increase Under Tenant Protection Act

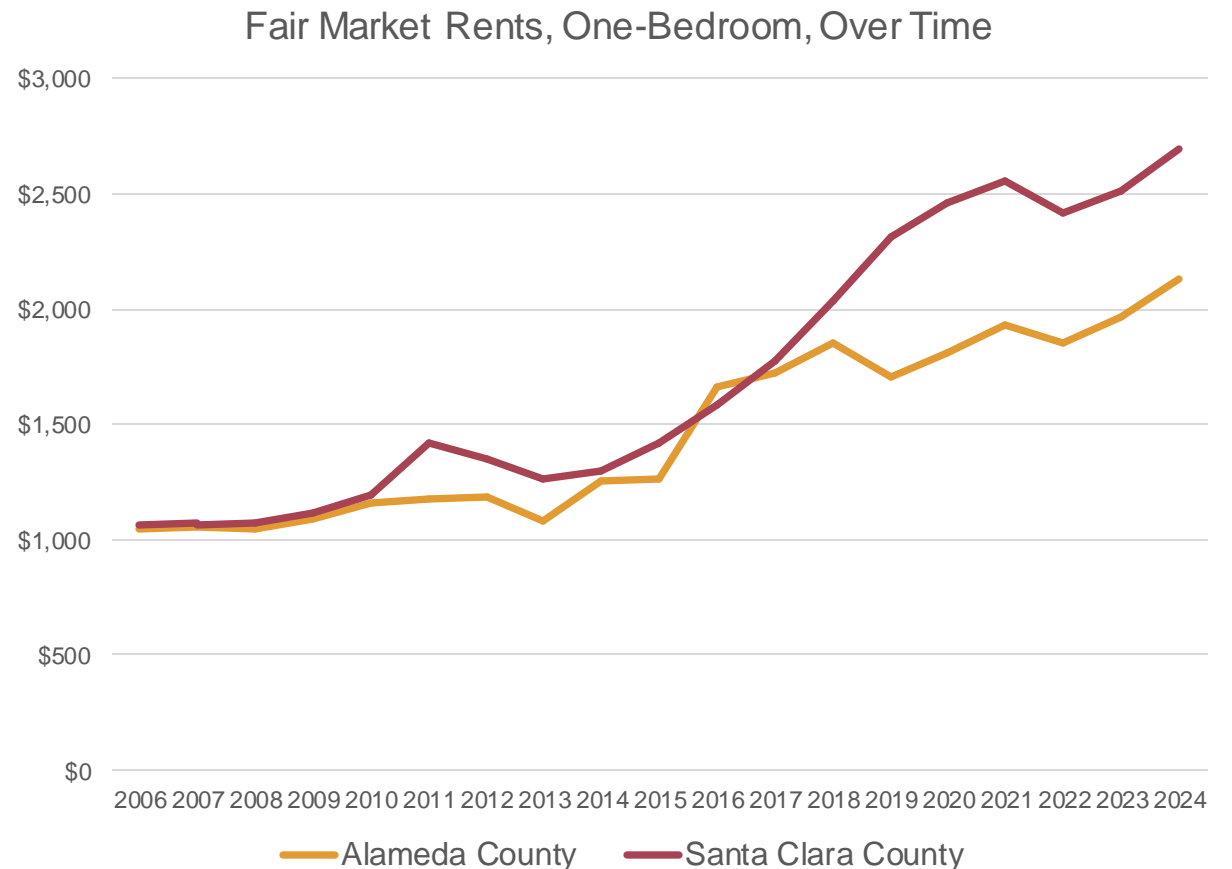


Note: CPI increases are based on April data as specified by AB 1482

Source: U.S. Bureau of Labor Statistics "Consumer Price Index for All Urban Consumers (CPI-U): All items in San Francisco-Oakland-Hayward, CA, all urban consumers, not seasonally adjusted"

# Cost of Rent Bay Area Region

- Alameda County has trended lower than Santa Clara County for Fair Market Rents for one-bedroom rentals since 2017
- The rent data comes HUDs Fair Market Rent (FMR) program
- According to HUD, “the FMR is the 40th% of gross rents for typical, non-substandard rental units occupied by recent movers in a local housing market”



# Housing Burden in San Leandro

- To afford the median rent for a one-bedroom apartment in San Leandro, a person would need to earn \$37.04/hour at a full-time job
- Double the California minimum wage of \$16.00/hour

	Median Rent	Hourly Rate Needed to Afford Median Rent (before Taxes)
1-Bedroom	\$1,925	\$37.04
2-Bedroom	\$2,495	\$48.48



# Housing Burden in San Leandro

- Minimum wage earners need to work the equivalent of 2.6 full-time jobs in order to afford a median one-bedroom apartment in San Leandro

	Median Rent	# of Minimum Wage Jobs Needed to Afford Median Rent (Approx.)
1-Bedroom	\$1,925	2.5
2-Bedroom	\$2,495	3.3

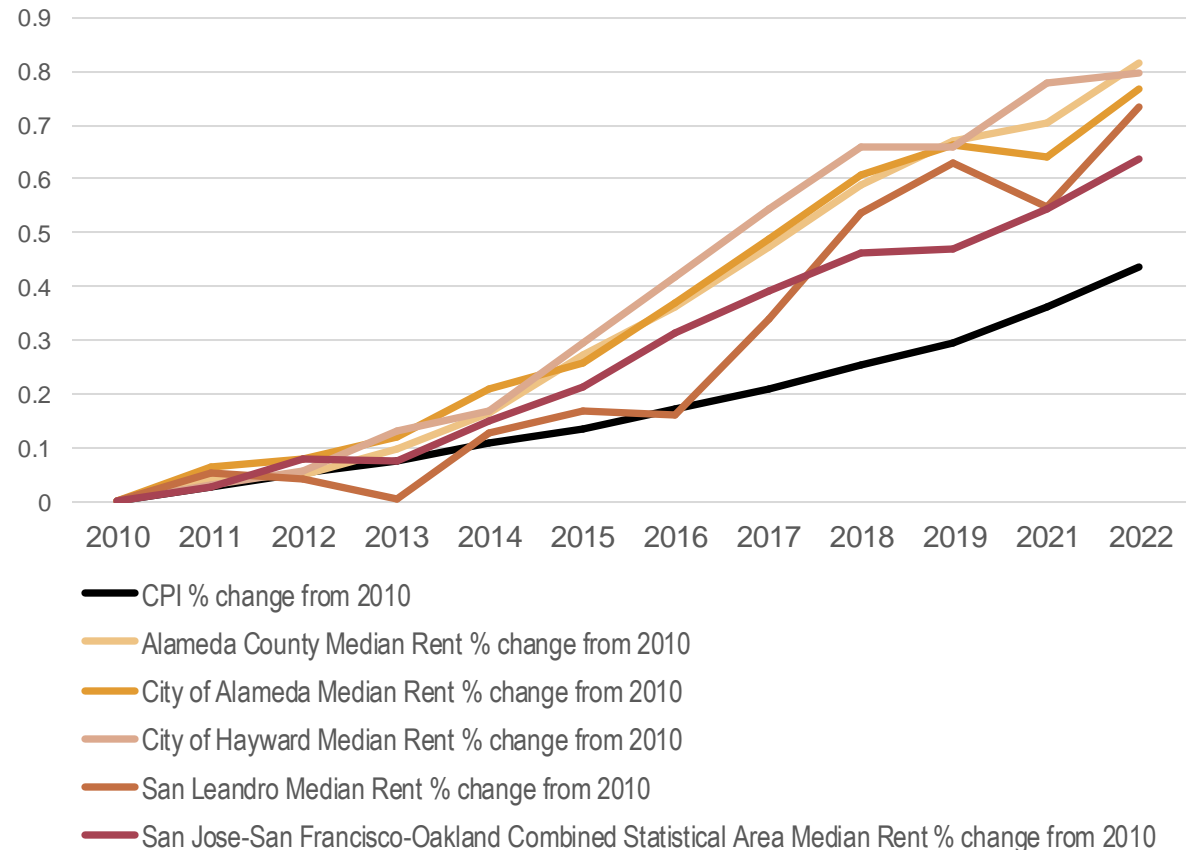
# Housing Burden vs Bay Area Region

- Median rents in San Leandro have increased 82% over 2010 levels, outpacing CPI for San Francisco-Oakland-Hayward, which increased 44%
- This follows the same trend as other local areas that have also seen median rent increases higher than the CPI increases over time

Note: 2010 represents base year for comparison.

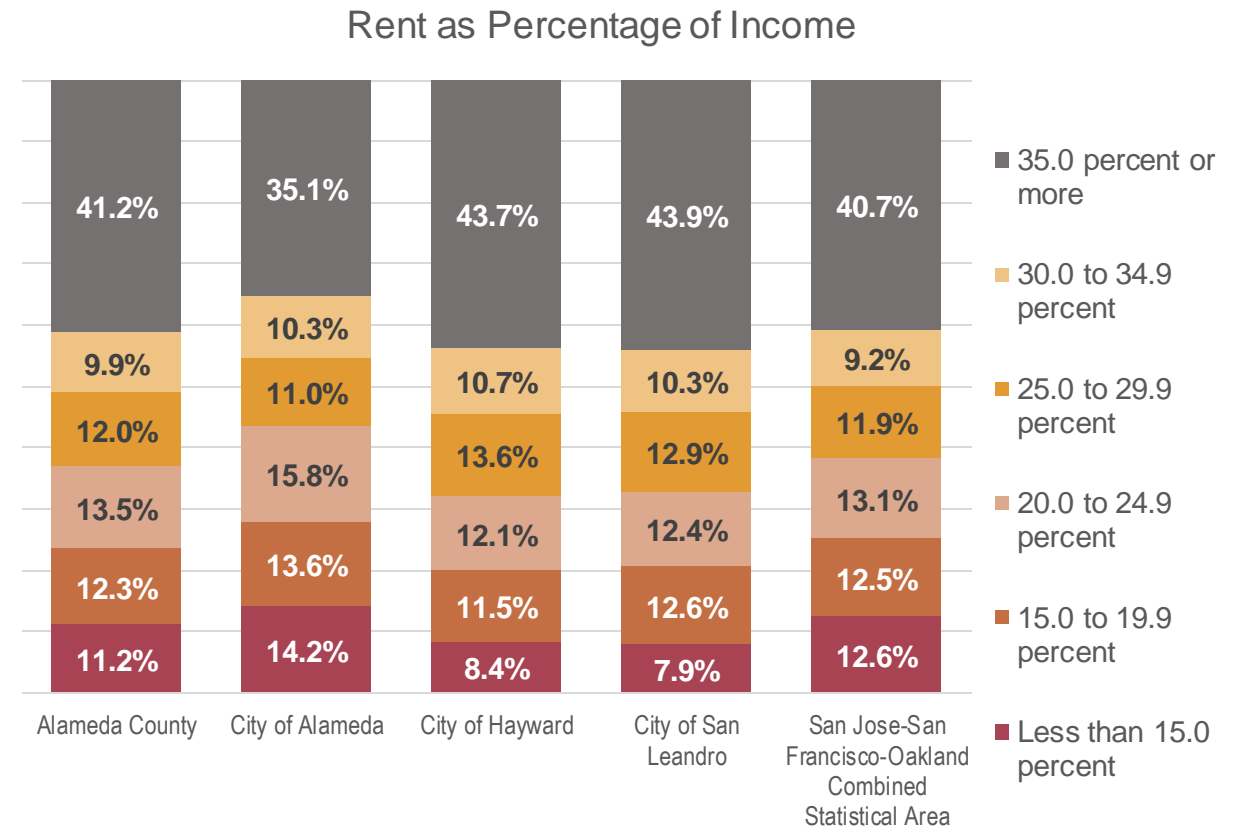
Sources: U.S. Census Bureau, "Median Contract Rent (Dollars)," 2010-2022. American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B25058, 2010  
U.S. Bureau of Labor Statistics "Consumer Price Index for All Urban Consumers (CPI-U): All items in San Francisco-Oakland-Hayward, CA, all urban consumers, not seasonally adjusted." 2010-2023. <https://data.bls.gov/pdq/SurveyOutputServlet>

Median Rents Compared with Consumer Price Index  
(San Francisco-Oakland-Hayward), 2010-2023



# Housing Burden vs Bay Area Region

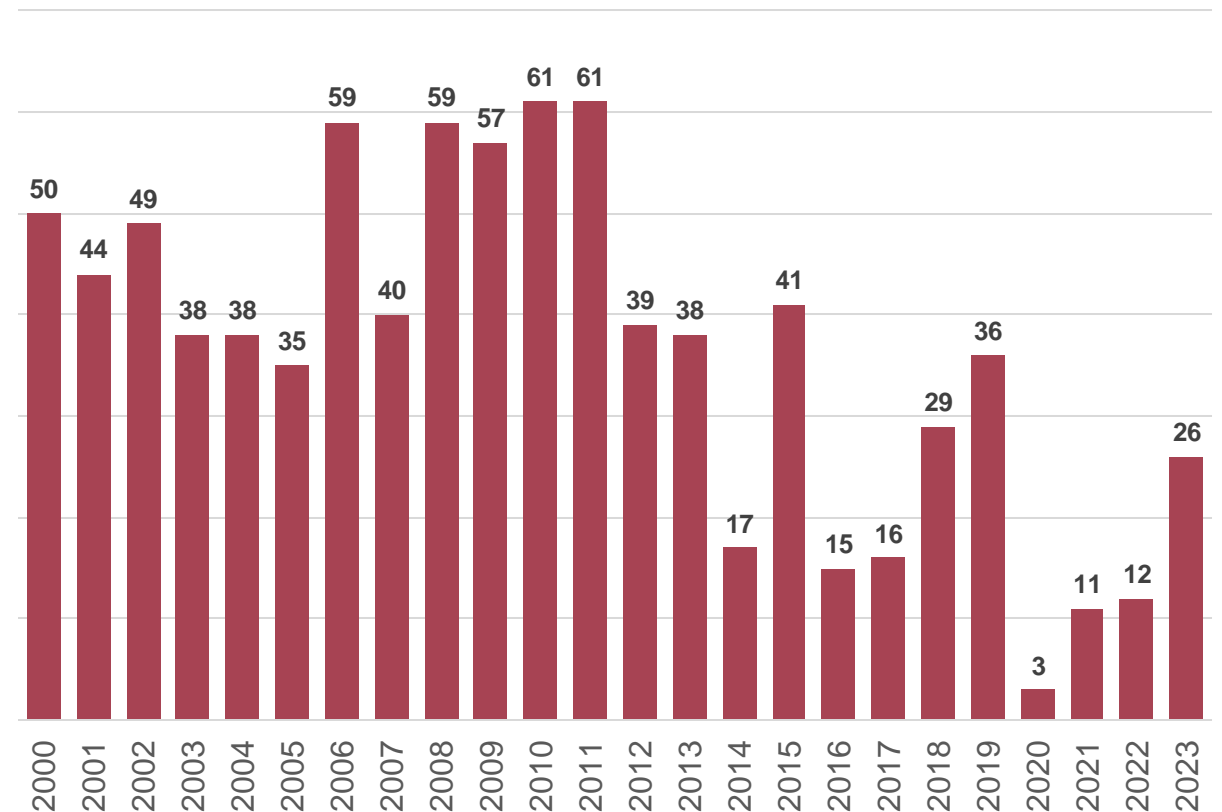
- San Leandro and Hayward have the highest percentages of people paying more than 35% of their income as rent (43.9% and 43.7%, respectively). In both cities, more than 1/2 are paying 30%+ of income in rent
- People paying more than 30% of income on housing are considered “housing burdened”



# Unlawful Detainers

- Unlawful detainers in San Leandro averaged 479.6 per year prior to 2020 (2000-2019)
- Unlawful detainers had been on a downward trend since peaking at in 2008
- Includes zip codes: 94577, 94578, 94579

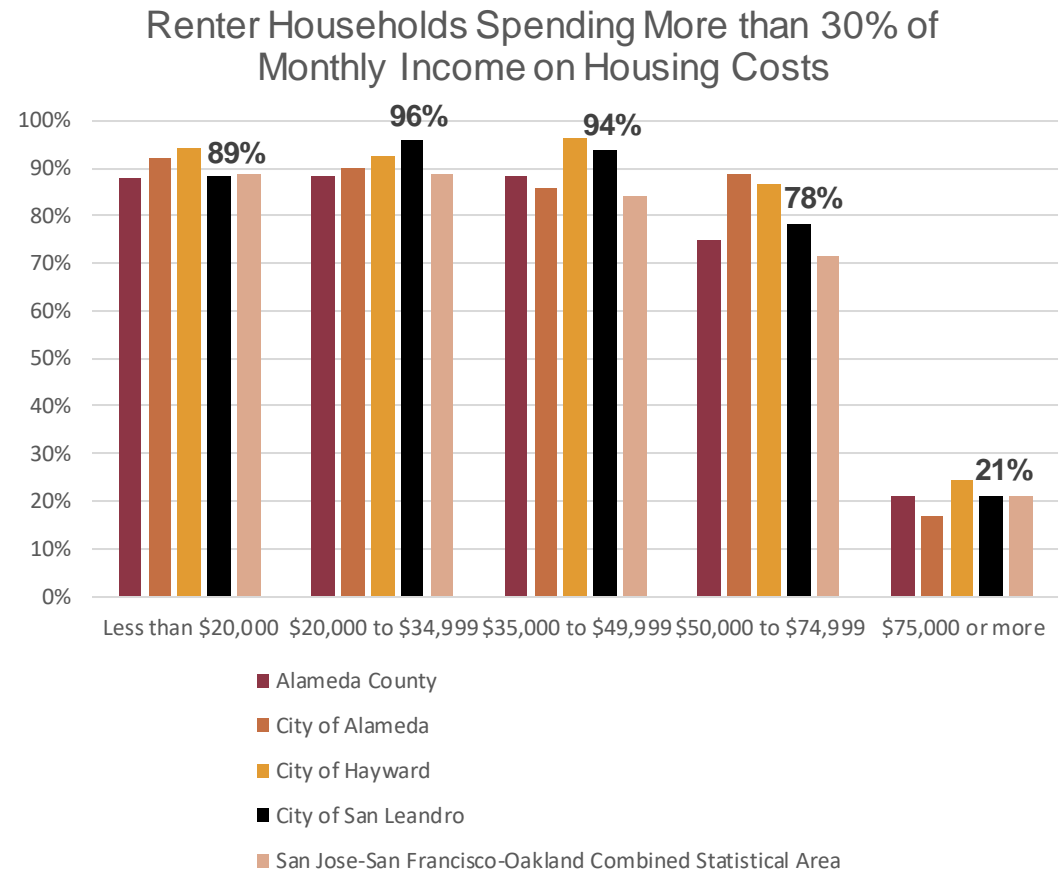
Unlawful Detainers, San Leandro, Excluding Commercial



Sources: Alameda County Superior Courts, "Unlawful Detainers, San Leandro."

# Housing Burden vs Bay Area Region

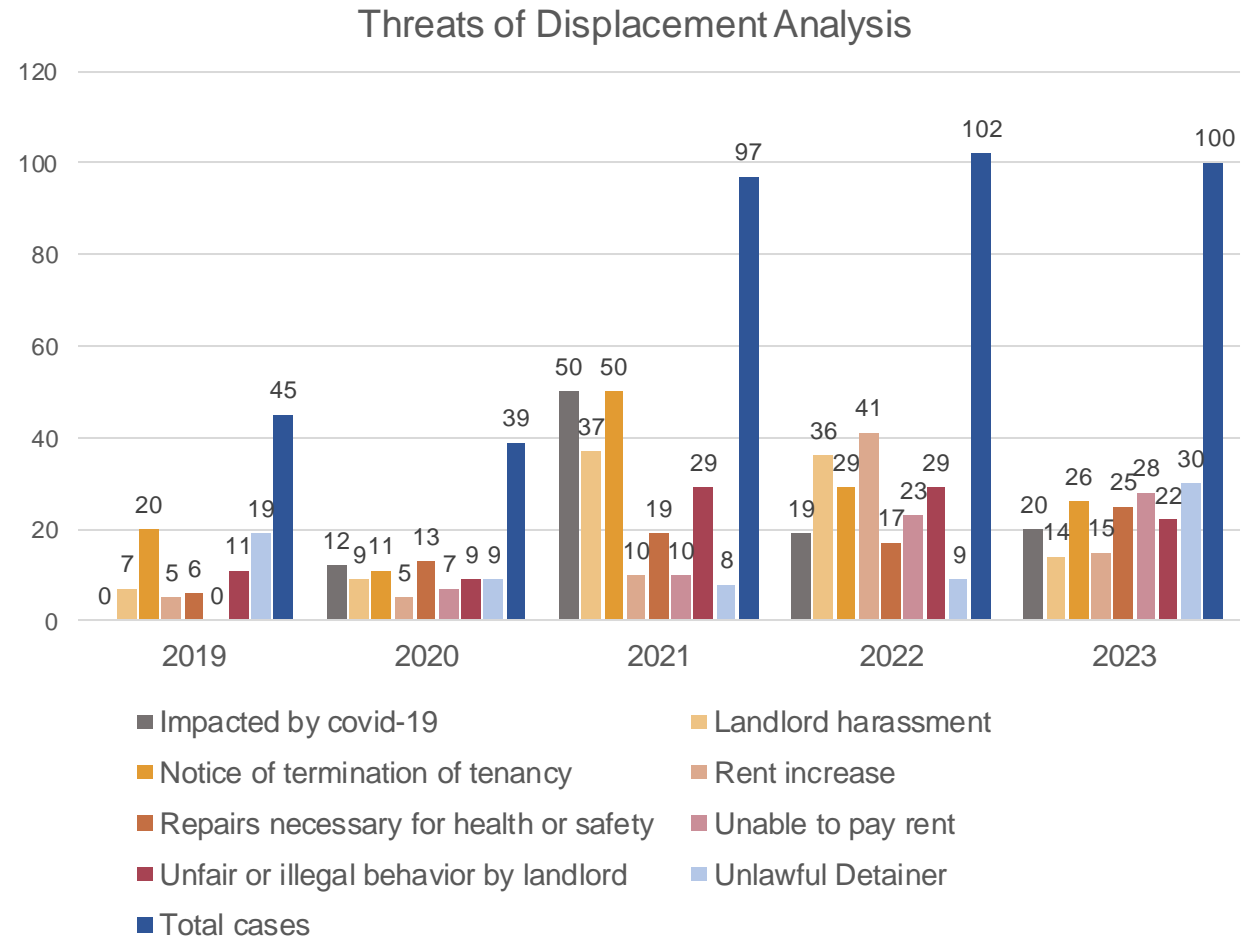
- The majority of renter households that earn less than \$75,000 are considered housing burdened
- In San Leandro, 96% of households earning \$20,000 to \$34,999 are housing burdened
- Only 21% of households earning \$75,000 or more are housing burdened



# Threats of Displacement

- Total cases have more than doubled between 2019 (45) and 2023 (100)
- 40% of cases in 2023 involved rent increase, up 10% from prior year
- Percentages will add up to more than 100% because cases can have more than one threat of displacement
- Excludes residents of unincorporated San Leandro
- Category "Notice of termination of tenancy" includes verbal threats of eviction as well as written notices

Sources: Centro Legal de La Raza



# San Leandro Data Trends Summary

- 40% of households in San Leandro are renters
- Renter households are more likely to be Black or African American compared with total population of San Leandro
- San Leandro has the second highest proportion of Hispanic or Latino renter households (31%) compared to other local areas
- Almost one fifth (19.3%) of renters in San Leandro are seniors, aged 65 and older, which is the highest percentage when compared with other local areas
- Median rents have continued to rise in San Leandro since 2010, mirroring trends in other local areas
- Rents in San Leandro are comparable or slightly lower than Alameda and Hayward

# San Leandro Data Trends Summary, Cont.

- A full-time worker would need to earn \$37.04/hour to avoid housing burden or work the equivalent of 2.6 fulltime minimum wage jobs in order to afford a one-bedroom apartment in San Leandro
- The median household income for renter households in San Leandro has been lower than other local areas over time
- Median rents in San Leandro have increased 82% over 2010 levels, outpacing CPI for the San Francisco-Oakland-Hayward, which increased 44% during the same time frame
- San Leandro has the highest % of people paying 35%+ of income as rent (43.9%)
- More than 1/2 are housing burdened
- San Leandro has experienced a decline in renter-occupied one-unit attached rentals and 2-apartment rentals



# Sources

# Sources

- U.S. Census Bureau
- U.S. Department of Housing and Urban Development
- California Office of Finance
- Zillow
- RentCafe
- Alameda County Superior Courts
- Centro Legal de La Raza