

TWILIGHT ZONING

The Uniquely Slow Housing Growth in New York City's Low-Density Districts

This policy brief is part of CHPC's **One-Size Housing Fits All** initiative, which investigates how well the range of housing options available meet the diverse and dynamic needs of New Yorkers' lives, and what we can do to better meet these needs.

WHY WE LOOKED AT THIS

In recent years, the rate at which New York City has added housing has not kept up with demand. Some areas have added far more housing than others. Planning needs to be responsive to the widely varying conditions of the city's neighborhoods, so we shouldn't expect low-density districts to grow at the same rate as high-density districts. But **how slow is too slow?**

Our recent poll of low-density districts suggested that the limited quantity and variety of housing in these areas is contributing to financial and social strains on renters and homeowners. This prompted CHPC to assess the extent to which new housing creation has been constrained in these districts.

WHAT WE ANALYZED

We analyzed data on the existing housing stock and recent changes to it, aiming to answer the following questions:

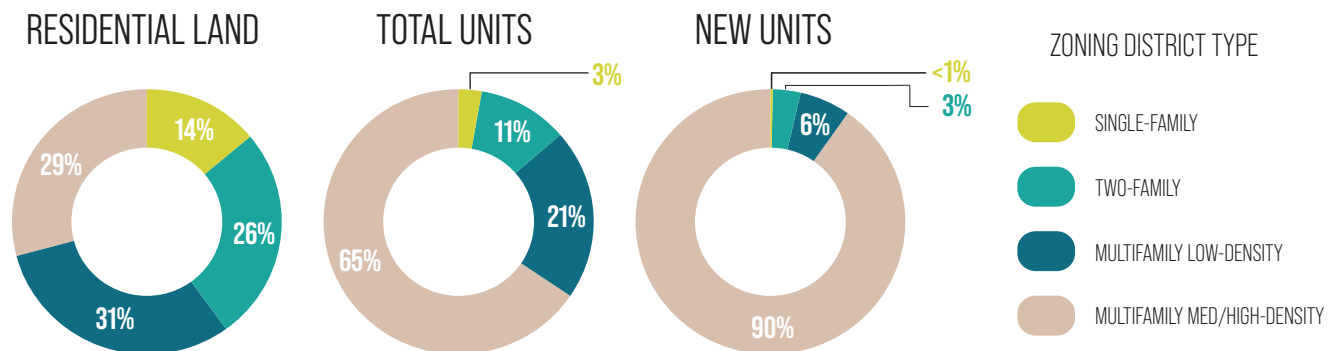
- Where are low-density districts mapped, and what types of housing does zoning allow in them?
- How much of the city's existing housing, and its recently built housing, is located within low-density districts? How does this compare to medium- and high-density districts?
- How does recent housing production in low-density districts compare to other parts of the city and region, and to other cities?

WHAT WE FOUND

NYC's low-density zoning districts **under-produce housing** by all available benchmarks.

They cover **71% of NYC's residential land** and contain **34% of its housing**, but account for **only 9% of housing added since 2010**.

They **have added less housing per capita** than any other part of the Metro area or other major U.S. city.



Source: PLUTO 23v3, NYC Department of City Planning Housing Database 22Q4

WHAT ARE LOW-DENSITY DISTRICTS?

New York City's low-density zoning districts, which include R1 through R5 districts, vary in the building forms and sizes they permit, but typically allow buildings of two to three stories. They can be categorized by the types of housing allowed: single-family, two-family, and multifamily districts.

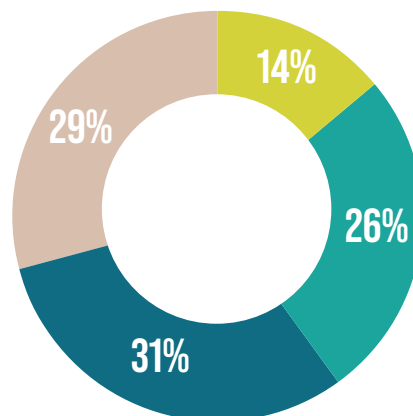
Two-family districts also allow single-family homes, and multifamily districts also allow single- and two-family homes. While a single-family home may be built on any existing residential lot, buildings of two or more units can be built only if they fall within limits on density and building dimensions and if they satisfy minimum lot sizes and parking requirements.

Low-density districts are mapped on 71% of the city's residentially zoned land. Multifamily districts are the most widely mapped of the low-density districts, comprising 31% of NYC's residentially zoned land. Two-family districts are close behind (26%), followed by single-family zones (14%).¹

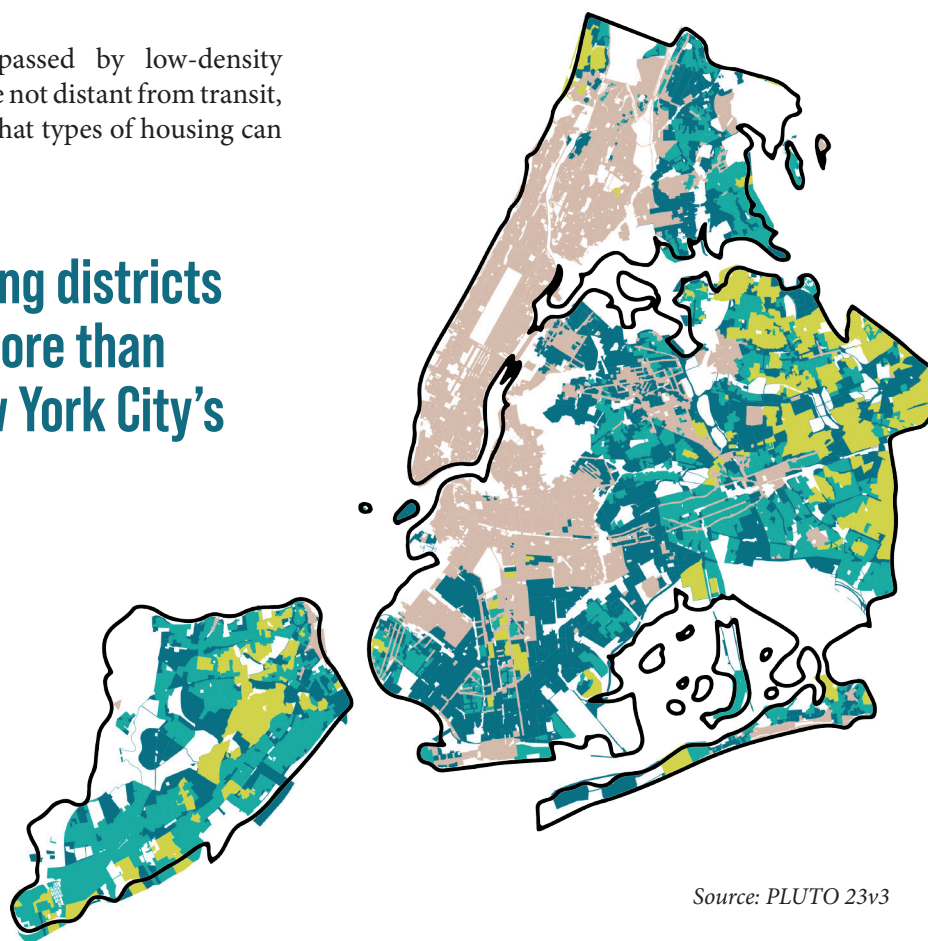
The large land area encompassed by low-density districts, including areas that are not distant from transit, highlights the significance of what types of housing can and cannot be built in them.

Low-density zoning districts are mapped on more than two thirds of New York City's residential land.

RESIDENTIAL LAND AREA

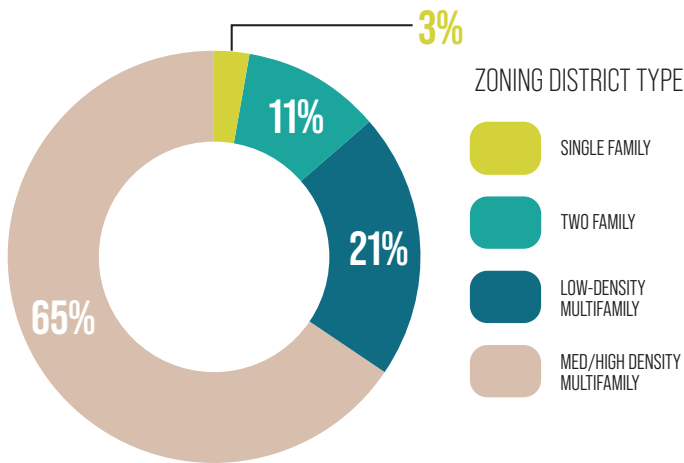


ZONING DISTRICT TYPE



Source: PLUTO 23v3

TOTAL UNITS

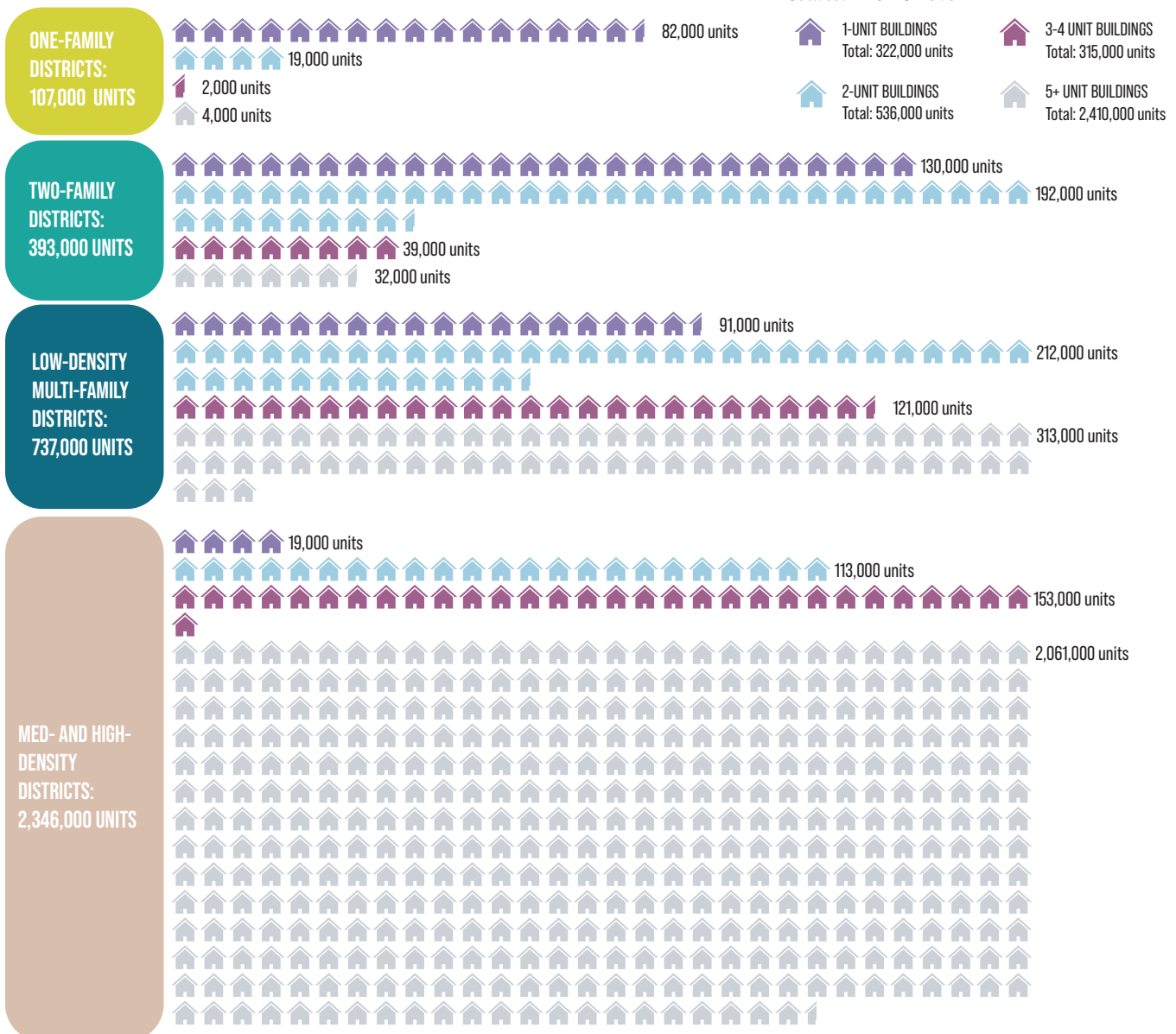


WHERE IS THE HOUSING TODAY?

Higher-density districts and districts that allow multifamily housing account for a larger share of existing housing. This in part reflects what higher-density zoning means: more housing per unit land area. But it also reflects the types of buildings allowed.

Low-density multifamily districts cover roughly twice the land that single-family districts do, but contain about seven times the amount of housing. Mid- to high-density multifamily districts contain nearly two thirds of the city's housing units, despite covering only 29% of NYC's residential land.²

Source: PLUTO 23v3



WHAT'S BEEN BUILT LATELY?

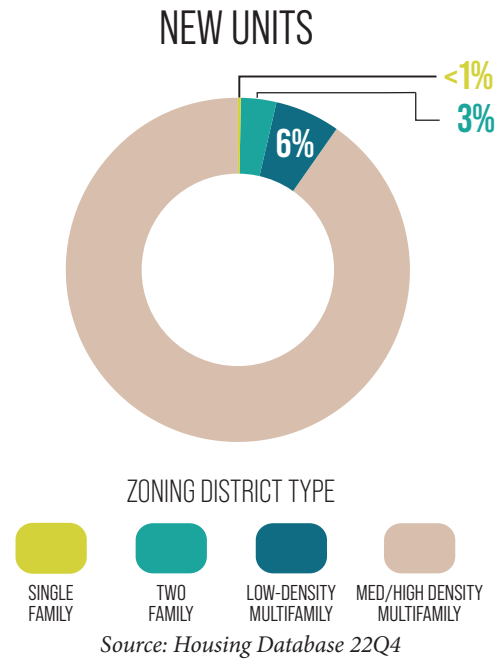
Most of the housing in New York City was built before current zoning regulations were in place, so the geographic distribution of housing often reflects bygone regulations. To understand how current regulations are shaping the availability of housing in neighborhoods, we need to look specifically at housing that has been built recently, under current zoning.

Data on housing construction since 2010 reveals stark differences in the rate at which housing has been added in single-family, two-family, and multifamily low-density zoning districts. Of the nearly 40,000 units started or completed in low-density neighborhoods; roughly 24,400 (61%) are in multifamily districts, compared with 13,700 (35%) in two-family districts, and just 1,600 (5%) in single-family districts.

Over the same time period, over 365,000 units were permitted or completed in mid- and high-density districts. **Low-density districts have produced just 9 percent of the city's new housing since 2010.**³

Even these figures understate the slow pace at which low-density districts have added housing overall. New housing additions are also offset by losses, such as older housing being replaced by newer housing, smaller buildings being replaced by larger ones, or the consolidation of units within a building turning a two-family home into a single-family home. In areas where most land is already occupied by homes, zoning makes it difficult to build more than a single-family home. So in areas where permitted housing types are limited, we might expect less net addition of housing.

Indeed, when we look at net change, rather than gross additions to housing, it paints a sobering picture for all low-density districts, but especially single-family districts. Low-density districts added only 20,300 units on net since 2010, and single-family districts, which cover 14 percent of the City's residential land, have added a net of just over 700 housing units since 2010. That's over 12,500 acres — 20 square miles, more residential land than in all of Manhattan! — of New York City on which 56 units per year of housing have been added.⁴



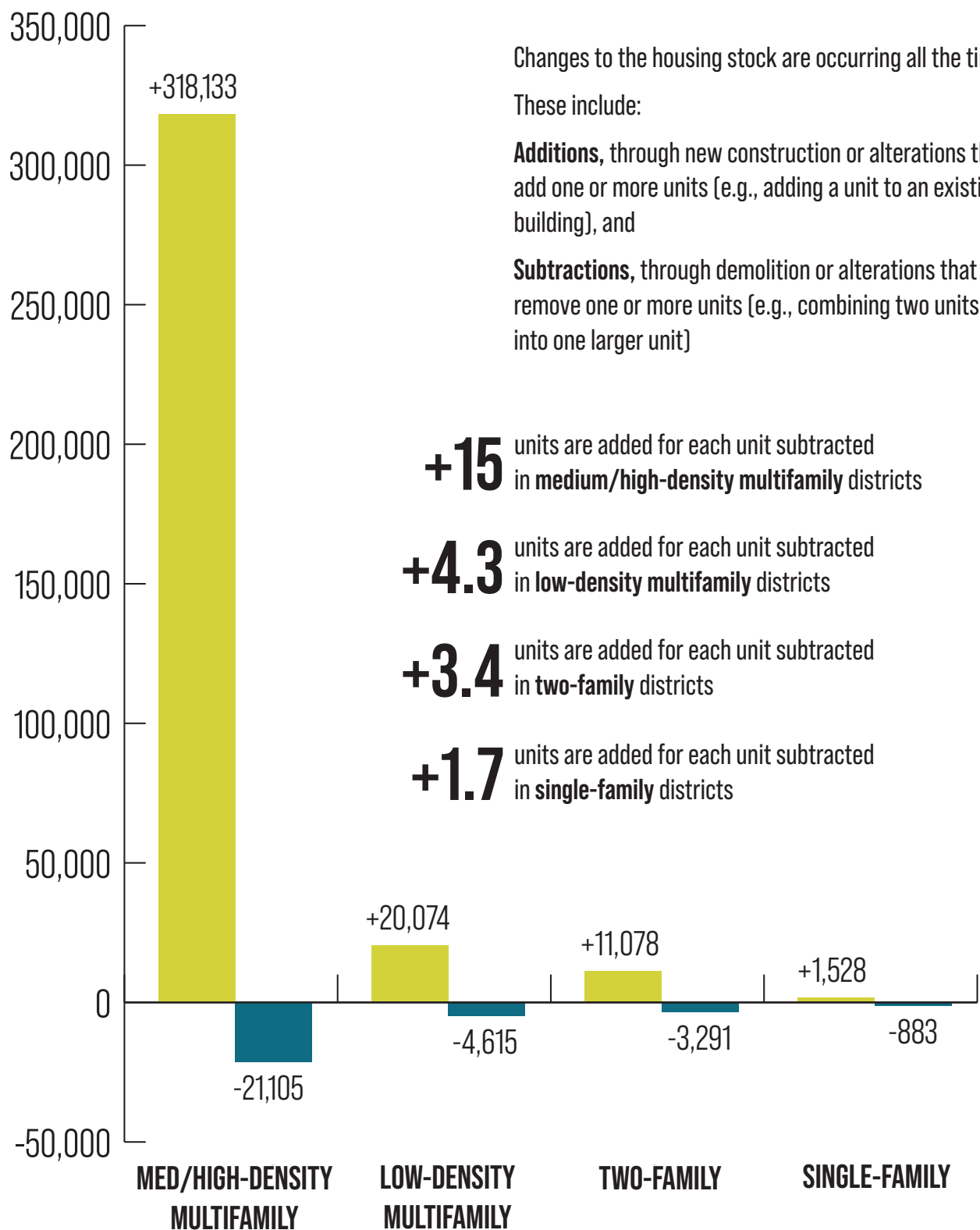
Single-family districts cover more residential land than Manhattan, but have added just 56 units a year since 2010.

To be clear, we shouldn't expect low-density districts to produce as much housing as higher-density districts. In general, higher-density districts permit more housing per acre because they have better access to transit, more supporting infrastructure, or other planning advantages.

However, the lack of additions to housing in low-density districts constrains housing choices for residents, with real effects on the lives of neighborhood residents. In our recent policy brief, *Home Truths: A Survey of Unmet Housing Need in Lower-Density Districts*, fully one third of respondents told us that they had family or friends who had recently moved out of the neighborhood because they couldn't find another home there, and 89% of residents who wanted to move reported having trouble finding another home in their neighborhood.⁵

The dramatically slower housing production of low-density districts brings us back to the question: how slow is too slow? In the absence of existing standards, we compared low-density districts to other geographies.

NET CHANGE IN HOUSING BY DISTRICT TYPE SINCE 2010



Source: NYCHDB 22Q4

HOW DOES THIS COMPARE TO ELSEWHERE?

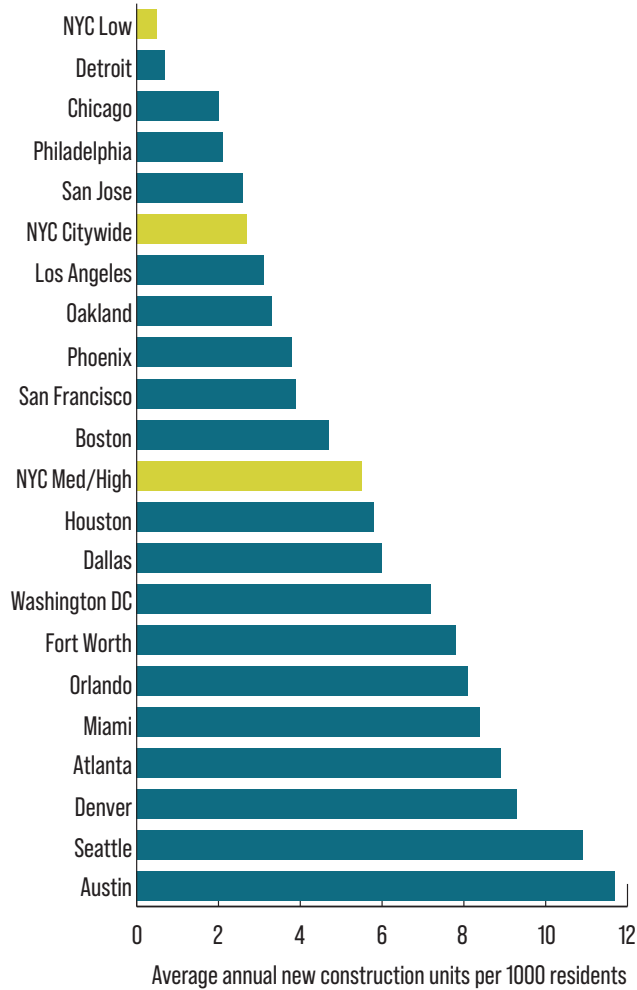
Per-capita housing production is a common measure of the adequacy of housing growth. It is typically higher in young or sprawling cities and lower in already built-up areas; the same amount of new housing will yield a higher growth rate in a sparsely populated area than in an urban one. But it provides a good measure of how well an area is providing for the natural growth of its population, and how much it's imposing on other areas the demands of population growth. Using this metric, it is striking how New York City's low-density districts compare to other cities and portions of the region.

From 2011 to 2020, NYC's mid- and high-density districts produced almost as much housing per capita

as Houston and Dallas, with a yearly average of 5.48 new housing units per 1000 residents created. In contrast, during the same period, NYC's **low-density districts produced just 0.45 new housing units per 1000 residents per year, which trailed Detroit for the lowest rate among cities examined** (see bottom left).⁶ Notably, Detroit's population decreased by 10% from 2010 to 2020, while Houston and Dallas had increases of 10% and 9%, respectively.⁷

How do NYC's low-density and higher-density districts compare to the per-capita growth in the rest of the metropolitan area? We compared these areas with portions of the New York metro region analyzed in the Department of City Planning's regional analysis. Mid- and high-density districts in NYC produced more housing per capita than any subregion. **And NYC's low-density districts produced less housing per capita than any other portion of the region, including housing-starved Long Island.**⁸

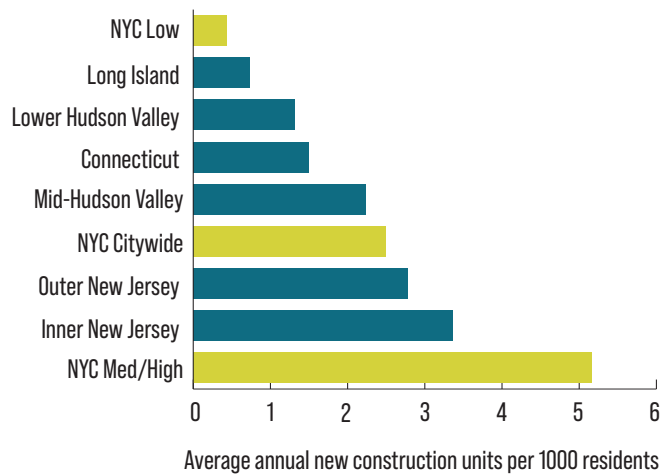
New Construction per Capita, NYC and Major US Cities, 2011-2020



Source: NYCHDB 22Q4, Housing Our Neighbors Report

New York City's low-density districts build less housing per capita than Detroit or Long Island.

New Construction per Capita, NYC Metro Region, 2010-2021



Source: NYCHDB 22Q4, NYC Metro Region Explorer

WHAT DOES THIS ALL MEAN?

New York City's low-density districts are producing new housing at an extremely low rate — not just lower than high-density areas; not just lower than other growing cities: new housing is doing less to support neighborhood population growth in low-density New York City than in troubled, shrinking cities like Detroit or in the New York suburbs.

It's unsurprising that residents of low-density neighborhoods report financial strain and anxiety about their ability to sustain the cost of living in their neighborhoods.⁹ The uniquely slow growth in the amount of housing available in these neighborhoods further fuels rising rents and housing prices, not only in these neighborhoods but throughout the city and region.

Through initiatives including Mayor Adams's City of Yes and Speaker Adams's Fair Housing Framework, New York City is increasingly seeking to describe what it means for every neighborhood to do its part to meet the profound need for more housing. It can be challenging to define what "doing one's part" looks like when underbuilt land, supporting infrastructure and facilities, and housing demand are distributed unevenly across the city. But a precise definition isn't necessary to understand that, as a whole, **New York City's low-density districts are not doing their part to meet the need for more housing**—they come in dead last in every analysis presented here of per-capita housing growth.

This isn't to say that all low-density areas must become high-density areas! Growth can take many forms, including many that already exist in low-density neighborhoods: accessory dwelling units, two-family homes, semi-detached or attached houses, or small apartment buildings. Growth can be achieved incrementally, with small additions spread over a large area, as well as through location-specific changes that allow more density in appropriate places. But **for New York City's neighborhoods to contribute equitably to housing growth, we will need to find more ways to add housing in low-density districts.**

WHAT'S NEXT?

Our next research brief will look at the many changes to zoning in low-density neighborhoods in recent decades, and how, individually and cumulatively, they have contributed to the uniquely slow growth of low-density areas by limiting the amount and variety of housing that can be lawfully added.

ENDNOTES

- 1 CHPC analysis of PLUTO 23v3
- 2 *Ibid.*
- 3 CHPC analysis of NYC Department of City Planning Housing Database 22Q4 (NYCHDB 22Q4)
- 4 CHPC analysis of PLUTO 23v3 and NYCHDB 22Q4
- 5 Slatkin, Howard et al. *Home Truths: A Survey of Unmet Housing Needs in Lower-Density Districts*. Citizens Housing Planning Council (CHPC, Dec 2023)
- 6 CHPC analysis of NYCHDB 22Q4; *Housing Our Neighbors*
- 7 U.S. Census (2010, 2020)
- 8 CHPC analysis of NYCHDB 22Q4; "Metro Region Explorer"
- 9 *Home Truths*.

ACKNOWLEDGMENTS

This report was researched and written by:

Howard Slatkin, Executive Director
Ray Xie, Policy Analyst

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42 Broadway, Suite 2010
New York, NY 10004