

Turner Center/MapCraft SB 9 model results, CA jurisdictions with greater than 5,000 single family parcels

| Name | Total single-family parcels | SB 9-eligible parcels | Parcels where SB9 would increase the number of market-feasible units (rounded to nearest 100) | Parcels where SB9 changes feasible outcome from no new units to 1+ new units (rounded to nearest 100) | Total market-feasible new units if SB9 were enacted (rounded to nearest 100) | | SB9 Units per Eligible Lot |
|-----------------|-----------------------------|-----------------------|---|---|--|-------|----------------------------|
| | | | | | | | |
| Adelanto | 7,600 | 7,600 | 100 | - | 100 | 100 | 0.02 |
| Alameda | 13,000 | 12,200 | 500 | - | 700 | 700 | 0.06 |
| Alhambra | 9,700 | 9,700 | 600 | 100 | 800 | 800 | 0.09 |
| Anaheim | 42,900 | 36,300 | 2,300 | 1,000 | 4,100 | 4,100 | 0.11 |
| Antioch | 27,100 | 26,300 | 1,600 | 500 | 2,600 | 2,600 | 0.10 |
| Apple Valley | 20,600 | 20,500 | 3,000 | 700 | 6,100 | 6,100 | 0.30 |
| Arcadia | 10,600 | 9,500 | 1,200 | 600 | 2,700 | 2,700 | 0.28 |
| Arroyo Grande | 5,200 | 5,200 | 500 | 200 | 900 | 900 | 0.18 |
| Atascadero | 7,600 | 6,100 | 800 | 200 | 1,800 | 1,800 | 0.29 |
| Atwater | 6,600 | 6,600 | 200 | - | 300 | 300 | 0.04 |
| Azusa | 5,800 | 5,100 | 300 | - | 400 | 400 | 0.08 |
| Bakersfield | 87,700 | 87,400 | 4,800 | 1,800 | 9,000 | 9,000 | 0.10 |
| Baldwin Park | 10,700 | 10,700 | 800 | - | 1,000 | 1,000 | 0.10 |
| Banning | 8,500 | 8,100 | 400 | - | 600 | 600 | 0.07 |
| Beaumont | 13,500 | 13,000 | 700 | 100 | 1,100 | 1,100 | 0.08 |
| Bellflower | 8,200 | 8,200 | 600 | - | 800 | 800 | 0.10 |
| Belmont | 6,400 | 5,500 | 300 | 100 | 600 | 600 | 0.11 |
| Benicia | 7,200 | 7,100 | 400 | 100 | 600 | 600 | 0.08 |
| Berkeley | 17,700 | 13,800 | 800 | 100 | 1,100 | 1,100 | 0.08 |
| Brea | 10,400 | 7,300 | 400 | 100 | 600 | 600 | 0.08 |
| Brentwood | 18,400 | 18,300 | 1,500 | 600 | 2,500 | 2,500 | 0.14 |
| Buena Park | 15,700 | 15,700 | 1,100 | 200 | 1,700 | 1,700 | 0.11 |
| Burbank | 18,300 | 15,500 | 800 | 300 | 1,300 | 1,300 | 0.09 |
| Burlingame | 5,500 | 5,200 | 200 | 100 | 400 | 400 | 0.08 |
| Calexico | 6,000 | 6,000 | 100 | - | 100 | 100 | 0.02 |
| California City | 5,700 | 5,700 | 300 | 100 | 600 | 600 | 0.11 |

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|----------------|-----------------------------|-----------------------|---|---|---|----------------------------|
| | | | | Parcels where SB9 changes feasible outcome from no new units to 1+ new units (rounded to nearest 100) | feasible units (rounded to nearest 100) | |
| Camarillo | 18,700 | 17,500 | 1,100 | 100 | 1,600 | 0.09 |
| Campbell | 7,600 | 7,600 | 400 | 200 | 700 | 0.09 |
| Carlsbad | 25,200 | 22,000 | 1,500 | 600 | 2,900 | 0.13 |
| Carson | 17,400 | 17,400 | 700 | - | 900 | 0.05 |
| Cathedral City | 11,000 | 11,000 | 800 | 800 | 1,800 | 0.17 |
| Ceres | 10,200 | 10,100 | 400 | - | 600 | 0.06 |
| Cerritos | 13,600 | 13,600 | 1,100 | 400 | 1,800 | 0.13 |
| Chico | 20,000 | 19,800 | 800 | - | 1,500 | 0.07 |
| Chino | 16,300 | 16,200 | 1,000 | 100 | 1,500 | 0.09 |
| Chino Hills | 19,900 | 19,200 | 1,300 | 200 | 2,100 | 0.11 |
| Chula Vista | 40,400 | 38,800 | 2,100 | 200 | 3,100 | 0.08 |
| Citrus Heights | 21,000 | 20,900 | 1,700 | 300 | 2,600 | 0.12 |
| Claremont | 8,500 | 7,500 | 600 | 200 | 1,000 | 0.14 |
| Clovis | 30,000 | 29,900 | 1,200 | 200 | 2,000 | 0.07 |
| Coachella | 6,900 | 6,900 | 2,100 | 2,100 | 3,600 | 0.52 |
| Colton | 9,000 | 8,000 | 200 | - | 300 | 0.04 |
| Compton | 14,600 | 14,600 | 1,000 | - | 1,200 | 0.09 |
| Concord | 26,300 | 26,200 | 1,800 | 500 | 3,000 | 0.11 |
| Corona | 29,000 | 26,200 | 1,700 | 400 | 2,800 | 0.11 |
| Costa Mesa | 15,300 | 15,300 | 700 | 300 | 1,200 | 0.08 |
| Covina | 9,200 | 9,000 | 600 | 100 | 900 | 0.10 |
| Culver City | 5,500 | 5,400 | 300 | - | 400 | 0.07 |
| Cupertino | 11,700 | 11,600 | 700 | 400 | 1,300 | 0.12 |
| Cypress | 11,400 | 11,400 | 600 | - | 900 | 0.08 |
| Daly City | 18,000 | 18,000 | 800 | - | 1,000 | 0.05 |
| Dana Point | 8,200 | 7,700 | 400 | 200 | 800 | 0.11 |
| Danville | 11,900 | 11,500 | 1,500 | 800 | 3,400 | 0.30 |
| Davis | 12,400 | 12,400 | 900 | 100 | 1,200 | 0.10 |

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| | | | | | | | |
| Delano | 7,500 | 7,500 | 200 | - | 300 | 300 | 0.04 |
| Desert Hot Springs | 7,700 | 7,700 | 200 | - | 300 | 300 | 0.04 |
| Diamond Bar | 12,700 | 11,400 | 900 | 500 | 1,800 | 1,800 | 0.16 |
| Dixon | 5,100 | 5,100 | 300 | - | 400 | 400 | 0.08 |
| Downey | 18,300 | 18,300 | 1,100 | 200 | 1,600 | 1,600 | 0.09 |
| Dublin | 12,800 | 12,700 | 800 | 200 | 1,100 | 1,100 | 0.09 |
| Eastvale | 15,300 | 15,100 | 1,200 | 300 | 1,800 | 1,800 | 0.12 |
| El Cajon | 12,700 | 11,400 | 600 | 100 | 1,100 | 1,100 | 0.09 |
| El Centro | 7,500 | 7,500 | 200 | - | 400 | 400 | 0.06 |
| El Monte | 10,600 | 10,600 | 800 | 100 | 1,100 | 1,100 | 0.10 |
| Elk Grove | 47,800 | 47,400 | 3,200 | 700 | 5,100 | 5,100 | 0.11 |
| Encinitas | 14,500 | 12,900 | 1,200 | 500 | 2,500 | 2,500 | 0.19 |
| Escondido | 23,500 | 19,300 | 1,400 | 300 | 2,600 | 2,600 | 0.14 |
| Eureka | 6,300 | 6,200 | 300 | - | 500 | 500 | 0.08 |
| Fairfield | 26,700 | 26,500 | 1,500 | 200 | 2,100 | 2,100 | 0.08 |
| Folsom | 19,800 | 19,400 | 1,200 | 300 | 2,100 | 2,100 | 0.11 |
| Fontana | 41,500 | 39,000 | 4,100 | 1,400 | 6,800 | 6,800 | 0.17 |
| Foster City | 6,000 | 6,000 | 300 | 100 | 500 | 500 | 0.08 |
| Fountain Valley | 14,600 | 14,600 | 600 | 100 | 800 | 800 | 0.06 |
| Fremont | 46,300 | 46,200 | 2,200 | 900 | 4,000 | 4,000 | 0.09 |
| Fresno | 104,200 | 103,900 | 2,200 | 100 | 3,800 | 3,800 | 0.04 |
| Fullerton | 24,800 | 23,700 | 1,200 | 500 | 2,500 | 2,500 | 0.11 |
| Galt | 6,600 | 6,600 | 400 | - | 500 | 500 | 0.08 |
| Garden Grove | 27,100 | 27,100 | 900 | 200 | 1,400 | 1,400 | 0.05 |
| Gardena | 8,000 | 8,000 | 300 | - | 300 | 300 | 0.04 |
| Gilroy | 11,700 | 11,600 | 700 | 100 | 1,100 | 1,100 | 0.09 |
| Glendale | 23,000 | 12,400 | 700 | 100 | 1,000 | 1,000 | 0.08 |
| Glendora | 12,500 | 11,300 | 900 | 200 | 1,500 | 1,500 | 0.13 |

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| | | | | | | | |
| Goleta | 6,400 | 6,300 | 400 | 100 | 500 | | 0.08 |
| Hanford | 14,300 | 14,200 | 400 | 100 | 700 | | 0.05 |
| Hawthorne | 6,600 | 6,600 | 400 | - | 500 | | 0.08 |
| Hayward | 24,900 | 24,800 | 1,400 | 300 | 2,300 | | 0.09 |
| Hemet | 20,100 | 19,200 | 800 | 200 | 1,400 | | 0.07 |
| Hercules | 5,400 | 5,400 | 400 | 100 | 600 | | 0.11 |
| Hesperia | 24,400 | 24,400 | 2,900 | 300 | 5,800 | | 0.24 |
| Highland | 11,700 | 9,000 | 400 | 300 | 900 | | 0.10 |
| Hollister | 8,300 | 8,200 | 900 | 500 | 1,700 | | 0.21 |
| Huntington Beach | 42,300 | 38,400 | 1,600 | 500 | 2,600 | | 0.07 |
| Imperial | 5,100 | 5,000 | 100 | - | 100 | | 0.03 |
| Indio | 20,900 | 20,900 | 800 | 100 | 1,200 | | 0.06 |
| Inglewood | 10,900 | 10,900 | 700 | 200 | 1,100 | | 0.10 |
| Irvine | 39,700 | 37,800 | 2,200 | 300 | 3,300 | | 0.09 |
| Jurupa Valley | 20,400 | 18,900 | 2,500 | 700 | 4,800 | | 0.26 |
| La Habra | 10,200 | 9,700 | 300 | 100 | 600 | | 0.06 |
| La Mesa | 10,600 | 10,600 | 700 | 200 | 1,200 | | 0.11 |
| La Mirada | 11,800 | 11,600 | 600 | 100 | 800 | | 0.07 |
| La Puente | 6,300 | 6,300 | 300 | - | 400 | | 0.07 |
| La Quinta | 16,100 | 16,100 | 700 | 200 | 1,300 | | 0.08 |
| La Verne | 7,500 | 5,300 | 200 | 100 | 400 | | 0.08 |
| Laguna Hills | 6,400 | 6,400 | 500 | 200 | 1,100 | | 0.17 |
| Laguna Niguel | 15,500 | 13,000 | 800 | 200 | 1,400 | | 0.11 |
| Lake Elsinore | 15,100 | 8,000 | 400 | - | 700 | | 0.09 |
| Lake Forest | 16,800 | 13,700 | 600 | 100 | 900 | | 0.06 |
| Lakewood | 22,100 | 22,100 | 1,000 | - | 1,300 | | 0.06 |
| Lancaster | 37,000 | 37,000 | 1,800 | 200 | 2,800 | | 0.08 |
| Lathrop | 6,100 | 6,100 | 400 | - | 600 | | 0.09 |

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| | | | | | | |
| Lemon Grove | 5,200 | 5,200 | 400 | 100 | 600 | 0.11 |
| Lemoore | 6,100 | 6,000 | 200 | - | 400 | 0.06 |
| Lincoln | 17,600 | 17,300 | 1,200 | 100 | 1,700 | 0.10 |
| Livermore | 23,500 | 23,400 | 1,300 | 500 | 2,400 | 0.10 |
| Lodi | 14,100 | 14,100 | 500 | 100 | 800 | 0.05 |
| Lompoc | 8,700 | 8,500 | 500 | 200 | 800 | 0.09 |
| Long Beach | 59,600 | 58,300 | 2,800 | 200 | 3,600 | 0.06 |
| Los Altos | 9,100 | 9,100 | 1,500 | 1,200 | 3,500 | 0.38 |
| Los Angeles | 447,700 | 355,200 | 23,000 | 6,000 | 37,600 | 0.11 |
| Los Banos | 10,600 | 10,600 | 100 | - | 200 | 0.02 |
| Los Gatos | 7,300 | 5,200 | 500 | 200 | 900 | 0.18 |
| Lynwood | 7,100 | 7,100 | 500 | - | 600 | 0.08 |
| Madera | 11,900 | 11,900 | 1,400 | 1,200 | 2,700 | 0.23 |
| Manhattan Beach | 9,800 | 9,800 | 900 | 300 | 1,400 | 0.14 |
| Manteca | 19,800 | 19,600 | 1,000 | - | 1,400 | 0.07 |
| Martinez | 8,900 | 8,000 | 800 | 300 | 1,400 | 0.17 |
| Menifee | 30,000 | 25,700 | 2,100 | 800 | 3,600 | 0.14 |
| Menlo Park | 7,000 | 6,300 | 400 | 200 | 900 | 0.15 |
| Merced | 17,200 | 17,100 | 400 | 100 | 600 | 0.04 |
| Milbrae | 5,200 | 5,000 | 300 | 100 | 600 | 0.11 |
| Milpitas | 12,500 | 12,500 | 700 | 100 | 900 | 0.08 |
| Mission Viejo | 26,300 | 23,600 | 1,300 | 200 | 1,900 | 0.08 |
| Modesto | 50,400 | 50,400 | 2,400 | 800 | 3,900 | 0.08 |
| Montclair | 5,500 | 5,500 | 600 | 300 | 1,000 | 0.18 |
| Montebello | 8,500 | 8,500 | 500 | - | 700 | 0.08 |
| Monterey Park | 9,900 | 9,900 | 500 | 100 | 900 | 0.09 |
| Moreno Valley | 42,800 | 41,200 | 2,700 | 200 | 4,000 | 0.10 |
| Morgan Hill | 9,800 | 8,300 | 700 | 300 | 1,400 | 0.17 |

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| | | | | | | | |
| Mountain View | 9,100 | 9,100 | 700 | 300 | 1,100 | 0.12 | |
| Murrieta | 27,100 | 20,000 | 1,200 | 300 | 1,900 | 0.10 | |
| Napa | 17,100 | 16,900 | 1,500 | 500 | 2,700 | 0.16 | |
| National City | 5,300 | 5,300 | 200 | - | 400 | 0.07 | |
| Newark | 10,400 | 10,300 | 500 | 100 | 700 | 0.07 | |
| Newport Beach | 20,100 | 13,900 | 800 | 300 | 1,400 | 0.10 | |
| Norco | 6,600 | 6,100 | 1,200 | 400 | 2,600 | 0.42 | |
| Norwalk | 19,500 | 19,500 | 700 | - | 900 | 0.04 | |
| Novato | 11,500 | 11,400 | 900 | 400 | 1,900 | 0.17 | |
| Oakdale | 6,000 | 6,000 | 300 | - | 500 | 0.08 | |
| Oakland | 66,700 | 51,200 | 2,800 | 100 | 3,700 | 0.07 | |
| Oakley | 11,500 | 10,400 | 1,000 | 300 | 1,600 | 0.16 | |
| Oceanside | 39,700 | 37,700 | 2,400 | 600 | 4,000 | 0.11 | |
| Ontario | 27,600 | 27,500 | 1,900 | 700 | 3,300 | 0.12 | |
| Orange | 25,200 | 21,000 | 1,200 | 700 | 2,400 | 0.12 | |
| Oxnard | 30,300 | 30,300 | 1,200 | - | 1,600 | 0.05 | |
| Pacifica | 10,500 | 10,500 | 800 | 200 | 1,300 | 0.12 | |
| Palm Desert | 14,100 | 14,100 | 1,000 | 400 | 1,900 | 0.14 | |
| Palm Springs | 12,000 | 11,500 | 900 | 300 | 1,700 | 0.15 | |
| Palmdale | 37,300 | 35,100 | 1,900 | 300 | 3,100 | 0.09 | |
| Palo Alto | 14,800 | 14,200 | 1,000 | 400 | 1,700 | 0.12 | |
| Pasadena | 20,400 | 16,000 | 1,200 | 300 | 2,000 | 0.13 | |
| Paso Robles | 8,500 | 8,500 | 900 | 200 | 1,600 | 0.19 | |
| Patterson | 5,600 | 5,600 | 100 | - | 200 | 0.03 | |
| Perris | 15,600 | 15,400 | 900 | - | 1,300 | 0.09 | |
| Petaluma | 15,700 | 15,600 | 800 | 200 | 1,300 | 0.08 | |
| Pico Rivera | 12,300 | 12,300 | 1,000 | - | 1,300 | 0.10 | |
| Pittsburg | 15,500 | 15,300 | 600 | 100 | 900 | 0.06 | |

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|------------------|-----------------------------|-----------------------|--|---|---|---------------|
| | | | feasible units (rounded to nearest 100) | feasible units if SB9 | | |
| Placentia | 10,700 | 10,700 | 500 | 100 | 700 | 0.07 |
| Pleasant Hill | 8,100 | 8,100 | 700 | 300 | 1,200 | 0.15 |
| Pleasanton | 18,400 | 17,500 | 1,300 | 500 | 2,400 | 0.14 |
| Pomona | 22,900 | 22,300 | 1,400 | 100 | 2,000 | 0.09 |
| Porterville | 12,300 | 12,300 | 600 | 300 | 1,200 | 0.10 |
| Poway | 12,100 | 7,800 | 900 | 400 | 2,200 | 0.28 |
| Rancho Cordova | 16,800 | 16,300 | 1,300 | 200 | 1,800 | 0.11 |
| Rancho Cucamonga | 36,100 | 31,200 | 1,900 | 200 | 3,300 | 0.11 |
| Rancho Mirage | 6,100 | 6,100 | 600 | 200 | 1,200 | 0.20 |
| + | 9,200 | 5,400 | 300 | - | 400 | 0.08 |
| Redding | 25,200 | 18,600 | 1,300 | 400 | 2,500 | 0.13 |
| Redlands | 17,300 | 15,100 | 1,100 | 200 | 2,000 | 0.13 |
| Redondo Beach | 7,700 | 7,700 | 400 | - | 400 | 0.06 |
| Redwood City | 12,000 | 10,900 | 700 | 200 | 1,100 | 0.10 |
| Rialto | 18,800 | 17,700 | 1,400 | 100 | 1,900 | 0.11 |
| Richmond | 20,300 | 19,400 | 1,300 | 100 | 1,700 | 0.09 |
| Ridgecrest | 8,100 | 8,100 | 200 | - | 300 | 0.04 |
| Riverbank | 6,200 | 6,200 | 200 | - | 400 | 0.06 |
| Riverside | 60,400 | 58,000 | 4,900 | 900 | 8,000 | 0.14 |
| Rocklin | 17,900 | 17,600 | 1,000 | 100 | 1,600 | 0.09 |
| Rohnert Park | 9,200 | 9,200 | 400 | - | 500 | 0.06 |
| Rosemead | 6,900 | 6,900 | 500 | - | 600 | 0.09 |
| Roseville | 39,600 | 39,300 | 2,000 | 200 | 2,800 | 0.07 |
| Sacramento | 116,300 | 116,000 | 6,700 | 800 | 9,600 | 0.08 |
| Salinas | 21,200 | 21,200 | 1,100 | 200 | 1,600 | 0.08 |
| San Bernardino | 34,500 | 28,300 | 1,500 | 100 | 2,200 | 0.08 |
| San Bruno | 8,700 | 8,400 | 400 | 100 | 500 | 0.06 |
| San Carlos | 8,100 | 6,400 | 300 | 100 | 500 | 0.09 |

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| | | | | | | | |
| San Clemente | 16,200 | 12,800 | 900 | 300 | 1,700 | 0.13 | |
| San Diego | 203,600 | 133,200 | 7,200 | 2,700 | 12,900 | 0.10 | |
| San Dimas | 8,600 | 7,100 | 800 | 300 | 1,300 | 0.18 | |
| San Francisco | 94,600 | 93,700 | 6,400 | 500 | 8,400 | 0.09 | |
| San Gabriel | 5,800 | 5,800 | 400 | 100 | 700 | 0.11 | |
| San Jacinto | 11,100 | 10,600 | 300 | - | 500 | 0.05 | |
| San Jose | 168,600 | 168,100 | 10,300 | 2,500 | 15,900 | 0.09 | |
| San Juan Capistrano | 8,100 | 7,900 | 600 | 300 | 1,500 | 0.19 | |
| San Leandro | 18,600 | 17,400 | 1,200 | 200 | 1,700 | 0.10 | |
| San Luis Obispo | 8,500 | 8,400 | 500 | 100 | 800 | 0.09 | |
| San Marcos | 14,600 | 10,000 | 600 | 100 | 1,100 | 0.11 | |
| San Mateo | 17,100 | 15,400 | 700 | 300 | 1,200 | 0.08 | |
| San Rafael | 10,100 | 9,300 | 800 | 400 | 1,700 | 0.18 | |
| San Ramon | 17,200 | 17,000 | 900 | 300 | 1,600 | 0.10 | |
| Sanger | 5,500 | 5,500 | 200 | - | 300 | 0.05 | |
| Santa Ana | 31,000 | 31,000 | 1,000 | 200 | 1,500 | 0.05 | |
| Santa Barbara | 14,900 | 11,500 | 900 | 300 | 1,700 | 0.15 | |
| Santa Clara | 18,100 | 18,000 | 700 | 300 | 1,100 | 0.06 | |
| Santa Clarita | 38,500 | 23,900 | 1,600 | 400 | 2,500 | 0.11 | |
| Santa Cruz | 9,800 | 9,600 | 700 | 200 | 1,200 | 0.12 | |
| Santa Maria | 19,500 | 19,500 | 1,000 | - | 1,300 | 0.07 | |
| Santa Monica | 7,200 | 7,100 | 200 | 200 | 500 | 0.07 | |
| Santa Rosa | 40,900 | 39,700 | 2,800 | 800 | 5,000 | 0.13 | |
| Santee | 10,700 | 7,800 | 400 | 100 | 700 | 0.08 | |
| Saratoga | 9,600 | 7,900 | 1,100 | 700 | 2,600 | 0.33 | |
| Seaside | 5,200 | 5,200 | 300 | - | 400 | 0.07 | |
| Simi Valley | 32,000 | 22,600 | 1,500 | 200 | 2,200 | 0.10 | |
| South Gate | 10,400 | 10,400 | 700 | - | 900 | 0.09 | |

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| | | | | | | |
| South San Francisco | 12,300 | 12,200 | 700 | - | 900 | 0.07 |
| Stockton | 63,100 | 58,100 | 2,300 | 400 | 3,600 | 0.06 |
| Suisun City | 8,000 | 8,000 | 300 | - | 400 | 0.05 |
| Sunnyvale | 21,000 | 21,000 | 900 | 400 | 1,400 | 0.07 |
| Temecula | 27,000 | 25,300 | 2,300 | 500 | 3,700 | 0.15 |
| Temple City | 7,200 | 7,200 | 600 | 200 | 1,000 | 0.14 |
| Thousand Oaks | 32,100 | 17,300 | 1,300 | 500 | 2,400 | 0.14 |
| Torrance | 27,900 | 27,900 | 1,600 | 200 | 2,200 | 0.08 |
| Tracy | 21,800 | 21,700 | 2,300 | 1,300 | 4,200 | 0.19 |
| Tulare | 15,600 | 15,600 | 700 | 400 | 1,400 | 0.09 |
| Turlock | 15,900 | 15,900 | 800 | 200 | 1,300 | 0.08 |
| Tustin | 10,500 | 9,800 | 500 | 100 | 700 | 0.08 |
| Twentynine Palms | 5,100 | 5,100 | 400 | 100 | 800 | 0.15 |
| Unincorporated Alameda | 33,200 | 26,900 | 2,000 | 600 | 3,400 | 0.13 |
| Unincorporated Butte | 29,100 | 7,300 | 600 | - | 1,100 | 0.15 |
| Unincorporated Contra Costa | 45,000 | 32,600 | 3,400 | 1,300 | 7,000 | 0.22 |
| Unincorporated El Dorado | 50,200 | 18,400 | 2,200 | 600 | 4,400 | 0.24 |
| Unincorporated Fresno | 36,700 | 19,700 | 1,600 | 200 | 3,200 | 0.16 |
| Unincorporated Humboldt | 21,500 | 9,500 | 600 | - | 1,200 | 0.13 |
| Unincorporated Kern | 89,700 | 48,300 | 2,100 | 300 | 3,900 | 0.08 |
| Unincorporated Los Angeles | 184,600 | 143,900 | 12,400 | 3,600 | 20,900 | 0.15 |
| Unincorporated Madera | 20,500 | 7,200 | 900 | - | 1,600 | 0.23 |
| Unincorporated Marin | 19,500 | 9,300 | 900 | 600 | 2,300 | 0.25 |
| Unincorporated Merced | 15,400 | 11,900 | 700 | - | 1,200 | 0.10 |
| Unincorporated Monterey | 25,200 | 7,400 | 900 | 400 | 1,900 | 0.25 |
| Unincorporated Orange | 35,400 | 20,700 | 1,800 | 1,000 | 4,000 | 0.19 |
| Unincorporated Placer | 43,800 | 14,700 | 2,200 | 900 | 5,400 | 0.37 |
| Unincorporated Riverside | 102,600 | 60,600 | 4,400 | 600 | 7,600 | 0.13 |

| Name | Total single-family parcels | SB 9-eligible parcels | Parcels where SB9 would increase the number of market-feasible units (rounded to nearest 100) | Total market-feasible new units if SB9 were enacted (rounded to nearest 100) | | | SB9 Units per Eligible Lot |
|--------------------------------|-----------------------------|-----------------------|---|---|---------------------------|--|----------------------------|
| | | | | Parcels where SB9 changes feasible outcome from no new units to 1+ new units (rounded to nearest 100) | feasible new units if SB9 | | |
| Unincorporated Sacramento | 141,100 | 133,900 | 10,800 | 2,700 | 18,900 | | 0.14 |
| Unincorporated San Bernardino | 111,300 | 35,700 | 3,300 | 600 | 5,900 | | 0.17 |
| Unincorporated San Diego | 111,300 | 54,000 | 7,200 | 2,400 | 15,800 | | 0.29 |
| Unincorporated San Joaquin | 33,200 | 21,400 | 1,700 | 300 | 3,100 | | 0.15 |
| Unincorporated San Luis Obispo | 34,600 | 15,200 | 1,400 | 500 | 2,800 | | 0.19 |
| Unincorporated San Mateo | 16,600 | 10,400 | 800 | 300 | 1,500 | | 0.14 |
| Unincorporated Santa Barbara | 34,200 | 22,000 | 2,300 | 800 | 4,700 | | 0.21 |
| Unincorporated Santa Clara | 16,400 | 11,500 | 1,300 | 800 | 3,300 | | 0.29 |
| Unincorporated Santa Cruz | 34,700 | 23,700 | 2,500 | 1,000 | 5,400 | | 0.23 |
| Unincorporated Sonoma | 38,800 | 19,100 | 2,900 | 1,200 | 6,700 | | 0.35 |
| Unincorporated Stanislaus | 22,600 | 15,600 | 1,000 | 100 | 1,700 | | 0.11 |
| Unincorporated Tulare | 29,500 | 12,300 | 800 | 100 | 1,500 | | 0.12 |
| Unincorporated Ventura | 24,100 | 11,000 | 1,200 | 400 | 2,600 | | 0.23 |
| Unincorporated Yuba | 13,300 | 9,700 | 1,900 | 1,900 | 4,000 | | 0.41 |
| Union City | 13,100 | 13,100 | 600 | 100 | 800 | | 0.06 |
| Upland | 15,100 | 14,700 | 1,900 | 900 | 3,500 | | 0.24 |
| Vacaville | 25,300 | 25,100 | 1,700 | 300 | 2,400 | | 0.10 |
| Vallejo | 29,400 | 28,700 | 1,200 | 200 | 1,900 | | 0.06 |
| Ventura | 23,900 | 20,600 | 1,400 | 200 | 2,000 | | 0.10 |
| Victorville | 29,900 | 29,900 | 1,400 | 300 | 2,700 | | 0.09 |
| Visalia | 33,900 | 33,700 | 1,300 | 300 | 2,300 | | 0.07 |
| Vista | 15,400 | 13,700 | 1,300 | 400 | 2,600 | | 0.19 |
| Walnut | 8,800 | 8,400 | 700 | 300 | 1,500 | | 0.18 |
| Walnut Creek | 11,200 | 11,000 | 1,100 | 500 | 2,300 | | 0.21 |
| Watsonville | 5,600 | 5,600 | 300 | - | 500 | | 0.08 |
| West Covina | 21,500 | 20,500 | 1,400 | 300 | 2,300 | | 0.11 |
| West Sacramento | 12,300 | 12,300 | 700 | 100 | 1,100 | | 0.09 |
| Westminster | 15,900 | 15,800 | 1,100 | 500 | 1,900 | | 0.12 |

| Name | Total single-family parcels | SB 9-eligible parcels | Total market- | | SB9 Units per Eligible Lot |
|--------------|-----------------------------|-----------------------|---|---|----------------------------|
| | | | Parcels where SB9 would increase the number of market-feasible units (rounded to nearest 100) | Parcels where SB9 changes feasible outcome from no new units to 1+ new units (rounded to nearest 100) | |
| Whittier | 17,000 | 14,900 | 900 | 200 | 0.11 |
| Wildomar | 10,100 | 5,800 | 800 | 400 | 0.27 |
| Windsor | 7,600 | 7,500 | 700 | 200 | 0.16 |
| Woodland | 13,000 | 12,900 | 1,100 | 300 | 0.13 |
| Yorba Linda | 19,100 | 15,500 | 1,100 | 500 | 0.17 |
| Yuba Linda | 15,000 | 14,900 | 1,700 | 800 | 0.20 |
| Yucaipa | 12,000 | 11,000 | 1,100 | 200 | 0.19 |
| Yucca Valley | 7,500 | 6,400 | 1,000 | 400 | 0.33 |

Methodology

It is unrealistic to assume that under SB 9, every single-family lot would be split, or that every existing single-family home would be demolished and replaced with four new units. For example, some lots may be too small, have other existing structures or ADUs, have a history of being rented, or other physical conditions that prevent changes. Some owners may have no interest in developing their property. And finally, even if a property owner is interested in pursuing new development on their land, trying to recoup this investment with market-rate rental or sales will prove financially infeasible in many instances. To develop a better estimate of the potential impact of SB 9 on new supply, we conducted an analysis of how many new homes would be both physically eligible and financially feasible as a result of SB 9, as well as what types of development would be most likely, taking into account on-the-ground market dynamics.

We partnered with MapCraft Labs, which developed a financial feasibility model to assess market-feasible housing capacity on existing parcels with detached single-family homes. The base layer for the analysis is a parcel dataset from UrbanFootprint which includes all counties in California with populations greater than 45,000 people, and covers homes built prior to 2020.⁷ This dataset includes roughly 7.5 million single-family parcels across the state. We used MapCraft's Lab analysis tool to determine what types and scales of housing development would be feasible with an approach that considers construction costs, market demand, financing, land use policies, and individual parcel characteristics.

To inform our model, several assumptions were made about market conditions and trends. For example, all properties with single-family detached land uses were assumed to conform to zoning and currently have exactly one existing unit (e.g., no ADUs). In combination with tax assessor data, we estimated the value of each existing single-family property on those parcels. MapCraft calculates standard development "pencil out" models to compute snapshots of market feasibility on every relevant parcel, both under current policies and as proposed in SB 9. These models are based on the financial evaluations conducted by developers to assess an investment's viability early in the development process by balancing the cost of developing the site with expected rental or sale income.⁸ MapCraft's models of small-scale development look at financial feasibility from the perspectives of owner-occupants, owner-occupant landlords, small-scale investors, and commercial investors, with market-feasible unit potential based on a probabilistic blend of all possible development options. Financial expectations of investors and lending terms are based on conversations with industry professionals and are updated by MapCraft regularly.

MapCraft's calculations incorporate data and assumptions about current rents, sales prices, construction costs, and investors' expected return on investment rates, and are validated by ECONorthwest, a West Coast economics consultancy. MapCraft's market demand information relies on multiple sources, including CoStar, Zillow, tax assessors, U.S. Census, and transaction records. MapCraft's construction cost information is based on interviews and RS Means. Finally, the modeling relies on

assumptions about parking requirements based on previous Turner Center research, typical unit sizes, and other factors that inform development.⁹

The provisions of SB 9 would allow for a variety of development options. For this analysis we examined the most likely development scenarios as shown in Appendix B. Our business-as-usual scenario evaluates development feasibility for housing supply changes currently permissible under single-family zoning, while the alternative policy scenario considers the additional set of development options allowed under SB 9. For example, under the business-as-usual scenario, a homeowner may decide to build an ADU but would only be able to split the parcel into two lots, each with two homes, under the alternative policy scenario allowed under SB 9.

Our estimates also account for the fact that SB 9 includes anti-displacement language that prohibits alteration or demolition of renter-occupied homes. To approximate this, we used the percentage of single-family home rentals in each census tract (as determined by ACS data) to discount results for development outcomes that alter or demolish the existing structure.

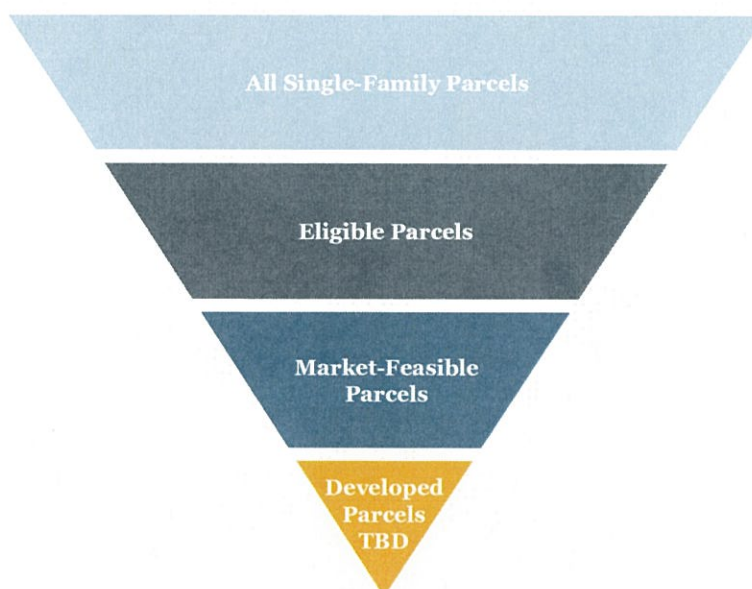
We also examined the potential impacts of owner-occupancy requirements by removing financial scenarios that assume all the new units are rentals, as well as development scenarios that require demolition of an existing structure. In addition, we assumed that owners received a 25 percent discount for the unit they occupied in split lot development scenarios.

Market-feasible capacity is not a forecast of future production.

While this analysis identifies the number of market-feasible units, in most cases these market-feasible units will take years to be developed, and some may never get built. This analysis considers the market feasibility of redevelopment on each eligible single-family parcel in isolation, and assumes that every property owner is maximizing the economic potential of their lot. However, that is not the case for several reasons.

First, the most economically feasible use does not consider the motivations and preferences of individual property owners. Any change in use requires the cooperation of the owner, either to sell the site or to redevelop it themselves. The economics

Figure 2: Production Funnel



may suggest that the highest value of a house may be to tear it down and rebuild it into a much larger house, but if a homeowner prefers a small house or the existing architecture, they're not going to rebuild. Converting a house to a duplex and renting out half may be most profitable for a homeowner, but that will not happen if that homeowner is uninterested in living more closely with others in what was formerly "their" space or in becoming a landlord or homeseller. Even when a property owner does wish to redevelop their site, they may lack the upfront capital and sophistication to initiate the process; and then may be unable to access financing due to a low credit score or other underwriting barrier.

In addition, redevelopment does not happen instantaneously; it requires homeowner awareness and interest, available construction industry capacity, a suitable financing ecosystem and viable routinized business models for development in order to proceed. State ADU laws, for example,

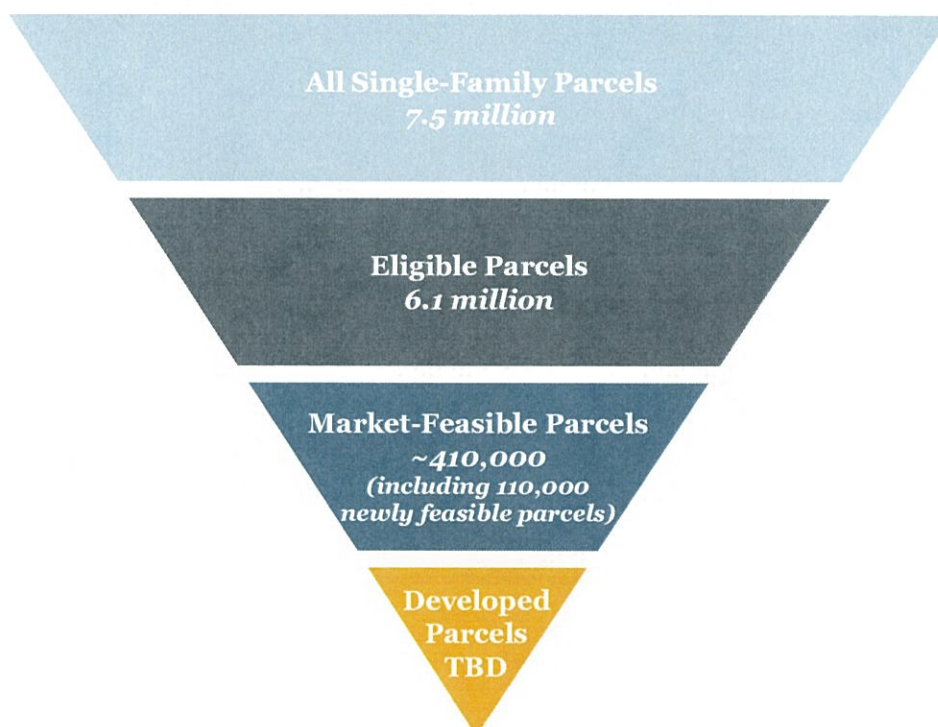
have taken several years to ramp up as awareness, delivery models, industry and local agency capacity have adapted to law changes. It is reasonable to assume that it may take years for that capacity to fully emerge in California if SB 9 becomes law.

Findings

SB 9 could enable the creation of over 700,000 new homes that would otherwise not be market feasible.

Under our business-as-usual scenario, we estimate 1,800,000 new ADUS/JADUS are currently market-feasible and could be built under today's zoning laws across California's 7,500,000 existing single-family housing parcels. With SB 9, we estimate that approximately 700,000 additional new units would become market-feasible, representing a 40 percent increase in existing development potential across California's single-family housing parcels.

Figure 3: Parcel Development Funnel (Total Numbers)



SB 9 would enable the development of more units on 410,000 single-family parcels, of which only 110,000 parcels would become newly feasible.

Overall, SB 9 would change the development feasibility of a relatively small number of parcels. First, the conditions stipulated by the legislation limit the number of parcels that can utilize the bill's provisions, as illustrated in Figure 3. For example, the bill's current limitations on new development in high fire hazard areas, historic districts, non-urbanized areas, and existing renter homes removes approximately 1.4 million existing single-family homes from consideration.¹⁰ Of the 6.1 million remaining parcels, the majority would not be affected because of an absence of physical capacity or financial feasibility. However, on 5.4 percent of current single-family parcels, SB 9 would enable new development. For 110,000 single-family parcels (1.5 percent of total single-family parcels), SB 9 would enable new development where none was financially feasible before, and for another

300,000 parcels, SB 9 would allow for more units than under our business-as-usual scenario.

For the majority of single-family properties, we find the most financially viable outcome is not to pursue any development whatsoever, both under our business-as-usual scenario and under our SB 9 scenario.

Under our assumptions about today's regulations, market conditions, and development alternatives, we found that doing nothing was the most likely option for California's single-family parcels: development is not feasible for 80 percent of parcels (Figure 4). If SB 9 passed, 110,000 parcels would be newly developable, causing the share of infeasible parcels to tick down slightly to 78 percent. The primary benefit of SB 9 comes from allowing slightly more units on parcels where development already makes sense and in opening up any added units to homeownership opportunities through the ability to legally subdivide those parcels.

Figure 4. Likely Parcel Feasibility By Number of Feasible Units

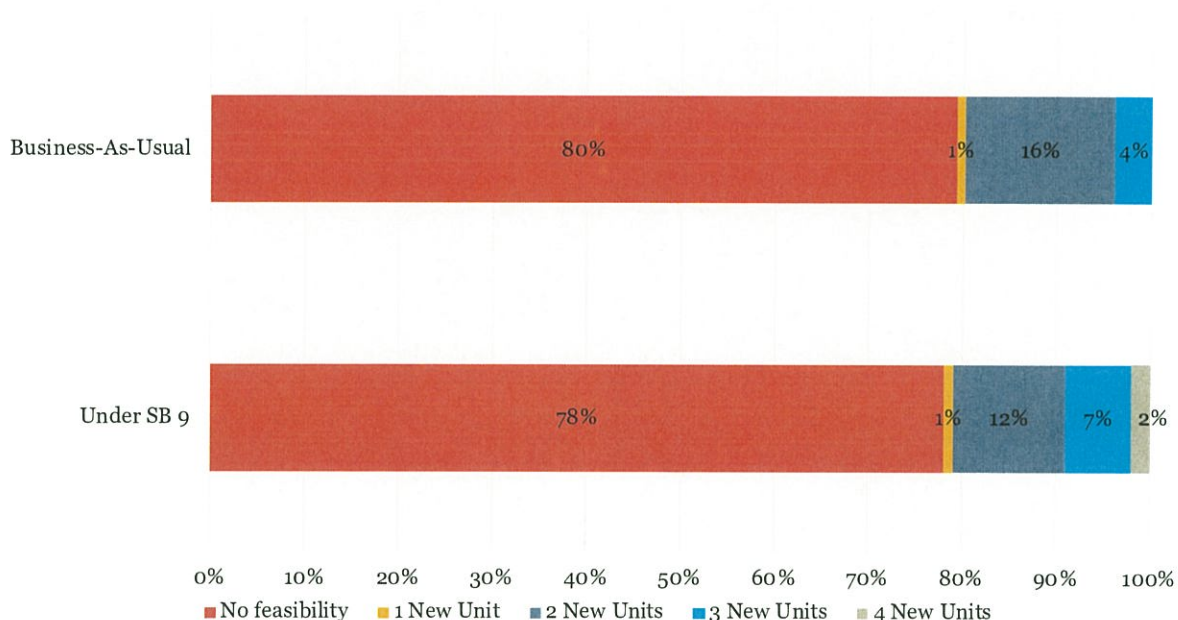
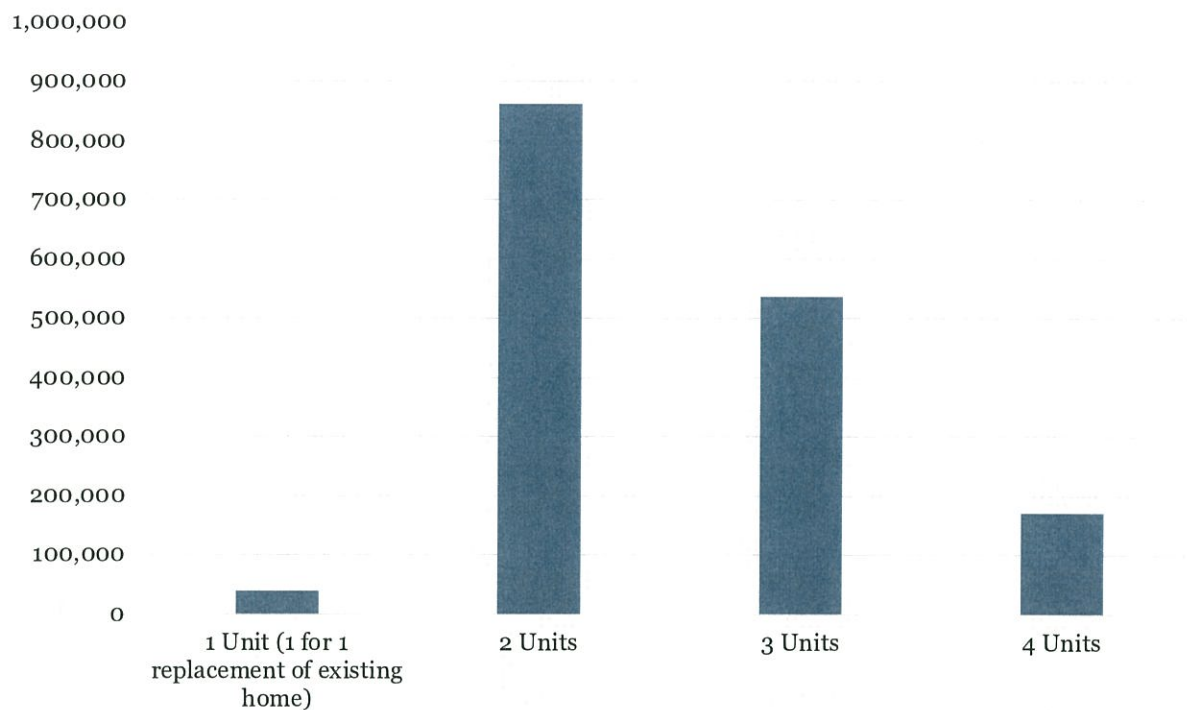


Figure 5. Estimates of Parcels with Feasible Capacity Under SB 9



SB 9 is unlikely to lead to significant demolition of the existing stock.

We found that nearly 97 percent of single-family homes would be retained under SB 9's provisions, either without any modification or with less intensive development (e.g., subdividing the existing structure to enable a duplex conversion). In many places, existing zoning allows homes to be demolished and replaced with larger single-family homes, which we found was the most financially attractive scenario on 1 percent of all single-family parcels under our business-as-usual scenario. Under SB 9, the likelihood of tearing down a single-family home and replacing it with a larger single-family home falls by half to 0.5 percent due to other viable development opportunities.

While SB 9 would provide a boost in three- and four-unit feasibility, duplexes would be the most dominant form of financially-feasible development.

The majority of viable development opportunities should SB 9 be enacted would result in two units per existing lot (Figure 5). Duplexes comprise an important block of this new capacity, accounting for 35 percent of all new units, two thirds of which would be in converted existing single-family homes. SB 9 would also enable a somewhat higher total number of feasible units by allowing greater uptake of three- and four-unit development.

There is wide regional variation in market-feasible units.

The amount of new market-feasible units varies by region. Los Angeles County resulted in the most new market-feasible units under SB 9 with approximately 126,000 new homes. While significant, Los Angeles County also comprises both the most single-family parcels and SB 9 eligible parcels (Table 2). Analyzing new market-feasible units per eligible single-family parcel finds that Yuba, El Dorado, Sutter, and Nevada counties would see the most new market-feasible potential per parcel, although the overall number of new feasible units is relatively low compared to larger counties. Many coastal California counties exhibited higher than average per parcel unit ratios, such as Marin, Santa Cruz, San Luis Obispo, and Santa Barbara counties, signaling that rents and sales prices there could support new homes resulting from SB 9. Meanwhile, most Central Valley counties, such as Fresno, Merced, Kern, and Stanislaus, showed below average potential for new homes per parcel, reflecting lower financial feasibility. For a list of all county results, see Appendix A. At the city level, the state's most populous jurisdictions were all below average for market-feasible units per parcel, as shown in Table 3.

Owner-occupancy requirements would have a limited negative impact on the market feasibility of development pursuant to SB 9, but they could have a much larger impact on actual delivery of units under SB 9.

SB 9, as currently written, allows jurisdictions to impose owner-occupancy requirements for lot split applicants, but not for duplex conversions. Our analysis finds that, if every jurisdiction imposed

owner-occupancy requirements, the total financially feasible units enabled by SB 9 would decrease by roughly 6 percent, or approximately 40,000 units. This limited impact reflects the fact that our model indicates only 10 percent of new units under SB 9 would be attributable to lot splits.

While the owner-occupancy requirement would have only a modest impact on the financial viability of new units, it may have a significant effect on the number of owners willing to actually pursue new development on their properties. By preventing owners from splitting a lot unless they plan to live there themselves for at least a year, or from allowing a developer to take on development involving a lot-split pursuant to SB 9, the owner-occupancy requirement may reduce the number of homes that will result from SB 9.

Shifts in construction costs and rental and sales prices could change development feasibility.

In addition to assessing the potential impact of SB 9 using current market conditions, we also ran a sensitivity analysis to examine the potential impact of SB 9 under different market scenarios. Our analysis found that a 10 percent decrease in construction costs could increase the amount of market-feasible units by 5 percent, or roughly 36,000 more units than the 700,000 baseline impact of SB 9. Local and state policymakers should therefore also consider policies that could help reduce the costs of production to enable policies such as SB 9 to work more effectively in more places. In the opposite direction, we found that a 10 percent increase in construction costs lowers development feasibility by 4.5 percent, or by approximately 32,000 units. Our

Table 2. SB 9-Eligible Parcels and Market-Feasible New Units by Largest Counties

| County | Total single-family parcels | SB 9-eligible parcels | Parcels where SB 9 would increase the number of market-feasible units | Parcels where SB 9 changes feasible outcome from no net new units to 1+ net new units* | Total market-feasible new units if SB 9 is enacted** | Total market-feasible new units divided by SB 9 eligible lots |
|---|-----------------------------|-----------------------|---|--|--|---|
| Los Angeles | 1,441,000 | 1,210,500 | 79,500 | 18,000 | 127,000 | 0.10 |
| San Diego | 554,500 | 398,500 | 28,500 | 9,000 | 54,500 | 0.14 |
| Orange | 557,000 | 486,000 | 26,500 | 8,500 | 47,000 | 0.10 |
| Riverside | 563,000 | 483,000 | 36,500 | 10,000 | 62,500 | 0.13 |
| San Bernardino | 493,000 | 385,000 | 32,000 | 8,000 | 56,500 | 0.15 |
| Santa Clara | 331,000 | 319,500 | 22,000 | 8,500 | 40,000 | 0.13 |
| Alameda | 306,500 | 277,000 | 16,000 | 3,500 | 25,000 | 0.09 |
| Sacramento | 369,500 | 360,500 | 25,000 | 5,000 | 40,500 | 0.11 |
| Contra Costa | 263,500 | 239,000 | 20,000 | 7,500 | 38,000 | 0.16 |
| Fresno | 203,500 | 186,000 | 5,500 | 500 | 10,500 | 0.06 |
| Statewide totals (excluding counties with pop. under 45,000) | 7,470,500 | 6,182,500 | 410,000 | 111,500 | 714,000 | 0.12 |

*Note: This is a subset of the parcels where SB 9 would increase the number of market-feasible units.

**Note: Market-feasible new units are rounded.

Table 3. SB 9-Eligible Parcels and Market-Feasible New Units by Most Populous California Cities*

| City | Total single-family parcels | SB 9-eligible parcels | Parcels where SB 9 would increase the number of market-feasible units | Parcels where SB 9 changes feasible outcome from no net new units to 1+ net new units** | Total market-feasible new units if SB 9 is enacted | Total market feasible new units divided by SB 9 eligible lots |
|---------------|-----------------------------|-----------------------|---|---|--|---|
| Los Angeles | 447,500 | 355,000 | 23,000 | 6,000 | 37,500 | 0.11 |
| San Diego | 203,500 | 133,000 | 7,000 | 3,000 | 13,000 | 0.10 |
| San Jose | 168,500 | 168,000 | 10,500 | 2,500 | 16,000 | 0.10 |
| San Francisco | 94,500 | 93,500 | 6,500 | 500 | 8,500 | 0.09 |
| Fresno | 104,000 | 104,000 | 2,000 | 100 | 4,000 | 0.04 |
| Sacramento | 116,500 | 116,000 | 6,500 | 800 | 9,500 | 0.08 |
| Long Beach | 59,500 | 58,500 | 3,000 | 200 | 3,500 | 0.06 |
| Oakland | 66,500 | 51,000 | 3,000 | 100 | 3,500 | 0.07 |
| Bakersfield | 87,500 | 87,500 | 5,000 | 2,000 | 9,000 | 0.10 |
| Anaheim | 43,000 | 36,000 | 2,500 | 1,000 | 4,000 | 0.11 |

*Note: This is a subset of the parcels where SB 9 would increase the number of market-feasible units.

**Note: Market-feasible new units are rounded.

model also analyzed sensitivity to changes in rental and sales prices. We found that a 10 percent increase in prices resulted in an 8 percent increase in market-feasible units, or roughly 57,000 more units.

Policy Implications

A significant amount of land in California has historically been designated for single-family homes, limiting the development of a greater diversity of urban infill housing options in jurisdictions across the state. Solving California's housing crisis—let alone tackling the challenges of climate change and residential segregation—requires policies that intensify land use in these communities. California's statewide ADU laws were a step in the direction of gently adding more density to simultaneously address the housing, climate, and equity challenges faced by the state. But, in other ways, California lags behind other states in its land use regulations and dogged resistance to changing single-family zoning. For example, the state of Oregon recently required jurisdictions to allow multifamily housing—either two or three units—on all single-family parcels. Some cities have gone even further, such as Portland and Minneapolis, both of which have voted to loosen allowable homebuilding on single-family parcels. While many cities in California—including Los Angeles, San Diego, San Jose, Sacramento, Berkeley, and Oakland—are exploring similar options, SB 9 could play an important role in enabling the construction of a significant amount of new house options that are smaller-scale, more cost-effective, more varied, and inclusive across the urban areas of the state.

Our analysis shows that approximately 700,000 new, market-feasible homes would be enabled under SB 9. But despite the concerns of some of its detractors, SB 9 will not lead to the overnight transformation of residential neighborhoods. Differential owner preferences and limited applicability means that only a share of that potential is likely to be developed, particularly in the near term as awareness and capacity expands. As such, while important, the new units unlocked by SB 9 would represent a fraction of the overall supply needed to fully address the state's housing shortage.

Policymakers should consider complementary strategies to ensure that this legislation is effective. These strategies could include outreach to make sure that homeowners are aware of and understand the opportunities allowed by recent policy changes, either through SB 9 or existing ADU laws, and the expansion of more robust financing options to moderate- and low-income owners who wish to add new units to their parcels. Increasing housing production in single-family zoned areas is also not the only policy shift that is needed. Policymakers should add additional tools to boost supply overall, including by expanding permissible residential development on commercial property and by further reducing local barriers to new housing through expedited approval processes for conforming projects and reform of the local regulatory barriers and fees.

APPENDIX A

Appendix Table 1. County-Level Results

| County Name | Existing SFR Lots | SFR Lots Eligible for SB 9 | Additional Lots with 1+ Unit Capacity Under SB 9 | SB 9 Net Change in Market-Feasible Units* | SB 9 Net Units Per Eligible Lot |
|--------------|-------------------|----------------------------|--|---|---------------------------------|
| Alameda | 306,306 | 276,795 | 3,633 | 25,000 | 0.09 |
| Butte | 65,020 | 32,720 | 47 | 3,000 | 0.09 |
| Contra Costa | 263,303 | 238,957 | 7,438 | 38,000 | 0.16 |
| El Dorado | 57,386 | 19,133 | 583 | 4,500 | 0.24 |
| Fresno | 203,474 | 185,908 | 564 | 10,500 | 0.06 |
| Humboldt | 35,672 | 22,560 | 93 | 2,500 | 0.11 |
| Imperial | 33,036 | 27,002 | 76 | 1,500 | 0.06 |
| Kern | 216,321 | 174,219 | 2,226 | 14,500 | 0.08 |
| Kings | 29,045 | 26,784 | 87 | 1,500 | 0.06 |
| Lake | 27,095 | 10,257 | 60 | 1,000 | 0.10 |
| Los Angeles | 1,441,148 | 1,210,729 | 18,130 | 127,000 | 0.10 |
| Madera | 35,785 | 22,474 | 1,196 | 4,500 | 0.20 |
| Marin | 60,998 | 46,841 | 2,163 | 9,500 | 0.20 |
| Mendocino | 19,350 | 8,949 | 90 | 1,500 | 0.17 |
| Merced | 55,676 | 51,972 | 106 | 2,500 | 0.05 |
| Monterey | 75,348 | 55,097 | 845 | 6,000 | 0.11 |
| Napa | 31,248 | 25,890 | 1,108 | 5,000 | 0.19 |
| Nevada | 43,090 | 5,618 | 199 | 1,500 | 0.27 |
| Orange | 557,820 | 485,756 | 8,730 | 47,000 | 0.10 |
| Placer | 125,458 | 94,273 | 1,448 | 13,000 | 0.14 |
| Riverside | 562,935 | 482,821 | 10,149 | 62,500 | 0.13 |

APPENDIX A

Appendix Table 1. County-Level Results (Continued)

| County Name | Existing SFR Lots | SFR Lots Eligible for SB 9 | Additional Lots with 1+ Unit Capacity Under SB 9 | SB 9 Net Change in Market-Feasible Units* | SB 9 Net Units Per Eligible Lot |
|------------------------|-------------------|----------------------------|--|---|---------------------------------|
| Sacramento | 369,605 | 360,485 | 5,006 | 40,500 | 0.11 |
| San Benito | 12,747 | 9,940 | 740 | 2,500 | 0.25 |
| San Bernardino | 492,806 | 385,243 | 7,848 | 56,500 | 0.15 |
| San Diego | 554,502 | 398,386 | 9,015 | 54,500 | 0.14 |
| San Francisco | 94,400 | 93,514 | 486 | 8,500 | 0.09 |
| San Joaquin | 164,796 | 147,577 | 2,159 | 14,000 | 0.09 |
| San Luis Obispo | 75,016 | 53,068 | 1,229 | 8,500 | 0.16 |
| San Mateo | 151,508 | 134,531 | 3,112 | 17,000 | 0.13 |
| Santa Barbara | 91,540 | 75,399 | 1,506 | 10,000 | 0.13 |
| Santa Clara | 331,232 | 319,319 | 8,527 | 40,000 | 0.13 |
| Santa Cruz | 54,817 | 43,522 | 1,422 | 8,000 | 0.18 |
| Shasta | 55,366 | 25,997 | 402 | 3,500 | 0.13 |
| Solano | 110,592 | 105,962 | 684 | 8,500 | 0.08 |
| Sonoma | 124,610 | 103,452 | 2,688 | 16,500 | 0.16 |
| Stanislaus | 123,922 | 116,754 | 1,542 | 9,500 | 0.08 |
| Sutter | 24,707 | 19,357 | 1,111 | 4,000 | 0.21 |
| Tehama | 18,504 | 7,903 | 35 | 500 | 0.06 |
| Tulare | 104,235 | 86,679 | 1,096 | 6,000 | 0.07 |
| Tuolumne | 25,386 | 995 | 1 | 100 | 0.10 |
| Ventura | 184,033 | 135,836 | 1,604 | 14,500 | 0.11 |
| Yolo | 43,761 | 40,940 | 550 | 4,500 | 0.11 |
| Yuba | 16,743 | 13,064 | 2,016 | 4,500 | 0.34 |
| Statewide Total | 7,470,342 | 6,182,678 | 111,746 | 714,100 | 0.12 |

+Note: Parcels that could have feasibly built ADUs or JADUs in a pre-SB 9 scenario are not included in the "New Market-Feasible Lots Under SB 9" category in this table, even if our analysis found that under SB 9, they could now feasibly build three or four units. As a result, per lot averages of new feasible units will yield results higher than four units per lot.

*Note: Market-feasible new units are rounded

APPENDIX B

Specific Modeling Assumptions

The following assumptions were incorporated into MapCraft's analysis of SB 9.

Allowed Prototypes

The prototypes in the following tables were evaluated on each site.

Appendix Table 2. Prototype Options When SB 9's Lot Split Provision Is NOT Used

| Keep Existing Structure | Demo Existing Structure |
|---------------------------------|--|
| <i>Do nothing</i> | <i>Build new single-family residence (SFR)</i> |
| <i>Add detached ADU (DADU)</i> | <i>Build new SFR + detached ADU (DADU)</i> |
| <i>JADU conversion + DADU</i> | <i>Build new SFR + DADU + JADU</i> |
| Convert to duplex | Build duplex |
| Convert to duplex + DADU | Build duplex + DADU |
| Convert to duplex + DADU + JADU | Build duplex + DADU + JADU |

Italicized indicates outcomes that are possible in the business-as-usual scenario under current single-family zoning, without SB 9.

Appendix Table 3. Prototype Options When Using SB 9's Lot Split Provision

| Keep Existing Structure | | Demo Existing Structure and Create Two Lots |
|--|------------------|---|
| Subdivided Lot with Existing Structure | New Lot | |
| | | Build two new SFR |
| Do nothing | SFR | Build two new SFR + ADU |
| Add detached ADU (DADU) | SFR | Build two new SFR + JADU + ADU |
| JADU conversion | SFR | Build two new duplexes |
| JADU conversion + DADU | SFR | |
| Duplex conversion | SFR | |
| Do Nothing | SFR + ADU | |
| Add detached ADU (DADU) | SFR + ADU | |
| JADU conversion | SFR + ADU | |
| JADU conversion + DADU | SFR + ADU | |
| Duplex conversion | SFR + ADU | |
| Do nothing | SFR + JADU + ADU | |
| Add detached ADU (DADU) | SFR + JADU + ADU | |
| JADU conversion | SFR + JADU + ADU | |
| JADU conversion + DADU | SFR + JADU + ADU | |
| Duplex conversion | SFR + JADU + ADU | |
| Do nothing | Duplex | |
| Add detached ADU (DADU) | Duplex | |
| JADU conversion | Duplex | |
| JADU conversion + DADU | Duplex | |
| Duplex conversion | Duplex | |

For new-built duplex prototypes, MapCraft evaluated both stacked and side-by-side variations at a variety of scales. Also, four scales of single-family prototypes were tested. In total, 652 pro formas were evaluated on each parcel.

Data Inputs

The parcel data for this analysis was provided by UrbanFootprint and includes approximately 7.5 million parcels: all parcels with single-family dwellings in California counties with populations greater than 45,000 people.

For the purposes of this work, all properties with single-family detached land use were assumed to currently have one existing unit (i.e., no ADUs) and single-family zoning that limited development of multiple primary units. To support the assumption, UrbanFootprint scanned zoning in a sample of cities, finding that the vast majority of parcels with single-family homes are zoned for single-family. UrbanFootprint's parcel data included information on each lot and the single-family homes on those lots. In combination with tax assessor data, the value of each existing single-family property was estimated in the second quarter of 2020.

To be realistic about the policy constraints that limit development under current policies and SB9, MapCraft relied on coarse zoning-like limitations interpolated from homes built in each tract between 2005 and 2020. MapCraft assumed that developments on a parcel would need to conform to the 90th percentile of height, FAR, and lot coverage of other recently built homes in the same census tract. In other words, MapCraft assumed that plexes would be held to the same bulk restrictions as newer single-family homes.

MapCraft's financial calculations incorporated data and assumptions about early 2020 rents, sales prices, construction costs, and investors' expected return rates, which were validated by ECONorthwest and Economic & Planning Systems, two West Coast economics consultancies. Early 2020 data was used given the volatility of both the rental and for-sale prices during the COVID-19 pandemic. MapCraft's market demand information relied on multiple sources, including CoStar, Zillow, tax assessors, U.S. Census, and transaction records. MapCraft's construction cost information was based on interviews with cost observations localized based on RS Means. Financial expectations of investors and lending terms were based on MapCraft's conversations with industry professionals. Finally, the modeling relied on assumptions about parking requirements, typical unit sizes, development fees, and other factors that inform development. The Turner Center provided input on parking and fees that were incorporated into the analysis.

Tenancy-Based Eligibility Restrictions

SB 9 prohibits demolition or alteration of renter-occupied housing. To address this, Mapcraft used the percentage of single-family rentals in each tract (per the U.S. Census) to discount results for outcomes that require demolition of the existing structure.

SB 9 also allows jurisdictions to impose certain owner-occupancy requirements. Mapcraft tested the impact of this provision by running bookend scenarios at two extremes: 1) no jurisdictions impose owner-occupancy restrictions, and 2) all jurisdictions impose

owner-occupancy restrictions. To model the owner-occupancy requirement, Mapcraft disallowed all-rental valuation options and prototype options that required demolition of the existing structure. Mapcraft also tested the imposition of a risk premium threshold that eliminates any second split lot prototypes that do not generate residual land values that exceed the reduced value of the original property by 25 percent.

Notably, the results do not estimate the number of owner-occupants that may pursue development given an owner-occupancy requirement.

Lot Splitting Limitations

MapCraft used the following assumptions in modeling the ability of a parcel to split into two lots:

- Lots smaller than 2,400 square feet cannot be split.
- In cases where the existing structure is retained, the lot must have at least 4,000 sq ft of unbuilt area (after deducting the footprint of the existing structure from the lot size).

Parking Provision

MapCraft used Turner Center’s California Residential Land Use Survey to help define parking delivery minimums. Even if a jurisdiction’s code or SB 9 eliminates parking requirements, demand for parking may still exist, and developers will still provide parking. MapCraft assumed that developers will provide at least the parking ratios shown in Appendix Table 4.

Appendix Table 4. Assumptions of Minimum Demanded Parking for New Construction

| | Within ½ Mile of High-Capacity Transit | Not Near High-Capacity Transit |
|-----------------------------------|--|--------------------------------|
| Small Units (2 Bedrooms or Fewer) | 0.5 stalls/unit | 1 stall/unit |
| Large Units (3+ Bedrooms) | 1 stall/unit | 2 stalls/unit |

In prototypes where a small unit is added without a lot split or demolition of the existing structure, MapCraft assumed that no new parking spaces will be added.

Relaxed Zoning Restrictions

SB 9 prohibits local jurisdictions from imposing zoning standards on two-unit developments or newly split lots that would physically preclude the construction of up to two units, or that would preclude units from being at least 800 square feet. To reflect this, MapCraft increased the existing zoning restrictions on FAR, lot coverage, and impervious coverage. FAR was relaxed by increasing the allowed FAR by one quarter, lot coverage was relaxed by one quarter up to 75 percent coverage, and impervious coverage was increased one quarter up to 90 percent coverage.

ENDNOTES

1. It is often difficult for a homeowner to finance an ADU. Few loan products exist to finance ADU construction, and those that are available often do not go far enough to cover the costs of development. See <https://turnercenter.berkeley.edu/research-and-policy/reaching-californias-adu-potential-progress-to-date-and-the-need-for-adu-finance/>.
2. Senate Bill 9: Housing development approvals, April 27, 2021. https://leginfo.legislature.ca.gov/faces/billVersionsCompareClient.xhtml?bill_id=202102020SB9
3. Chapple, K., et. al. (2020). “Reaching California’s ADU Potential: Progress to Date and the Need for ADU Finance.” Retrieved from: <https://turnercenter.berkeley.edu/wp-content/uploads/2020/12/ADU-Brief-2020.pdf>.
4. 2021 Casita Coalition Best Practices Webinar Series. https://www.youtube.com/playlist?list=PLRPPog7f6IzVUuadN9ED5HztZGU_tgY32
5. Garcia, D., Tucker, J. & Schmidt, I. (2020). “Single-Family Zoning Reform: An Analysis of SB 1120.” Turner Center for Housing Innovation, UC Berkeley. Retrieved from: https://turnercenter.berkeley.edu/wp-content/uploads/2020/12/Single-Family_Zoning_Reform_An_Analysis_of_SB_1120.pdf.
6. On average, California added roughly 100,000 new homes each year between 2015 and 2019. California Industry Research Board, “Housing Production in California, 2005-2019”.
7. The following counties are not included: Calaveras, Siskiyou, Amador, Lassen, Glenn Del Norte, Colusa, Plumas, Inyo, Mariposa, Mono, Trinity, Modoc, Sierra, and Alpine.
8. For more information on the financial dynamics of development decisions, see our 2019 brief “Making it Pencil: The Math Behind Housing Development”.
9. Mawhorter, S. & Reid, C. (2018). Turner California Residential Land Use Survey. Berkeley, CA: University of California, Berkeley. Retrieved from: <https://californialanduse.org/>.
10. Historic areas were determined using National Park Service data, which does not include local or state historic designations.



ABOUT THE TERNER CENTER

The Turner Center formulates bold strategies to house families from all walks of life in vibrant, sustainable, and affordable homes and communities. Our focus is on generating constructive, practical strategies for public policy makers and innovative tools for private sector partners to achieve better results for families and communities.

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