

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	Total market-		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)		Parcels where SB9 feasible new units if SB9 were enacted (rounded to nearest 100)		SB9 Units per Eligible Lot
			SB 9-eligible parcels	feasible units to nearest 100)	new units (rounded to nearest 100)	feasible units to nearest 100)	new units (rounded to nearest 100)	feasible units to nearest 100)	feasible units to nearest 100)		
Adelanto	7,600	7,600	100	100	-	100	-	100	100	0.02	
Alameda	13,000	12,200	500	500	-	700	-	700	700	0.06	
Alhambra	9,700	9,700	600	600	100	800	100	800	800	0.09	
Anaheim	42,900	36,300	2,300	2,300	1,000	4,100	1,000	4,100	4,100	0.11	
Antioch	27,100	26,300	1,600	1,600	500	2,600	500	2,600	2,600	0.10	
Apple Valley	20,600	20,500	3,000	3,000	700	6,100	700	6,100	6,100	0.30	
Arcadia	10,600	9,500	1,200	1,200	600	2,700	600	2,700	2,700	0.28	
Arroyo Grande	5,200	5,200	500	500	200	900	200	900	900	0.18	
Atascadero	7,600	6,100	800	800	200	1,800	200	1,800	1,800	0.29	
Atwater	6,600	6,600	200	200	-	300	-	300	300	0.04	
Azusa	5,800	5,100	300	300	-	400	-	400	400	0.08	
Bakersfield	87,700	87,400	4,800	4,800	1,800	9,000	1,800	9,000	9,000	0.10	
Baldwin Park	10,700	10,700	800	800	-	1,000	-	1,000	1,000	0.10	
Banning	8,500	8,100	400	400	-	600	-	600	600	0.07	
Beaumont	13,500	13,000	700	700	100	1,100	100	1,100	1,100	0.08	
Bellflower	8,200	8,200	600	600	-	800	-	800	800	0.10	
Belmont	6,400	5,500	300	300	100	600	100	600	600	0.11	
Benicia	7,200	7,100	400	400	100	600	100	600	600	0.08	
Berkeley	17,700	13,800	800	800	100	1,100	100	1,100	1,100	0.08	
Brea	10,400	7,300	400	400	100	600	100	600	600	0.08	
Brentwood	18,400	18,300	1,500	1,500	600	2,500	600	2,500	2,500	0.14	
Buena Park	15,700	15,700	1,100	1,100	200	1,700	200	1,700	1,700	0.11	
Burbank	18,300	15,500	800	800	300	1,300	300	1,300	1,300	0.09	
Burlingame	5,500	5,200	200	200	100	400	100	400	400	0.08	
Calexico	6,000	6,000	100	100	-	100	-	100	100	0.02	
California City	5,700	5,700	300	300	100	600	100	600	600	0.11	

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			to nearest 100)	feasible units (rounded to nearest 100)	new units (rounded to nearest 100)	feasible units if SB9 were enacted (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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			to nearest 100)	nearest 100)	nearest 100)	nearest 100)	nearest 100)	nearest 100)	
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	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	200	1,600	1,600	0.09	
Dublin	12,800	12,700	800	200	200	1,100	1,100	0.09	
Eastvale	15,300	15,100	1,200	300	300	1,800	1,800	0.12	
El Cajon	12,700	11,400	600	100	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	100	1,100	1,100	0.10	
Elk Grove	47,800	47,400	3,200	700	700	5,100	5,100	0.11	
Encinitas	14,500	12,900	1,200	500	500	2,500	2,500	0.19	
Escondido	23,500	19,300	1,400	300	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	200	2,100	2,100	0.08	
Folsom	19,800	19,400	1,200	300	300	2,100	2,100	0.11	
Fontana	41,500	39,000	4,100	1,400	1,400	6,800	6,800	0.17	
Foster City	6,000	6,000	300	100	100	500	500	0.08	
Fountain Valley	14,600	14,600	600	100	100	800	800	0.06	
Fremont	46,300	46,200	2,200	900	900	4,000	4,000	0.09	
Fresno	104,200	103,900	2,200	100	100	3,800	3,800	0.04	
Fullerton	24,800	23,700	1,200	500	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	200	1,400	1,400	0.05	
Gardena	8,000	8,000	300	-	-	300	300	0.04	
Gilroy	11,700	11,600	700	100	100	1,100	1,100	0.09	
Glendale	23,000	12,400	700	100	100	1,000	1,000	0.08	
Glendora	12,500	11,300	900	200	200	1,500	1,500	0.13	

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

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			to nearest 100)	nearest 100)	nearest 100)	nearest 100)	nearest 100)	nearest 100)	
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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			to nearest 100	900	nearest 100	300	nearest 100	nearest 100	
San Clemente	16,200	12,800	900	300	1,700	1,700	0.13		
San Diego	203,600	133,200	7,200	2,700	12,900	12,900	0.10		
San Dimas	8,600	7,100	800	300	1,300	1,300	0.18		
San Francisco	94,600	93,700	6,400	500	8,400	8,400	0.09		
San Gabriel	5,800	5,800	400	100	700	700	0.11		
San Jacinto	11,100	10,600	300	-	500	500	0.05		
San Jose	168,600	168,100	10,300	2,500	15,900	15,900	0.09		
San Juan Capistrano	8,100	7,900	600	300	1,500	1,500	0.19		
San Leandro	18,600	17,400	1,200	200	1,700	1,700	0.10		
San Luis Obispo	8,500	8,400	500	100	800	800	0.09		
San Marcos	14,600	10,000	600	100	1,100	1,100	0.11		
San Mateo	17,100	15,400	700	300	1,200	1,200	0.08		
San Rafael	10,100	9,300	800	400	1,700	1,700	0.18		
San Ramon	17,200	17,000	900	300	1,600	1,600	0.10		
Sanger	5,500	5,500	200	-	300	300	0.05		
Santa Ana	31,000	31,000	1,000	200	1,500	1,500	0.05		
Santa Barbara	14,900	11,500	900	300	1,700	1,700	0.15		
Santa Clara	18,100	18,000	700	300	1,100	1,100	0.06		
Santa Clarita	38,500	23,900	1,600	400	2,500	2,500	0.11		
Santa Cruz	9,800	9,600	700	200	1,200	1,200	0.12		
Santa Maria	19,500	19,500	1,000	-	1,300	1,300	0.07		
Santa Monica	7,200	7,100	200	200	500	500	0.07		
Santa Rosa	40,900	39,700	2,800	800	5,000	5,000	0.13		
Santee	10,700	7,800	400	100	700	700	0.08		
Saratoga	9,600	7,900	1,100	700	2,600	2,600	0.33		
Seaside	5,200	5,200	300	-	400	400	0.07		
Simi Valley	32,000	22,600	1,500	200	2,200	2,200	0.10		
South Gate	10,400	10,400	700	-	900	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)		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
			to nearest 100	feasible units (rounded to nearest 100)	new units (rounded to nearest 100)	changes feasible outcome from no new units to 1+ new units (rounded to nearest 100)	feasible new units if SB9 were enacted (rounded to nearest 100)		
Unincorporated Sacramento	141,100	133,900	10,800	2,700	18,900	2,700	18,900	0.14	
Unincorporated San Bernardino	111,300	35,700	3,300	600	5,900	600	5,900	0.17	
Unincorporated San Diego	111,300	54,000	7,200	2,400	15,800	2,400	15,800	0.29	
Unincorporated San Joaquin	33,200	21,400	1,700	300	3,100	300	3,100	0.15	
Unincorporated San Luis Obispo	34,600	15,200	1,400	500	2,800	500	2,800	0.19	
Unincorporated San Mateo	16,600	10,400	800	300	1,500	300	1,500	0.14	
Unincorporated Santa Barbara	34,200	22,000	2,300	800	4,700	800	4,700	0.21	
Unincorporated Santa Clara	16,400	11,500	1,300	800	3,300	800	3,300	0.29	
Unincorporated Santa Cruz	34,700	23,700	2,500	1,000	5,400	1,000	5,400	0.23	
Unincorporated Sonoma	38,800	19,100	2,900	1,200	6,700	1,200	6,700	0.35	
Unincorporated Stanislaus	22,600	15,600	1,000	100	1,700	100	1,700	0.11	
Unincorporated Tulare	29,500	12,300	800	100	1,500	100	1,500	0.12	
Unincorporated Ventura	24,100	11,000	1,200	400	2,600	400	2,600	0.23	
Unincorporated Yuba	13,300	9,700	1,900	1,900	4,000	1,900	4,000	0.41	
Union City	13,100	13,100	600	100	800	100	800	0.06	
Upland	15,100	14,700	1,900	900	3,500	900	3,500	0.24	
Vacaville	25,300	25,100	1,700	300	2,400	300	2,400	0.10	
Vallejo	29,400	28,700	1,200	200	1,900	200	1,900	0.06	
Ventura	23,900	20,600	1,400	200	2,000	200	2,000	0.10	
Victorville	29,900	29,900	1,400	300	2,700	300	2,700	0.09	
Visalia	33,900	33,700	1,300	300	2,300	300	2,300	0.07	
Vista	15,400	13,700	1,300	400	2,600	400	2,600	0.19	
Walnut	8,800	8,400	700	300	1,500	300	1,500	0.18	
Walnut Creek	11,200	11,000	1,100	500	2,300	500	2,300	0.21	
Watsonville	5,600	5,600	300	-	500	-	500	0.08	
West Covina	21,500	20,500	1,400	300	2,300	300	2,300	0.11	
West Sacramento	12,300	12,300	700	100	1,100	100	1,100	0.09	
Westminster	15,900	15,800	1,100	500	1,900	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 City	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 Urban-Footprint 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.

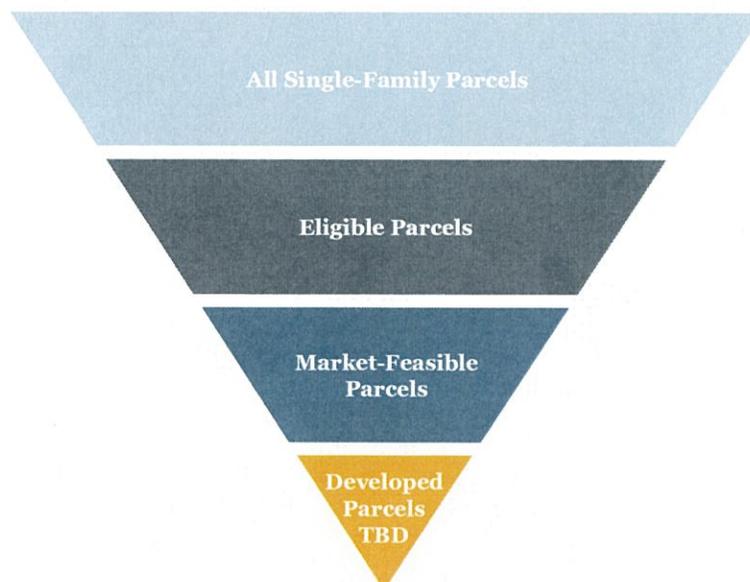
We also examined the potential impacts of owner-occupancy requirements by removing financial scenarios that assume all the new units are rentals, as well as development scenarios that require demolition of an existing structure. In addition, we assumed that owners received a 25 percent discount for the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

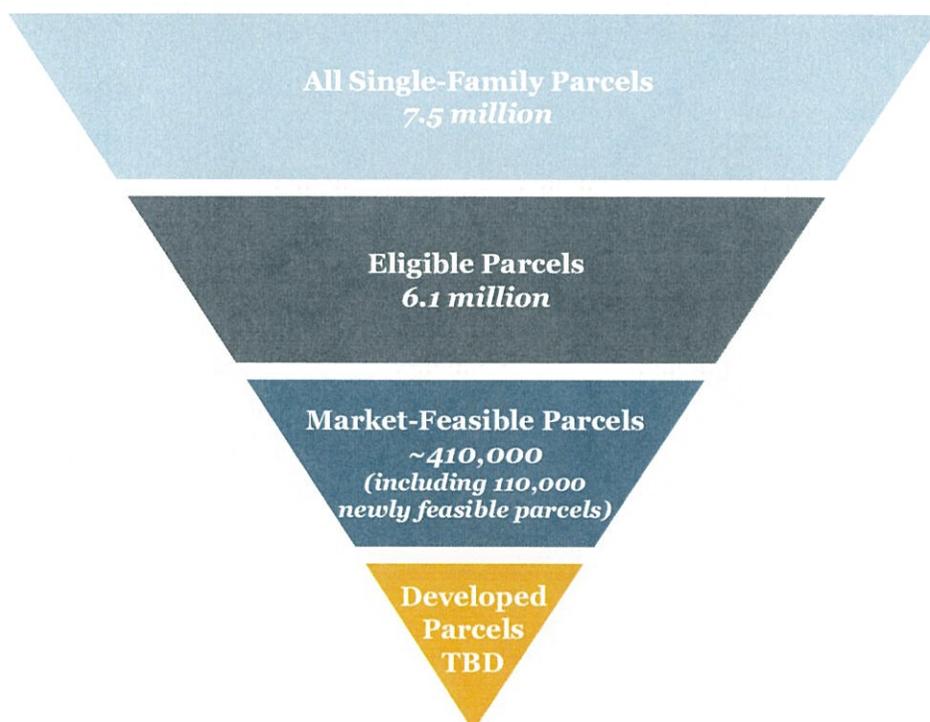
have taken several years to ramp up as awareness, delivery models, industry and local agency capacity have adapted to law changes. It is reasonable to assume that it may take years for that capacity to fully emerge in California if SB 9 becomes law.

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

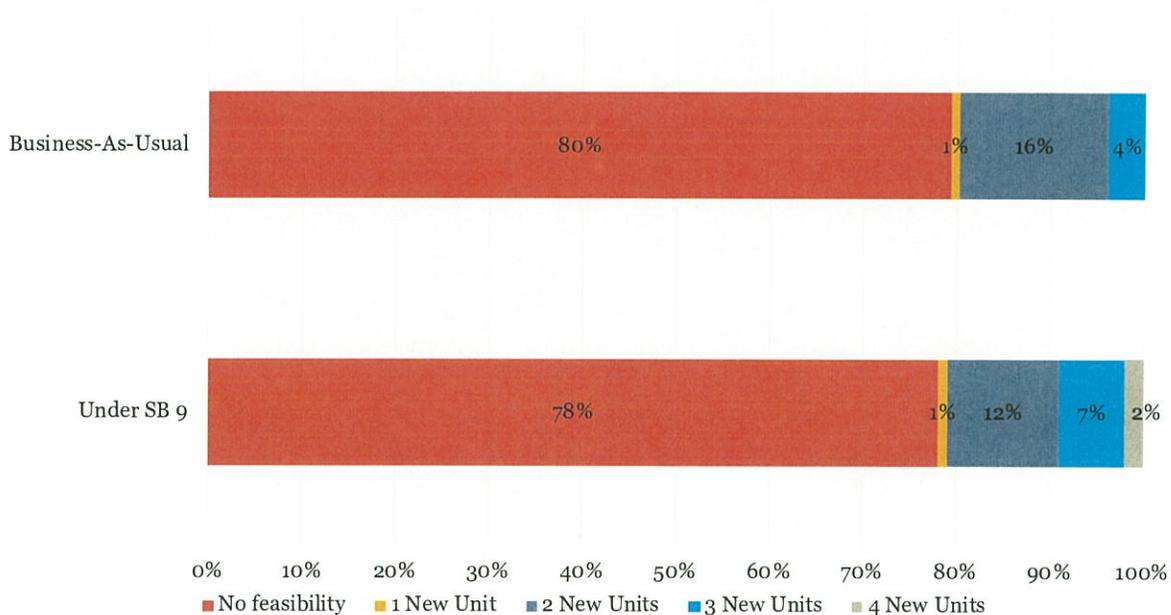
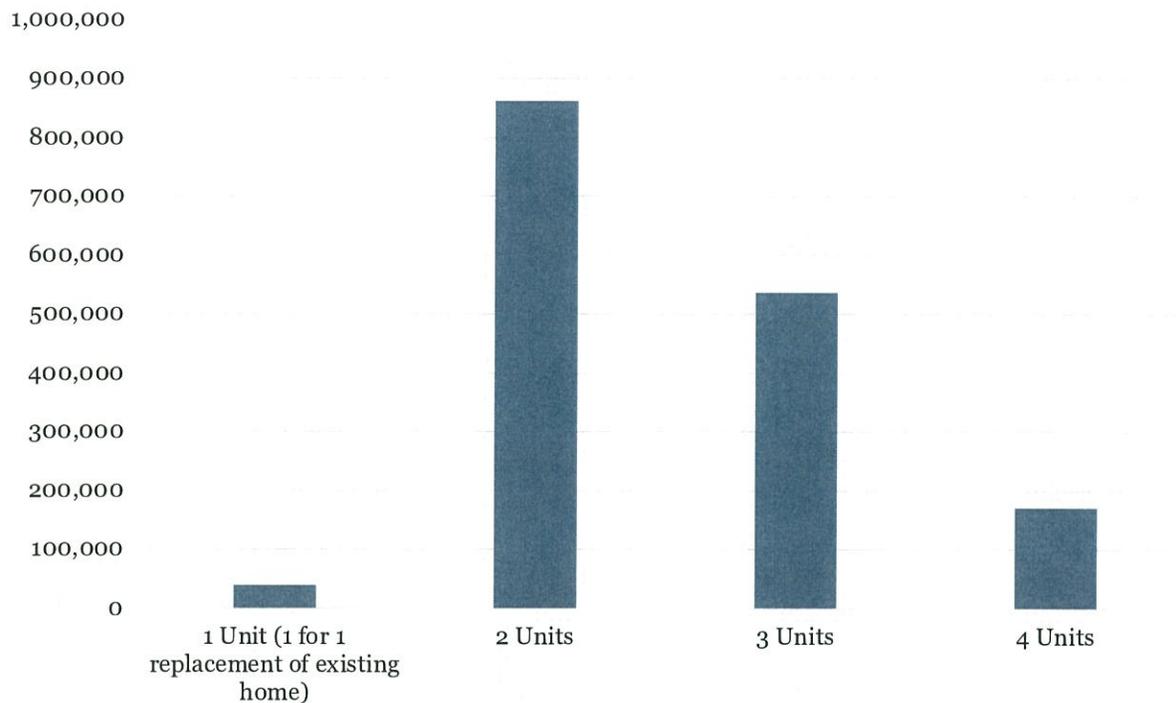


Figure 5. Estimates of Parcels with Feasible Capacity Under SB 9



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=20210220SB9
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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