

A tool kit to close California's housing gap: 3.5 million homes by 2025



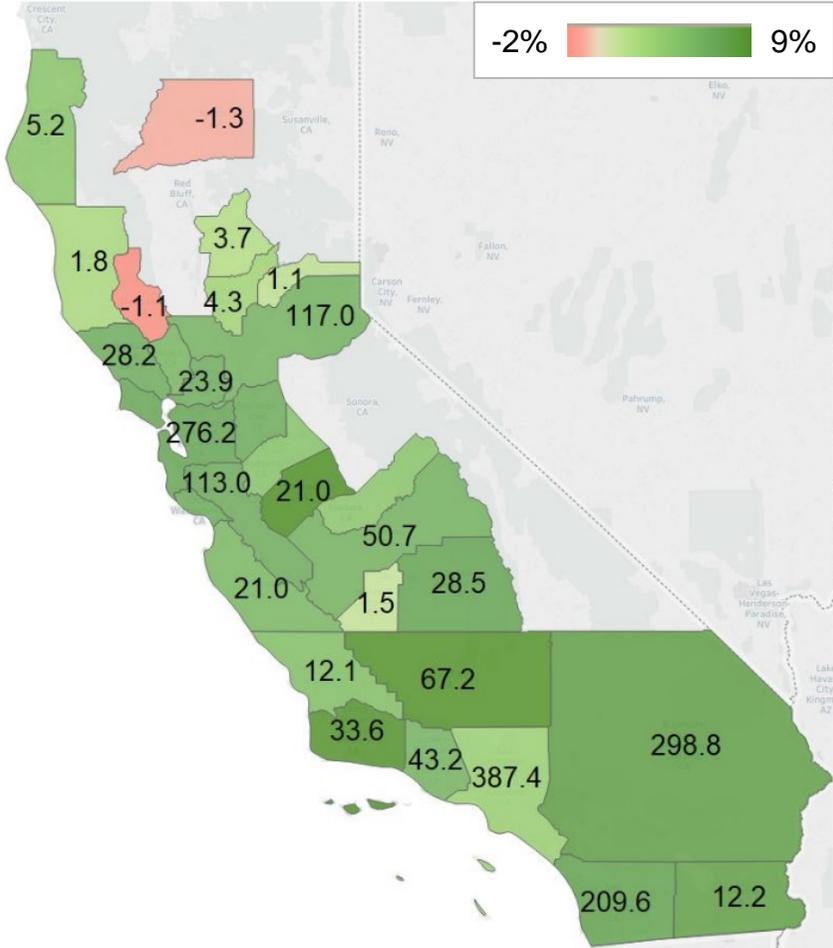
Rated #1 Think Tank 2015 (private sector category) by
the Global Think Tank Index, University of Pennsylvania

Map exhibits
October 2016

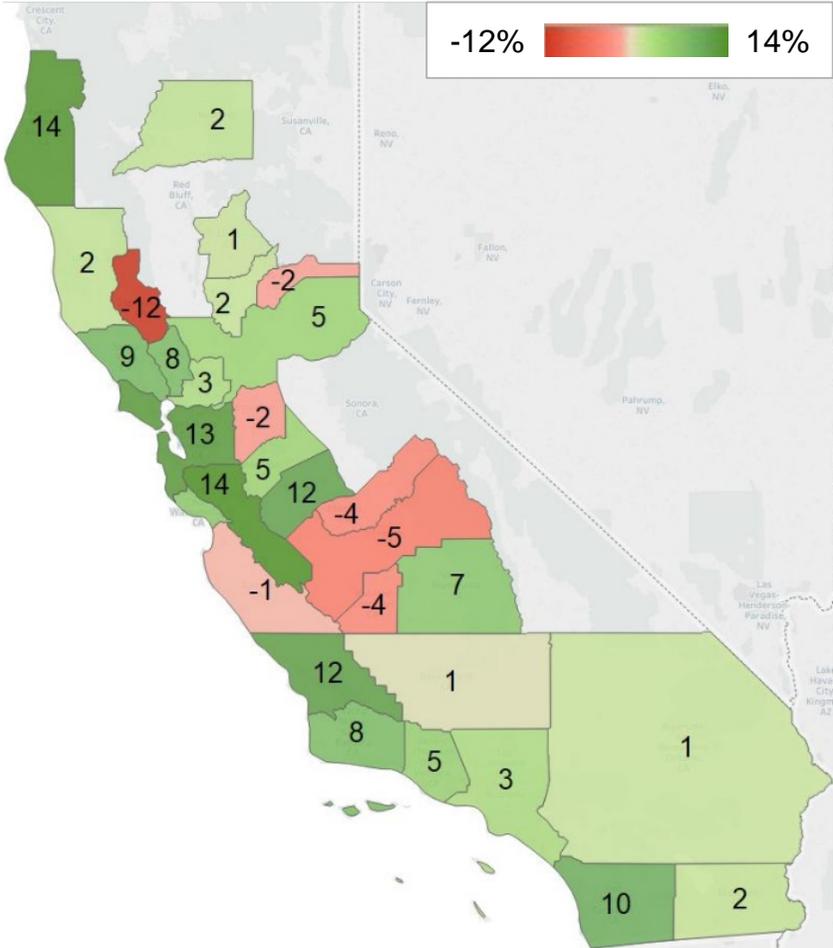
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California's population and incomes are rising, creating more demand for housing

Net change in population, 2009–14
Thousand people



Change in household area median income, 2009–14
%

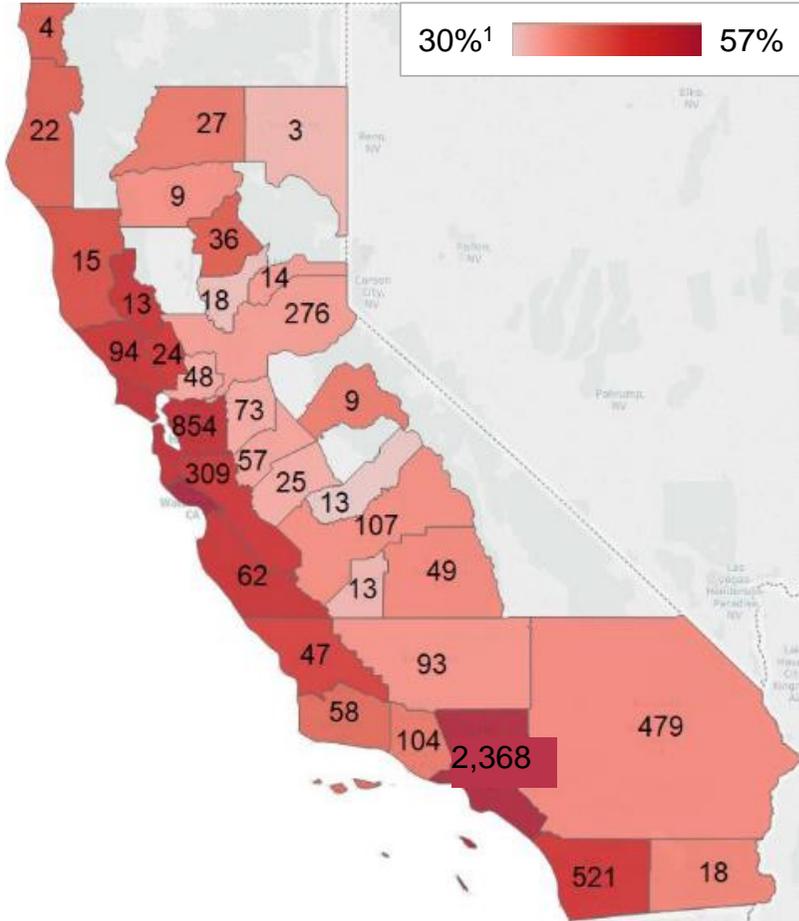


NOTE: Shaded regions represent 98% of state population; unshaded regions represent 2% of state population and lacked sufficient data.

At least 30 percent of people in every metropolitan statistical area (MSA) cannot afford local rents; that share is 60 percent in some areas

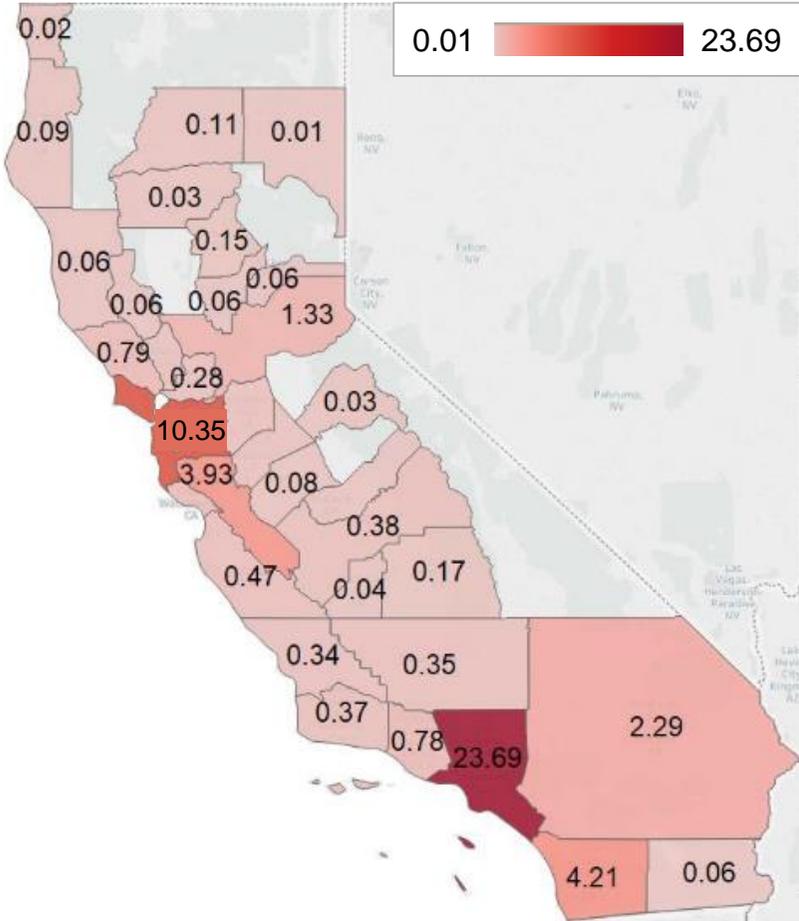
Households in MSA unable to afford rent

Thousand



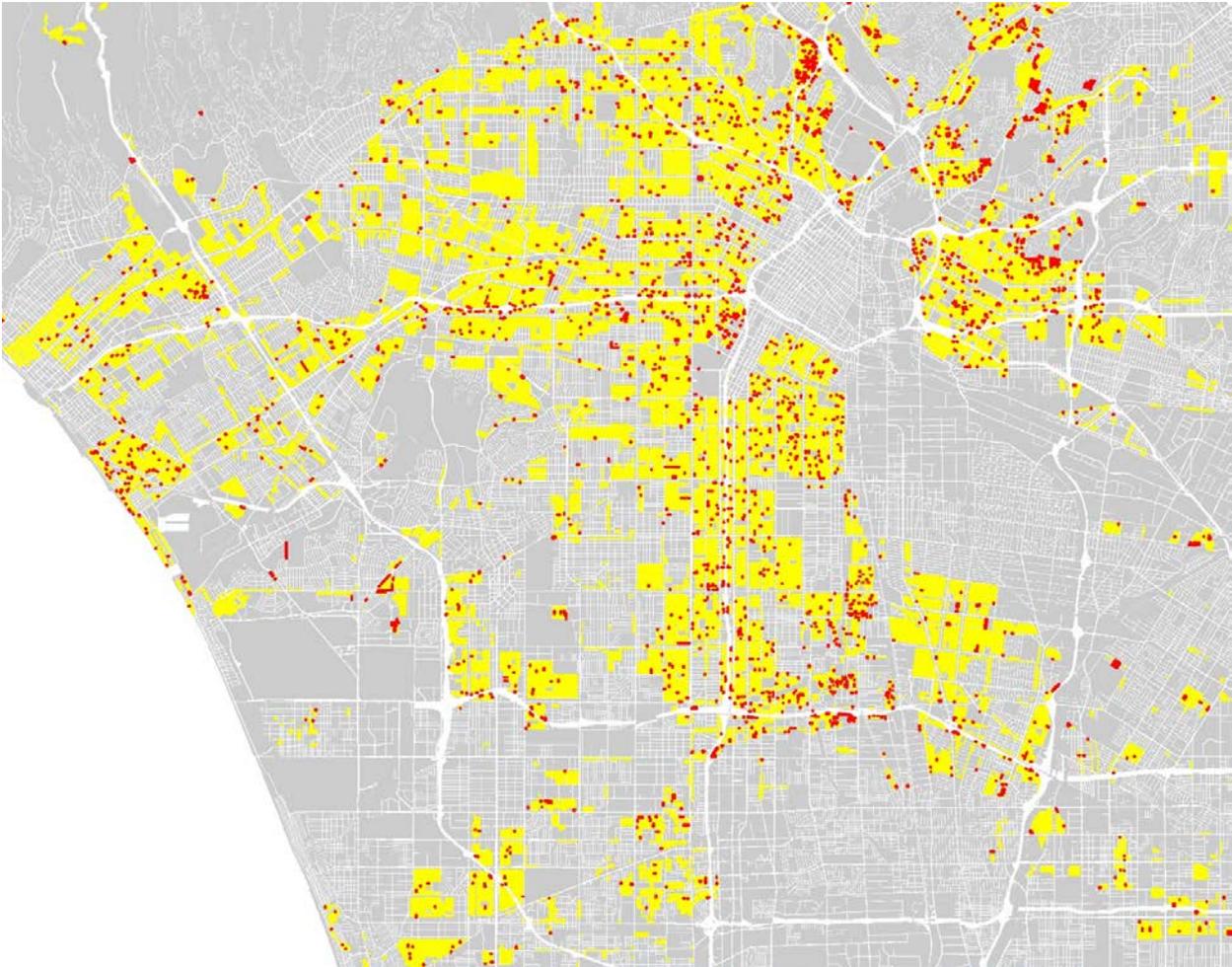
Distribution of affordability gap

\$ billion per year



¹ Number of households in MSA unable to afford the local cost of rent, as a share of the total number of households in MSA.
 NOTE: Shaded regions represent 98% of state population; unshaded regions represent 2% of state population and lacked sufficient data for analysis.

Los Angeles County has 5,600 to 8,900 vacant parcels zoned for multifamily use, with zoned capacity for 32,000 to 75,000 units



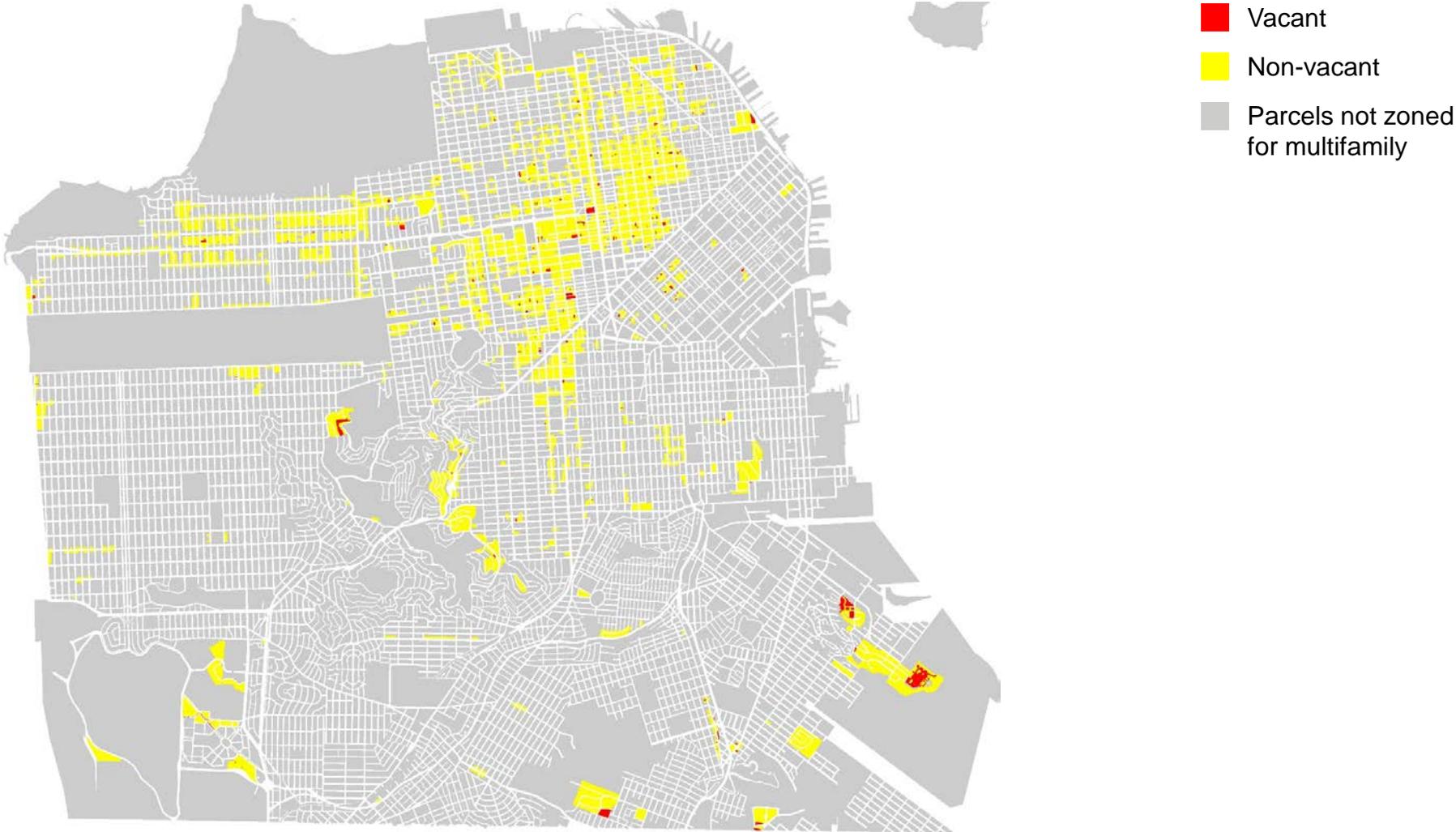
Parcels zoned for multifamily residence

Occupied land

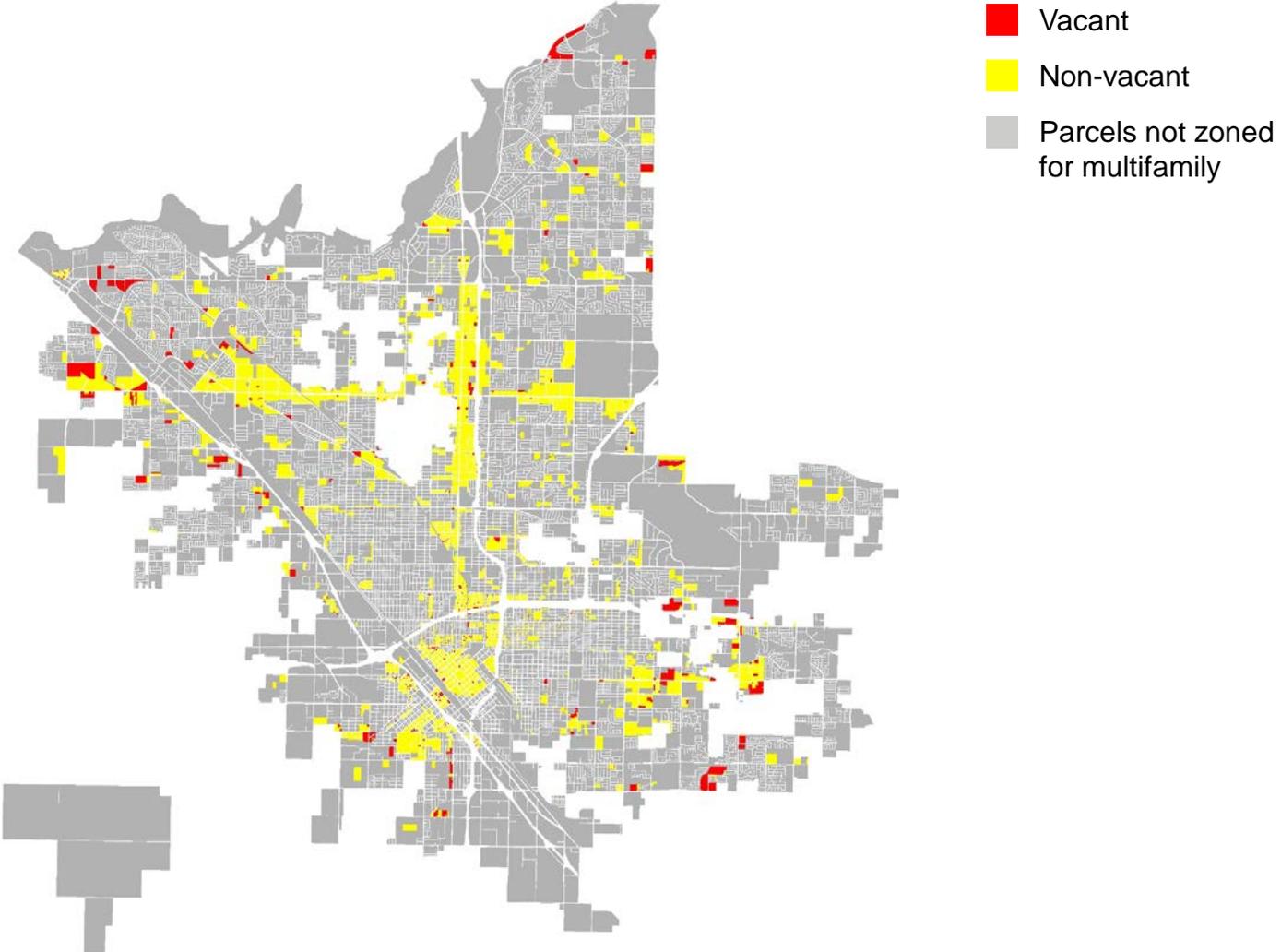
Vacant land

NOTE: Vacant parcels shown larger than actual size to improve legibility.

San Francisco has 373 vacant parcels zoned for multifamily use, with zoned capacity for 4,500 units

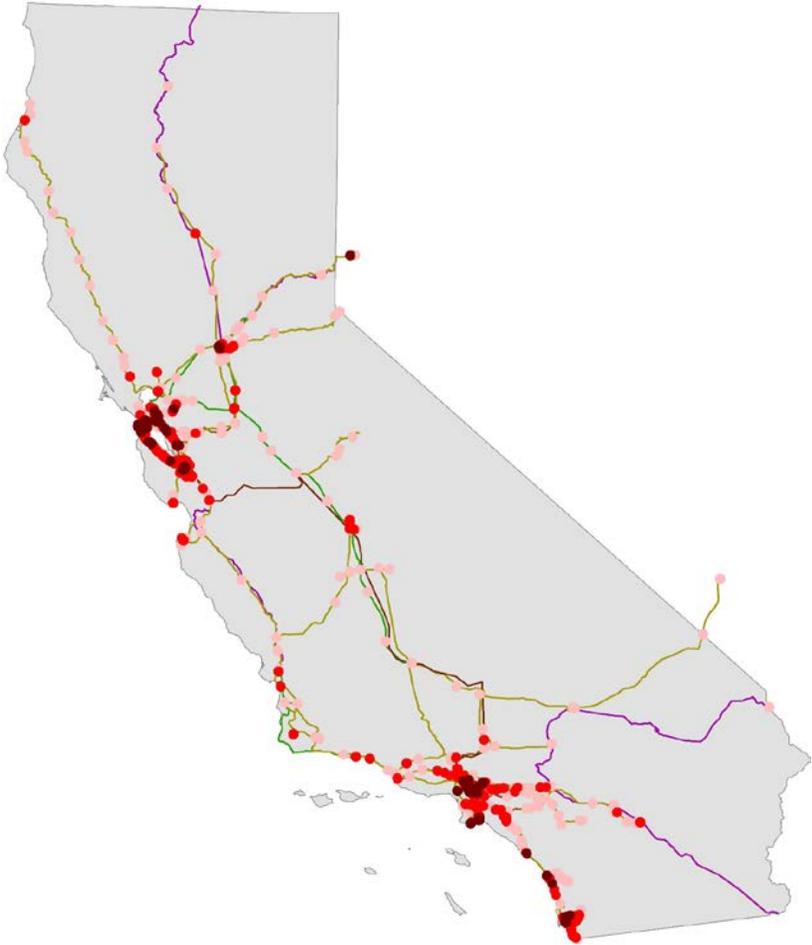


Fresno has 641 vacant parcels zoned for multifamily use, with zoned capacity for 27,000 units



California has capacity to create between one million and three million housing units within half a mile of transit hubs

Potential sites for transit-oriented housing



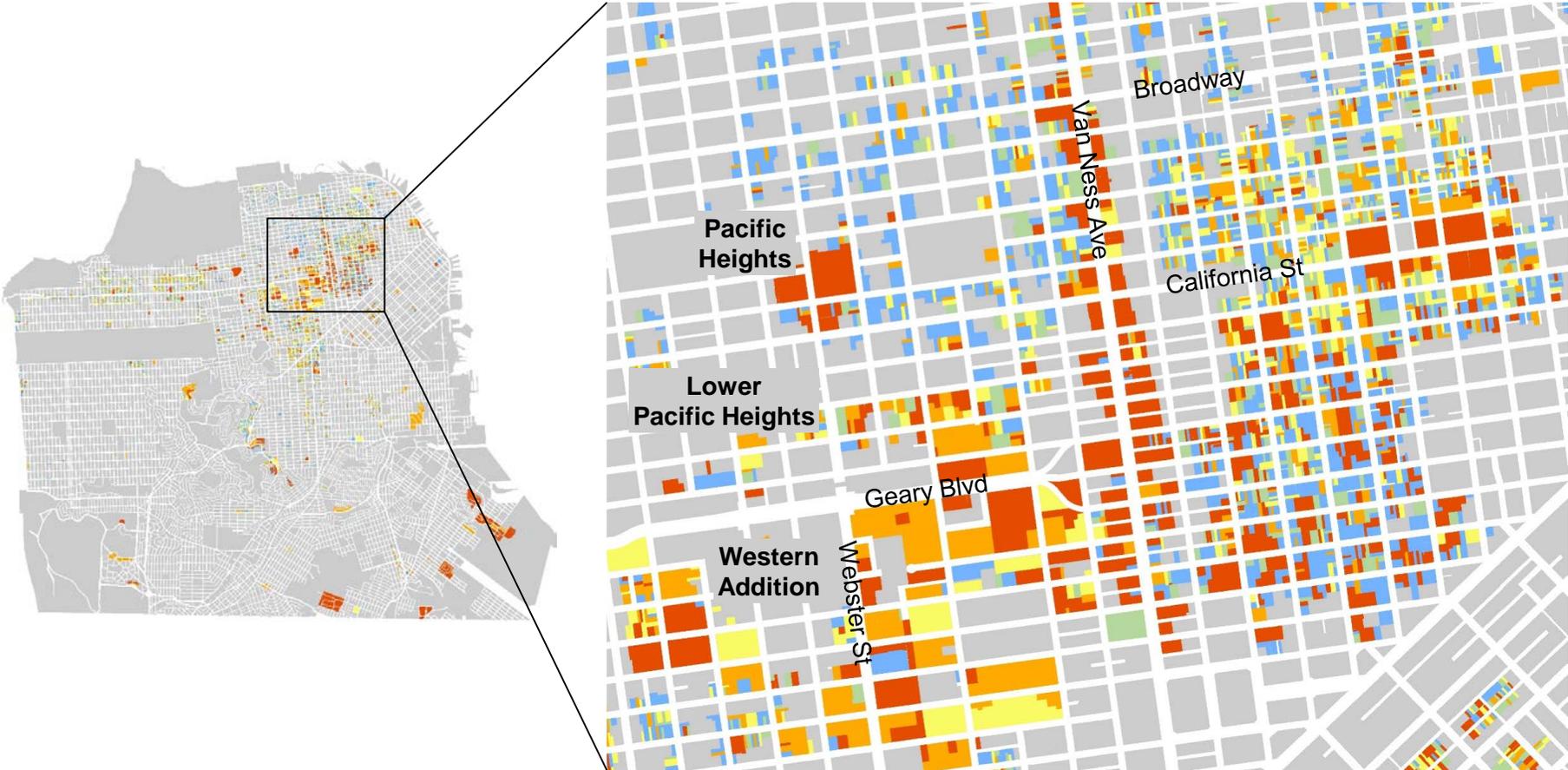
Urban type	Existing units Thousand	Additional units ¹ Thousand
● Regional hub >15 units per net acre	563	379
● Urban center 6.5–15 units per net acre	409	3,321–938
● Suburban node <6.5 units per net acre	192	516–1,672
Total	1,164	1,216–2,989

1 Low end of range assumes one unit per net acre is added for every 100 existing units; high end assumes development to the next urban density level.

In San Francisco, 31 percent of multifamily parcels use less than 50 percent of zoned capacity, with potential to add 70,500 units under current zoning

Utilization rate (%) ■ <25 ■ 25-50 ■ 50-75 ■ 75-100 ■ >100 ■ Parcels not zoned for multifamily

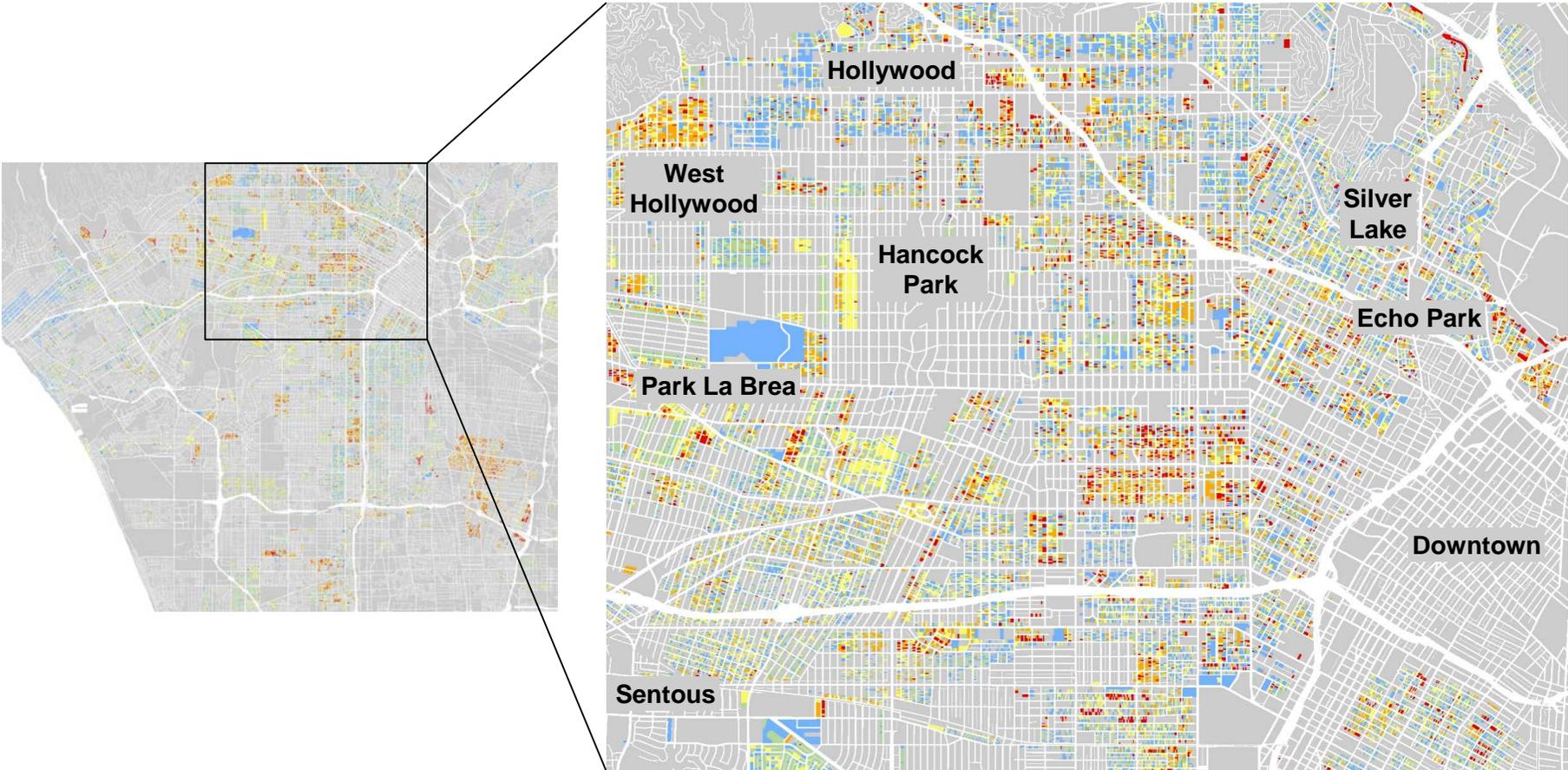
A closer look at San Francisco's multifamily utilization



In Los Angeles County, 28 percent of multifamily parcels use less than 50 percent of zoned capacity, with potential to add 306,000 units under current zoning

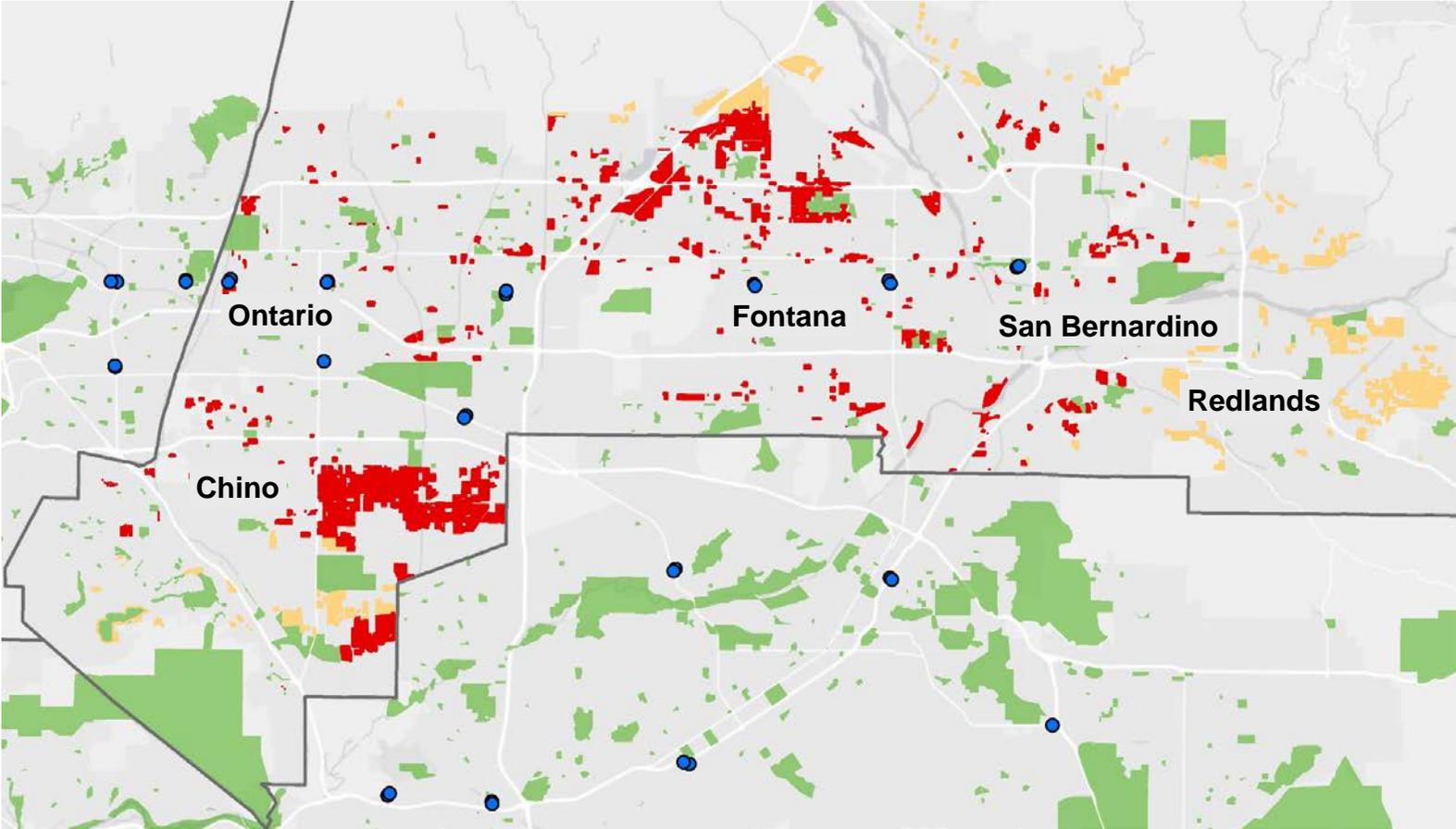
Utilization rate (%) ■ <25 ■ 25-50 ■ 50-75 ■ 75-100 ■ >100 ■ Parcels not zoned for multifamily

A closer look at Los Angeles County's multifamily utilization



San Bernardino County has 368,000 potential single-family units, with major opportunities in Chino and Fontana

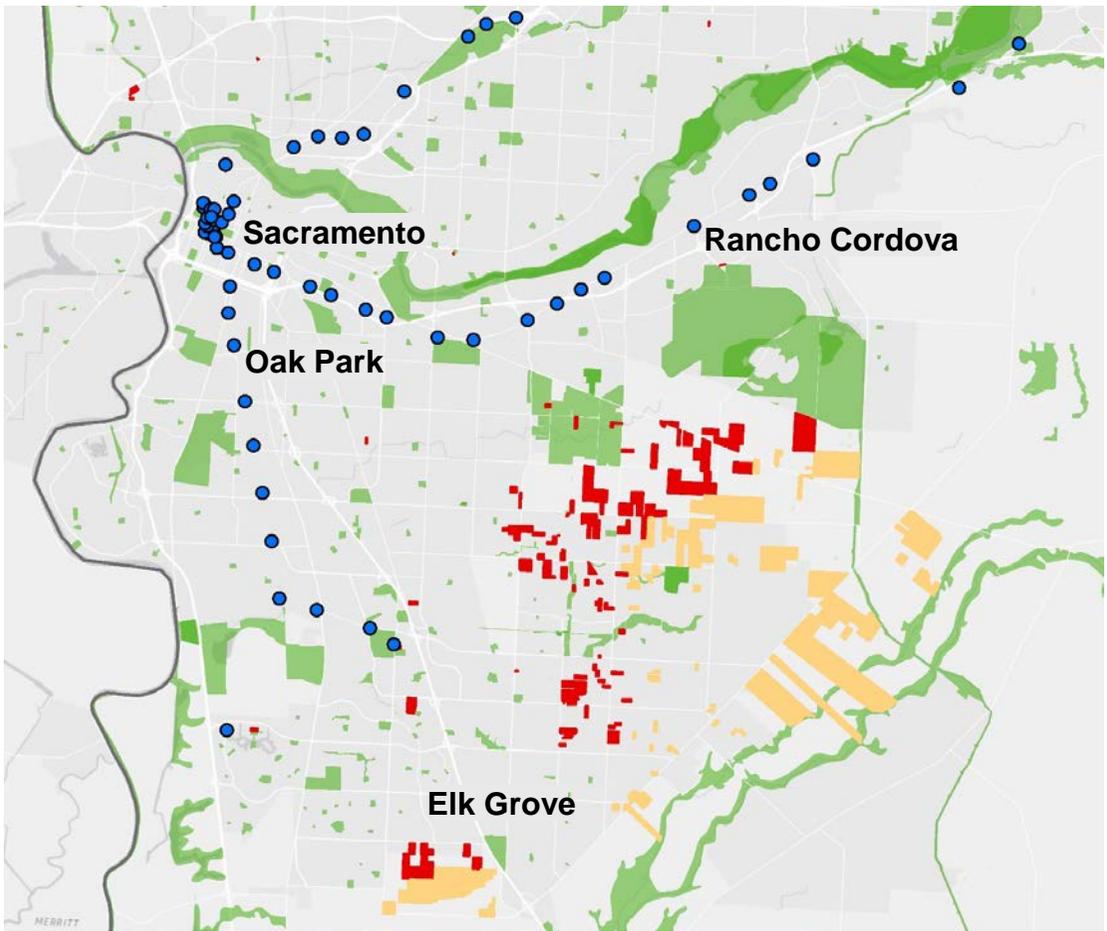
■ Target parcels <5 miles from transit ■ Target parcels >5 miles from transit ■ Preserved land ● Transit stops



NOTE: Analysis excludes potential new single-family homes around existing development that is quite low density, i.e., target parcels are limited to those within one mile of land currently developed at a density of >800 people per square kilometer. Additionally, a topographic filter was applied to screen out certain parcels on mountainous terrain.

Sacramento County has 61,000 potential single-family units clustered between Rancho Cordova and Elk Grove

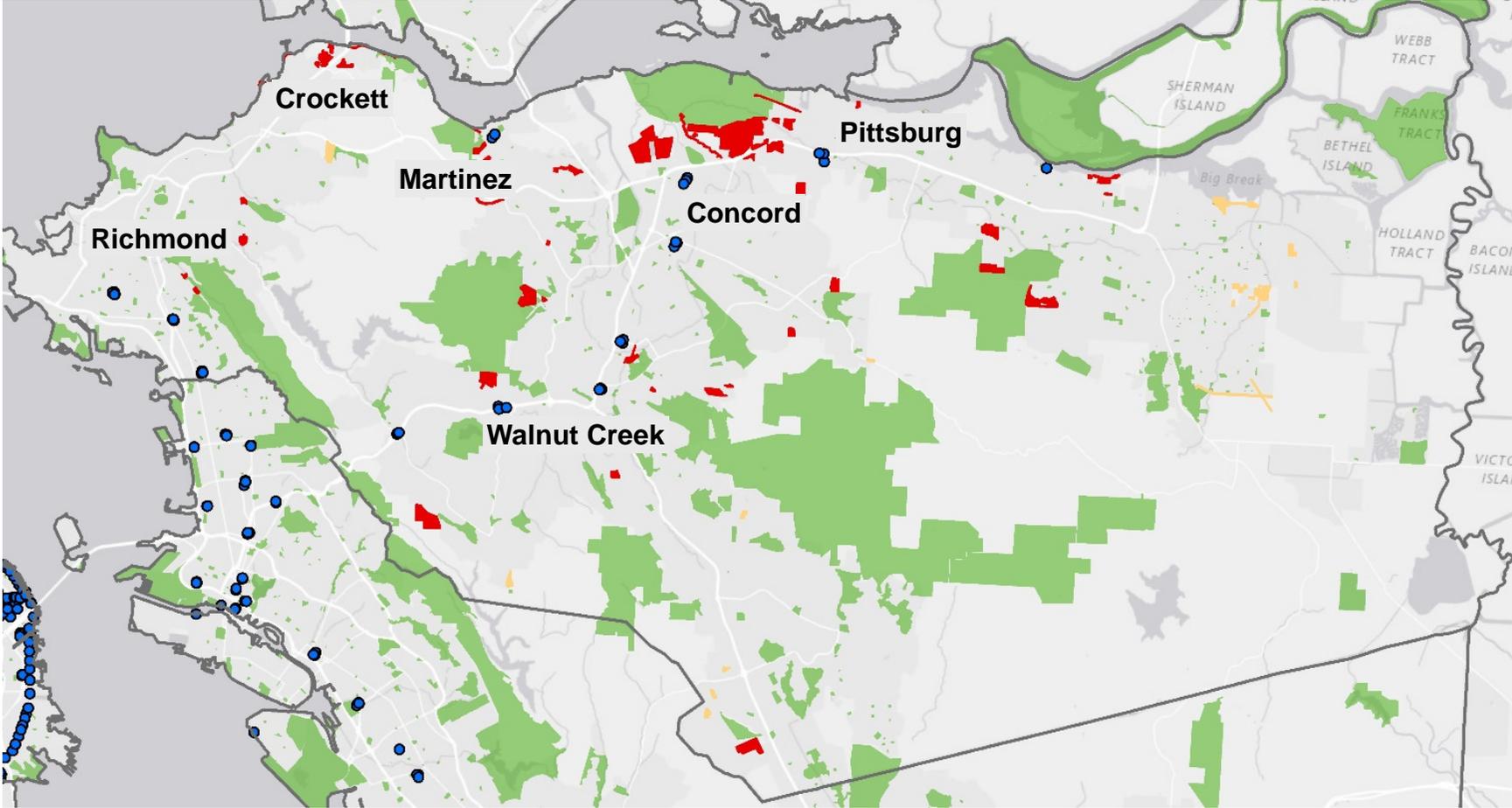
■ Target parcels <5 miles from transit ■ Target parcels >5 miles from transit ■ Preserved land ● Transit stops



NOTE: Analysis includes parcels zoned for general agriculture and not legally preserved, or vacant land deemed ready for development by Sacramento County Planning Department. Excludes parcels outside Sacramento County's urban growth boundary.

Contra Costa County has 185,000 potential single-family units, with major opportunities in Crockett, Martinez, and Pittsburg

■ Target parcels <5 miles from transit ■ Target parcels >5 miles from transit ■ Preserved land ● Transit stops



NOTE: Analysis includes parcels either zoned for general agriculture or deemed “unrestricted” under Contra Costa County zoning. Excludes parcels outside Contra Costa County urban growth boundary.