Appendix D: 2025 Blueprint Land Use Forecast Documentation

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What are the 2025 Blueprint Land Use Assumptions

Under SB 375, SACOG is required to adopt a Sustainable Communities Strategy (SCS) as part of every Metropolitan Transportation Plan (MTP) that, if implemented, aligns transportation, housing, and land use decisions to help achieve the GHG emissions reduction targets set by the California Air Resources Board (CARB). The Blueprint must include a land use forecast for the amount, location, and type of growth through 2035 and 2050. The plan must also include a set of policies, programs, and investments necessary to achieve the land use forecast.

The 2025 Blueprint land use forecast is, by design, intended to be both achievable and ambitious. It is achievable in that it is rooted in current local planning and based on the latest data available including recent development activity reported throughout the region, robust feedback from local staff, and an assessment of national and statewide trends in housing preference. It is also ambitious in that it is intended to outline a path towards achieving the triple bottom line goals of equity, economy, and environment, including achieving our greenhouse gas (GHG) emissions target; thus, remaining eligible for key sources of transportation funding. Programs like Green Means Go, technical and grant assistance, and other local regulatory reforms already underway will be critical components of bridging the gap between the achievable and ambitious nature of the land use forecast.

The plan is not necessarily intended to reflect a growth outcome based on business-as-usual policies and investments or even the point-in-time demand of today's residents. Rather, the goal is to understand the wide range of potential growth outcomes that exist between today and 2050 that could realistically occur given policy direction, public investments, and anticipated future demand trends. Within the range of potential outcomes, the plan identifies a path that achieves a set of policy goals outlined by the Board in policy framework adopted by the SACOG Board of Directors in February, 2022.

The 2025 Blueprint Land Use Assumptions Process and Engagement

1. **Regional Growth Projection**
   For each plan update, SACOG prepares a projection for the amount of regional growth in population, employment, and households the region can expect over the life of the plan. For the 2025 Blueprint, the projections adopted by the SACOG board in 2022 cover a timeframe from 2020 to 2050 and anticipate that the region will grow by nearly 600 thousand people, and will add just over 260 thousand new jobs, and 278 thousand new homes. See *Attachment D1* for a complete technical memo for how the regional growth projection was created and vetted.
2. **Project Initiation**
   SACOG staff conducted a series of local agency kickoff meetings in September 2021 to interview all 28 member agencies about key development projects, changes since the last MTP/SCS update, and policy priorities.
3. **Developing Key Inputs: Baseyear, Buildout, Community Types, and the Pipeline Inventory**
   Over the course of 2020-2021, SACOG staff worked to create a parcel-level 2020 baseyear (what existed in January 2020), buildout inventory (what is allowed to be built according to local general plans), and pipeline inventory (projects that are very likely to be built in the immediate future). These key inputs helped to create guardrails for future land use assumptions in the Blueprint, with 2020-2050 growth likely falling somewhere between what exists today and what local governments currently allow in their general plans, specific plans, and pipeline projects.

   As illustrated in Appendices C1 and C2, the SCOG region is classified into five community types – Centers and Corridors, Established Communities, Developing Communities, Rural Residential and Lands not Identified for Development in the MTP/SCS based on the existing development pattern and how the

local jurisdictions see their communities grow in the future. Land within each jurisdiction is classified as one of these categories. For the purposes of forecasting and reporting, those lands are further divided into Sub-Community types, which roughly correspond to the planning areas within the local general plans, specific plans, master plans and community plans. Staff made edits to the subcommunity type geographies (the areas at which the land use assumptions are summarized) in response to feedback from local staff and the SACOG Board. While largely the same as the 2020 MTP/SCS, these changes reflect new planning documents, green zone nominations, annexations, transition of some developing communities to established communities (if absorption crosses 50% at the plan level), and the disaggregation of developing communities into developing communities already under construction, and potential developing communities not yet under construction

Between 2020-2021, SACOG created a parcel level inventory of existing housing units and jobs. Census data, local jurisdiction assessor data, and housing permit data from annual progress reports were used to establish 2020 housing unit estimates. An address-based employment inventory, supplemented by additional employment numbers from educational, medical and government agencies, was used for estimating the number of jobs. These estimates, referred to collectively as "Baseyear" data, reflect the existing development as of January 2020.

SACOG also created a buildout inventory of jobs and housing units or the maximum regulatory development potential that existed in the local plans. Appendix D2 describes the methodology used for the buildout quantification. The Baseyear and Buildout inventory summaries were sent to all local planning staff for a 6-week review period in January 2022. Based on feedback from local staff, SACOG made revisions and finalized this dataset into the first set of columns in Appendix C3. See *Attachment D2* for a complete technical memo for how the buildout inventory was created and vetted.

The regional buildout estimates far exceed the regional growth projections. In fact, the regional housing buildout capacity is seven times the 2020-2050 regional growth projection for housing. As noted above, Baseyear and Buildout form the guardrails of the 2020-2050 growth assumptions by subcommunity type in the land use forecast. To arrive at the land use forecast growth assumptions, staff analyzed the historical housing permit trends (Appendix D3) and the growth readiness of the Developing Communities (Appendix D5). Staff also created a pipeline inventory of projects that are very likely to be built in the immediate future, especially in the 2020-2035 timeframe. These key inputs formed the basis for scenario testing through pathways and, eventually, for the discussion scenario and adopted land use forecast described below.

4. Pathways

Between April 2022 and March 2023, SACOG worked with staff and the board to develop, revise, and evaluate three potential pathways for growth of the region between 2020 and 2050. This included:

- Pathway local government review period: 4/5/22 – 5/6/22
- Revised (2.0) pathway land use assumptions sent to planners: 7/14/22
- Presentations to committees and Board in August 2022 to discuss pathways and a guest presentation from Cascadia Partners on the buildout inventory. (Staff Report/Attachments here, Presentation Here)
- Final (3.0) pathway land use assumptions sent to planners: 2/13/23
- Presentations to LUNR and Board in March 2023 to discuss evaluation of pathway performance (Staff Report/Attachments here, Presentation Here)
- This work culminated on June 16th, 2023 with the in-person Blueprint Workshop in Folsom, which brought together nearly 300 elected officials, public agency staff, and community leaders from across the Sacramento region to help shape the long-range plan.

5. **Discussion Scenario**

Between spring and fall of 2023, SACOG staff used feedback from the general public, local planners, the SACOG Board, pathways performance metric evaluation, and a finer grain update to the pipeline inventory to narrow the pathway land use assumptions into a single set of land use assumptions, called the Discussion Scenario.

On 8/7/23, SACOG held a Blueprint local planner workshop to discuss how the pathways perform across the triple bottom line goals and key considerations as SACOG develops a single set of land use and transportation assumptions the plan. The Draft Discussion Scenario was then sent to local government staff for a six week review period from 9/5/23 to 10/7/23.During this review period, SACOG received feedback through a regional workshop with local staff, 5 countywide "office hours" meetings, 10 individual jurisdiction meetings, and 11 comment letters or emails. While not all suggested changes were made to the Discussion Scenario, SACOG staff revised the Discussion Scenario assumptions to reflect local feedback and made minor adjustments to account for rebalancing to maintain the same regional growth projection and updated pipeline project assumptions.

After modeling these assumptions along with a set of transportation investments, a full summary of the Spring 2024 Discussion Scenario performance, including greenhouse gas performance, was presented to the SACOG Land Use and Natural Resources Committee (4/4) as well as at the Board in April (4/18).

6. **Adopted Land Use Forecast**

In the lead up to the June 2024 Board meeting, the SACOG board gave direction to refine the discussion scenario into the final land use forecast while meeting the following criteria:

Achieve the 19% GHG reduction target, ensuring that the SACOG region remains eligible for hundreds of millions of dollars of state transportation funding.

Initial modeling from the pathways demonstrated that while Pathway 3 (88% infill) achieved the target and Pathway 1 (42% infill) would not. Pathway 2, which most resembles the 2020 MTP/SCS (65% infill), likely would fall just short. As such, the land use forecast explored a future with modest increases in the proportion of housing located in infill areas relative to Pathway 2 as a means of improving GHG performance while also balancing the reasonableness factors, triple bottom line policy factors, and local feedback. It also explores ambitious employment growth outside of the core as a means of improving jobs housing balance and lowering VMT in parts of the region with fewer jobs, services, and destinations today.

Meets the "reasonableness test" to ensure assumptions are achievable. This entailed:

- Inventorying and modeling all pipeline projects across the region that are either already built since 2020, under construction, approved, or in process but extremely likely to move forward. As a result of this process, the land use forecast includes more early planning period housing growth in high demand suburban cities and counties relative to Pathway 2. This trend is moderated in the 2035 to 2050 period as developing communities in these jurisdictions begin to build out.
- Aligning all assumptions with local general plans, specific plans, and master plans. Using the buildout inventory, SACOG ensured that the land use forecast is implementing local plans and is not relying on changes to allowed land uses at the local level. The buildout inventory is summarized as part of Appendix C and the methodology is included in Attachment D2.
- Factoring in historical permitting trends across jurisdictions, plan areas, and between infill and greenfield areas. For example, 67% of the housing permits in the last 5 years (2018-2022) have been in infill areas. The land use forecast explores a future where 67% of the 2020-2050 growth

occurs in infill areas—exactly in line with current trends. The housing permit trends by subcommunity type are detailed in Attachment D3.

- Reflecting the housing product type preference trends occurring nationally, regionally, and within peer-regions. These trends were analyzed and documented in Attachment D6 (Housing Product Type Preferences Analysis).
- Taking into account readiness considerations, including market conditions and the presence of regulatory hurdles like annexation, federal permits, litigation, and local agency approvals. Some of these factors are detailed in Attachment D4.

Balances Policy Priorities

While achieving the GHG target is a key regional policy priority of the 2025 Blueprint, there are a variety of other policy priorities in the 2025 Blueprint Policy Framework, which is oriented around the triple bottom line of equity, environment, and economy. The land use forecast attempts to maximize performance across the triple bottom line while also balancing other the considerations in this section.

Reflects Local Feedback

As discussed above, SACOG received significant feedback from local agencies after releasing the Draft Discussion Scenario assumptions in 2023. While many of the comments were relatively minor (like providing information on pipeline projects/key infrastructure investments), a few jurisdictions included requests for significant shifts. These shifts largely included shifts of housing growth from lower VMT infill areas to higher VMT developing communities not yet under construction.

Given the likelihood that these changes would both jeopardize the region's ability to achieve its GHG target and would be out of line with recent trends, which are 67% infill, SACOG strategically accommodated changes suggested by local agencies, particularly where strong evidence was provided to support these changes. This evidence included, but was not limited to, pipeline project information like tentative maps, infrastructure upgrades, or other metrics indicating project readiness.

Through the robust process outlined above, the 2025 Blueprint Land Use Forecast is responsive to local feedback, has better GHG performance than Pathway 2, meets the reasonableness test by being in line with recent trends and planning assumptions, and balances key triple bottom line policy objectives in the adopted Policy Framework. The land use forecast was adopted by the SACOG board at the June 2024 meeting. The following attachments are included as part of this appendix to provide additional details about key inputs and processes described above, and a summary by jurisdiction and placetype documentation has been added for clarification in reviewing projects for MTP/SCS consistency:

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Growth Projections for SACOG's 2024 MTP/SCS

Technical Memo

The development of regional growth projections is one of the first steps on the road to the 2024 Metropolitan Transportation Plan/Sustainable Communities Strategy (MTP/SCS). The projections set population, employment, and household totals for the plan horizon year (twenty years or more into the future) based on long-term growth trends in the region. All these projections are regional totals only at this point. Subsequent steps in the MTP/SCS update determine how to distribute the regional projections among cities, counties, and communities across greater Sacramento in a strategic way that will help to further regional and local objectives.

This memo provides a summary of the findings, approach, and process for developing an updated baseline growth projection for the Sacramento region. SACOG staff presented this projection as part of the December 2021 SACOG board committee cycle and sought comments from the region's planning staff and broader stakeholders. Besides some fixes to minor errata and a new section summarizing the scenario analysis, the document remains unchanged from the draft presented in December 2021.

Summary of 2024 MTP/SCS's Growth Projection

SACOG Planning Area Projections Summary*

	2019 (projections series estimate)	**2035** (projections series estimate)	**2050** (projections series estimate)
Population	2.48 million	2.815 million	3.05 million
Jobs	1.15 million	1.31 million	1.41 million
Households	0.88 million	1.03 million	1.14 million
Housing Units	0.92 million	1.08 million	1.20 million

	Change, 2019-2035 (baseline)	**Change, 2019-2035 (upper bound)**	**Change, 2019-2050 (baseline)**	**Change, 2019-2050 (upper bound)**
Population	330,000	368,000	566,000	630,000
Jobs	156,000	174,000	263,000	293,000
Households	148,000	165,500	264,000	288,000
Housing Units	156,000	174,000	278,000	303,000

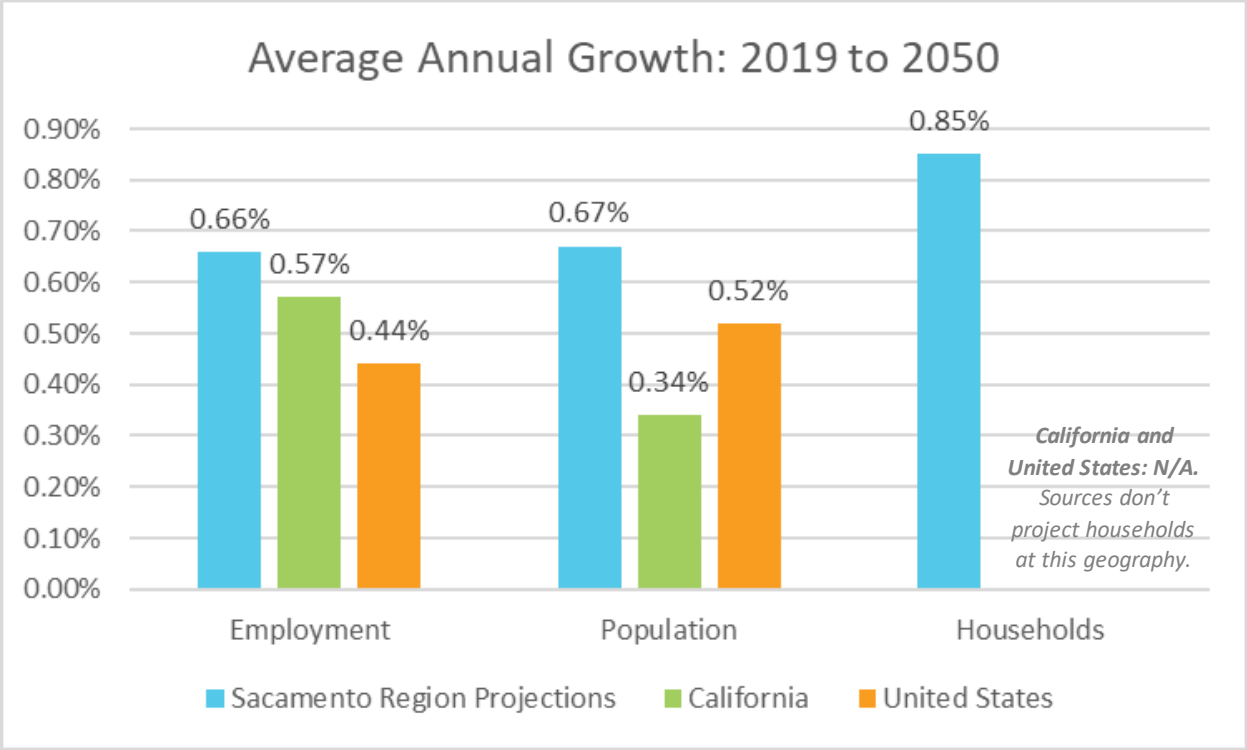
*Projections are for the six-county SACOG Planning Area (Tahoe Basin removed). The board's growth projection action is on the baseline growth increment (change). Through the MTP/SCS process staff works to apply the growth increment onto the plan's updated base year, which may vary slightly from the 2019 numbers produced by the projection series. The growth projection action sets the totals for the plan's pathway (scenario) development and subsequent analysis. For the 2024 update staff has also included an increment range between the baseline and an upper bound, which preserves the board's flexibility to revisit the growth totals during preferred scenario development if underlying economic or growth conditions change, or if there are substantial revisions to the plan's supporting policies.

Key Points

Region to outpace state and nation in growth

SACOG's growth projection has the region outpacing the state and nation. As such, the projection assumes an increasing competitive position for the region compared to historical trends. In other words, simply extending the region's trend-line trajectory of the past ten years would have resulted in a lower projection for the region, especially on the employment and household side. Instead, the project work coalesced around a set of regional growth factors across the three projected areas of employment, population, and households. The project's expert panel generally found the region's growth estimate to be reasonable, though raised important questions around the vulnerability of the assumptions.

Figure 1. Projected Sacramento Regional Growth Compared to State and Nation



Source: SACOG 2024 MTP/SCS projection series.

But pace of growth to slow by 2050

Growth in the Sacramento region is heavily influenced by national trends in employment and population. Overall U.S. population and employment growth is expected to slow over the next several decades as the population ages and the number of children born (per capita) continues to decline. Simply extending the growth projections from 2040 to 2050 leads to a slower annual growth rate across the nation, state, and region. More recent projections by other regional agencies also show a pronounced drop in growth relative to their prior projection series.

This increment of change looks similar to prior projection series (even though the updated is a longer period)

The new baseline projections see the Sacramento region growing by a little less than 600,000 people by 2050, while adding over 260,000 jobs and households. This increment of change is similar to the prior regional projection (produced in 2017). However, that prior projection covered a shorter period (2016 to 2040, compared to 2019 to 2050 for the new projection). The new projection thus has a lower growth rate on a yearly basis compared to the prior series. As mentioned above, this stems primarily from exogenous factors, most notably the projected decline in global and national fertility rates.

Table 1. Projection Compared to Prior Series

Table 1A. Summary of 2020 MTP/SCS projection (i.e., for the prior plan)

Base (initial) year	Horizon (end) year	# of years in series	Measure	Base year level	Horizon year level
2016	2040	24	Population	2,376,000	2,996,000
			Employment	1,060,000	1,330,000
			Households*	846,000	1,101,000

Table 1B. Summary of 2024 MTP/SCS projection (i.e., what has been updated for this plan)*

Base (initial) year	Horizon (end) year	# of years in series	Measure	Base year level (projection series)	Horizon year level (projection series)
2019	2050	31	Population	2,485,000	3,051,000
			Employment	1,152,000	1,415,000
			Households	882,000	1,146,000

Table 1C. Projection Comparison

	Total Growth Increment		Average Annual Growth Rate	
	2020 projections	2024 projections	2020 projections	2024 projections
Population	620,000	566,000	0.97%	0.66%
Employment	270,000	263,000	0.95%	0.67%
Households	255,000	264,000	1.10%	0.85%

**The initial year (2019) totals on the 2024 MTP/SCS projections table come from the projection series, which may differ from the plan's adopted base year. Staff applies the projection's growth increment (table 1C) to the plan's updated base year. The households cited in this table for the 2020 plan draw on the DOF-suggested levels (not the plan base year) to keep consistency between the 2020 and 2024 series.*

The future is uncertain. But some elements of the projection have been more stable through time.

In any projection it is vital upfront to recognize that the future is uncertain. This is particularly important in long-range projections such as those for the MTP/SCS that extend 20 or 30 years forward. Many changes will occur by 2050, some that are impossible to predict. But the fundamental components of the projection (including age and demographic trends) have been much more stable through time.

But the last 18 months have seen major disruptions to each of the projected components of jobs, population, and households. Staff has benefited by drawing on several examples from the last few decades of how the region has responded to major economic shocks and other disruptions (such as the closure of military bases, the dot com bubble, or the Great Recession). Long-range projections in any timeframe are hard; conducting projections in times of disruption (such as the current period) is even harder. The project team and expert panel explored which changes seen in the last few years would likely be more transitory, which could accelerate trends that would probably have already occurred, and which are new impacts that could shift the region's trajectory. While the updated projections very much

consider the effect of Covid-19 and associated changes, staff generally took a more conservative approach in incorporating these impacts into the projection series, concluding that any further revisions would be more speculative at this point given the short timeframe of the data, still evolving outcomes, and lack of consensus at the expert panel (or, as one member of the expert panel put it, 'more questions than answers at this point').

Projections bounded in recognition of uncertainty and potential further policy development

For this projection update staff has presented the growth projections within a bounded range (baseline and high), given the uncertainties engendered by Covid-19 as well the opportunity for further policy development over the course of the MTP/SCS. The growth projection action sets the totals for the plan's pathway (scenario) development. Staff does not expect any revisions to the growth totals. Staff has compiled the upper bound totals for reference if over the course of the MTP/SCS update the region experiences significant changes to underlying economic or growth conditions (especially as the region has more time to learn from the changes engendered by the Covid-19 pandemic), or the plan's policy development lands on substantial changes relative to the prior cycle.

Achieving the ultimate projection requires successful implementation of policies that enhance the attractiveness of the Sacramento region as a place to work and live. In prior cycles, the SACOG board felt the MTP/SCS had this combination of housing, mobility, quality of life, and economic prosperity policies to support a projection higher than the state and nation.

Introduction and Framing

The base year in this projection update is 2019, i.e., right before the disruptions caused by the Covid pandemic and its associated impacts (though the effects of the pandemic and associated disruptions are very much considered in the series update, as discussed above). Staff has not yet selected the horizon (end) year for the 2024 MTP/SCS. This projection update goes out to the year 2050, though the horizon year of the MTP/SCS may be earlier. In short, the projection presented here covers the period of 2019 to 2050. The summary projection is for the SACOG planning area of the six-county Sacramento region, which contains all of Sacramento, Sutter, Yolo, and Yuba Counties as well as the non-Tahoe Basin portions of El Dorado and Placer Counties (in other words, the projection removes the Tahoe Basin portion of El Dorado and Placer counties).

The detailed projections were completed for the full six-county area (including the Tahoe Basin). As a final step, staff removed the Tahoe Basin from the summary projection series.

In any projection it is vital upfront to recognize that the future is uncertain. This is particularly important in long-range projections such as those for the MTP/SCS that extend 20 or 30 years into the future. Federal and state planning requirements lead the plan to produce a single point future, which the growth projections provide. However, uncertainty analysis, both in the projections update and the plan in general, is very much central to the process.

Like other elements of the MTP/SCS, the growth projections must be based on a reasonable estimate that is supported by the underlying demographic and economic data. In this sense the work differs from visioning exercises that are less bound by financial, demographic, or other constraints. As such, the MTP/SCS's regional growth projections are distinct from estimates of overall buildout plans or growth

goals and are focused on estimating the growth the region can reasonably expect to experience over a bounded timeframe.

To complete the projection update staff looks at past trends in the region, state and nation (often extending thirty or more years back, but with a primary focus on the last ten years), examines what demographic and economic trends have changed recently (i.e., a focus on the past several years, and in this update, an exploration of the past 18 months given the recent disruptions), draws on a suite of work and critical thinking about future conditions (such as material from the Bureau of Labor Statistics, the State Department of Finance, and projections conducted by our other peer regions) and ultimately makes a set of assumptions based on this collection of information that shape the projection update. The update draws heavily on quantitative material (such as recent growth rates or projected changes in demographic trends) but uses an expert panel as a sounding board on the reasonableness of the results and assumptions.

The project's first expert panel, held on September 10th, 2021, focused on the assumptions and proposed approach to the projection update, and provided input on any long-term economic or demographic trends since SACOG's prior projections were completed (in late 2017). SACOG thanks the panel for their time, critical thinking, and expertise. In short, this work helped frame the approach staff employed in developing a draft set of projections for the region, by calling attention to what elements had changed since the prior update, providing resources and insight on relevant data sources and trends, and providing context from the work of other recent projection series.

To produce a baseline jobs projection for the Sacramento region staff contracted with the Center for the Continuing Study of the California Economy (CCSCE). CCSCE worked closely with SACOG project staff to develop a draft jobs projection. SACOG staff developed the population and household baseline projection based on this job projection by employing the technical methodology used in the prior projections update.

The project team presented this draft baseline projection in a second session with the expert panel, held on November 5th, 2021. Based on the panel's expert feedback, staff made several refinements to the baseline projection, discussed in this memo. The updated projection is termed the revised baseline projection. Attachment B also provides a summary of the expert panel's feedback and the changes staff made accordingly to produce the revised baseline projection.

Finally, it is also important in the projection update to note what assumptions the work takes in recognition that the future is uncertain. The major assumptions staff has taken to date on the projections are:

- Population growth is tied in large part to the region's projected job growth, and household projections in turn are largely based on the age/ethnic composition of the forecasted population plus trends in household formation.
- Growth in the Sacramento region is heavily influenced by national trends in population and employment. Most notably, U.S. population growth will slow over the next several decades, which affects the Sacramento regional projection.

- Many changes will occur by 2050, some that are impossible to predict. However, some elements of the projection (such as age and demographic trends) have been much more stable through time.
- Achieving the ultimate projection requires successful implementation of policies that enhance the attractiveness of the Sacramento region as a place to work and live. Last cycle, the SACOG board felt the prior MTP/SCS had this combination of housing, mobility, quality of life, and economic prosperity policies to support a projection higher than the state and nation.

Table 2. Projections Slow into 2050 Period

Projection Comparisons: Average Annual Growth Rate			
REGION	**AREA**	**PRIOR PROJECTION: 2016 to 2040**	**NEW PROJECTION: 2020 to 2050**
SACOG	Population	0.97%	0.66%
	Employment	0.95%	0.67%
	Households	1.10%	0.85%
	Source	2020 MTP/SCS	2024 MTP/SCS
Los Angeles (SCAG region)	Population	0.65%	0.32%
	Employment	0.86%	0.44%
	Households	0.91%	0.72%
	Source	2016 RTP	Preliminary projections for next Connect SoCal plan
Bay Area (MTC /ABAG)	Population	0.90%	0.89%
	Employment	0.62%	0.94%
	Households	0.91%	1.28%
	Source	2016 Plan Bay Area	Plan Bay Area 2050
San Diego (SANDAG)	Population	0.75%	0.33%
	Employment	0.73%	0.68%
	Housing Units	0.70%	0.57%
	Source	Series 13 projections	San Diego Forward: 2021 Regional Plan
California	Population	0.73%	0.34%
	Jobs	0.75%	0.57%
	Source	DOF (pop), CCSCE (jobs)	DOF (pop), CCSCE (jobs)
Nation	Population	0.65%	0.52%
	Jobs	0.60%	0.44%
	Source	Remi/census	Remi/census
State forecast for SACOG region	Population	1.08%	0.67%
	Source	DOF	DOF

Detailed Jobs Projection

Table 3. Sacramento Region Jobs Projection (six-county region including Tahoe Basin)

2019	2050	Difference	Avg Annual Growth Rate (AAGR)	AAGR of Prior Projection (2016 to 2040)
1,168,000	1,432,000	263,00	0.66%	0.95%

Jobs Projection Summary Points

- SACOG contracted with the Center for the Continuing Study of the California Economy (CCSCE) for support on the employment projection.
- CCSCE's methodology looks at the region's economic base in relation to the state and nation.
- The historical trend would suggest the region's job projection to lag, or closely mirror, the state employment projection.
- Instead, the regional jobs projection sees an increasingly competitive position for the Sacramento region moving forward. The projection has the Sacramento region outpacing the state and nation in job growth.
- The expert panel generally agreed that this higher growth rate for the Sacramento region could be justified, though did not reach consensus on which industries would best lead the region in outpacing the state.
- Like the other components of the projection (population and household formation), employment growth slows across the nation, state, and region in 2050 relative to the prior thirty years.
- The methodology for the detailed projected covered the full six-county region. SACOG removed the Tahoe Basin as a final step in the summary projection referenced in the introduction.

Jobs Projection Methodology

The Center for the Continuing Study of the California Economy produced a baseline jobs projection for the Sacramento region, including minor revisions as suggested by the expert panel. This section draws on a memo prepared by CCSCE for SACOG as part of the projection update.

The CCSCE methodology projects employment growth in the Sacramento region in relation to job growth (or decline) projected at the national and state level. In other words, the projection starts first at the national level, then the state, and finally the regional level. Total job growth is projected by examining growth in 103 separate industries based on CCSCE's industry cohort model.

The baseline CCSCE projection sees jobs in the Sacramento region growing slightly faster than jobs in the state to 2050, while jobs in the state are projected to grow faster than jobs in the nation. However, as noted above, job growth in each geography is projected to be slow in terms of average annual growth (AAGR) relative to the prior thirty years. The growth rates from 2019 to 2050 are far lower than the growth rate since 1990 for all geographies (national, state, regional). In the projection, growth is slowing as the population ages and birth rates decline. There will be fewer births, more deaths, and a smaller share of the population in the workforce. Average annual growth will slow to roughly half the growth

rate from the past 30 years. This is consistent with material produced in other projection series, such as those summarized in Table 2 above.

Table 4. Summary of Sacramento Region, State, and National Jobs Projection (jobs in thousands)

Projection	2019	2050	2019-2050 % Change	2019-2050 AAGR*
United States	162,795	186,402	14.5%	0.44%
California	19,411	23,168	19.4%	0.57%
Sacramento Region	1,170	1,433	22.5%	0.66%

*Source: CCSCE. *AAGR stands for average* annual growth rate*

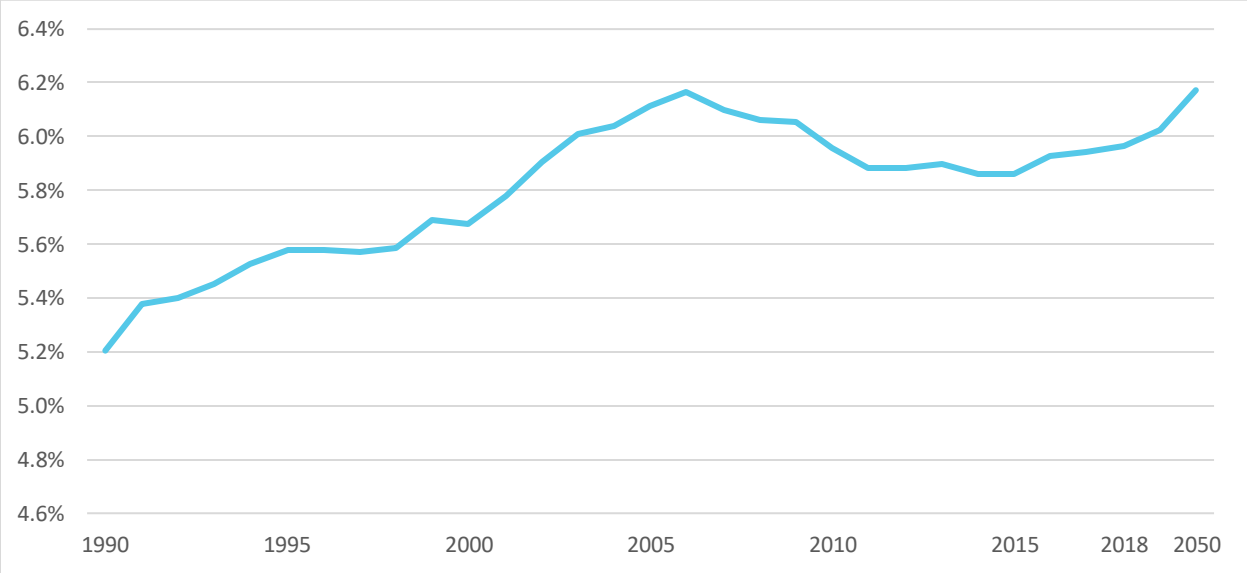
Table 5. Comparison of Jobs Projection to Historical Period (jobs in thousands)

Projection	1990	2019	2050	1990-2019 AAGR	2019-2050 AAGR
United States	121,679	162,795	186,402	1.0%	0.4%
California	14,148	19,411	23,168	1.1%	0.6%
Sacramento Region	736	1,170	1,433	1.6%	0.7%

Source: CCSCE

The region is projected to have 6.2% of jobs in California in 2050, up from 6.0% in 2018 and 2019. As mentioned in the opening, the base year for these projections is 2019 (prior to the pandemic) though pandemic effects were considered in developing the projections.

Figure 2. Sacramento Region Share of California Jobs: Historical and Projection End



Source: CCSCE

Explanation of Base Industry Jobs

An assumption made in the projections update is that the principal driver of regional job growth is the growth potential in the region's economic base—those sectors that can choose where they locate (mostly) and sell goods and services primarily to state, national and world markets.

CCSCE projects the Sacramento region to get a slightly increased share of state base industry jobs (5.7% in 2050) compared to 5.5% in 2018 and 2019, described later in the section on the regional job projection.

CCSCE uses a custom categorization/classification of base industries. In this categorization, the high-tech manufacturing sector includes computer manufacturing, pharmaceuticals and aerospace. The diversified manufacturing sector includes all other manufacturing industries. Wholesale trade and transportation includes wholesale trade and all transportation industries including warehousing. The professional, business and information services sector includes all professional, scientific and technical industries, software publishing, internet related services, and employment services. The tourism and entertainment sector includes motion pictures, amusement industries and hotels. Basic government jobs include federal and state government jobs, and the resource-based sector includes agriculture, mining, and food manufacturing.

Methodology for Developing the Job Projection

The U.S. Job Projections

The national and state job projections for 2050 used as input to these Sacramento region job projections were developed by CCSCE in June and July 2021 for the Southern California Association of Governments (SCAG).

The national projections included a projection of total population, total jobs, and jobs by industry. SCAG provided CCSCE with a national set of projections developed by Regional Economic Models, Inc (REMI) in 2021.

Based on CCSCE's judgment and confirmed by input from the SCAG panel of experts (many of whom serve on the SACOG panel), CCSCE made two small adjustments to the REMI projection of U.S. population and jobs in 2050. The population projection was raised by 1% to 384.1 million based on the assumption that immigration levels would be roughly 100,000 per year (10% higher) than the last Census projection.

The thinking behind this adjustment was:

1) the aging of the population and lower birth rates assumed in the population projection would increase the pressure for labor-skill based immigration,
2) the current administration was removing some of the prior administration's restrictions on international migration, and
3) there is a broad business consensus around higher levels of immigration to fill job openings.

The second adjustment was to raise the number of jobs relative to population based on the assumption of increased labor force participation rates (LFPRs) relative to the REMI model projections. Overall LFPRs would decline with the aging population but less so than REMI projected.

The thinking behind this adjustment was

1) there would be somewhat higher rates for African American and Latino males as incarceration rates declined and
2) there would be increases for women (especially Latina women) as education levels increased, birth rates dropped and services like free pre-K and more affordable childcare became available.

The result was a national 2050 projection of 384.1 million people and 186.4 million jobs, both slightly higher than the REMI projection. SACOG staff elected to use this same national projection that was used by SCAG in its recent projection update. The section below on the population projection summarizes some of the comments the SACOG expert panel raised on these assumptions, especially labor force participation.

National job growth by industry

CCSCE developed national job projections by approximately 100 individual industries. The work drew on the REMI 2050 projections, the Bureau of Labor Statistics (BLS) projections to 2030 and CCSCE's expert judgment. SACOG staff elected to use this national job projection by industry, which was also endorsed by the SCAG panel.

When the REMI 2050 and BLS 2030 projections showed similar average annual growth rates, the national projection used the REMI projected growth rate to 2050.

There were many industries in CCSCE's model where REMI did not provide a projection. When REMI provided a projection for an industry that the CCSCE sub industry was a part of (for example, REMI projected chemical manufacturing and CCSCE split the sector into pharmaceuticals and other chemicals), the REMI projection was used for the larger sector if it was consistent with the BLS growth trend and CCSCE made the sub industry projections using the BLS 2030 growth trends in most cases.

When REMI did not provide a projection needed in the CCSCE model and the step above was not possible, CCSCE used the BLS growth trend.

When REMI and BLS disagreed on the long-run industry growth, CCSCE used judgment to select which trend to follow.

The major changes made by CCSCE were to reduce some BLS growth rates past 2030 when the BLS 2020-2030 projections were used.

The national pattern of basic industry growth is shown below and is the most important input to the state and Sacramento regional projections. There are three small changes in the national categories from those used in the regional projections, but they do not affect the major trends or results.

State government is not a basic industry at the national level and there are a few transportation sectors that mainly serve local markets.

By far the largest sector growth nationally is in professional, business and information services, almost all in high-tech services. The tourism and entertainment sector has the second highest growth rate, and

both of these sectors are strengths of the California economy. Diversified manufacturing jobs are projected to decline slightly and high-tech manufacturing job growth is small, though there are large projected output increases offset by strong productivity growth.

Growth in other sectors is more modest in the national projections and the growth in transportation sector is largely in warehousing and delivery jobs.

Table 6. U.S. Base Industry Job Projection Trends (in thousands)

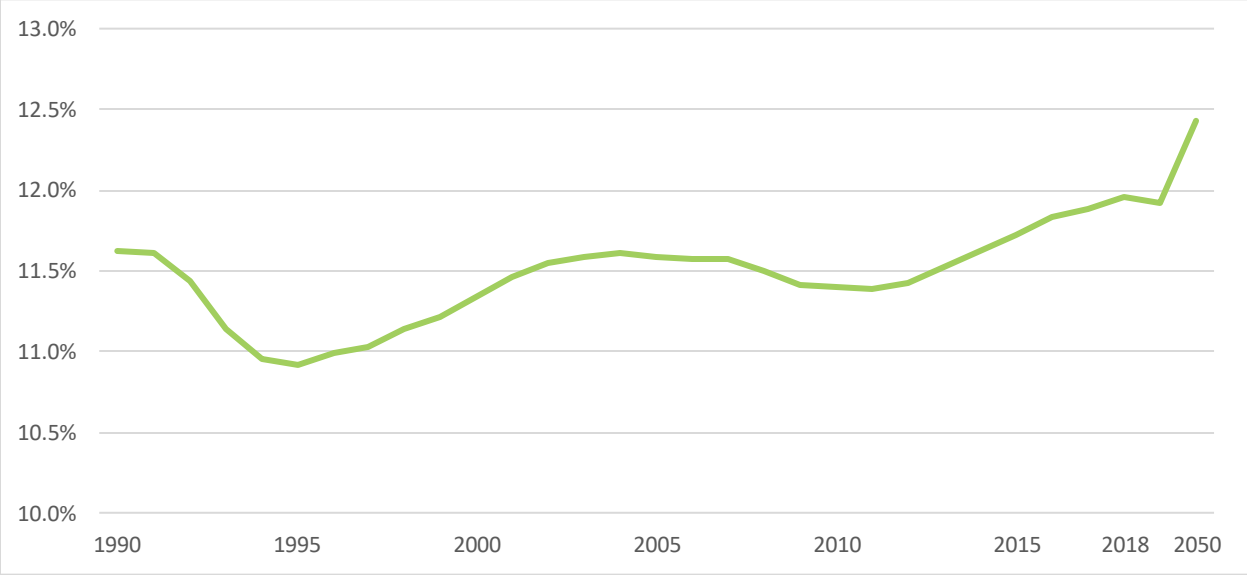
Base Industry	2019	2050	2019-2050 Change	2019-2050 % Change
High Tech Manufacturing	1,921	1,999	79	4.1%
Diversified. Manuf.	8,100	7,754	-346	-4.3%
Wholesale Trade & Transp.	8,676	9,145	469	5.4%
Prof, Bus & Info Serv.	16,745	21,641	4,896	29.2%
Tourism & Ent	4,266	5,128	862	20.2%
Basic Govt	2,834	3,032	198	7.0%
Resource Based	3,129	3,256	127	4.1%
Total Basic Jobs	45,670	51,955	6,285	13.8%

Source: CCSCE

The California Job Projections

The CCSCE projection sees California adding jobs at a faster rate than the nation. The state is projected to capture 12.4% of the nation's jobs in 2050, up from 12.0% in 2018 and 11.9% in 2019. The state has captured an increasing share of national jobs in recent years on the strength of the state's economic base.

Figure 3. California Share of U.S. Jobs: Historical and End Year Projection



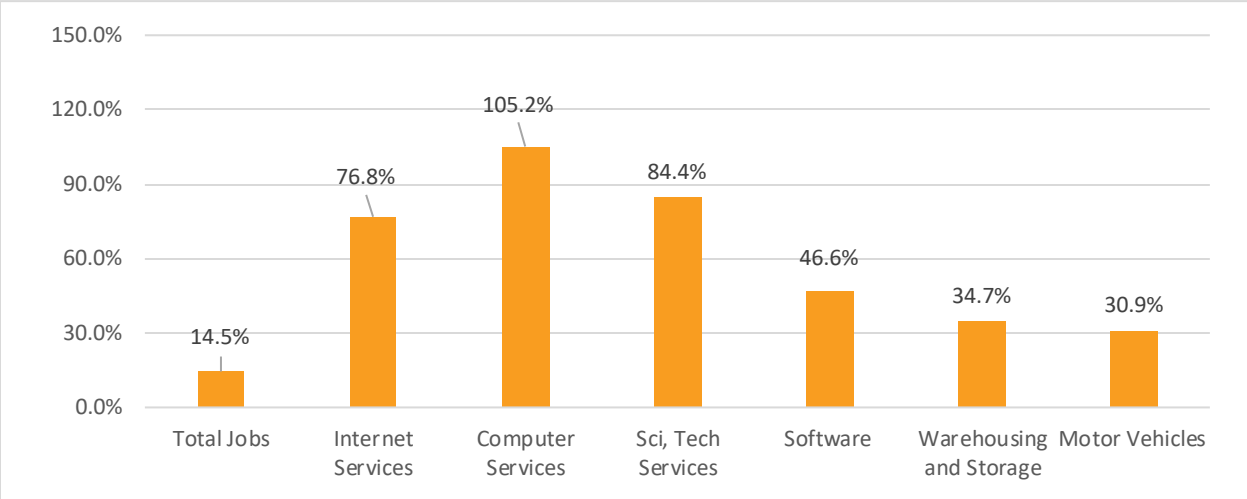
Source: CCSCE

California Base Projection

The case for the strength of California's economic base is straightforward. The state has a high share in some of the nation's fastest growing sectors.

The chart below shows some of the nation's fastest-growing economic base industries.

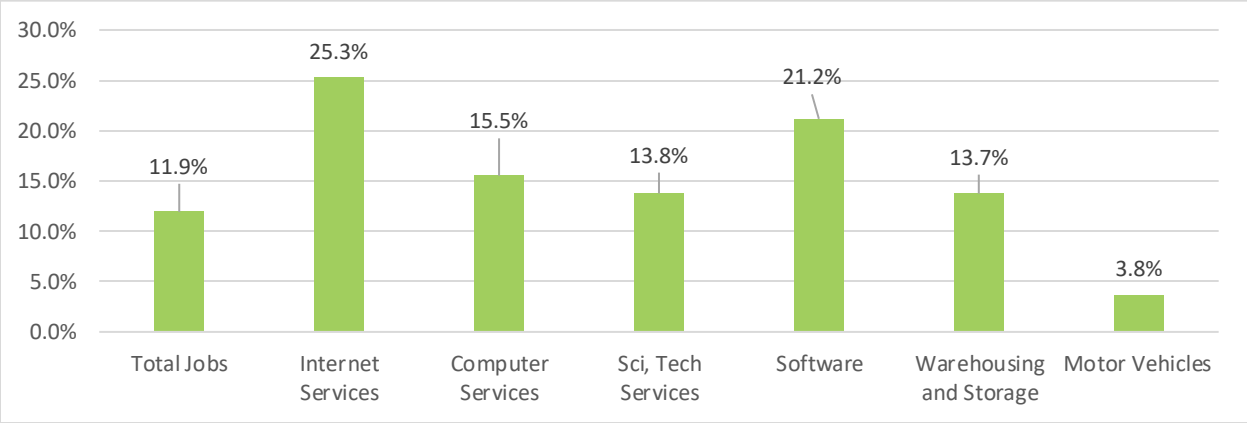
Figure 4. High Growth Industries: Projected National Job Growth 2019 to 2050



Source: CCSCE

These are sectors in which California has a relatively large share of current jobs.

Figure 5. California Share of Select U.S. Base Industry Jobs, 2019



Source: CCSCE

CCSCE's reasoning for above-average job growth in California's economic base rests on three major factors:

1) California remains a center for innovation in tech, design, and entertainment
2) California benefits from location on the Pacific Rim for trade tourism and talent
3) California benefits from being a welcoming place to live and work

As such, California is projected to get 13.5% of U.S. basic industry jobs in 2050, up from 12.8% in 2019.

The largest numerical job gains are in the professional, business and information service industries followed by entertainment and tourism and wholesale trade and transportation industries. Other basic industry clusters are projected to have small job gains and diversified manufacturing jobs are projected to decline.

Most of the cluster share gains between 2019 and 2050 are the result of the composition of the clusters, not from projected share increases in the individual industries in each cluster. CCSCE projected that most industry shares would remain in the recent historical range.

Small share increases were projected for some professional and information service sectors as well as warehousing, support for transportation and motor vehicle manufacturing—all continuing but slowing recent share gains.

Table 7. California Base Industry Clusters

	Jobs (thousands)		State as Percent of U.S.	
Base Industry	**2019**	**2050**	**2019**	**2050**
High Tech Manufacturing	407	428	21.2%	21.4%
Diversified. Manuf.	666	644	8.2%	8.3%
Wholesale Trade & Transp.	1,051	1,170	12.1%	12.8%
Prof, Bus & Info Serv.	2,333	3,178	13.9%	14.7%
Tourism & Ent	623	762	14.6%	14.9%
Basic Govt	248	266	8.8%	8.8%
Resource Based	502	541	16.0%	21.4%
Total Basic	5,830	6,989	12.8%	13.5%

Source: CCSCE

Other California Industries

CCSCE projected local (population and business) serving jobs in relation to the projection of basic industry jobs using the state's relation to the national share. California has historically had a very similar ratio of local serving jobs to basic jobs as the nation, which the state-level projection held into the future. Specifically, California was projected to have 3% fewer local serving jobs relative to basic industry jobs than the nation following the historical trend.

CCSCE did not project individual local serving industries. Instead, CCSCE projected the composition of local serving jobs in the state by projecting the individual industry shares of total local serving jobs.

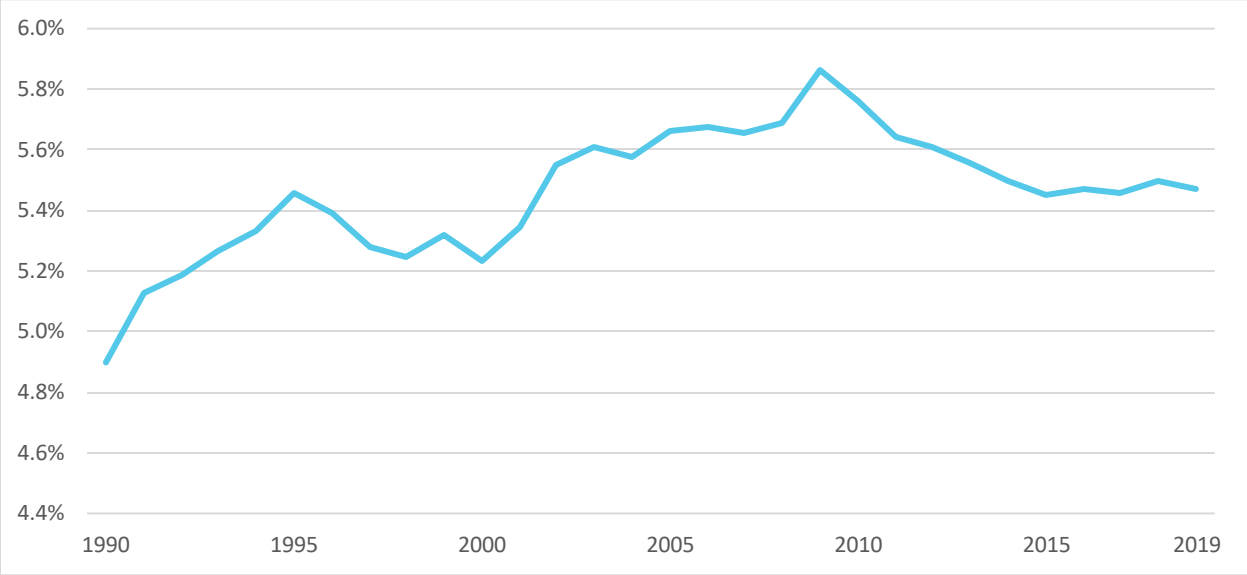
The one exception is that state and local government and education jobs are projected based on projections of relevant population and caseload growth, which is important for the Sacramento regional projections.

The Sacramento Region Job Projections

CCSCE employed the same methodology for the Sacramento region industry job projection: growth was projected in relation to projected state industry growth in the same manner as California was projected in relation to the nation.

The work was informed by a primary trend: the Sacramento economic base outpaced the state between 1990 and 2007 but has since lagged state base sector growth.

Figure 6. Sacramento Region Share of CA Base Industry Jobs: Historical



Source: CCSCE

The Sacramento region's economic base is highly concentrated in two sectors: (1) state government jobs and (2) professional, business, and information service industries.

One big change seen in the industry data has been the sharp drop in the growth of professional, business and information industry jobs, and a decline also in wholesale trade and transportation industry growth between the earlier and later periods. Other changes were smaller, and the region added more state government jobs between 2007 and 2019 than between 1990 and 2007. High tech manufacturing jobs went from a small gain up to 2007 to a small loss after 2007.

Table 8. Sacramento Region Base Industry Jobs (thousands): 1990 to 2007 compared to 2007 to 2019

Base Industry	1990	2007	2019	1990-2007	2007-2019
High Tech Manufacturing	7	8	7	2	-1
Diversified. Manuf.	33	31	30	-2	-1
Wholesale Trade & Transp.	37	54	59	17	5
Prof, Bus & Info Serv.	52	101	105	49	4
Tourism & Ent	18	24	30	6	6
Basic Govt	119	125	139	6	14
Resource Based	19	15	16	-4	0
Total Basic Jobs	**285**	**359**	**386**	**75**	**27**

Source: CCSCE

The basic industry share declines occurred most notably between 2009 and 2015 after which the region has maintained 5.5% of state basic industry jobs.

The region's share of state basic industry jobs fell primarily as a result of share losses in two sectors — wholesale trade and transportation and professional, business and information services.

Specific share losses of note were in warehousing and in architectural, computer, management, and scientific R&D services.

Table 9. Sacramento Region Base Industry Jobs (as % of CA): Historical

Base Industry	1990	2007	2019
High Tech Manufacturing	1.0%	2.0%	1.7%
Diversified. Manuf.	2.7%	3.1%	3.5%
Wholesale Trade & Transp.	4.1%	4.7%	4.4%
Prof, Bus & Info Serv.	4.0%	5.1%	4.3%
Tourism & Ent	3.6%	4.0%	4.2%
Basic Govt	16.0%	17.0%	17.8%
Resource Based	4.1%	3.3%	3.2%
Total Basic Jobs	4.9%	5.7%	5.5%

Source: CCSCE

If the historical shares were the only guide, the projections would have maintained the 5.5% share of state basic industry jobs in 2050 that the region had in 2019. However, CCSCE worked with the SACOG project team to assess the region's competitive positioning and possible areas of strength moving forward. The analysis focused on, among other inputs, the region's comprehensive economic development strategy (CEDS), the recent Brookings analysis for the region, and the Prosperity Strategy, which all call attention to life sciences, food/agriculture and innovative mobility as areas of promise for the Sacramento region.

Each of these clusters have seen developments since the last time SACOG updated its projections. Some developments within these regionally-identified focus areas called out in the Prosperity Strategy include:

- **Life sciences:** such as Aggie Square, a planned innovation hub on UC Davis' Sacramento campus focused on life sciences, technology, and engineering as one example of activating the cluster.
- **Innovative mobility:** including the California Mobility Center, a planned center to support early-stage companies and commercialization within future mobility space (including EVs), plus workforce development in this emerging sector. The effort has many partners, including Sacramento State, SMUD, etc.
- **Food/ag:** with the goal to bring more value-adding functions back to region, such as through a food hub or other piece of food system infrastructure.

Based on this analysis, the project team made small adjustments to four professional service sectors in the baseline projections. Shares in architectural, computer, management, and scientific R&D services in 2050 were projected at the highest level in the region's past history. In addition to the supporting material referenced above, additional reasoning to increase the jobs share is based on two assumptions:

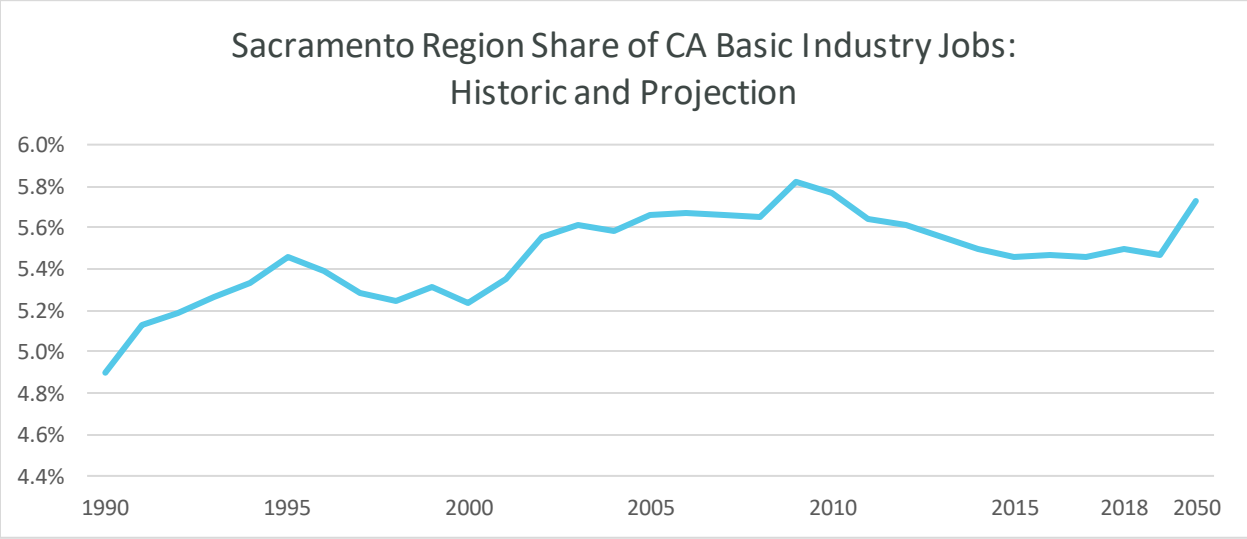
1) these jobs are affected by state government policy to expand into new policy areas. Some of these jobs are either direct contractors to state government or are there because their clients are interested in these polices. This relates not directly to state government employment levels but to the scope of policy.
2) the state has recently and will continue to develop new policies and related funding and regulatory authority such as in housing, climate change, health care coverage and child related programs.

Other potential areas of growth being studied in the region were not included in share increases beyond the history. These included agricultural-related activities and growth in high-tech manufacturing. Some increase in life sciences is included in the scientific R&D services industry.

These changes pushed the projected regional share of state basic jobs up slightly from 5.5% to 5.7%, near the previous high (i.e., without these changes, the job projection would have been more in line with historical averages. Instead, the baseline projection has the region outpacing the state in job growth).

CCSCE and the SACOG project team presented these job projections to the project's expert panel. Based on the feedback of that panel, the team adjusted down the projected share of architectural and engineering services. The expert panel felt the original projection in this industry could have been too aggressive, given that the historical share for the industry was heavily affected by the prior cycle of development. The result of the change was to lower the 2050 projection in that industry from 11,600 to 10,700 jobs (with the projected share at 5.6%, the recent average, instead of the original projection of 6.1%). The expert panel also discussed the recent regional job growth within the broader health industry (see attachment B for a fuller discussion of the expert panel dialogue and guidance). The health sector includes both base and non-base industries. SACOG, working with CCSCE, adjusted up the projection in the health insurance sector, which is partly a basic industry (from 25,800 jobs in the original base line 2050 projection to 26,700 in the revised baseline projection). The analysis assumes the jobs to fall within the Professional, Business, and Information base grouping.

Figure 7. Revised Baseline Job Projection Has Region Recapturing High Share of Base Industry Jobs



Source: CCSCE

In short, the revised baseline job projections have the region recapturing a higher share of state base industry jobs. The largest regional basic industry job gains to 2050 are in the professional, business and information services cluster. The majority of the growth follows national and state trends while a smaller part is the result of projected share gains discussed above (i.e., through increased shares in computer, management, scientific R&D services and base health and healthcare activity). The projected job change in the other clusters follows national and state trends, where the region is projected to get roughly the same share of state jobs in each of the other basic industry clusters. Note that the revised baseline projections assume an increasing competitive position for the region compared to the recent historical record.

Table 10. Sacramento Region Base Industry Jobs (thousands): Historic and Projected

Base Industry	2007	2019	2050	Change 2007-19	Change 2019-50
High Tech Manufacturing	8	7	8	-1	1
Diversified. Manuf.	31	30	29	-1	-1
Wholesale Trade & Transp.	54	59	69	5	10
Prof, Bus & Info Serv.	101	105	156	4	50
Tourism & Ent	24	30	38	6	8
Basic Govt	125	139	159	14	20
Resource Based	15	16	18	0	2
Total Basic Jobs	359	386	477	27	91

Source: CCSCE

Table 11. Sacramento Region Base Industry Jobs (as % of CA): Current and Projected

Base Industry	2019	2050	2019	2050
High Tech Manufacturing	7	8	1.7%	1.9%
Diversified. Manuf.	30	29	3.5%	3.6%
Wholesale Trade & Transp.	59	69	4.4%	4.5%
Prof, Bus & Info Serv.	105	156	4.3%	4.8%
Tourism & Ent	30	38	4.2%	4.2%
Basic Govt	139	159	17.8%	18.1%
Resource Based	16	18	3.2%	3.3%
Total Basic Jobs	386	477	5.5%	5.7%

Source: CCSCE

The local serving jobs in the regional jobs projection were projected in the same manner as for the state—first looking at the ratio of local serving jobs in the region compared to the state and then projecting what share of the total of local serving jobs would be in each industry.

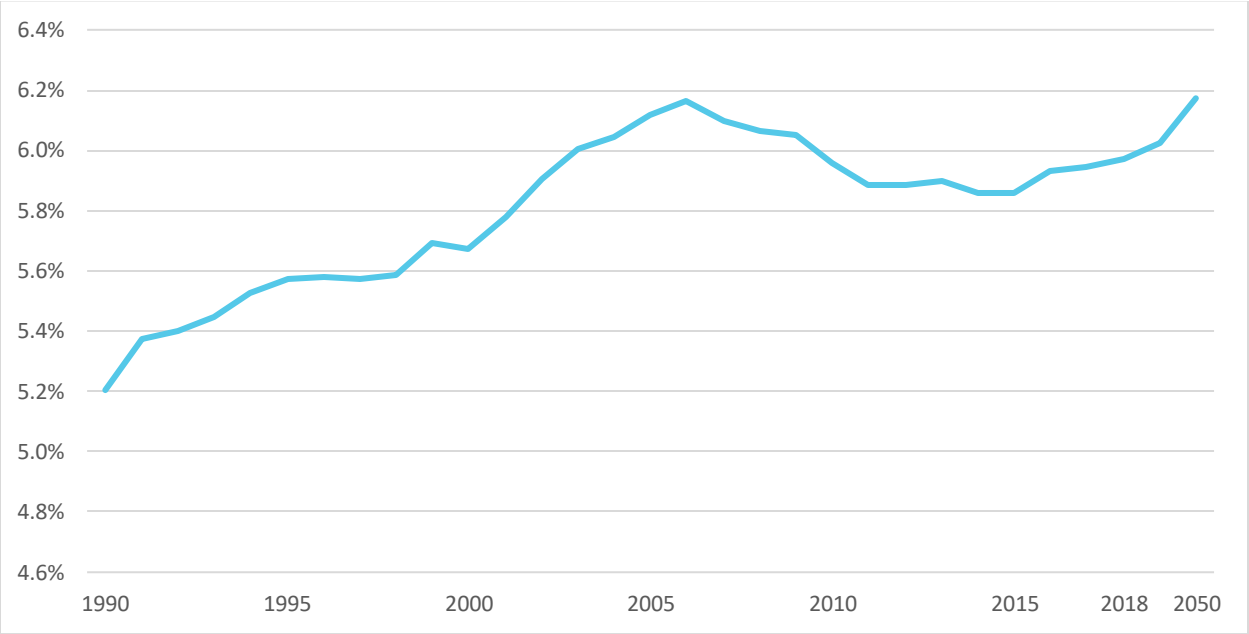
There was one modification of this methodology for the Sacramento region. The region has historically had a slightly higher share of local serving jobs than the state as the region is home to people who work in other regions slightly more than in other regions of the state. These commuters support local jobs such as retail, restaurants, local government and education and medical services. CCSCE analyzed recent

Census and Replica commute data to inform the projection. The historical advantage of the region for local serving jobs was increased slightly in the projections to 2050 reflecting an assumption that the region would gain even more commuting residents over time. This assumption has a small positive effect on the projection of total regional jobs in 2050.

Jobs Projection Summary

In summary, the revised baseline job projection for the Sacramento region sees the region capturing an increasing share of jobs, thus outgrowing (on a percentage basis) the state and nation. The region is projected to have 6.2% of jobs in the state by 2050, up from 6.0% in 2018 and 2019. As mentioned in the opening, the base year for these projections is 2019 (prior to the pandemic) though pandemic effects were considered in developing the projections. The baseline projection is to the end year of 2050. Subsequent steps will create interim years in the projection series.

Figure 8. Revised Baseline Sacramento Job Projection (as % of CA Jobs)



Source: CCSCE

Detailed Population Projection

Table 12. Sacramento Region Population Projection (full six-county region)

2019	2050	Difference	Avg Annual Growth Rate (AAGR)	AAGR of prior projection (2016 to 2040)
2,528,000	3,042,000	514,000	0.66%	0.97%

Population Projection Summary Points

- The baseline population projection uses the DOF age/ethnicity and fertility rates to build a population based on CCSCE's suggested jobs total.
- The projection has the Sacramento region growing faster than the state and nation.
- Like the other recent set of projections throughout the state and nation however, this new population projection represents a slower growth rate compared to SACOG's prior projection period (2016 to 2040).
- The baseline Sacramento population projection for 2050 falls in line (within a half percentage point) of the DOF projection for the region out to 2050.
- The methodology for the detailed projected covered the full six-county region. SACOG removed the Tahoe Basin as a final step in the summary projection referenced in the introduction.

Background of population projection

Like the rest of the state and nation, population growth in the Sacramento region has slowed (from a high of over 50,000 a year in the early 2000s to less than 20,000 a year during great recession). In the last five years (2015-2020, pre-Covid), the region's population growth had steadied, adding between 25,000 to 30,000 new residents per year.

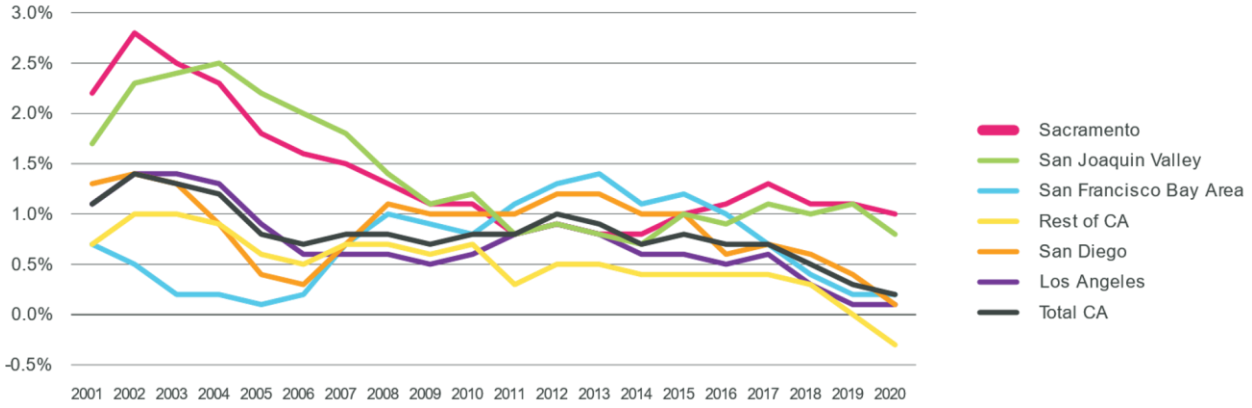
Table 13. Population Growth by SACOG County, 2000 to 2020

	Annual Average Growth Rate			
County	2000-2005	2005-2010	2010-2015	2015-2020
Sacramento	2.0%	1.0%	0.9%	1.0%
Placer	4.4%	2.5%	1.3%	1.7%
Yolo	2.0%	1.5%	1.0%	1.0%
El Dorado	1.9%	1.1%	0.2%	1.1%
Sutter	2.0%	1.7%	0.3%	1.0%
Yuba	2.0%	1.7%	0.5%	1.3%
6-County Total	2.3%	1.3%	0.9%	1.1%

Source: SACOG, December 2020. Based on population estimates from the California Department of Finance.

But population growth in the rest of the state has slowed even more over the same period, often dramatically. As such, Sacramento region is among fastest growing in the state, along with San Joaquin. In short, the Sacramento region has had a higher annual growth rate than the rest of the state, but still lower than what the region witnessed in the early part of the millennium.

Figure 9. Annual Population Growth, Sacramento, and Other California Regions, 2000 to 2020



Source: SACOG analysis of DOF E-5 series data.

Elements of Population Change

Regional population change stems from three components:

- Natural increase (births each year compared to deaths)
- Domestic migration
- International migration

Within the Sacramento region, international migration is an important contributor to annual population growth. California as a state receives a high share of the nation's international immigration (over 150,000 international migrants come to the state each year). Indeed, without international migration, the state's population would start to decrease as a consistent trend (and why it went negative in the past year). Within the Sacramento region, the number of net international migrants coming to the region is about 8,000 or 9,000 (the measure is on a net basis, though international in-migration greatly exceeds out-migration). International migration directly results in over a third of the region's population growth the past decade.

Natural increase (births exceeding deaths in the population present at the beginning of the year) has been the largest component of population growth within the region. This, in part, is tied to international migration, as, on average, more recent immigrants to the region have tended to have larger family sizes relative to the regional average. Across all groups, fertility rates (the number of children born per woman) have been falling across the nation, state, and region, especially over the last ten years. This fall in fertility rates is a major impact on the projections moving forward.

Finally, domestic migration has been the smallest portion of population change in the last region the last decade. This in part is because the measure is more affected by both in and outflows, so the net change tends to be smaller (i.e., international migration is heavily in-migrants, while domestic migration sees both in and out flows). The region has had a net domestic out-migration several of the past ten years, though those tended to be earlier in the decade.

Figure 10. Sources of Population Growth in Sacramento Region

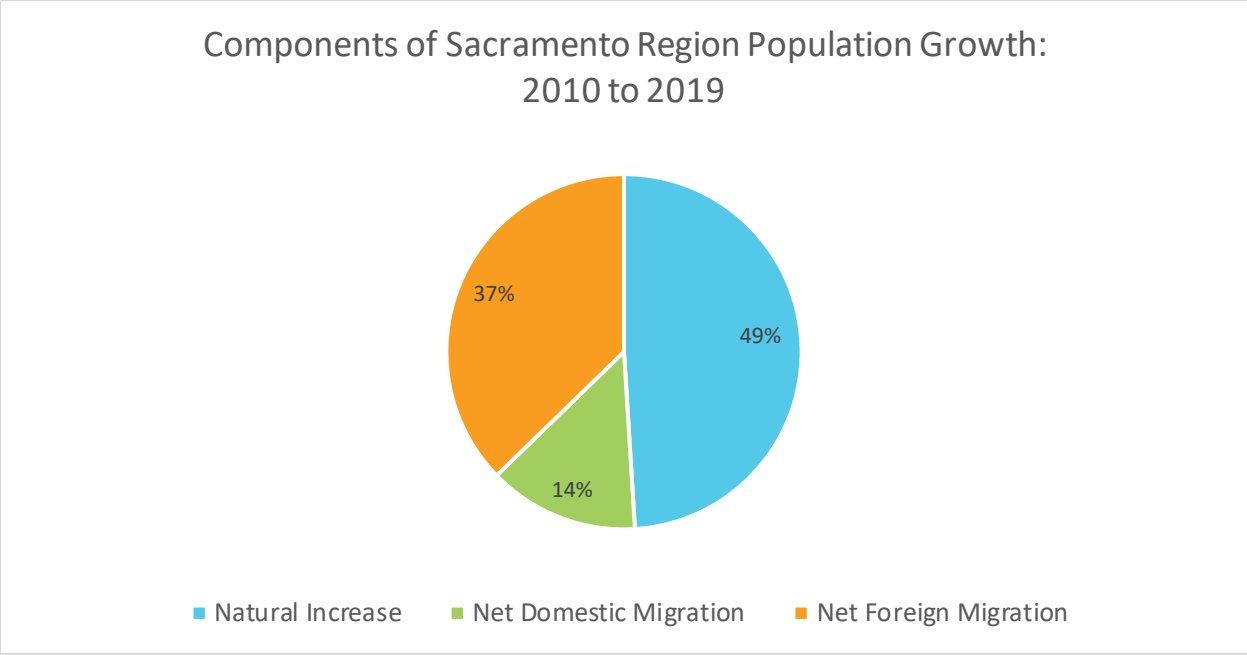
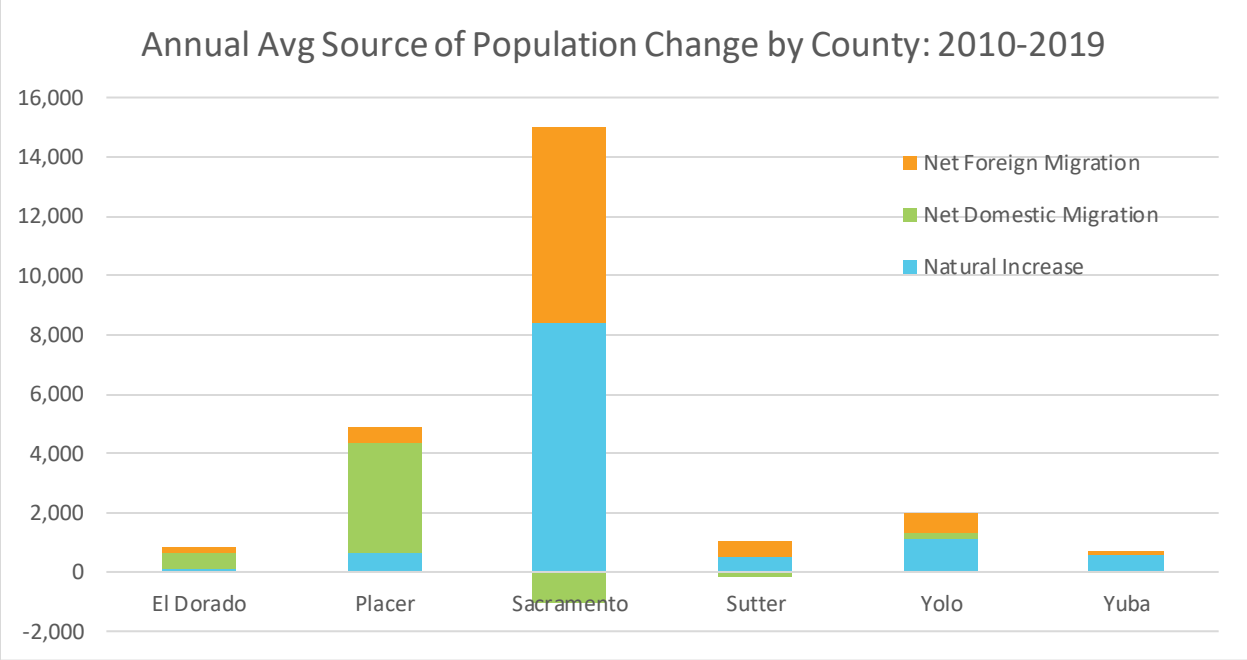


Figure 11. Average Source of Population Change by County



Source of both: SACOG analysis of DOF E-6 series. Estimates are for July 1 to July 1 of each year

International Migration in the Population Projection

International migration has plummeted the last several years, more recently because of travel restrictions surrounding the Covid pandemic and, before that, changes to immigration policy at the federal level. The population projection for the Sacramento region assumes these to be short term

trends, and that international migration will rebound over the next several years, thus remaining an important element of population growth through 2050. The first expert panel discussed immigration at length and agreed with this assumption around rebounding international immigration (as did the expert panel for SCAG).

As mentioned above, the population projection for the nation uses a slightly higher level of international migration to 2050 than the baseline REMI model. This higher projection then affects the state and regional projection.

While the panel generally thought international immigration would rebound, they noted that the countries generating the highest number of international migrants may shift, especially by 2050. Countries such as Mexico and China (which together account for the largest number of international migrants to the nation) have lower birth rates than the U.S., and many demographers looking at international migration expect fewer migrants from these countries into the future. Instead, countries in sub-Saharan Africa and Central Asia may be the sources of more international migration to the U.S. moving forward. The expert panel thought that this shift in international migration patterns could reduce California's share of the nation's foreign immigration (as the east coast may be the first landing spot for many future migrants). However, the panel also noted that California has been a welcoming state with a strong tradition of international migration and thought the state would maintain its strong position in attracting foreign immigration. Further, the Sacramento region has its own unique patterns of international migration, including recent inflows from countries such as Syria and Afghanistan (high projected birth rates and out migration). The Sacramento regional population projection maintains the immigration levels estimated in the DOF series (i.e., that immigration rebounds from its low the past few years).

Natural Increase in Population Projection

The California Department of Finance (DOF) makes available detailed population projections for each county in the state, out to 2060. DOF's age cohort model tracks changes each year as populations age and move through life stages.

SACOG's population projection uses the detailed fertility and mortality estimates from the DOF data. In other words, the projection builds a population around the job totals suggested by the CCSCE jobs estimate in conjunction with the detailed demographic data provided by DOF.

The expert panel found this approach reasonable, though noted that the recent migration to the Sacramento region from Syria and Afghanistan are not yet fully accounted for in the DOF population series, which could result in a slight undercount of estimated natural increase in the region moving forward. But as the SACOG projection has the region growing faster than the state and nation, the panel found the population results reasonable.

Domestic Migration (and what's been happening since COVID)

We are still living through a period of disruption, so it is hard to separate short term trends from longer term shifts. However, the first expert panel recommended staff investigate several resources to get a better sense of population growth and in-migration to the region the last 18 months. SACOG analyzed the recommended material and presented the findings to the second expert panel. It is also worth

reiterating that domestic migration has been the smallest component of regional population change the last decade.

According to Census and DOF data, regional population growth slowed in 2020 (i.e., comparing January 1 of 2021 to January 1 of prior years). The growth rate was 0.5% last year, compared to the 1% average of last 10 years. The slowing of regional population growth can likely be explained by several factors:

- COVID direct effects (unexpected deaths because of Covid-19)
- Less international migration (and fewer students at UC Davis, both also short-term effects of Covid-19)
- In rough numbers, these three things seem to explain most of difference in the slower population growth rate
- Domestic migration covered below.

Figure 12. Population Change in SACOG Region Last 10 Years, and in 2020

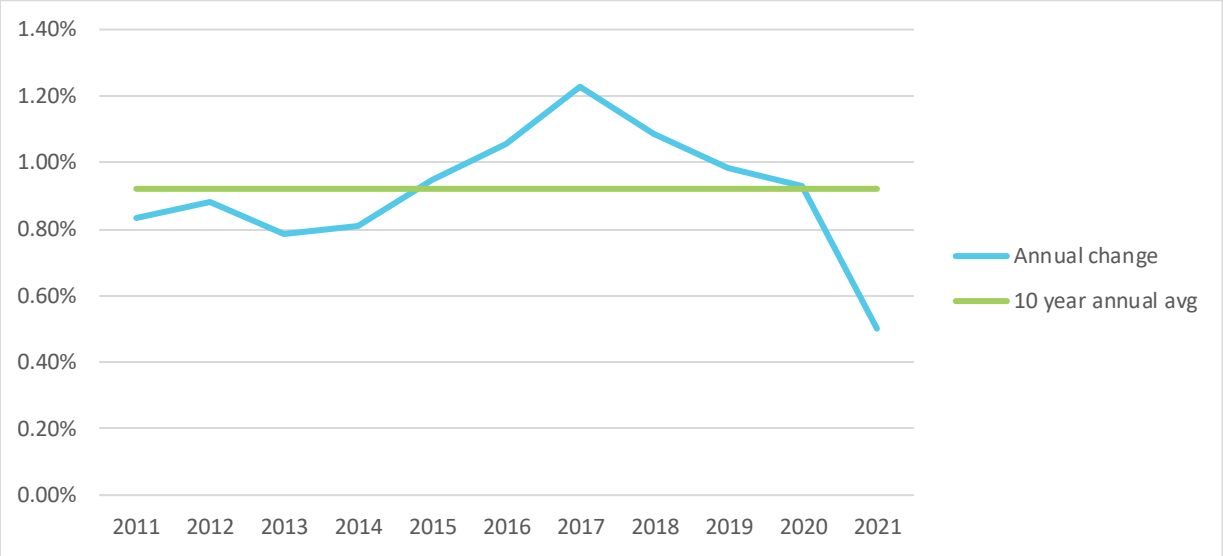


Table 14. Population Change by County, with Emphasis on 2020

County	Average Annual Population Change 2011 to 2020	Population Change 2020 to 2021
El Dorado	1,246	1,843
Placer	5,058	5,979
Sacramento	13,437	7,857
Sutter	660	-50
Yolo	2,043	-3776
Yuba	636	897
SACOG Region	23,080	12,750

Source for both charts/tables: SACOG analysis of DOF E-5 series

Domestic migration during last 18 months

SACOG analyzed USPS change of address and University of California Consumer Credit Panel data relating to in and out migration to the SACOG region. Both are proprietary data sets. SACOG was not able to access the raw data, but was able to analyze databases prepared as part of other reports/materials.

Nationally, the USPS data shows some outflows from urban centers in 2020. Most of these movers were young, affluent, and highly educated. However, the overall number of moves was small (especially compared to historical numbers, as William Frey of Brookings points out) and constituted a relatively small percentage of the metro area's population. CBRE (who released a report summarizing this USPS data) predicts this outflow will subside the next few years (i.e., was more of a blip instead of a longer-term shift).

The UC-CCP data gives good information on moves in the state. The overall percentage of Californians moving, either within or out of the state, has declined since 2004.

Overall, around 75% of all moves are within respective regions. Based on the UC-CCP data, this remained largely unchanged during 2020 (though a slight uptick on moves outside of region at the end of year).

Residential mobility was down in the 2nd and 3rd quarters of 2020 in the state compared to the year prior. In the 4th quarter of 2020, the data suggests a 3% increase in out-of-region moves compared to year prior. In short, UC-CCP's look at the credit data doesn't see evidence of the mass exodus talked about in newspapers or other popular sources.

The Bay Area is more of an outlier though, in that yes, the data shows that region did see an uptick in out-migration.

What does this mean for Sacramento region?

The chart below shows the largest MSAs providing in-migration to the SACOG region, and how this changed in 2020 compared to 2019. Based on this USPS data, we do see an increase in net moves from the Bay Area to Sacramento in 2020, compared to 2019: from about 8,000 net in 2019 to maybe 13,000 net in 2020 (i.e., an increase of 5,000 net).

Table 15. Largest sources of in-state migration to Sacramento region, 2019 compared to 2020

	Moves to Sacramento		Moves from Sacramento		Net migration to Sacramento from MSA	
MSA	**2019**	**2020**	**2019**	**2020**	**2019**	**2020**
San Francisco + East Bay	10990	14706	5380	5170	5610	9536
San Jose	4274	5110	1774	1710	2500	3400
Los Angeles	3941	4784	3156	3224	785	1560
Vallejo	2789	3131	2013	1871	776	1260
Stockton	2441	2576	2065	2181	376	395
San Diego	1631	1713	1477	1714	154	-1

Source: SACOG analysis of USPS address change data.

However, the Sacramento region also experienced an increase in out-migration. This is a bit harder to track in the USPS data (outside of the largest regions, the data gets rolled up into an 'other' category, so is harder to track net change across MSAs). But some regions with likely increased new outflows from Sacramento, 2020 compared to 2019 include:

- Reno
- Phoenix
- Las Vegas
- Boise
- Dallas

And looking at the Consumer Credit Panel data, all six of the SACOG counties saw an increase in the number of domestic out-migrants compared to the year prior. Placer and El Dorado saw an increase in the number of domestic in-migrants.

Table 16. Consumer Credit Data shows upticks in out-migration from region

Q4 migration to/from Sacramento Region: 2020 compared to 2019				
County	**# of exits**	**% change relative to prior year**	**# of entrances**	**% change prior year**
El Dorado	4,265	9%	4,724	24%
Placer	8,267	7%	9,241	12%
Sacramento	23,978	9%	21,675	-1%
Sutter	1,729	6%	1,507	-5%
Yolo	5,082	1%	4,456	-4%
Yuba	1,819	0%	1,796	-4%

Source: SACOG analysis of UC CCP data

So based on this data, the region actually had a net domestic out migration of about 1,500 in Q4 2020 (important to note this only covers Q4 of 2020, not the whole year. But as the supporting material suggests, the first three quarters of 2020 saw suppressed residential mobility across all regions, so the 4th quarter is not a bad proxy of domestic migration for the year.)

Does change of address/consumer credit data suggest changes in region's trajectory on domestic in-migration, and thus the population projection?

We are still living through this, but maybe not as much in terms of total numbers. However, the expert panel did think the region would continue to be an attractive location for in-migrants from the rest of the state. The most noticeable near-term shift seems to be an acceleration in the number on in-migrants for the Bay Area (long a source of in-migration to the region, but more recently accelerated). Likewise, however, the data showed an increase in the number of people leaving the Sacramento region. With in the region, Placer and El Dorado Counties saw an uptick in in-migration. Across all these recent trends, some on the expert panel thought the affects could be more transitory and focused on the first years of the projection series. Further, overall, these numbers are small, as domestic migration has been the smallest component of population change in region last 10 years (15% compared to ~35% for international migration and ~50% for natural increase). The more immediate impact on in-migration may be on housing costs compared to population change. The third section of this memo discusses the projection on household formation and thus housing demand.

Jobs Compared to Population

The final step in the population projection is to pair the jobs projection with the regional assumptions around natural increase and domestic and international migration discussed above. The approach is to look at the number of jobs compared to the total population. An important input in this assessment is the labor force participation rate (the labor force participation rate, or LFPR, is the percentage of the civilian noninstitutional population within the working age cohort that is working or actively looking for work. It is one of the most important measures of regional labor markets, with a focus on the working age segment of the population).

As discussed above in the jobs section, the national model used for the projection assumes a slightly higher labor force participation than the base REMI model. The SCAG expert panel found this assumption reasonable. The second SACOG expert panel discussed labor force participation rates in relation to the regional projections. The panel noted that labor force (as well as the broader jobs to population ratio) will be affected by both push and pull factors (i.e., factors driving the labor force participation rate lower, as well as goals/trends that could increase labor force participation).

For factors that might lead to a lower number of workers relative to total population. First, the population is aging not only in the region but throughout the country. So while LFPR measures the working age population, a broader measure on jobs to total population would be lower in an aging population. Next, the U.S. has seen a slight but steady decline in labor force participation the last decade. In the near term, labor force participation (especially for women of color) has declined more dramatically. While this near-term decline may be short lived, many economists see a future where the longer-term decline persists, both because of attitudes (more desire for part-time work, etc.) as well as an increasing adoption of technology (automation replacing many repetitive jobs, potentially at an even faster pace because of the changes engendered by Covid, etc.). In short, labor force participation in the working age population has been going down, and the population is aging into the projection period, so there is good reason to assume a lower jobs to population ratio moving forward.

In contrast, there are many factors that could increase labor force participation. First, while the LFPR has dropped over the last decade, this has been more noticeable in young adults and the prime working age cohort (and in particular, for men aged 25 to 34). Economists assign multiple factors to this drop,

including a shift in attitudes towards work as well issues such as the opioid epidemic which has hit some labor markets incredibly hard. But labor force participation for the 54+ age cohort has been increasing (i.e., people are working longer than in the past, especially in the 70+ cohort). The SACOG population projections assume that this trend at the tail end of the LFPR curve will continue (i.e., that people will work longer as the projection advances through time). As the expert panel points out, this could be a vulnerable assumption, especially given the unique nature of the Sacramento labor force, many of whom are public sector workers that tend to retire earlier than the labor force in general. But with all new public sector workers under the PEPRA law, plus uncertainties about the solvency of the public pension system in a horizon year that is several decades out, the team felt it reasonable to assume that public sector workers on average would also be retiring later at the end of the projection period.

Next, while the Sacramento region is aging (thus more people aging out of the labor force) it is doing so slightly slower than the rest of the state and other large metro regions. As the table below shows, by 2050, a slightly higher percentage of the Sacramento regional population will be in the 15-64 age cohort, which would be a slight boost to labor force participation.

Table 17. Working Age Cohort in by Projection Period

	Percent of regional population in 'working age' (15-64) cohort, by year						
Region	2020	2025	2030	2035	2040	2045	2050
Sacramento (SACOG)	65%	64%	63%	62%	62%	62%	61%
San Diego (SANDAG)	65%	63%	62%	61%	60%	59%	58%
LA (SCAG)	66%	65%	63%	62%	61%	60%	59%
Bay Area (MTC/ABAG)	66%	65%	63%	62%	61%	60%	59%
California	66%	64%	63%	62%	61%	60%	59%

Source: SACOG analysis of DOF P-3 series.

Further, recent shifts to remote work may make it feasible for more people to participate in the formal labor force, in that they can more easily balance work with childcare and other family responsibilities (such as caring for an aging parent). Finally, the population projections assume progress in reducing the disparities by race/ethnicity in labor force participation. The projections assume there would be somewhat higher rates for African American and Latino males in the workforce as barriers to entry are removed and incarceration rates decline, and an increase for women of color as similar barriers are eroded, education levels increase, birth rates drop, and services like free pre-Kindergarten and more affordable childcare become more available.

Given both the upward and downward influences on labor force participation and employment relative to the total population, the project team decided to hold the jobs to population ratio constant between the base and horizon years of the projection (i.e., that the factors pulling labor force participation down would be offset by those pulling it up). This assumption lowers the regional population total somewhat relative to a scenario of declining LFRP and total jobs to population. The team presented this approach to the expert panel. Some of the panel did raise questions to this approach, while others noted how the methodology aligned with the projections recently completed for the Los Angeles region, and that other projections actually have an increasing number of jobs relative to population. Further, the jobs to population ratio used in the Sacramento projections is lower than that for the major metropolitan areas

of the state. Based on the input of the expert panel, staff feels using a constant job to population ratio to be reasonable, while pointing out the various assumptions made in this calculation.

Detailed Households Projection

Table 18. Sacramento Region Households Projection (full six-county region)

2019	2050	Difference	Avg Annual Growth Rate (AAGR)	AAGR of prior projection (2016 to 2040)
899,000	1,170,000	271,000	0.85%	1.10%

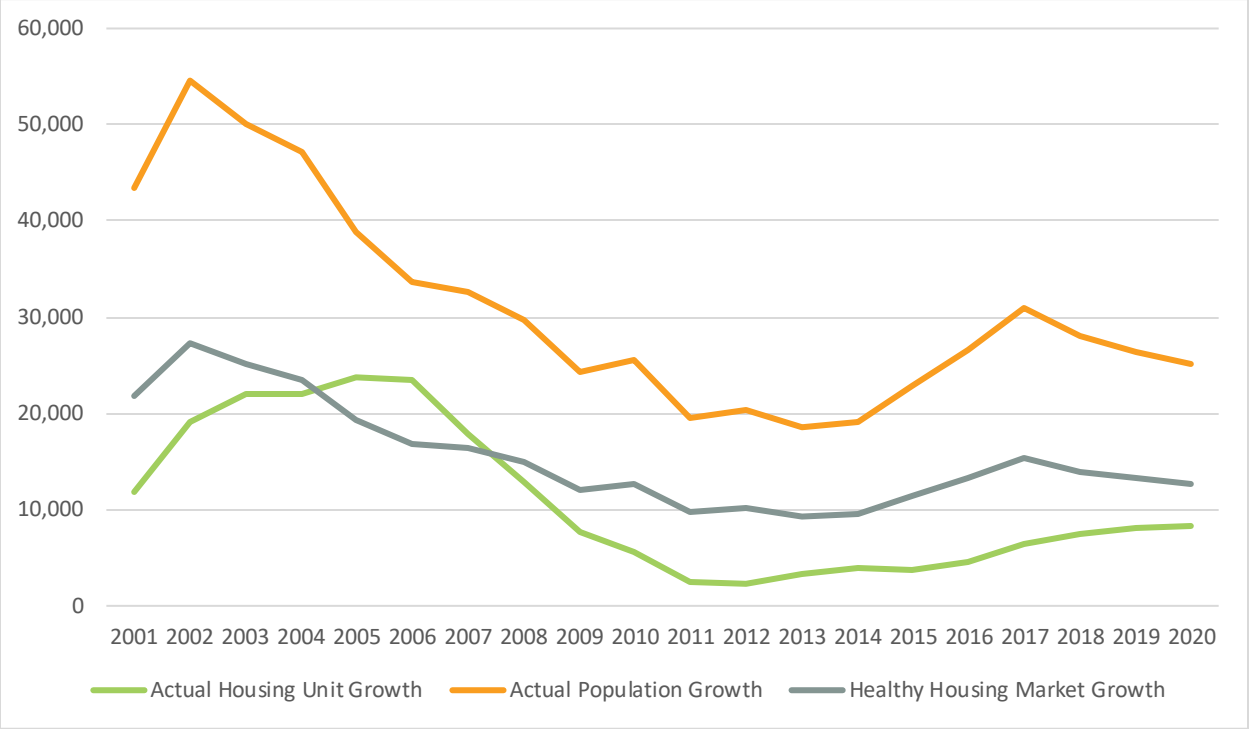
Household Projection Summary Points

- Like the rest of the state, the region has underproduced housing relative to population and jobs most of the last 20 years. But the household projection assumes substantial progress in the housing arena moving forward. The projection has the regional household rate exceeding the projected population and jobs growth rate out to 2050, as the region responds to pent up demand, provides more housing choice for a changing (and aging) demographic, and benefits from supportive policies at both the regional and state level (including Green Means Go).
- However, significant barriers persist, primarily around housing affordability. Housing and rental prices in the Sacramento region have greatly outstripped median incomes, leading to an increasing housing cost burden for residents (and dampening household formation). While the projection assumes substantial progress around housing cost, it does include a small affordability check on the future year headship rates.
- The projection is on household formation (not dwelling units). However, the two are intertwined. The next step in the projections process is to estimate housing units from the suggested households. SACOG has used a static 5% vacancy assumption in the past, which fellow members of the panel have also used.
- The methodology for the detailed projected covered the full six-county region. SACOG removed the Tahoe Basin as a final step in the summary projection referenced in the introduction.

Underproduction of housing

Like the rest of the state, the region hasn't been building enough housing to keep up with demand. From 2009 onward the Sacramento region has added about 65,000 new housing units (about a 0.5% annual average growth). The region would have needed to add an additional 80,000 units in that timeframe (or about 6,500 more units per year above what is has been building) just to meet the new population growth. This indicator only compares new housing to new population and does not account for any existing housing shortage. Each year the region underproduces housing adds to the cumulative impact of the housing shortage.

Figure 13. Sacramento Region Housing Production Compared to Population Growth Last 20 Years

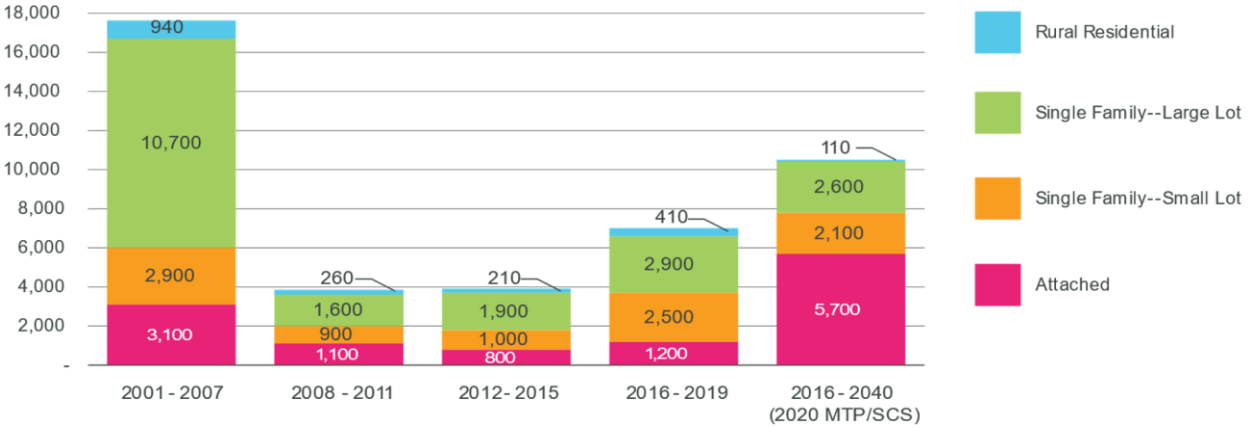


Source: SACOG analysis of DOF E-5 annual population and housing estimates. "Healthy housing" market growth defined as 1 new housing unit to 2 new residents (or 0.5 new units per new resident) using a static 5% vacancy rate assumption.

New housing by product type

Of all housing types. the region most underproduces attached housing relative to regional goals. This differs from the coastal areas of the state (i.e., there has been a divergence between the coast and inland areas in production of new housing by product type). However, the North State Building Industry Association (BIA) believe their housing inventory database could show more momentum around attached housing production in the Sacramento region than the cited DOF data. Further, the region now has funding for the Green Means Go program to accelerate infill housing.

Figure 14. Underproduction of housing in region relative to regional goals most acute in attached housing product

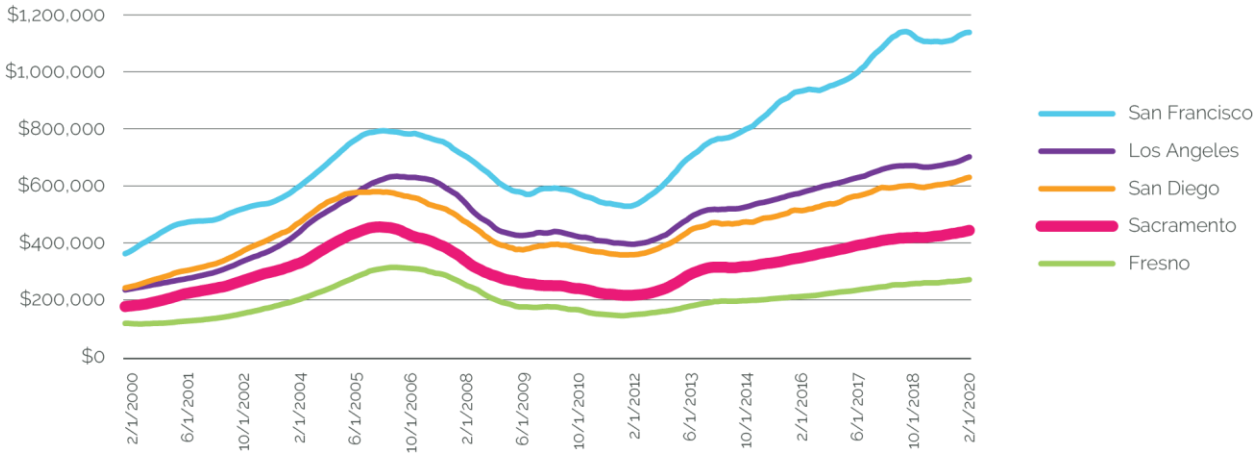


Source: SACOG's 2020 MTP/SCS

Sacramento housing market less expensive from California perspective, but expensive from national perspective

While housing in the Sacramento region is less expensive relative to the large coastal areas of the state, it is more expensive compared to the nation at large. Zillow estimated in 2020 the typical value of homes in the United States at about $262,000, compared to about $440,000 in the Sacramento MSA. The project team did some work looking at rents (reported below), which showed the Sacramento region had the highest increase in average rent of the 18 studied fellow mid-sized regions. Renters in our region are very susceptible to housing cost burden. But on the flip side, higher asking rents could lead to more multi-family construction.

Figure 15. Median Home Values by California MSA (in $2020)



Source: SACOG analysis of Zillow monthly median home values by metro area, January 2000 to April 2020. Region defined as MSA.

Region is less expensive from California perspective (though rents increasing quickly)

Figure 16. Average Asking Rents by California MSA: July 2021

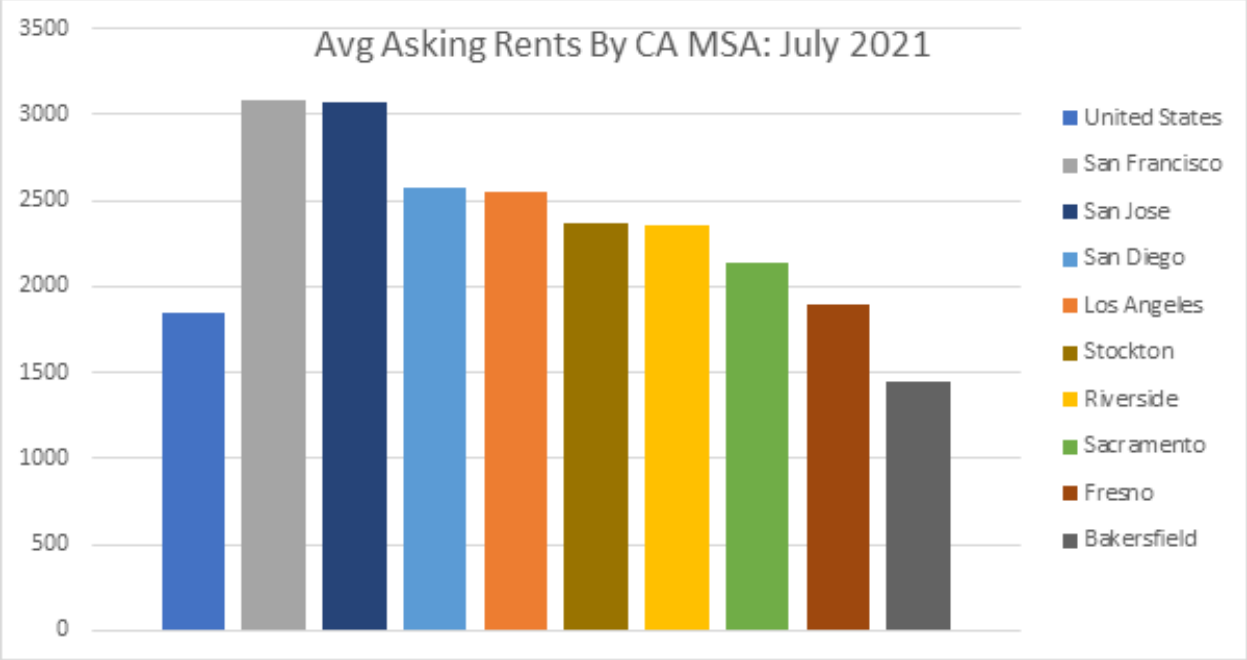
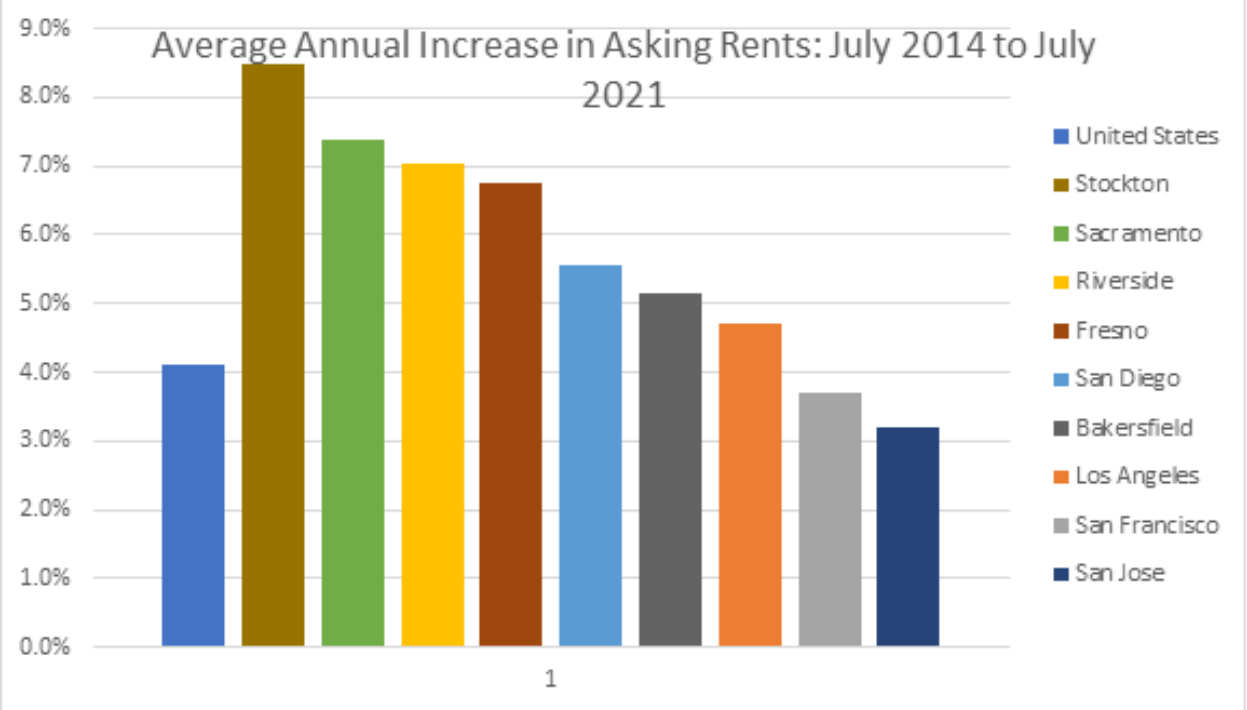


Figure 17. Average Annual Increase in Asking Rents: July 2014 to July 2021



SACOG analysis of Zillow monthly average rent, for MSA. Measure is calculation of average rent in the 40th to 60th percentile. Note these data go out to 2021, while the national data below end in 2020.

In national perspective, Sacramento region looks expensive

Figure 18. National 'Mid-Sized' Region Perspective: Average Rents (April 2020)

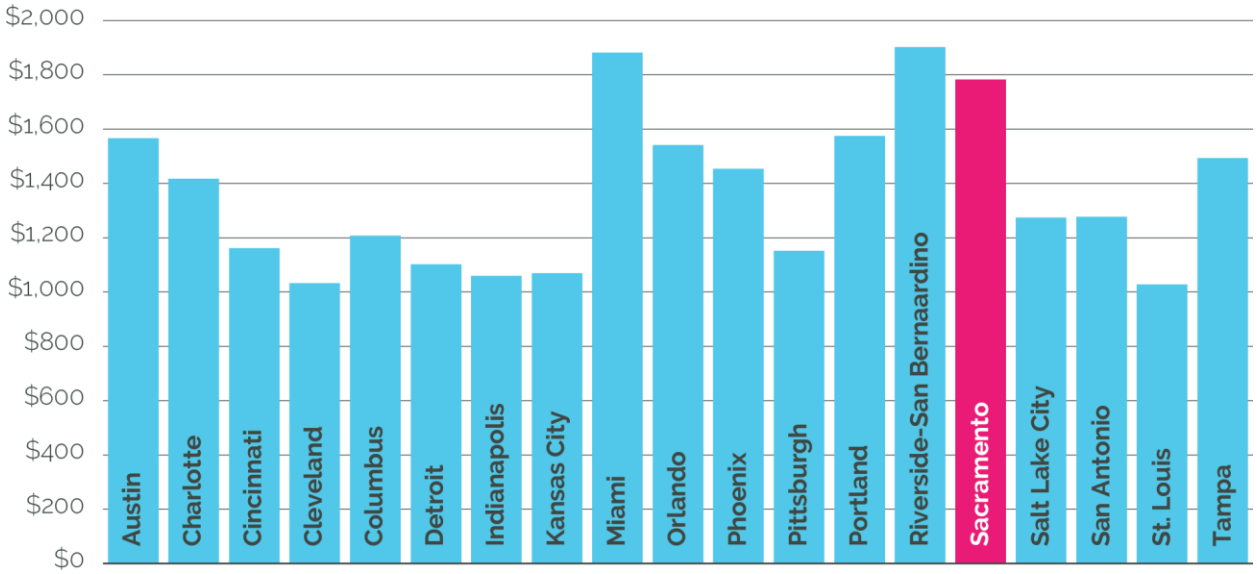
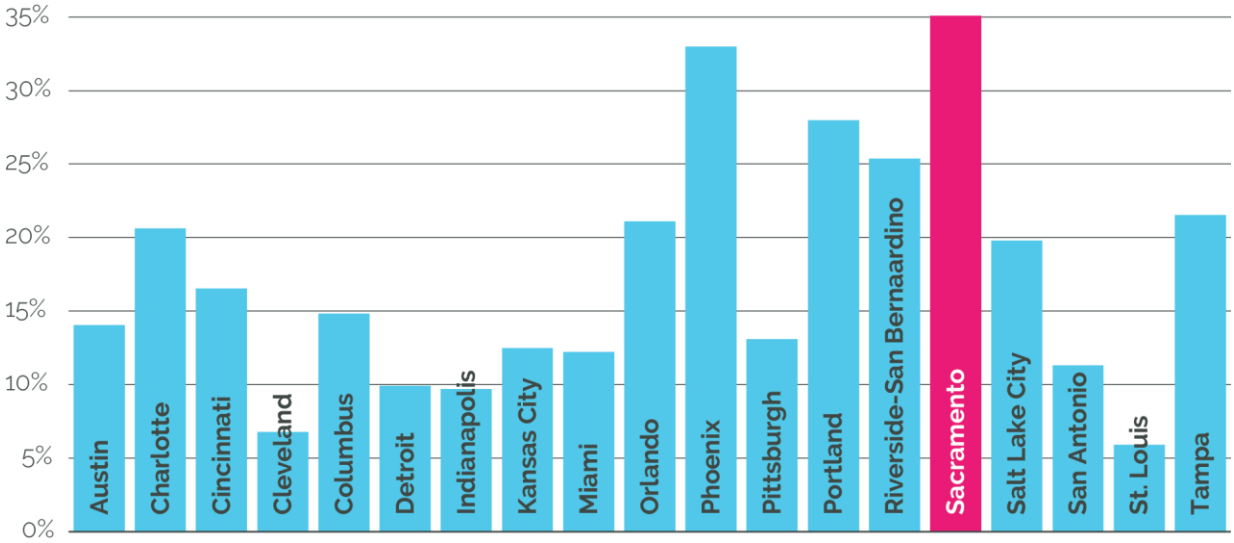


Figure 19. Change in Average Asking Rent (2014 to 2020) by Peer Mid-Size Region

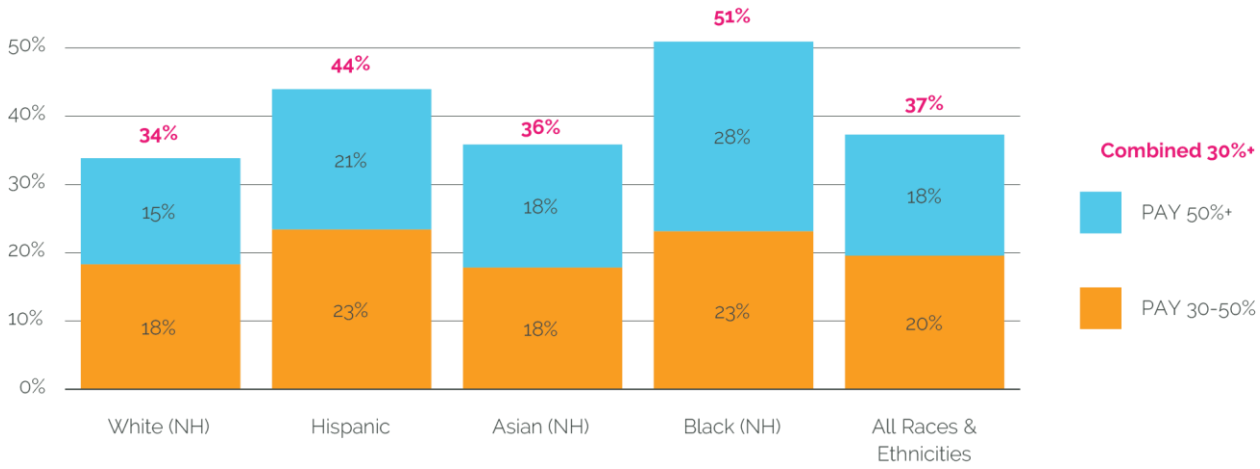


SACOG analysis of Zillow monthly average rent, for MSA. Measure is calculation of average rent in the 40th to 60th percentile. Note these data go out to 2020, while the state data above go to 2021.

Like the rest of state, housing cost burden a serious issue in Sacramento

Work completed for the region's comprehensive economic development strategy shows how housing cost increases have greatly outpaced wage growth in the region. This finding predates the recent rapid appreciation in both for sale and rental products, so may even underestimate this impact. Indeed, when paired with income, the region's housing costs burden is dramatic, and looks more like the coastal regions of the state (which have higher housing costs but also higher incomes. Housing cost burden is defined as households paying more the 30% of gross income to cover housing).

Figure 20. Housing-cost burden in Sacramento Region by race and ethnicity, 2016



Source: 2016 Comprehensive Housing Affordability Strategy (CHAS) data, HUD.

Affordability challenges in region have dampened household formation

Data from DOF shows that headship rates have declined in the region the last decade, especially at younger ages (this finding was echoed by the SCAG expert panel). As headship rates decline, average household size increases (average household size in this memo refers to the number of people living per dwelling unit, not the square footage of the unit). This has occurred when demographic trends suggest average household size should be going down, as the population ages (leading to smaller household sizes in general) and the Millennial generational cohort is in its prime household formation years (leading to new household formation). Instead, we have seen more 'rooming up' (i.e., people living with roommates) and more multi-generational households. In short, housing costs have dampened housing formation for all generational cohorts, but for Millennials in particular (the focus in much of the literature has been on Millennials, in that they have had less time to accumulate assets, are facing higher levels of student debt, and whose entry into the labor force has been heavily disrupted by the Great Recession and now Covid-19). While this trend is national, it may be more acute in the Sacramento region, given the rapid increase in housing costs relative to income. And while the in-migration from the Bay Area is small relative to overall regional population, this has also contributed to the increase in housing prices regionally.

The state and many localities in the region have enacted policy and regulatory changes to reduce the barriers to housing production. Green Means Go is the most prominent example, while local governments have tools such as rezoning that will be essential components to increase housing production. The project team saw many building blocks in place to help overcome some of the

challenges of housing in the region. The expert panel generally concurred, thinking the region had a competitive housing position relate to the rest of the state, and that several of the fastest growing markets outside of the state experienced even more rapid increases in housing prices, at least relative to a state perspective (in other words, the panel recommended a relative approach in the projections. While housing prices have increased, they have done so as well in many other peer sized regions, though increases in the Sacramento region have outpaced most every other mid-sized region). In short, the panel, like staff, agreed that an increased household projection could be justified, as long as it included supportive policies.

Headship rates and household projection

To build household projections from the population total described above, the project team used detailed headship rates provided by DOF. As the headship rates only went to 2030, staff used a blended 2026-2030 headship rate for the period after 2030. Staff confirmed the expert panel's question that the headship rates did increase through the projection period. The panel noted that an alternative methodology could have been to apply the trend from 2026-2030 carried forward (instead of a blended rate), but generally found the assumptions around the headship rates to be reasonable.

The headship rates estimate how many households would be formed given demographic conditions. Several participants on the first expert panel recommended staff better connect household formation to affordability and production considerations. In other words, the headship rates assume the economy will produce the housing to accommodate the population growth expected from demographic trends and the jobs projection. Some panelists thought that prior projections' higher production rate sustained over time was less supported by the background material, especially in relation to increasing unaffordability. As such, staff built a minor affordability check on the household formation projection in 2050, which was carried back through the series. So while the projection still assumes considerable strides in housing affordability and a diversity of product, it uses the observed increase in average household size over the prior decade (an increase of about 0.06 while trends suggest the opposite direction) as a proxy for the effect of unaffordability. In other words, the methodology imposes an upward shift of 0.06 to the average household size suggested by the headship rates in the horizon year of the projection (a shift from 2.6 to 2.66 average household size). Importantly, average household size still decreases noticeably over the course of the projection, just not quite as much as if the projection solely used the headship rates in absence of production and affordability assumptions.

The Sacramento region household projection uses a static assumption on group quarters (i.e., that group quarters population will maintain the same relative level to total population through the projection timeframe) to establish householder population from total population. The expert panel found this assumption to be reasonable in that, like for labor force participation, there would be factors pulling both directions on group quarters (for example, more assisted living facilities for an aging population, but also, hopefully a lower incarceration rate).

Finally, achieving the household projection (like the other parts of the projection) requires supportive policy action that reverses the trends of the last decade. Staff feels the projection to be reasonable, though reliant on progress in the assumptions around lower barriers to housing production.

Sensitivity Testing on Draft Growth Projections

This section describes three sensitivity tests staff conducted on the preliminary growth projections for the 2024 Metropolitan Transportation Plan/Sustainable Communities Strategy:

1. A high/medium/low scenario based on the draft jobs projection
2. An overlay of other projected growth rates onto the Sacramento baseline series
3. A set of simple scenarios that change one of the key assumptions in the baseline series

The work is meant to give the board and stakeholders a sense of the sensitivity of the projection update's various assumptions, as well as where the recommended projection falls within a high/medium/low range based on these same assumptions. Each of the three tests is described in turn.

1. High and Low Job Scenario

Drawing on input from CCSCE's economic analysis and industry cohort model, staff created a low and high scenario around the baseline jobs projection.

The high scenario assumes improvements to the region's economic base (above and beyond those of the baseline scenario) and enhanced megaregional connectivity. The low scenario continues the trend of the last five years, where the Sacramento region has stabilized at around 5.5% of the state's base industry jobs (after declining since 2009). The low scenario assumes the region will maintain 5.5% of state base industry jobs to 2050 (the baseline scenario assumed the region would capture an increased share of base industry jobs) and held constant (relative to the initial projections) the ratio of base industry to total jobs. The high scenario has about 59,000 more jobs in the horizon year compared to the baseline scenario, and the low about 54,000 fewer jobs compared to the baseline.

Table 19. High/Medium/Low Job Projection Summary

	2019	2050	Growth Increment	AAGR
Baseline	1,168,700	1,432,600	263,900	0.66%
High Scenario	1,168,700	1,491,300	322,600	0.79%
Low Scenario	1,168,700	1,378,800	210,100	0.53%

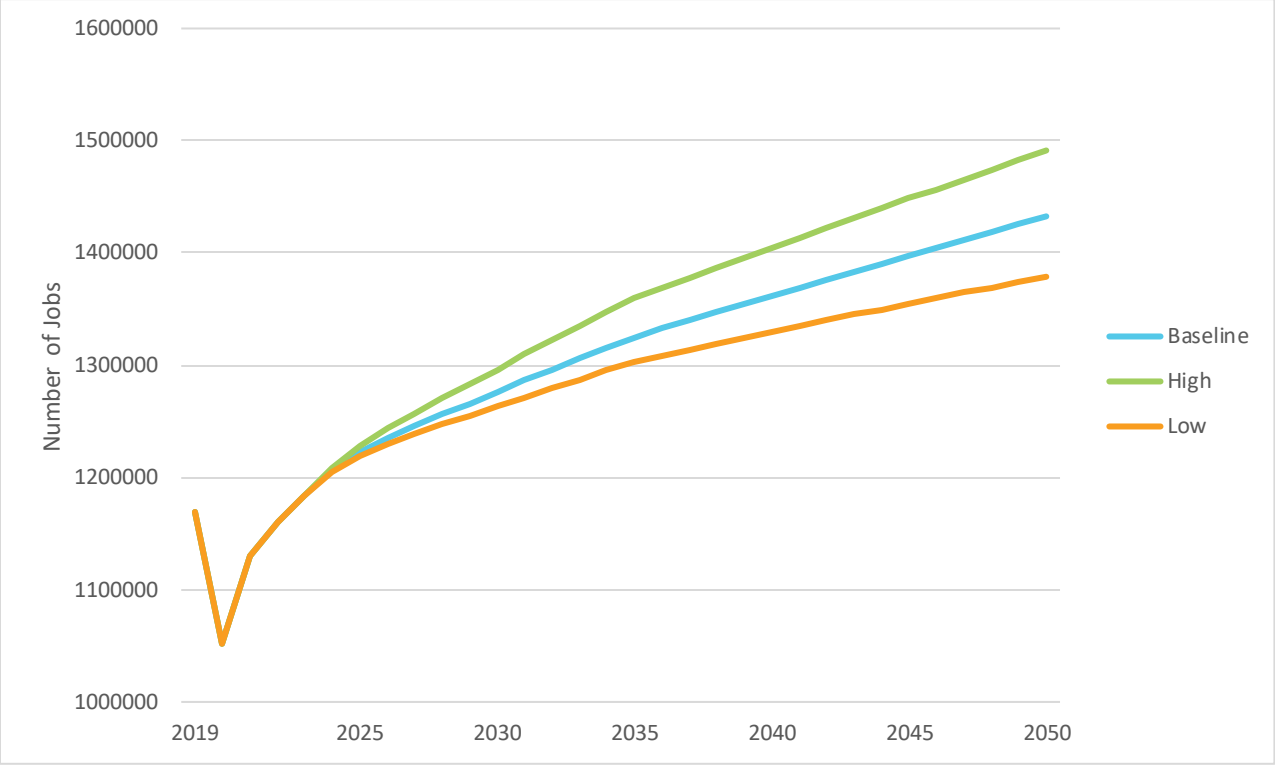
*Sensitivity testing conducted on full six-county projection (including Tahoe Basin)

The high and low scenarios held employment constant to the baseline through 2023 (i.e., the changes began in 2024 onwards and continued to 2050). In this sense, the scenarios are meant to show different long-term growth trajectories for the region based on changing assumptions around the region's economic base, not to weigh in on different possible short-term changes as the region rebounds from the Covid-19 pandemic.

Staff created both scenarios after the second expert panel meeting (i.e., the panel did not weigh in on the high and low scenarios), drawing on the input and themes from the panel sessions. The panel discussed greater cooperation between Norther California regions, which resulted in an increased assumption around greater megaregional connectivity in the high scenario. The panel also discussed the region's economic base moving forward, including which industries may be poised for further growth. However, as mentioned in the panel write up notes, the group did not reach consensus on which industries would lead the way in the region outpacing the nation and state in job growth.

Input from the expert panel also informed the low scenario. Some in the panel session felt the assumed increases in the baseline projections, especially in the Professional, Business and Informational Services sector, could be overly aspirational. In the low scenario, staff held the region's share in these and the other economic base industries to the trend of the last five years.

Figure 21. High and Low Job Scenario compared to Baseline (i.e., "Medium") Projection



Source: SACOG analysis for 2024 MTP/SCS, for six-county region (including Tahoe Basin)

2. Other Projection Rates

In this test, staff applied the annual growth rates from a series of other projections onto the Sacramento region. In short, the test is meant to shed light on what the projection would look like if the Sacramento region were to grow more at the pace projected for these other regions. Each comparator region has its own unique demographic characteristics and economic base that may differ (sometimes pronouncedly) from the Sacramento region. As such, the test is not meant to imply these other growth rates as likely or reasonable for the Sacramento region, but simply to show how the Sacramento projections compare to a set of other recently completed projections.

Staff conducted the test on the population and jobs projections. There were not sufficient comparators for the household projection (as the state and federal sources generally do not project households long-term).

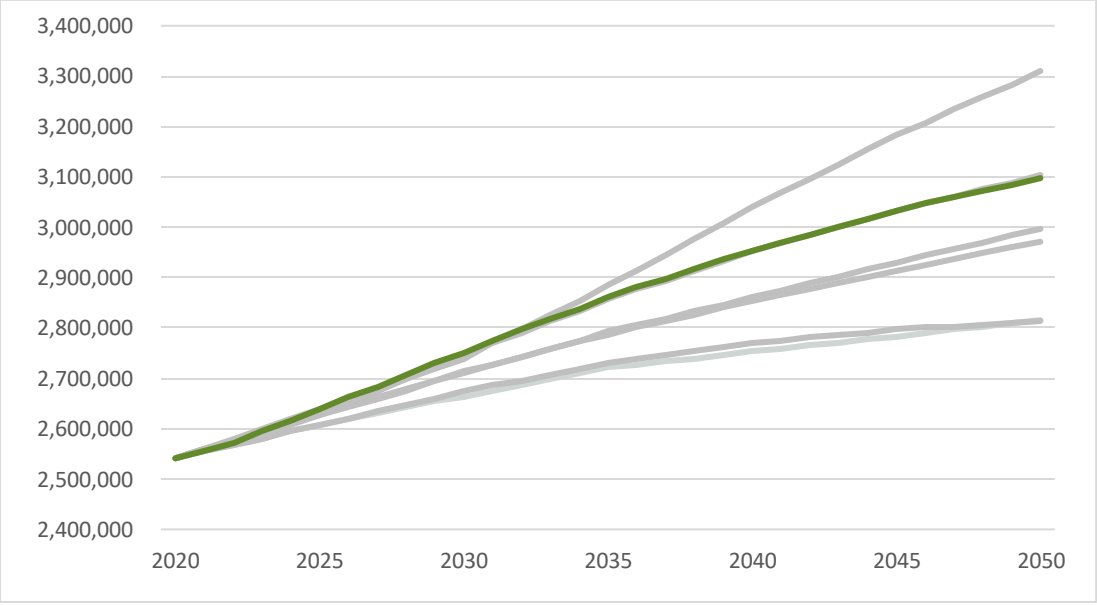
Growth Rates of Other Population Projections

Staff compared the preliminary Sacramento growth rate to a set of other population projections:

- US Census national projections
- State DOF projections for California
- State DOF projections for the Sacramento region
- Projections for the other large California regions (Bay Area, Los Angeles and San Diego) completed by their respective regional planning agencies

Staff created the comparator series using five-year average annual growth rates based on the totals cited in the respective sources. In some cases, staff interpolated interim values using a straight-line linear method (for example, if the source only reported at ten-year increments, staff interpolated the five-year number).

Figure 22. SACOG Baseline Population Projection Compared to Other Population Growth Rates



Source: SACOG analysis for 2024 MTP/SCS, for six-county region (including Tahoe Basin)

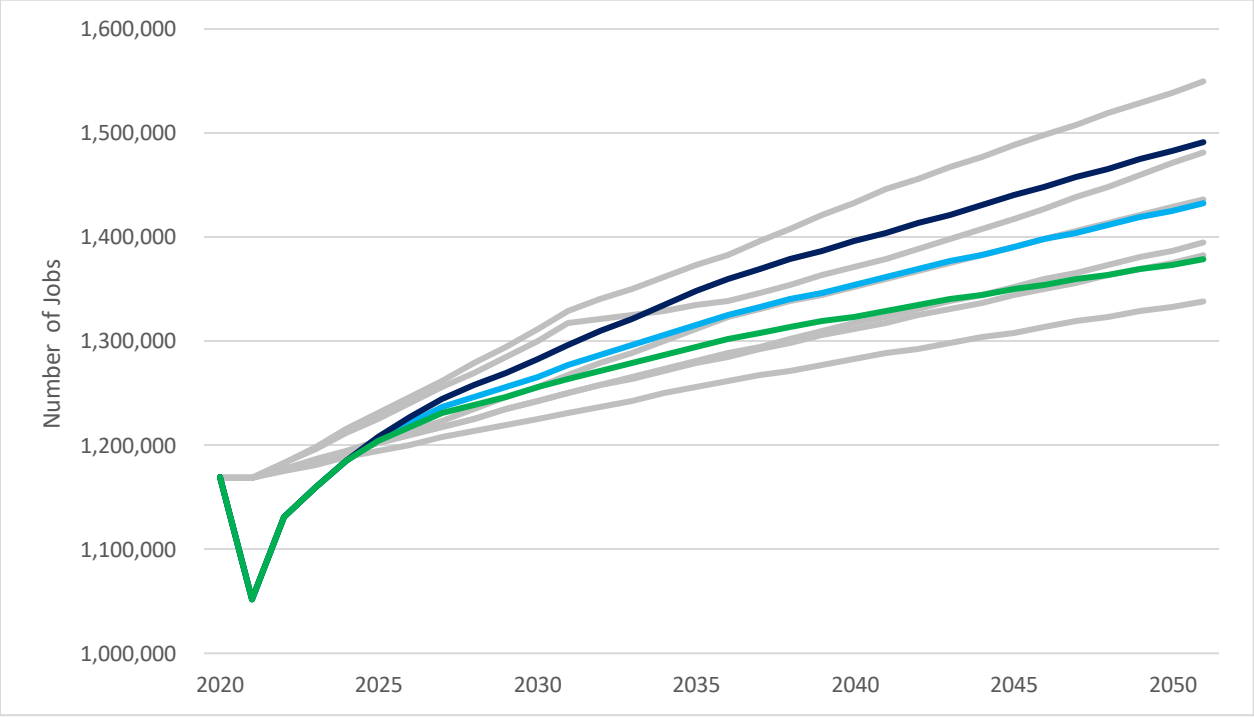
Growth Rates of Other Jobs Projections

Staff used the same approach for the jobs projection test as described for the population projection. However, given that there was one fewer comparator point, staff added in the projections from another nearby region (San Joaquin County), to keep the total number of comparators constant. The jobs growth rate comparison consisted of:

- The national jobs projection from the REMI model (as the BLS projection only extends to 2030)
- The state jobs projection as prepared by CCSCE
- The job projection of other California regions (Bay Area, Los Angeles, San Diego, and San Joaquin)

For both the Bay Area and San Joaquin rates, staff created a ten-year average annual growth rate at the beginning of the projection series (instead of five year) given the different approaches the projections took to near-term changes, in particular, a base year that began before or after the onset of Covid-19 (i.e. some in the comparator series were updated before Covid, while others had a base year after the effects of Covid-19. The comparison smoothed these to a constant growth rate in 2020, with differing rates beginning in 2021). Since these projections were on jobs, staff overlaid the high/medium/low jobs scenario conduct as part of the first sensitivity test.

Figure 23. SACOG High/Medium/Low Employment Projections Compared to Other Job Growth Rates



Source: SACOG analysis for 2024 MTP/SCS, for six-county region (including Tahoe Basin)

3. Simple Scenarios

This section reports a series of simple tests staff conducted meant to call attention to the sensitivity of various assumptions made through the projection update. The material that follows should not be interpreted as formal scenario modeling (which includes a more dynamic accounting of the interplay between multiple variables) but instead as sketch level scenarios meant to call attention to a single variable or assumption.

Staff created five simple scenarios that change a single assumption in the projection update. The work drew on themes raised in the expert panel series or through the projection update to both identify which variables to test, as well as determine reasonable parameters on the studied scenario assumption. These five scenarios are:

- Increased domestic in-migration (i.e., higher domestic in-migration than assumed in the baseline projection)
- Stabilized birth rates (i.e., higher birth rates than assumed in the baseline projection)
- Slowing international migration (i.e., lower international migration than assumed in baseline projection)
- Shifting location of state government jobs (i.e., lower number of state government jobs than assumed in the baseline projection)
- Lagging incomes (i.e., lower growth in general due in part to increased housing unaffordability)

Increased domestic in-migration

This scenario assumes the Sacramento region would experience a sustained increase in domestic in-migration above that of the baseline series, largely under an assumption that more remote/telework options would lead to more people moving to and staying in the region (on a net basis).

Observed data shows the Sacramento region to have had an increase in net migration from the Bay Area during 2020. However, out-migration from the Sacramento region also increased in the same time period. This scenario assumes in-migration will outstrip out-migration moving forward, and adds an additional 5,000 population in-migration to the Sacramento region in 2022 (slowing annually through the projection series) above that of the baseline while keeping out-migration to that of the pre-pandemic average (as suggested by the DOF data). The team landed on the 5,000 additional initial in-migration as a reasonable assumption for the scenario based on a review of the migration data discussed above. The result is an increase in net migration, and thus population, to the region above the baseline projection. All the scenarios that test a primarily population-based assumption then assume the regional economy would respond with a corresponding shift in employment (an assumption in upon itself) so that population totals are then converted to a jobs estimate using the same jobs to population ratio of the baseline series. As such, all scenarios can then be compared on a consistent basis (for this exercise, on the employment aspect of the projection).

Stabilized birth rates

Brith rates across the region, state, nation and globe have consistently declined over the last 100 years. The baseline projection series assumes the birth rate in 2050 in the region will be lower than it is

currently. The stabilized birth rate scenario instead keeps the birth rate constant over the series (at 11.042/1,000). The result is more births projected in the region, and thus a higher population estimate. Like in the prior scenario, staff then estimated an employment total on the revised population projection using the same jobs to employment ratio.

Slowing international migration

The project's expert panel raised uncertainties about international migration moving forward. As described in more detail in the panel write up, the primary countries of origins of international migrants to the region and nation may shift, with countries like Mexico, China, and India accounting for a lower share in the future.

Population growth in California (and to a lesser extent in the Sacramento region) is heavily reliant on international migration. This scenario assumes that more of the nation's international migrants will land on the east coast (such as New York and Washington DC) and south (such as Atlanta), where there are stronger ties of existing immigrant groups to those countries expected to have higher birth rates in the next few decades. The scenario reduces international net migration to the region by 2,000 per year starting in 2030, ratcheting up to 4,000 by 2050. Staff landed on this range based on an analysis of net migration to the region based on country of origin.

Shifting location of state government jobs

The project's expert panel discussed many potential advantages to the region's economy as more and more employers shift to a remote or hybrid work environment. However, the panel also noted that a more remote work environment could be a threat to the region's largest base industry, state government employment.

The Sacramento region currently has about 11% of its job in state government. While it is no surprise that the region is concentrated in state government jobs, it is even more concentrated in state government jobs even compared to other state capitals.

This scenario assumes that sustained telework options will lead for more state government jobs being held by residents outside of the Sacramento region (though still in California). In other words, in this scenario, the region's share in state government jobs decreases. So that while the scenario still has a concentration in state government jobs in 2050, the share would mirror that of other 'mid-sized' state capitals (Columbus, Indianapolis, Oklahoma City, Raliegh, Salt Lake City, and Tallahassee).

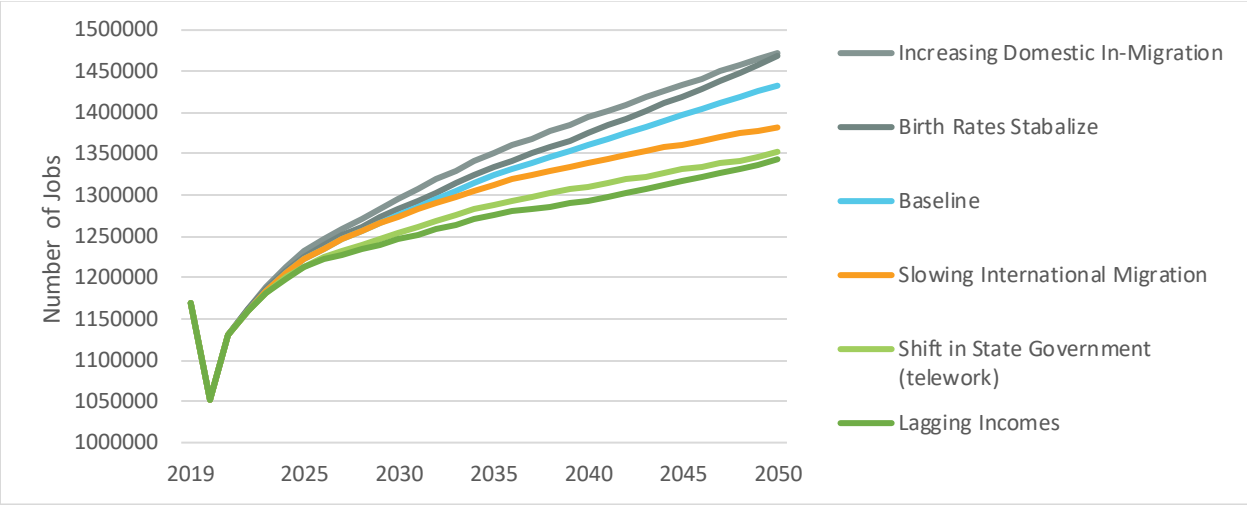
Lagging Incomes

Like many other parts of the state and country, housing costs have continued to rise faster than regional median income. The disparity between housing cost and income has been particularly acute the past 18 months, as the region has experienced a rapid increase in home prices.

The baseline projection sees substantial progress in addressing rising housing costs through both a more supportive policy environment as well as increased production. This scenario assumes that regional incomes continue to lag housing costs, so that housing unaffordability becomes more pronounced. To proxy the effect of increased unaffordability, the scenario employs a very simplistic approach- using the projected growth rate in southern California (blended Los Angeles and San Diego rates) applied to the Sacramento region. The assumption is that the projections for two regions have come to reflect the slowing growth in those regions in large part stemming from affordability issues. As such, this scenario is

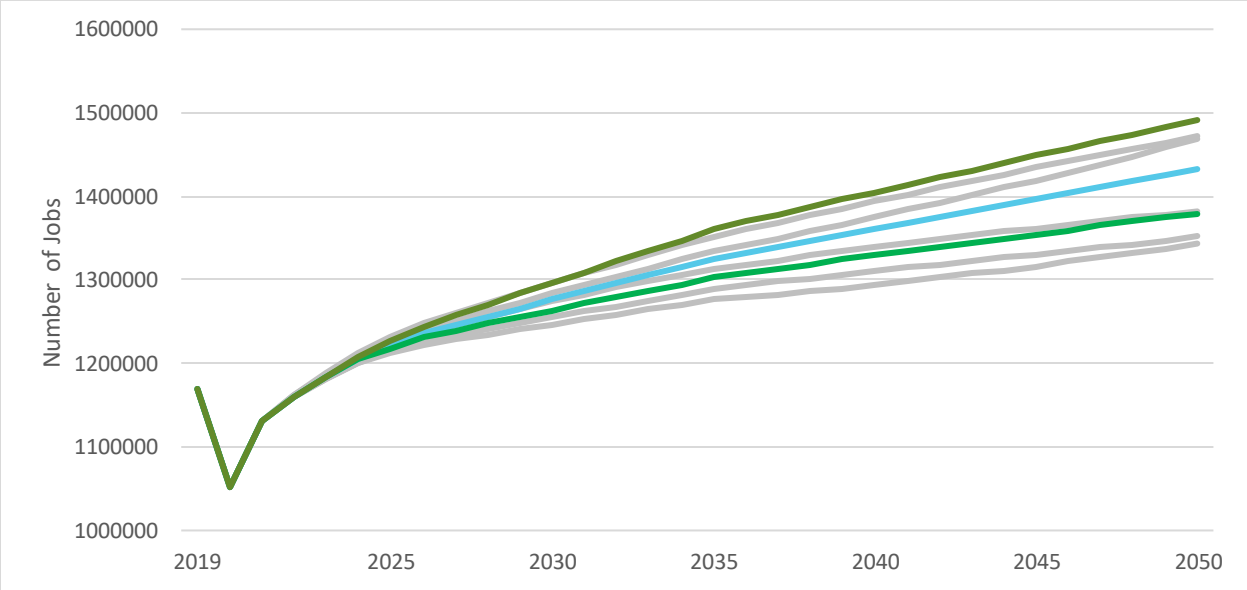
very simplistic and should be interpreted as an illustrative test, not as a predictive exercise on the affect of housing and income.

Figure 24. Results of Five Simple Scenarios



Source: SACOG analysis for 2024 MTP/SCS, for six-county region (including Tahoe Basin)

Figure 25. Five Simple Scenarios Compared to High/Medium/Low Employment Scenarios



Source: SACOG analysis for 2024 MTP/SCS, for six-county region (including Tahoe Basin)



D2. Buildout Technical Documentation:

Exploring Regulatory and Market Factors for the 2024 Blueprint

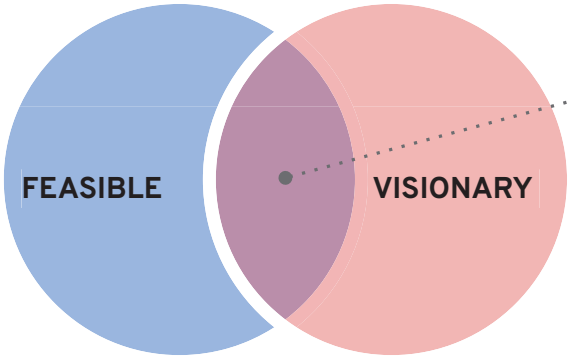
Sacramento Area Council of Governments

August 18th, 2022

Supporting the MTP/SCS

Sustainable Communities Strategies are intended to guide local land use planning toward regional greenhouse gas reductions targets. However, these plans are only impactful to the extent they are achievable.

The California Air Resources Board has set ambitious standards for lowering greenhouse gas emissions, which jurisdictions need to take bold and innovative measures to meet.



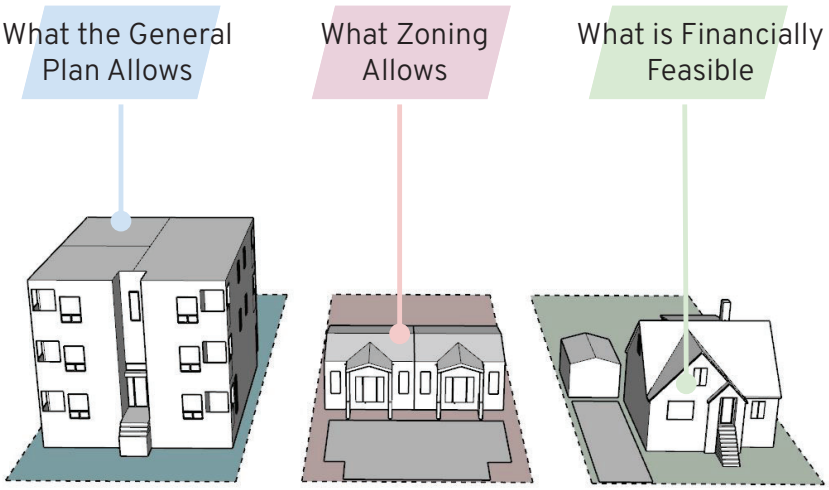
To meet state GHG targets, the MTP/SCS will need to push boundaries.

The build-out analysis provides critical intelligence to the SACOG modeling team to ensure MTP/SCS pathways are both **visionary AND feasible.**

Build-Out Capacity

3 ways to assess build-out capacity:

1. **Plan Designation**: What the General Plan says is allowed
2. **Zoning:** What zoning makes possible
3. **Market Feasibility:** What is financially feasible to build, given current market conditions



Catalog of General Plans and Zoning

Basic Info		ADUs	DU Density			Lot Dimensions		Setbacks		
GPLU_ID	ZONE_NAME	USE_ADUS	MAX_DENS	MAX_DENS_W_ADU	MIN_LOT_SZ	WIDTH	DEPTH	SB_FRONT	SB_SIDE	SB_REAR
GALT_LDR	Maximum Density Sing	1	6.7	13.4	6500	65	100	20	5	10
GALT_RR	Residential Agriculture	1	0.2	0.4	217800	100	2178	20	10	10
GALT_RE	Residential Estates	1	1.0	2.0	43560	100	435.6	20	5	10
GALT_MDR	Medium Density Resid	1	8.0	15.8	5500	55	100	20	5	10
GALT_MHDR	Medium High Multiple-	1	14.0		5000	65	76.9	20	5	10
GALT_HDR	High Density Multiple-f	0	24			100	100			
GALT_MU	Mixed Use	0	35			100	100			
GALT_C	Highway Commercial	0				100	100			
GALT_OP	Office-Professional	0				100	100			
GALT_LI	Industrial	0			10000	100	100			
GALT_PQ	Public/Quasi-Public	0				100	100			
GALT_P	Public/Quasi-Public	0				100	100			
GALT_OS	Public/Quasi-Public	0				100	100			
ELKG_CC	General Commercial	1	Residential not			100	100	25	0	0
ELKG_RC	Shopping Center	0				100	100	25	0	0
ELKG_EC	Business and Professi	0				100	100	25	10	10
ELKG_LIF	Light Industrial/Flex	0				100	100	25	0	0
ELKG_LI	Industrial-Office Park	0				100	100	25	10	0
ELKG_HI	Heavy Industrial	0				100	100	25	0	0
ELKG_VCMU	Villege Center Mixed-U	1	40	80		100	100	0	0	0
ELKG_RMU	Residential Mixed-Use	1	40	80		100	100	5	0	10
ELKG_POS	Commercial Recreatio	0				100	100	25	0	0

28 General Plans

70+ Specific Plans

425 Zoning Classifications

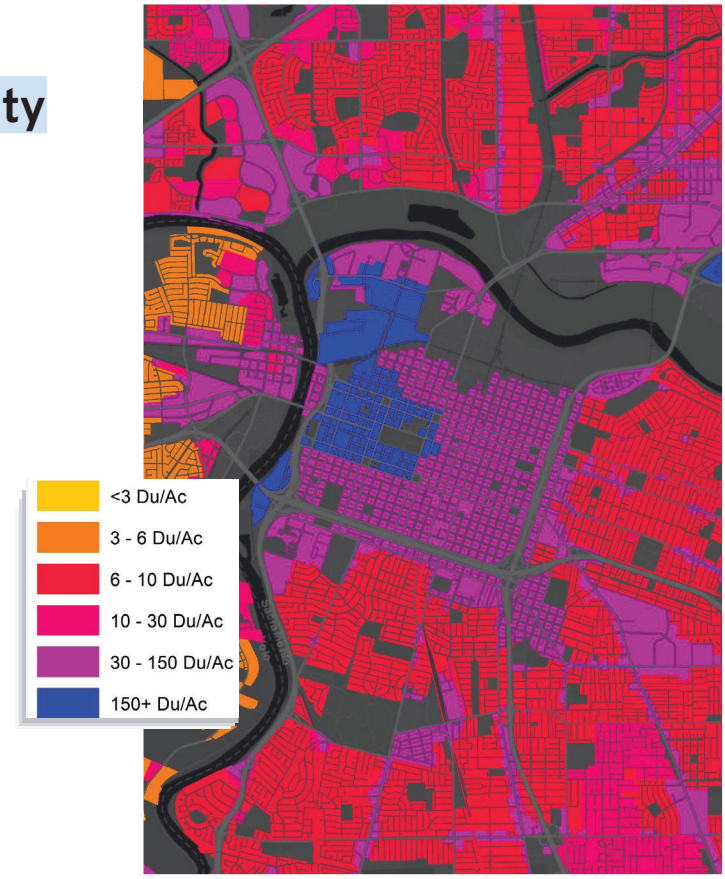
Cataloged height, density, setbacks, parking requirements, allowed uses

1. General Plan Build-Out Capacity

- "Typical" way of assessing build-out capacity
- Maximum heights, densities, and FARs cataloged for each General Plan land use designation

How is this used in the MTP/SCS?

General plans represent each jurisdictions' desired growth patterns and transportation improvements. This is important because the state requires the MTP/SCS to consider local plans and policies.

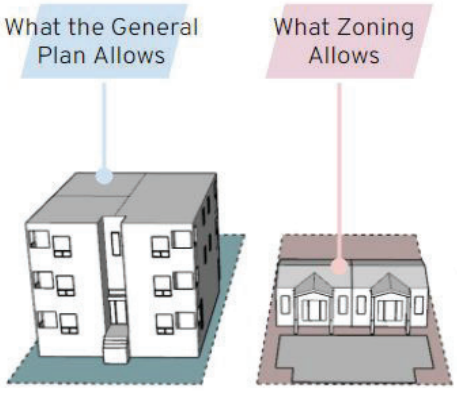


2. Zoning-Based Build-Out Capacity

- Zoning is intended to implement general plan land use.
- Sometimes, zoning creates barriers to implementing the general plan and limits build out capacity.

How is this used in the MTP/SCS?

Zoning isn't typically studied as part of the MTP/SCS. However, it has very real implications for how much capacity exists within each of the regions' jurisdictions. This analysis helps SACOG ensure they are being realistic in their assumptions about where future growth could occur.

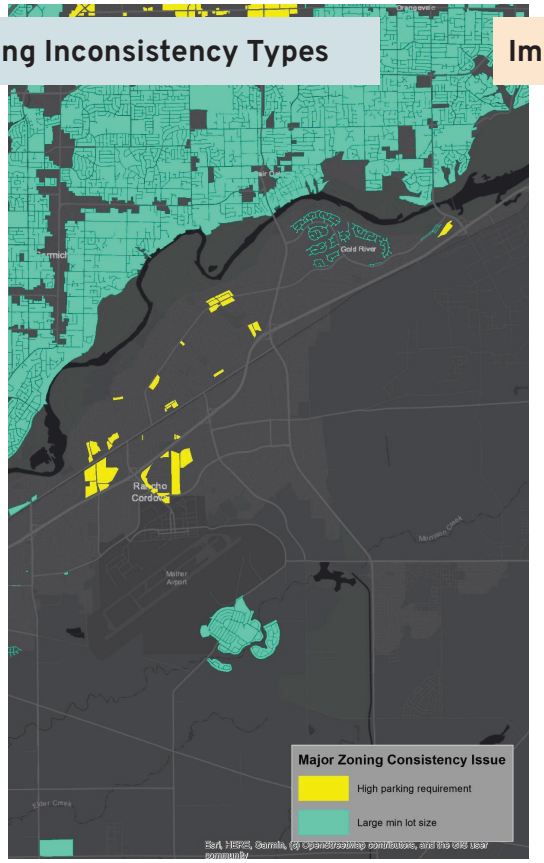


Supporting the MTP/SCS

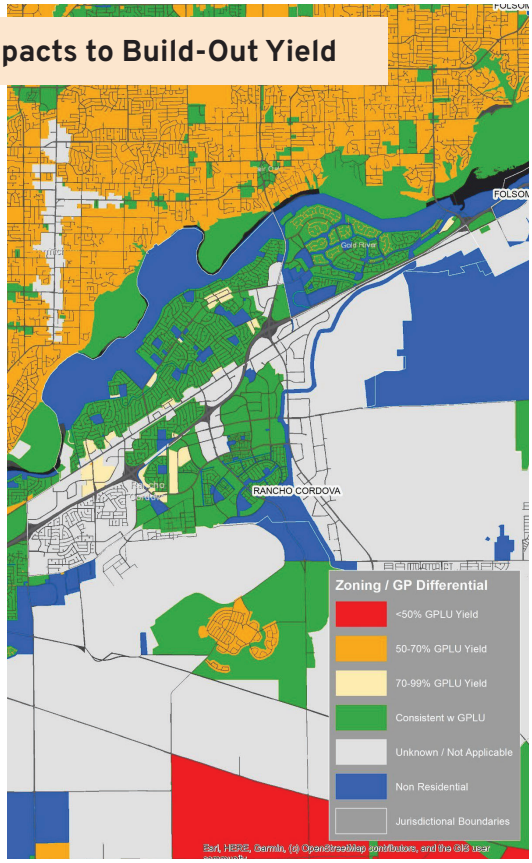
Zoning inconsistencies are mapped across the 6-county SACOG region.

They can be visualized to identify potential implementation issues or used to create queries during the scenario modeling process.

Zoning Inconsistency Types



Impacts to Build-Out Yield



3. Market-Based Build-Out Capacity

- Building to the maximum that zoning allows may not always be feasible in the current market environment.
- In many cases around the region, zoning allows higher densities than the market can support.

How is this used in the MTP/SCS?

Knowing what densities are allowed by local zoning AND supported by local market conditions ensures that SACOG's land use scenarios are achievable. Factoring market feasibility into land use pathways ensures that SACOG's regional transportation investments work in harmony with where growth is likely to occur.

What is Likely to be Built



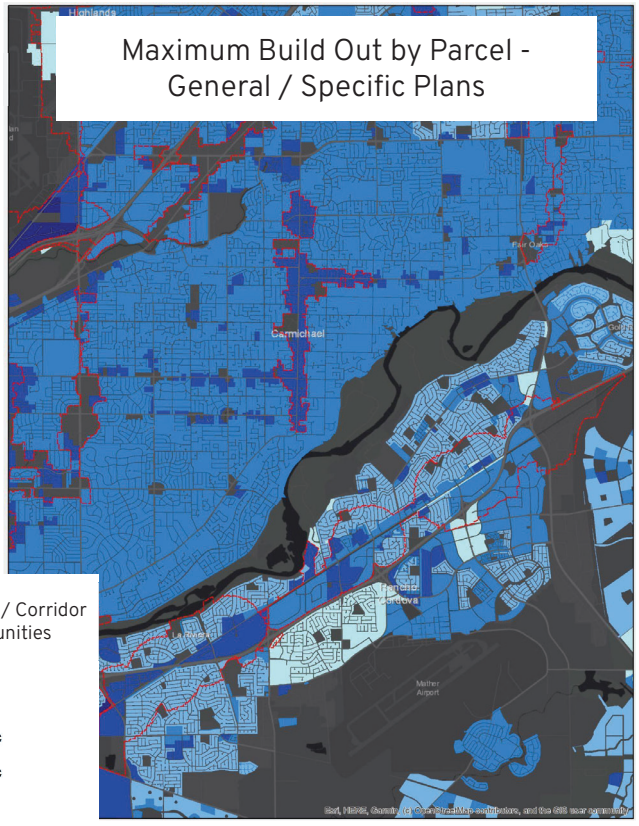
1. General Plan Build-Out Capacity

General Plan build-out capacity is based on the maximum development envelope allowed within each jurisdictions' General and Specific Plans.

TABLE LU-1
LAND USE DEVELOPMENT STANDARDS

Land Use Category	Minimum Parcel Size (acres)	Maximum Parcel Size (acres)	Minimum Density (du/ac)	Maximum Density (du/ac)	Minimum FAR	Maximum FAR	Height Maximum (feet)
Residential Categories							
Rural Residential	2	10	0.1	0.5	-	-	35
Estate Residential	0.5	2	0.51	2.0	-	-	35
Low Density Residential	-	-	2.1	6.0	-	-	35
Medium Density Residential	-	-	6.1	18.0	-	-	40
High Density Residential	-	-	18.0	40.0	-	-	60 [1]

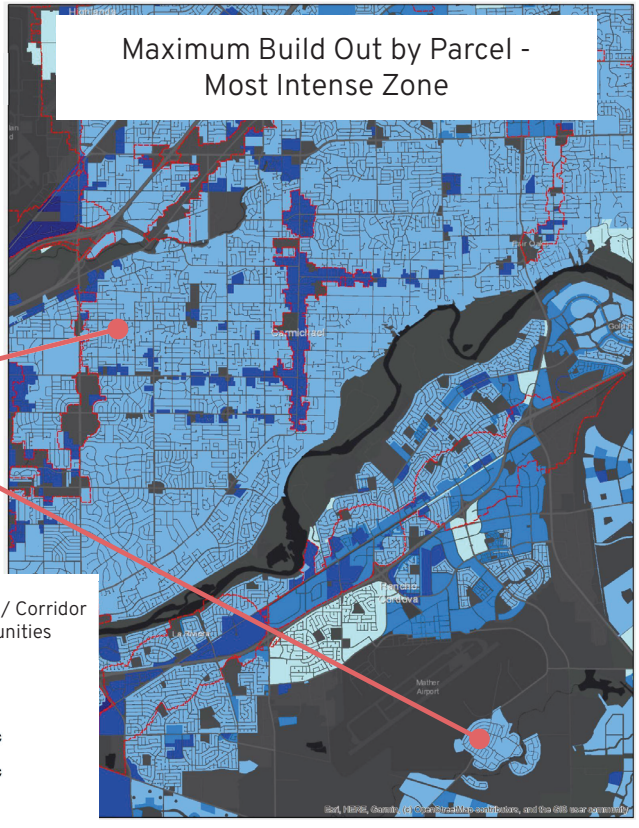
Excerpt from City of Rancho Cordova's General Plan Land Use Element



2. Zoning-Based Build-Out Capacity

Zoning-based build-out capacity is based on the underlying zoning that implements General Plan land use.

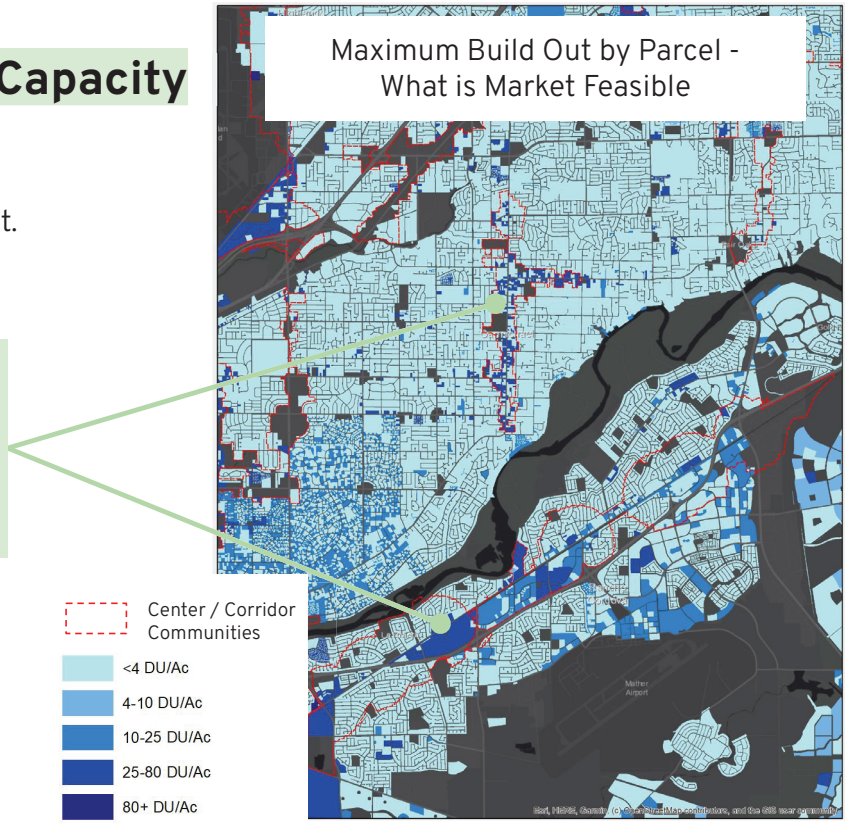
Reductions in capacity (lighter shades of blue) are due to an implementing zone that does not allow as much development as the General Plan does.



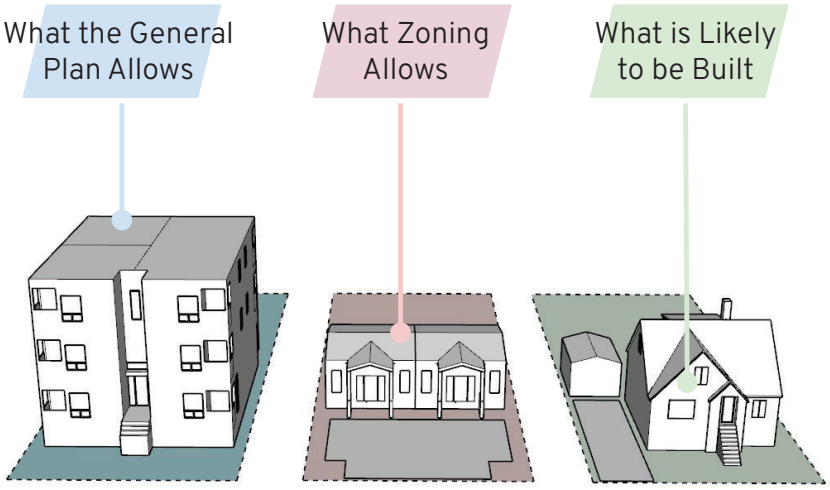
3. Market-Based Build-Out Capacity

Market-based build-out capacity takes land values, rents, and general plans into account. It allows us to estimate feasible build out density and likely development location.

Market-based capacity is a reflection of current market conditions. Areas where rents and sales prices are not high enough to make development feasible are removed. Capacity reductions are less severe in Center and Corridor Communities.



Draft Regional MTP/SCS Build-Out Estimates



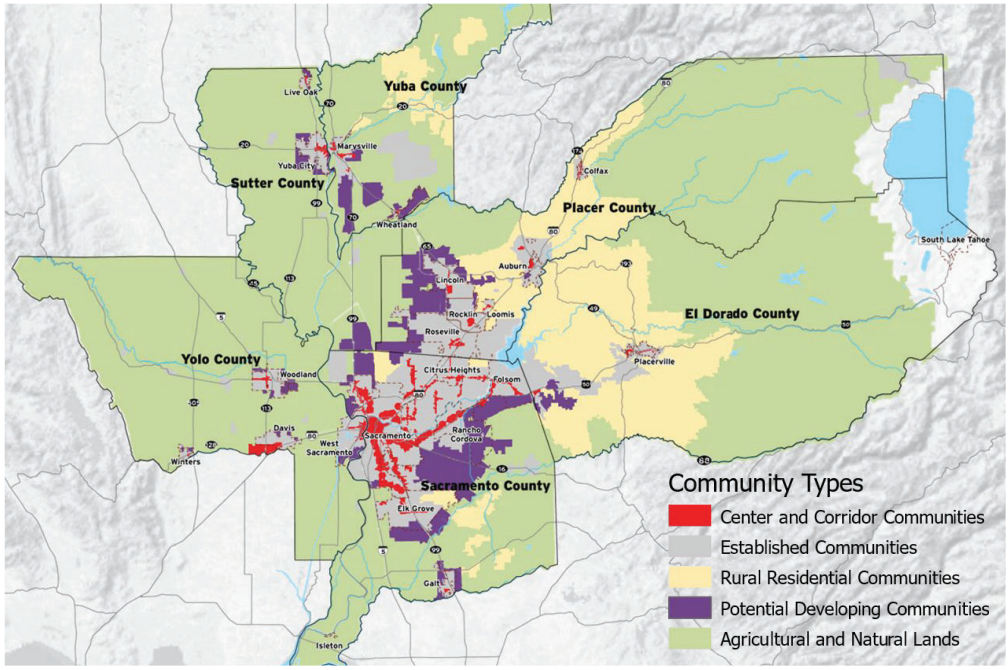
Estimates Revised April 2023

General/Specific Plan Build-Out:
~3.0 Million DUs

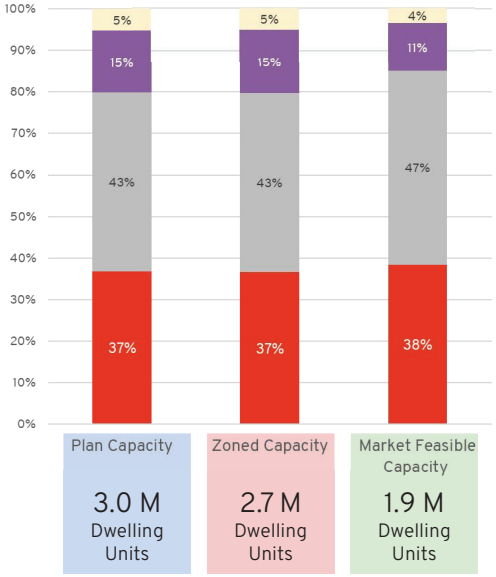
HBU Zoning Build-Out:
~2.7 Million DUs

Market-Based Build-Out:
~2.1 Million DUs

Where Does Build-Out Capacity Exist?

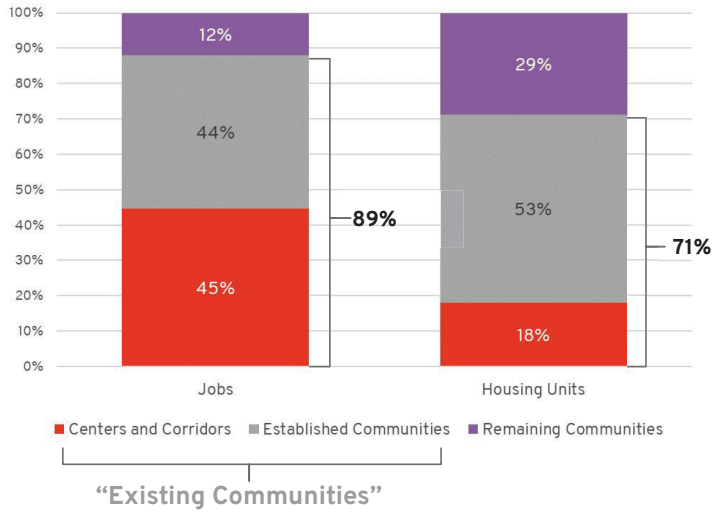


Share of Build-Out Capacity by Community Type and Analysis Method



Share of Annual Housing and Job Growth by Community Type (2016 - 2020)

Source: SACOG Curated Parcel Data



Recent Development Trends

The vast majority of the region's recent growth has happened in Existing Communities.

Between 2016 and 2020, **89%** of the region's job growth and **71%** of its housing unit growth occurred in Existing Communities.

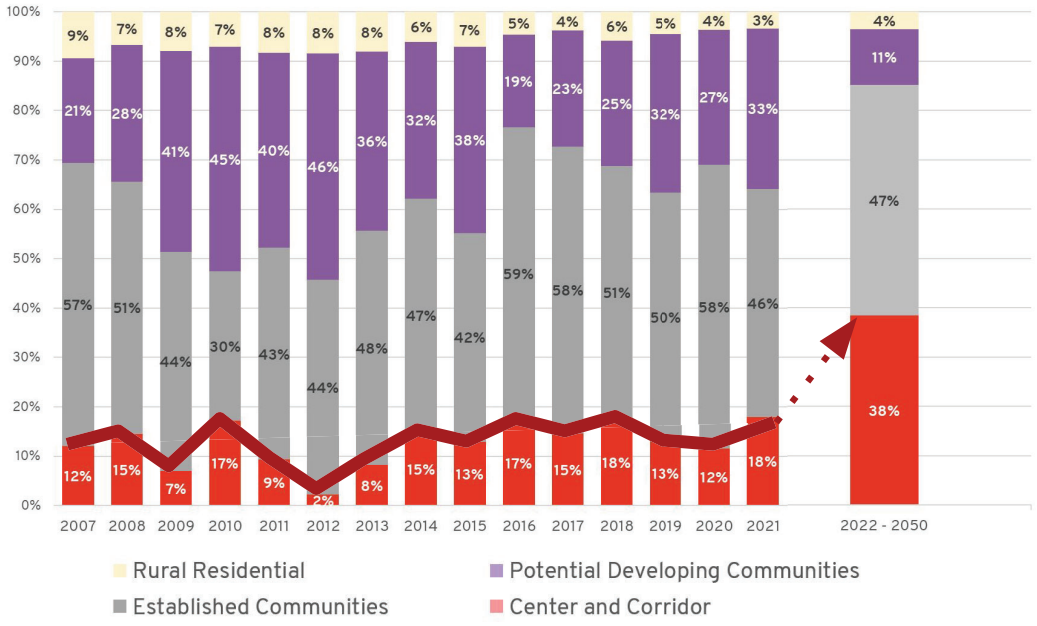
While this trend in job growth is encouraging, it is clear that housing unit growth is lagging, particularly in **Center and Corridor Communities.**

What is behind this trend, and what does it mean for the 2024 MTP/SCS?

Share of Annual Residential Permits by Community Type (2007 - 2021)

Source: SACOG Housing Permit Database

Market Feasible Capacity by Community Type (2022 - 2050)



Underperforming Center & Corridor Communities

38% of the region's market-feasible build-out capacity exists in **Center/Corridor Communities**.

Despite favorable market conditions and ample General Plan capacity, Center/Corridor Communities are still not living up to their potential as growth engines for the region.

What is Holding Center and Corridor Communities Back?

Development "Friction"

- Infrastructure
- Zoning Barriers
- Development Review

SACOG's Challenge:

What can the region do to reduce development friction in these areas?

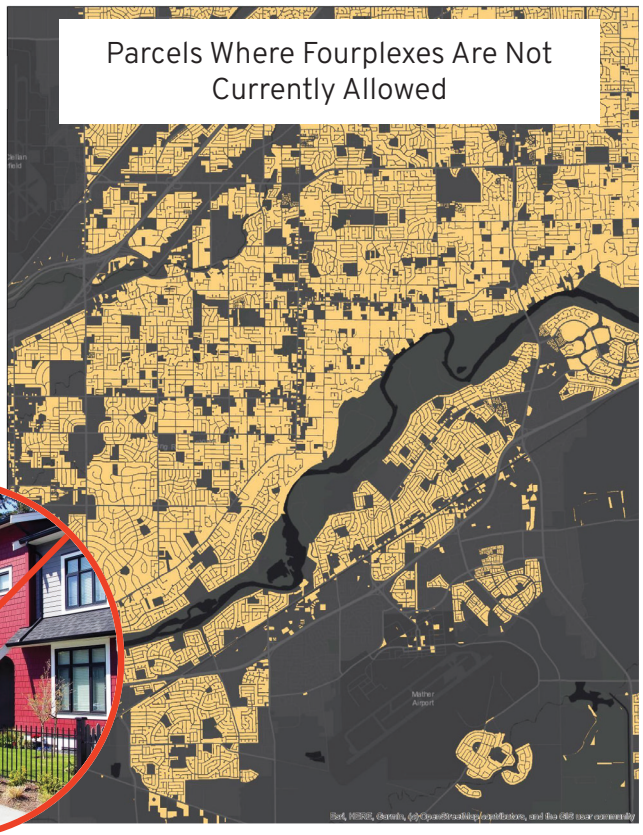


Opportunities For Future Research

The Market-based build-out analysis provides a useful tool for assessing where near term opportunities exist to develop within existing development regulations. But it also provides a way to explore a "what-if" scenario.

The map at the right shows areas where fourplexes are not currently allowed





Opportunities For Future Research

What if development regulations changed? Would that create more opportunities for housing?

The map at the right shows parcels where fourplexes would be feasible, if development regulations allowed them to be built.





Jurisdiction/Community Type	Historical Housing Permits														Average Permits		
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	5 Year (2019-2023)	10 Year (2014-2023	Plan Period (2020-2023)
Placerville																	
Center and Corridor Communities	-	-	-	1	-	-	-	-	-	-	-	2	-	-	0	0	1
Established Communities	-	2	-	46	-	2	47	51	20	16	26	14	16	1	15	19	14
Placerville Total	**-**	**2**	**-**	**47**	**-**	**2**	**47**	**51**	**20**	**16**	**26**	**16**	**16**	**1**	**15**	**20**	**15**
Eldorado County Unincorporated																	
Center and Corridor Communities (El Dorado Hills Town Center)	-	-	-	-	-	-	-	-	-	-	214	-	-	-	43	21	54
Established Communities (listed below)															-	-	-
Cameron Park	1	2	2	5	8	7	2	9	15	11	3	10	28	24	15	12	16
El Dorado Hills	20	9	56	77	66	81	5	190	163	177	60	45	162	198	128	115	116
El Dorado/Diamond Springs	1	-	-	-	-	-	1	3	5	2	1	1	5	10	4	3	4
Placerville (minus city)	-	-	-	-	1	3	-	-	4	2	1	1	2	2	2	2	2
Shingle Springs	-	-	-	41	1	5	-	2	2	1	2	-	8	2	3	2	3
Rural Residential Communities	41	32	11	16	22	25	6	56	122	103	29	6	109	61	62	54	51
Developing Communities (listed below)															-	-	-
Bass Lake Hills	-	-	-	-	-	-	-	-	-	1	35	18	129	77	52	26	65
Carson Creek	-	-	-	-	-	-	-	151	60	176	57	34	95	79	88	65	66
Valley View	23	27	78	247	154	181	13	269	190	8	6	-	2	-	3	82	2
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
Lime Rock	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Marble Valley	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Eldorado County Unincorporated Total	**86**	**70**	**147**	**386**	**252**	**302**	**27**	**680**	**561**	**481**	**408**	**115**	**540**	**453**	**399**	**382**	**379**
EL DORADO COUNTY TOTAL	**86**	**72**	**147**	**433**	**252**	**304**	**74**	**731**	**581**	**497**	**434**	**131**	**556**	**454**	**414**	**401**	**394**
Auburn															-	-	-
Center and Corridor Communities	1	-	-	-	-	-	-	18	1	2	3	-	2	3	2	3	2
Established Communities	14	9	4	70	7	12	7	17	39	20	68	9	92	103	58	37	68
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
Baltimore Ravine	-	-	-	-	-	-	-	-	-	-	-	-	1	-	0	0	0
Auburnn Total	**15**	**9**	**4**	**70**	**7**	**12**	**7**	**35**	**40**	**22**	**71**	**9**	**95**	**106**	**61**	**40**	**70**
Colfax																	
Center and Corridor Communities	-	-	-	-	-	-	-	-	-	1	-	-	-	-	0	0	-
Established Communities	-	-	-	-	-	-	-	-	-	-	-	30	9	-	8	4	10
Colfax Total	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**1**	**-**	**30**	**9**	**-**	**8**	**4**	**10**
Lincoln																	
Center and Corridor Communities	30	18	43	64	-	-	-	-	-	27	136	50	42	156	82	41	96
Established Communities	90	62	90	219	259	140	199	148	165	88	238	124	130	308	178	180	200
Developing Communities (listed below)															-	-	-
Hwy 65 Area	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
SUD-B Northeast Quadrant	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Village 1	-	-	-	-	-	-	-	-	-	-	-	16	42	125	37	18	46
Village 2	-	-	-	-	-	-	-	-	-	-	-	-	24	55	16	8	20
Village 5	-	-	-	-	-	-	-	1	-	-	-	-	-	1	0	0	0
Village 7	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
SUD A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
SUD C	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Village 3	-	-	-	-	-	-	-	-	-	1	-	-	-	-	0	0	-
Village 4	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Village 6	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Lincoln Total	**120**	**80**	**133**	**283**	**259**	**140**	**199**	**149**	**165**	**116**	**374**	**190**	**238**	**645**	**313**	**248**	**362**
Loomis																	
Center and Corridor Communities (Loomis Taylor Rd)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Established Communities	5	-	-	2	-	5	2	-	1	1	-	11	21	8	8	5	10
Rural Residential Communities	3	3	2	4	6	11	18	12	12	3	7	20	11	8	10	11	12
Loomis Total	**8**	**3**	**2**	**6**	**6**	**16**	**20**	**12**	**13**	**4**	**7**	**31**	**32**	**16**	**18**	**16**	**22**
Rocklin																	
Center and Corridor Communities	1	2	1	1	8	23	30	28	3	3	27	40	3	7	16	17	19
Established Communities	291	107	108	131	186	275	350	636	737	503	263	442	363	412	397	417	370
Developing Communities (listed below)															-	-	-
Hwy 65 Corridor	-	-	-	-	-	-	129	72	95	308	57	6	-	-	74	67	16
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
Clover Valley	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Rocklin Total	**292**	**109**	**109**	**132**	**194**	**298**	**509**	**736**	**835**	**814**	**347**	**488**	**366**	**419**	**487**	**501**	**405**
Roseville																	
Center and Corridor Communities (listed below)															-	-	-
Douglas/Harding/Sunrise	-	-	-	-	-	-	-	-	2	-	-	-	2	-	0	0	1
Downtown/Riverside Gateway/Atlantic	2	-	1	-	3	1	1	2	57	2	2	65	2	2	15	14	18
Established Communities	673	427	831	295	567	941	765	779	813	775	846	1,030	736	610	799	786	806
Developing Communities (listed below)															-	-	-
Creekview	-	-	-	-	-	-	-	-	-	-	-	98	263	149	102	51	128
Sierra Vista	-	-	-	-	-	-	44	144	295	282	474	723	796	644	584	340	659
Amoruso Ranch	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Roseville Total	**675**	**427**	**832**	**295**	**570**	**942**	**810**	**925**	**1,167**	**1,059**	**1,322**	**1,916**	**1,799**	**1,405**	**1,500**	**1,192**	**1,611**
Placer County Unincorporated																	
Center and Corridor Communities (Government Center Master Plan)	-	-	-	-	-	-	-	-	-	-	40	38	-	79	31	16	39
Established Communities	58	161	132	133	25	150	148	188	196	154	120	104	314	302	199	170	210
Rural Residential Communities	76	55	40	60	11	93	78	66	111	122	125	133	129	134	129	100	130
Developing Communities (listed below)															-	-	-
Placer Vineyards	-	1	-	-	-	-	-	2	-	-	-	30	162	157	70	35	87
Riolo Vineyards	-	-	-	-	-	-	-	-	12	15	15	5	96	223	71	37	85
Bickford Ranch	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Placer One	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sunset Area Plan (excluding Placer One)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
Regional University	-	-	-	-	-	-	-	-	-	2	-	-	-	-	0	0	-
Placer County Unincorporated Total	**134**	**217**	**172**	**193**	**36**	**243**	**226**	**256**	**319**	**293**	**300**	**310**	**701**	**895**	**500**	**358**	**552**
PLACER COUNTY TOTAL	**1,244**	**845**	**1,252**	**979**	**1,072**	**1,651**	**1,771**	**2,113**	**2,539**	**2,309**	**2,421**	**2,974**	**3,240**	**3,486**	**2,886**	**2,358**	**3,030**
Citrus Heights																	
Center and Corridor Communities (listed below)															-	-	-
Auburn Blvd	-	-	-	-	-	-	-	-	-	-	-	-	-	1	0	0	0
Greenback Ln/Sunrise Blvd	-	-	-	-	-	-	-	-	-	-	-	61	165	17	49	24	61
Sunrise Tomorrow Specific Plan	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Established Communities	-	16	14	4	7	38	23	3	4	25	7	14	18	96	32	24	34
Citrus Heights Total	**-**	**16**	**14**	**4**	**7**	**38**	**23**	**3**	**4**	**25**	**7**	**75**	**183**	**114**	**81**	**48**	**95**

Jurisdiction/Community Type	Historical Housing Permits														Average Permits		
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	5 Year (2019-2023)	10 Year (2014-2023	Plan Period (2020-2023)
Elk Grove																	
Center and Corridor Communities (listed below)															-	-	-
Big Horn/Bruceville/Laguna	-	-	69	-	-	-	-	-	-	-	-	-	6	216	44	22	56
Elk Grove Blvd	-	-	365	-	-	64	-	-	-	-	-	-	-	-	-	6	-
Laguna West	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Established Communities	271	332	357	409	347	570	551	327	280	532	713	539	296	327	481	448	469
Rural Residential Communities	4	-	3	3	11	6	8	3	10	5	12	4	11	8	8	8	9
Developing Communities (listed below)															-	-	-
Southeast Planning Area	-	-	-	-	-	-	-	-	-	-	45	126	246	189	121	61	152
Sterling Meadows	-	-	-	-	-	-	-	-	75	254	170	117	129	70	148	82	122
Livable Employment Area	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
Elk Grove Subareas	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Elk Grove Total	**275**	**332**	**794**	**412**	**358**	**640**	**559**	**330**	**365**	**791**	**940**	**786**	**688**	**810**	**803**	**627**	**806**
Folsom																	
Center and Corridor Communities (listed below)															-	-	-
Bidwell Corridor	-	-	-	-	60	-	-	-	1	140	-	-	-	186	65	39	47
Gold Line Station Areas	20	-	-	-	-	8	40	49	74	59	35	22	2	3	24	29	16
Established Communities	95	85	152	257	263	251	115	126	160	422	537	180	184	35	272	227	234
Developing Communities (listed below)															-	-	-
Folsom Plan Area	-	-	-	-	-	-	-	-	17	201	351	568	826	788	547	275	633
Folsom Total	**115**	**85**	**152**	**257**	**323**	**259**	**155**	**175**	**252**	**822**	**923**	**770**	**1,012**	**1,012**	**908**	**570**	**929**
Galt																	
Center and Corridor Communities (Downtown/Lincoln Corridor)	-	81	-	-	-	-	-	-	-	-	-	-	1	1	0	0	1
Established Communities	-	-	-	16	50	65	71	116	37	43	35	54	129	117	76	72	84
Developing Communities (listed below)															-	-	-
Liberty Ranch	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Remaining SOI	-	2	2	13	8	11	-	-	9	-	2	1	3	-	1	3	2
Galt Total	**-**	**83**	**2**	**29**	**58**	**76**	**71**	**116**	**46**	**43**	**37**	**55**	**133**	**118**	**77**	**75**	**86**
Isleton																	
Established Communities	-	-	-	-	-	-	-	6	5	-	-	-	-	-	-	1	-
Isleton Total	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**6**	**5**	**-**	**-**	**-**	**-**	**-**	**-**	**1**	**-**
Rancho Cordova																	
Folsom Blvd and Station Areas	-	-	-	-	-	-	-	-	-	-	-	-	1	158	32	16	40
Established Communities	89	22	4	44	41	207	101	100	4	103	64	43	2	-	42	67	27
Developing Communities (listed below)															-	-	-
Sunridge	148	154	191	225	107	303	100	157	154	242	425	579	439	277	392	278	430
Rio Del Oro	-	-	-	-	-	1	-	16	-	-	-	-	47	32	16	10	20
Suncreek	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
The Ranch	-	-	-	-	-	-	-	-	-	-	-	-	67	143	42	21	53
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
Arboretum	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Westborough Specific Plan	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Rancho Cordova Total	**237**	**176**	**195**	**269**	**148**	**511**	**201**	**273**	**158**	**345**	**489**	**622**	**556**	**610**	**524**	**391**	**569**
Sacramento City																	
Center and Corridor Communities (listed below)															-	-	-
Downtown Sacramento (West of 16th St)	2	-	1	179	69	5	-	185	100	88	9	161	401	738	279	176	327
Midtown Sacramento (East of 16th St)	119	19	16	-	33	67	11	70	289	217	52	268	197	208	188	141	181
Railyards	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
River District	-	-	-	-	180	-	-	-	-	-	-	-	123	323	89	63	112
Natomas I-5 Corridor	-	-	-	-	-	-	-	-	94	293	192	221	352	320	276	147	271
Future Green Line Station Areas	-	-	-	-	-	-	11	22	30	24	28	12	1	278	69	41	80
North Blue Line Station Areas	1	-	-	-	-	20	25	14	1	3	1	10	11	146	34	23	42
Arden/Point West/Expo	-	-	-	-	-	-	-	-	-	-	-	195	281	-	95	48	119
Gold Line Station Areas	2	-	7	-	8	-	426	3	234	16	3	21	241	39	64	99	76
Oak Park Broadway and Stockton Blvd	-	-	-	58	3	15	2	8	38	10	3	18	17	3	10	12	10
South Blue Line Station Areas	16	9	22	39	26	39	212	239	92	82	52	133	142	46	91	106	93
West Broadway	-	-	-	-	-	8	73	90	42	105	39	17	252	237	130	86	136
Established Communities	83	42	59	92	97	74	485	997	1,460	1,024	666	967	464	634	751	687	683
Developing Communities (listed below)															-	-	-
Delta Shores	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Northlake	-	-	-	-	-	-	-	-	-	-	-	231	483	371	217	109	271
Panhandle	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
Airport South Industrial Project	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sacramento City Total	**223**	**70**	**105**	**368**	**416**	**228**	**1,245**	**1,628**	**2,380**	**1,862**	**1,045**	**2,254**	**2,965**	**3,343**	**2,294**	**1,737**	**2,402**
Sacramento County Unincorporated																	
Center and Corridor Communities (listed below)															-	-	-
Arden-Arcade Corridors (Arden/Fair Oaks/Fulton/Watt)	24	-	1	-	-	-	13	33	-	-	12	-	-	-	2	6	3
Auburn Blvd/Madison Ave	-	-	-	-	-	-	-	-	-	-	-	-	-	1	0	0	0
Fair Oaks Blvd Central- El Camino to Winding	2	-	2	2	-	-	12	11	-	-	-	9	-	-	2	3	2
Fair Oaks Blvd East- Fair Oaks Village	-	-	-	-	-	-	4	11	-	-	-	2	-	-	0	2	1
Florin Rd	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Franklin Blvd	2	-	-	-	-	-	-	-	-	-	-	-	-	12	2	1	3
Gold Line Station areas (Watt to Butterfield)	-	-	-	-	-	-	-	-	-	-	-	-	2	6	2	1	2
Gold Line Station Areas (Hazel/Easton)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Greenback Ln	35	18	153	40	50	36	40	30	2	-	1	1	-	1	1	16	1
North Watt, Antelope Acres, Light Rail Station Area	171	97	-	-	-	8	-	13	69	62	70	76	69	1	56	37	54
Stockton Blvd	37	1	2	-	-	2	-	45	80	46	28	12	32	7	25	25	20
Established Communities	67	255	71	324	24	23	56	66	55	69	236	257	364	429	271	158	322
Rural Residential Communities	8	4	6	5	1	1	-	-	3	-	18	32	25	28	21	11	26
Developing Communities (listed below)															-	-	-
Florin Vineyard	-	-	-	-	-	-	5	72	102	22	1	-	3	20	9	23	6
North Vineyard Station	134	57	114	216	14	2	90	153	201	115	193	120	113	5	109	101	108
Vineyard Springs	1	-	1	-	-	6	68	9	32	55	1	1	4	11	14	19	4
Cordova Hills	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Glenborough at Easton	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Mather South	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
Aerojet	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Elverta	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Grand Park	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Jackson Township	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
West Jackson	-	-	-	-	-	-	-	-	-	-	-	-	1	-	0	0	0
Newbridge	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Upper Westside	-	1	-	-	-	-	-	-	-	-	-	1	2	-	1	0	1
Agricultural and Natural Lands	10	13	18	8	1	-	9	14	-	-	10	14	11	1	7	6	9
Sacramento County Unincorporated Total	**491**	**446**	**368**	**595**	**90**	**78**	**297**	**457**	**544**	**369**	**570**	**525**	**626**	**522**	**522**	**408**	**561**
SACRAMENTO COUNTY TOTAL	**1,341**	**1,208**	**1,630**	**1,934**	**1,400**	**1,830**	**2,551**	**2,988**	**3,754**	**4,257**	**4,011**	**5,087**	**6,163**	**6,529**	**5,209**	**3,857**	**5,448**

Jurisdiction/Community Type	Historical Housing Permits														Average Permits		
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	5 Year (2019-2023)	10 Year (2014-2023	Plan Period (2020-2023)
Live Oak																	
Center and Corridor Communities (Live Oak Downtown)	-	-	-	-	-	-	-	-	-	1	-	-	-	-	0	0	-
Established Communities	28	-	1	56	-	2	90	-	7	79	64	69	64	18	59	39	54
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
Recent Annexation	-	-	-	-	-	-	-	-	-	-	1	-	-	-	0	0	0
Agricultural and Natural Lands	-	-	1	-	1	-	1	-	-	-	-	-	-	1	0	0	0
Live Oak Total	**28**	**-**	**2**	**56**	**1**	**2**	**91**	**-**	**7**	**80**	**65**	**69**	**64**	**19**	**59**	**40**	**54**
Yuba City																	
Center and Corridor Communities	-	-	-	-	-	-	2	-	-	-	1	-	-	4	1	1	1
Established Communities	34	10	17	43	37	44	30	11	27	18	12	22	62	40	31	30	34
Developing Communities (listed below)															-	-	-
Bogue Stewart	-	-	-	-	-	-	1	-	-	-	1	2	1	-	1	1	1
South SOI/99 Corridor	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Lincoln East	-	-	-	-	-	-	-	-	-	1	-	1	-	-	0	0	0
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
Remaining SOI	1	-	1	-	2	-	-	-	-	1	-	1	-	3	1	1	1
Yuba City Total	**35**	**10**	**18**	**43**	**39**	**44**	**33**	**11**	**27**	**20**	**14**	**26**	**63**	**47**	**34**	**32**	**38**
Sutter County Unincorporated																	
Established Communities	6	1	-	1	5	5	2	2	1	2	1	3	3	3	2	3	3
Developing Communities (listed below)															-	-	-
Sutter Pointe	-	-	-	-	-	-	-	-	-	-	-	-	-	1	0	0	0
Agricultural and Natural Lands	10	8	6	1	6	14	10	6	1	-	6	10	26	15	11	9	14
Sutter County Unincorporated Total	**16**	**9**	**6**	**2**	**11**	**19**	**12**	**8**	**2**	**2**	**7**	**13**	**29**	**19**	**14**	**12**	**17**
SUTTER COUNTY TOTAL	**79**	**19**	**26**	**101**	**51**	**65**	**136**	**19**	**36**	**102**	**86**	**108**	**156**	**85**	**107**	**84**	**109**
Davis																	
Center and Corridor Communities (listed below)															-	-	-
Core Area	1	2	3	-	-	1	2	-	9	-	2	-	1	2	1	2	1
Nishi	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Established Communities	8	19	46	94	25	19	117	208	94	75	299	48	78	309	162	127	184
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
Potential Annexations/SOI	-	-	-	-	-	1	-	-	-	-	-	-	-	-	-	0	-
Jurisdiction Total	**9**	**21**	**49**	**94**	**25**	**21**	**119**	**208**	**103**	**75**	**301**	**48**	**79**	**311**	**163**	**129**	**185**
West Sacramento																	
Center and Corridor Communities (listed below)															-	-	-
Bridge District	35	15	23	39	102	117	-	99	55	69	19	-	-	-	18	46	5
Pioneer Bluff	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Remaining Center and Corridor Area	62	-	-	-	-	-	-	-	-	1	115	1	-	1	24	12	29
Washington	2	-	-	-	-	270	-	15	14	-	-	143	-	48	38	49	48
Established Communities	90	57	54	88	54	60	28	86	47	126	613	171	41	132	217	136	239
Developing Communities (listed below)															-	-	-
Liberty	-	-	-	1	3	-	3	1	-	-	-	-	-	-	-	1	-
River Park	-	-	-	-	-	-	-	-	-	-	-	2	-	1	1	0	1
Yarborough	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
West Sacramento Total	**189**	**72**	**77**	**128**	**159**	**447**	**31**	**201**	**116**	**196**	**747**	**317**	**41**	**182**	**297**	**244**	**322**
Winters																	
Winters Downtown	-	-	-	-	-	-	-	-	-	-	-	62	-	-	12	6	16
Established Communities	-	74	-	-	-	-	41	34	-	47	1	107	156	1	62	39	66
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
SOI	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Winters Total	**-**	**74**	**1**	**-**	**-**	**-**	**41**	**34**	**-**	**47**	**1**	**169**	**156**	**1**	**75**	**45**	**82**
Woodland																	
Center and Corridor Communities	-	1	-	-	-	1	1	1	-	5	5	6	6	5	5	3	6
Established Communities	51	80	51	100	62	112	238	175	81	349	113	369	99	322	250	192	226
Developing Communities (listed below)															-	-	-
Research and Tech Park	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
SOI	-	-	1	-	-	-	-	-	-	2	-	-	-	-	0	0	-
Woodland Total	**51**	**81**	**52**	**100**	**62**	**113**	**239**	**176**	**81**	**356**	**118**	**375**	**105**	**327**	**256**	**195**	**231**
Yolo County Unincorporated																	
Center and Corridor Communities (UCD Campus)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Established Communities (includes ag areas)	33	9	14	44	20	21	5	46	14	19	31	28	23	39	28	25	30
Yolo County Unincorporated Total	**33**	**9**	**14**	**44**	**20**	**21**	**5**	**46**	**14**	**19**	**31**	**28**	**23**	**39**	**28**	**25**	**30**
YOLO COUNTY TOTAL	**282**	**257**	**193**	**366**	**266**	**602**	**435**	**665**	**314**	**693**	**1,198**	**937**	**404**	**860**	**818**	**637**	**850**
Marysville																	
Center and Corridor Communities (Marysville Green Zone)	2	-	-	1	-	-	-	-	-	-	2	-	-	-	0	0	1
Established Communities	1	11	-	1	-	-	-	1	2	-	-	-	-	71	14	7	18
Jurisdiction Total	**3**	**11**	**-**	**2**	**-**	**-**	**-**	**1**	**2**	**-**	**2**	**-**	**-**	**71**	**15**	**8**	**18**
Wheatland																	
Center and Corridor Communities (Wheatland Green Zone)	-	-	-	-	8	-	-	-	-	-	-	-	-	-	-	1	-
Established Communities	-	-	-	-	4	-	-	-	-	-	1	1	1	-	1	1	1
Developing Communities (listed below)															-	-	-
Caliterra Ranch/Heritage Oaks	-	-	-	-	-	-	-	-	-	-	-	-	24	64	18	9	22
Projects Not Identified for Growth in the 2025 Blueprint by 2050															-	-	-
Hop Farm	-	-	-	1	-	-	-	-	-	-	-	-	-	-	-	-	-
Johnson Rancho	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nichols Grove	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Jurisdiction Total	**-**	**-**	**-**	**1**	**12**	**-**	**-**	**-**	**-**	**-**	**1**	**1**	**25**	**64**	**18**	**10**	**23**
Yuba County Unincorprated																	
Center and Corridor Communities (listed below)															-	-	-
North Beale Corridor	-	-	-	-	48	-	-	-	-	-	-	-	-	-	-	5	-
Olivehurst	-	-	-	-	-	-	-	-	-	-	-	1	2	-	1	0	1
Established Communities (listed below)															-	-	-
Beale AFB	-	-	-	-	-	-	-	-	-	9	-	-	-	-	2	1	-
Other Established Communities	4	2	1	2	3	5	3	-	10	21	25	204	40	26	63	34	74
Rural Residential Communities	28	16	11	11	22	30	22	12	65	42	40	44	30	20	35	33	34
Developing Communities (listed below)															-	-	-
East Linda	36	22	40	47	54	74	107	84	101	61	134	136	146	59	107	96	119
North Arboga Study Area	1	-	-	-	-	-	2	-	13	71	12	54	84	45	53	28	49
Plumas Lake	11	29	19	5	17	46	64	57	168	223	242	343	380	214	280	175	295
Highway 65 Employment Center	-	-	-	-	-	-	-	-	-	-	1	-	-	-	0	0	0
Jurisdiction Total	**80**	**69**	**71**	**65**	**144**	**155**	**198**	**153**	**357**	**427**	**454**	**782**	**682**	**364**	**542**	**372**	**571**
YUBA COUNTY TOTAL	**83**	**80**	**71**	**68**	**156**	**155**	**198**	**154**	**359**	**427**	**457**	**783**	**707**	**499**	**575**	**390**	**612**

Jurisdiction/Community Type	Historical Housing Permits														Average Permits		
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	5 Year (2019-2023)	10 Year (2014-2023	Plan Period (2020-2023)
Region Total (may not sum exactly due to rounding)	**3,115**	**2,481**	**3,319**	**3,881**	**3,197**	**4,607**	**5,165**	**6,670**	**7,583**	**8,285**	**8,607**	**10,020**	**11,226**	**11,913**	**10,010**	**7,727**	**10,442**
Community Type Totals (may not sum exactly due to rounding)																	
Center and Corridor Communities	567	263	709	424	598	685	905	986	1,287	1,256	1,091	1,647	2,356	3,255	1,921	1,407	2,087
Established Communities	2,013	1,794	2,064	2,594	2,159	3,117	3,482	4,327	4,448	4,713	5,046	4,897	3,910	4,579	4,629	4,068	4,608
Rural Residential Communities	160	110	73	99	73	166	132	149	323	275	231	239	315	259	264	216	261
Developing Communities	354	292	445	754	357	624	626	1,188	1,524	2,035	2,222	3,211	4,604	3,800	3,174	2,019	3,459
Projects Not Identified for Growth in the 2025 Blueprint by 2050	1	1	3	1	2	1	-	-	-	6	1	2	4	3	3	2	3
Agricultural and Natural Lands	20	21	25	9	8	14	20	20	1	-	16	24	37	17	19	16	24
Development Distribution																	
Center and Corridor Communities	18%	11%	21%	11%	19%	15%	18%	15%	17%	15%	13%	16%	21%	27%	19%	18%	20%
Established Communities	65%	72%	62%	67%	68%	68%	67%	65%	59%	57%	59%	49%	35%	38%	46%	53%	44%
Rural Residential Communities	5%	4%	2%	3%	2%	4%	3%	2%	4%	3%	3%	2%	3%	2%	3%	3%	2%
Developing Communities	11%	12%	13%	19%	11%	14%	12%	18%	20%	25%	26%	32%	41%	32%	32%	26%	33%
Projects Not Identified for Growth in the 2025 Blueprint by 2050	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Agricultural and Natural Lands	1%	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Attachment F: Factors Considered in Updating the MTP/SCS Land Use Forecast

	Regulatory/Policy and Market Factors	Description of Projects Assumed to have the Highest Likelihood of Inclusion in Blueprint Land Use Assumptions	Middle range of conditions	Description of Projects Assumed to have the Lowest Likelihood of Inclusion in Blueprint Land Use Assumptions
REGULATORY	**Local Entitlements**	Specific Plan approved, Annexation complete (if required), Tentative Map(s) approved, No active lawsuits	Range of conditions includes: projects that are approved but still need annexation; projects approved but no tentative maps submitted/approved; projects approved but have unsettled lawsuit; projects currently in process; projects in pre-application	Little to no current entitlement activity; Proposed projects with no formal approvals; identified by general plan or SOI as future growth area
	State/Federal Entitlements	Approved	Range of conditions includes: projects that are not yet approved but in process; projects participating in an HCP or NCCP; projects with no significant resource issues	Significant, unresolved resource issues
POLICY	**Increases Likelihood of Achieving GHG Target**	Lower than average VMT for Developing Communities when Modeled in One of the Blueprint Pathways	Range of conditions includes: projects that are in the SCS with average VMT; projects in the SCS with higher than average VMT; projects not in the SCS with lower than average VMT; projects not in the SCS with average VMT	Significantly Higher than Average VMT for Developing Communities when Modeled in One of the Blueprint Pathways
	Furthers Triple Bottom Line Policy Goals	Improves Ability to Achieve Multiple Triple Bottom Line Goals	Range of conditions includes: Project helps to achieve one or two of the triple bottom line goals but potentially at the expense of another	Does Not Actively Improve Ability to Achieve Any Triple Bottom Line Goals
MARKET	**Proximity to Job Centers**	Close proximity to existing regional job centers	Range of conditions includes: projects within close proximity of subregional job centers; projects within close proximity of what could become a regional job center	Significant distance from job centers
	Housing Mix	Mix of housing types including mostly small-lot and attached	Range of conditions includes: projects that have a mix of housing types including small-lot and attached housing at varying amounts; projects that are primarily large-lot residential because they are in more rural areas	All large-lot single-family where higher densities could be supported (i.e. more urban or suburban locations)
	Market Demand	Historically high market demand and limited number of approved or pending projects in market area, strong history of housing permits in subregion	Range of conditions includes: projects in areas with high market demand and high number of approved or pending projects in market area; projects in areas with average market demand and a high number of approved or pending projects in market area; projects in area with lower market demand and a high number of approved or pending projects in market area, but have a unique factor that could significantly change the market demand for the area	Historically low market demand and a high number of approved or pending projects in market area, no history of housing permits in subregion
	Adjacency	Adjacent or surrounded by existing urban development	Range of conditions includes: projects that are adjacent to existing development at varying rates	Plan boundary is 25% or less adjacent to existing urban development
	Developer Activity	Very active, single ownership or experienced ownership partnerships, multiple completed projects in region	Range of conditions includes: very active to active, single or multiple ownerships with no development history; single or multiple ownerships with varying levels of activity and some projects completed in the region; single or multiple ownerships with varying levels of activity and no history of completed projects in or outside the region	Not active, single or multiple ownership, no completed projects in the region
	Transportation Infrastructure	No major or regional infrastructure needed or infrastructure is fully funded	Range of conditions includes: projects that have some infrastructure, but need more; projects that can build some before significant infrastructure investment is needed; projects that need significant infrastructure and have funding	Significant infrastructure needed and not funded or not yet defined
	Other Infrastructure (sewer, water, flood control, etc)	No major or regional infrastructure needed of infrastructure is fully funded	Range of conditions includes: projects that have some infrastructure, but need more; projects that can build some before significant infrastructure investment is needed; projects that need significant infrastructure and have funding	Significant infrastructure needed and not funded or not yet defined

Attachment D5

County	Jurisdiction	Plan Area	Area (acres)	2020 Jobs	2020 Housing Units	Buildout Jobs	Buildout Housing Units	Plan Approved	Year Approved	Development Status	Year First Unit Built	Tentative Map Approved?	Annexation Required?	Annexation Complete?
El Dorado	El Dorado	Bass Lake Hills	1,414	70	180	200	1,458	Yes	1995, amended in 2016	Under Construction	2005	Yes	No	NA
El Dorado	El Dorado	Carson Creek	710	70	1,050	1,390	1,925	Yes	1996	Under Construction. Approaching Buildout	2005	Yes	No	NA
El Dorado	El Dorado	Lime Rock	740	-	10	-	800	No		Public Review Draft released in May 2024	0	No	No	NA
El Dorado	El Dorado	Marble Valley	2,342	-	-	1,200	3,236	No		DEIR in May 2024	0	No	No	NA
El Dorado	El Dorado	Valley View	2,037	110	2,130	770	2,840	Yes	1998	Under Construction	2003	Yes	No	NA
Placer	Auburn	Baltimore Ravine	277	-	20	160	730	Yes	2011	NA	0	Yes. Large Lot	No	NA
Placer	Lincoln	Hwy 65 Area	264	-	-	5,640	-	Yes	2004	NA	0	No	Yes	Yes
Placer	Lincoln	SUD A	2,242	-	20	1,560	600	No		NA	0	No	Yes	No
Placer	Lincoln	SUD C	104	-	-	-	-	No		NA	0	No	Yes	No
Placer	Lincoln	SUD-B Northeast Quadrant	198	-	-	2,000	430	Yes	2019	NA	0	No	Yes	Yes
Placer	Lincoln	Village 1	1,832	60	40	500	5,610	Yes	2013, amended in 2023	Under Construction	2021	No	Yes	Yes
Placer	Lincoln	Village 2	1,637	-	40	610	2,210	No		NA	0	No	Yes	No
Placer	Lincoln	Village 3	2,774	10	10	-	4,840	No		NA	0	No	Yes	No
Placer	Lincoln	Village 4	2,564	-	-	-	5,420	No		NA	0	No	Yes	No
Placer	Lincoln	Village 5	4,787	30	90	3,950	8,206	Yes	2017	NA	0	No	Yes	Yes
Placer	Lincoln	Village 6	2,737	20	10	-	5,080	No		NA	0	No	Yes	No
Placer	Lincoln	Village 7	703	-	10	210	3,285	Yes	2010, amended in 2024	Partial Grading	0	No	Yes	Yes
Placer	Placer	Bickford Ranch	1,928	-	-	520	1,890	Yes	2004, amended in 2015	Under Construction	2024	Yes	No	NA
Placer	Placer	Placer One	2,213	10	-	14,960	5,640	Yes	2019	Partial Grading / Under Construction.	0	Yes	No	NA
Placer	Placer	Placer Vineyards	5,230	30	160	7,690	14,130	Yes	2007	Under Construction	2022	Yes	No	NA
Placer	Placer	Regional University	1,159	-	-	2,030	4,400	Yes	2008, amended in 2019	NA	0	No	No	NA
Placer	Placer	Riolo Vineyards	526	10	30	70	930	Yes	2015	Under Construction	2018	Yes	No	NA
Placer	Placer	Sunset Area (excluding Placer Ranch)	5,891	6,300	-	49,460	2,500	Yes	2019, amended in 2024	NA	0	No	No	NA
Placer	Rocklin	Hwy 65 Corridor	528	200	540	5,000	1,150	Yes	2019	Under Construction	2016	No	Yes	Yes
Placer	Roseville	Amoruso Ranch	694	-	-	2,500	2,827	Yes	2016	Patial Grading	0	Yes	Yes	Yes
Placer	Roseville	Creekview	502	-	-	2,210	2,011	Yes	2012, amended 2022	Under Construction	2021	Yes	Yes	Yes
Placer	Roseville	Sierra Vista	2,075	30	850	10,330	8,772	Yes	2010	Under Construction	2016	Yes	Yes	Yes
Sacramento	Elk Grove	Elk Grove Subareas	10,368	90	50	43,347	27,820	No		NA	0	No	Yes	No
Sacramento	Elk Grove	Livable Employment Area	638	120	-	10,870	3,513	No		NA	0	No	Yes	No
Sacramento	Elk Grove	Southeast Planning Area	842	-	10	3,350	4,090	Yes	2014	Under Construction	2020	Yes	Yes	Yes
Sacramento	Elk Grove	Sterling Meadows	175	-	330	-	1,188	Yes	2008	Under Construction - Builtout	2018	Yes	Yes	Yes
Sacramento	Folsom	Folsom South Area	3,520	10	220	7,833	13,343	Yes	2011, amended 2024	Under Construction	2018	Yes	Yes	Yes
Sacramento	Galt	Eastview	502	110	10	560	1,745	Yes	2015	Graded	0	Yes	Yes	Yes
Sacramento	Galt	Remaining SOI	4,185	270	460	42,160	4,710	No		NA	0	No	Yes	Partial
Sacramento	Rancho Cordova	Arboretum (Legado)	1,352	-	-	3,634	6,916	No		NA	0	No	No	NA
Sacramento	Rancho Cordova	Rio Del Oro	3,828	10	20	4,290	12,189	Yes	2016	Partial Grading/Under Construction	2017	Yes	No	NA
Sacramento	Rancho Cordova	Suncreek	1,264	-	-	2,380	4,544	Yes	2013, amended in 2022	Partial Grading	0	Yes	No	NA
Sacramento	Rancho Cordova	Sunridge	2,606	960	4,470	2,760	9,886	Yes	2002	Under Construction	2005	Yes	No	NA
Sacramento	Rancho Cordova	The Ranch	530	-	-	400	1,554	Yes	2020	Under Construction	2021	Yes	No	NA
Sacramento	Rancho Cordova	Westborough Specific Plan	1,236	-	-	2,770	7,130	No		NA	0	No	Yes	No
Sacramento	Sacramento City	Airport South Industrial Project	475	-	-	6,850	-	No		NOP in 2023	0	No	Yes	No
Sacramento	Sacramento City	Delta Shores	800	1,160	-	6,650	5,220	Yes	2023	Grading	0	Yes	No	NA
Sacramento	Sacramento City	Northlake	577	-	-	2,780	2,732	Yes	2008	Under Construction	2021	Yes	Yes	Yes
Sacramento	Sacramento City	Panhandle	589	-	-	-	1,620	Yes	2018	Partial Grading	0	Yes	Yes	Yes
Sacramento	Sacramento County	Aerojet	5,325	1,600	-	40,180	-			NA	0	NA	No	NA
Sacramento	Sacramento County	Cordova Hills	2,669	-	-	3,190	8,000	Yes	2013, amended 2023	NA	0	No	No	NA
Sacramento	Sacramento County	Elverta	1,190	10	50	200	5,627	Yes	2007	NA	0	No	No	NA
Sacramento	Sacramento County	Florin Vineyard	3,872	1,570	690	18,830	9,919	Yes	2010	Under Construction (Started in 2017)	2017	Yes	No	NA
Sacramento	Sacramento County	Glenborough at Easton	1,208	-	-	1,800	3,239	Yes	2009	NA	0	No	No	NA
Sacramento	Sacramento County	Grand Park	5,402	20	10	16,563	24,331	No		NA	0	No	No	No
Sacramento	Sacramento County	Jackson Township	1,391	10	30	5,613	6,143	No		NA	0	No	No	NA
Sacramento	Sacramento County	Jackson West	5,900	1,240	110	11,210	16,484	No		Draft EIR,September 2024	0	No	No	NA
Sacramento	Sacramento County	Newbridge	1,095	110	10	450	3,075	No		FEIR in 2020	0	No	No	NA
Sacramento	Sacramento County	North Vineyard Station	1,594	210	1,620	560	6,063	Yes	1998	Under Construction	2008	Yes	No	NA
Sacramento	Sacramento County	South Mather	848	-	-	940	3,522	No		FEIR in 2020	0	No	No	NA
Sacramento	Sacramento County	Upper Westside	2,066	430	60	3,820	9,356	No		EIR in October 2024	0	No	No	NA
Sacramento	Sacramento County	Vineyard Springs	2,650	640	2,600	760	5,942	Yes	2000	Under Construction	2001	Yes	No	NA
Sutter	Live Oak	Recent Annexation	750	30	20	1,670	5,610	Yes		NA	0	No	Yes	Yes
Sutter	Sutter	Sutter Pointe	7,528	840	20	67,360	17,500	Yes	2009, amended in 2014	Partial Grading	0	Yes	No	NA
Sutter	Yuba City	Bogue Stewart	741	30	80	1,620	2,517	Yes	2019	NA	0	No	Yes	Partial
Sutter	Yuba City	Lincoln East	1,160	190	210	1,890	4,865	Yes/No	Approved in 2010 and rescinded in 2021	NA	0	No	Yes	Partial
Sutter	Yuba City	Remaining SOI	4,185	280	630	5,930	22,020	No		NA	0	No	Yes	No
Sutter	Yuba City	South SOI/99 Corridor	235	10	40	3,180	1,500	Yes	2004	NA	0	Yes	No	NA
Yolo	Davis	Potential Annexations/SOI	890	10	-	-	-	No		NA	0	No	Yes	No
Yolo	West Sacramento	Liberty	342	20	20	220	1,500	No		NA	0	No	No	NA
Yolo	West Sacramento	River Park	373	-	40	170	2,700	Yes/No	2008, Modified proposal under review	NA	0	No	No	NA
Yolo	West Sacramento	Yarborough	710	-	20	600	3,000	Yes	2008	NA	0	Yes, Phase 1	No	NA
Yolo	Winters	Winters SOI	353	-	-	470	400	Yes		NA	0	No	Yes	No
Yolo	Woodland	Research and Tech Park	350	-	-	5,000	1,600	Yes	2023	NA	0	No	Yes	Yes
Yolo	Woodland	Woodland SOI	3,066	450	50	23,850	5,960	No		NA	0	No	Yes	No
Yuba	Wheatland	Hop Farm	674	-	-	250	1,837	Yes	2011	NA	0	No	Yes	Yes
Yuba	Wheatland	Johnson Rancho	3,357	-	-	6,000	11,700	Yes	2011	NA	0	No	Yes	Yes
Yuba	Wheatland	Caliterra Ranch/Heritage Oaks	340	10	10	440	1,300	Yes	2017, amended 20205	Under Construction	2022	Yes	Yes	Yes
Yuba	Wheatland	Nichols Grove	486	-	10	300	1,750	Yes	2011	NA	0	No	Yes	No
Yuba	Yuba	East Linda	1,760	250	2,910	4,430	4,935	Yes	1990	Under Construction	2001	Yes	No	NA
Yuba	Yuba	Highway 65 Employment Center	5,045	1,140	30	23,000	400	Yes	2003	NA	0	Yes	No	NA
Yuba	Yuba	North Arboga Study Area	1,300	200	1,250	2,560	2,500	Yes	1992	Under Construction	2004	Yes	No	NA
Yuba	Yuba	Plumas Lakes	5,000	600	3,590	20,000	18,130	Yes	1993, ammended in 2023	Under Construction	2004	Yes	No	NA

Housing Product Type Preferences Analysis

September 2024

Executive Summary

The Sacramento Area Council of Governments (SACOG) hired Cascadia Partners to research trends in production and consumer-preferences toward attached housing (i.e. townhomes, duplexes, and multifamily buildings). SACOG also asked Cascadia Partners to meet with developers to better understand the challenges the region faces in producing more attached housing. This issue brief summarizes those findings and concludes with policy recommendations to support attached housing production.

- **The SACOG region has begun to mirror the national trend of more attached housing production**. After the Great Recession, jurisdictions around the United States permitted more attached housing as a share of all housing than in the decades prior. The SACOG region was slow to match that trend. However, as of 2023, 46% of the housing permitted in the region was attached or an accessory dwelling unit (which is sometimes attached).
- **During the 2010s and 2020s, a National Association of Realtors longitudinal survey found more consumers expressing a preference for walkable areas**, with consumers often showing a willingness to accept smaller lots, smaller houses, and even attached housing in order to live in walkable places. This supports the national attached housing trends described above.
- **Developers active in the region who were consulted for this research felt the SACOG region faced unique cost, land, and development ecosystem challenges** that act as obstacles to more attached housing. Many of these challenges can be overcome with policy changes or public investments, though some will require an improvement of broader macroeconomic conditions.

Recommendations for Jurisdictions

- Invest in the public realm to attract development in infill areas, particularly through underground infrastructure (sewer, water, electricity, etc.) and amenities (parks, streetscape improvements, etc.)
- Manage the development cost and risk factors within the public sector's control, such as by allowing apartments by-right in more places and implementing impact fee schedules that don't penalize attached, multifamily housing, and other forms of small housing units.
- Adopt speedy and predictable permitting and approval processes, including by offering ministerial approval processes to more attached and multifamily projects.
- Join SACOG in advocating for state and federal actions to improve consumers' prospects for attainable home ownership and reform building code in ways that reduce construction costs
- Earn California's Housing and Community Development Department's pro-housing designation

The SACOG Region Begins to Catch Up on Multifamily Housing

The nation permitted more multifamily and attached housing post-Recession

During the Great Recession, the construction of single-family detached housing declined sharply nationwide.[1] In the years since, that construction activity has been slow to recover, and multifamily housing has come to comprise a larger share of the nation's private market housing production than it had since the 1970s. Figure 1 below summarizes Department of Housing and Urban Development (HUD) permitting data, which offers a view of housing activity during the Recession and post-Recession period. It shows that nationwide, multifamily housing permits rose from less than 25% of housing permits in 2005 to nearly 40% in 2022. Depending on how the count of housing units is tallied—for example, privately owned units versus publicly owned units, or "permitted" versus "under construction" versus "constructed" units—multifamily is sometimes shown to comprise the majority of American housing production over the most recent decade.[2]

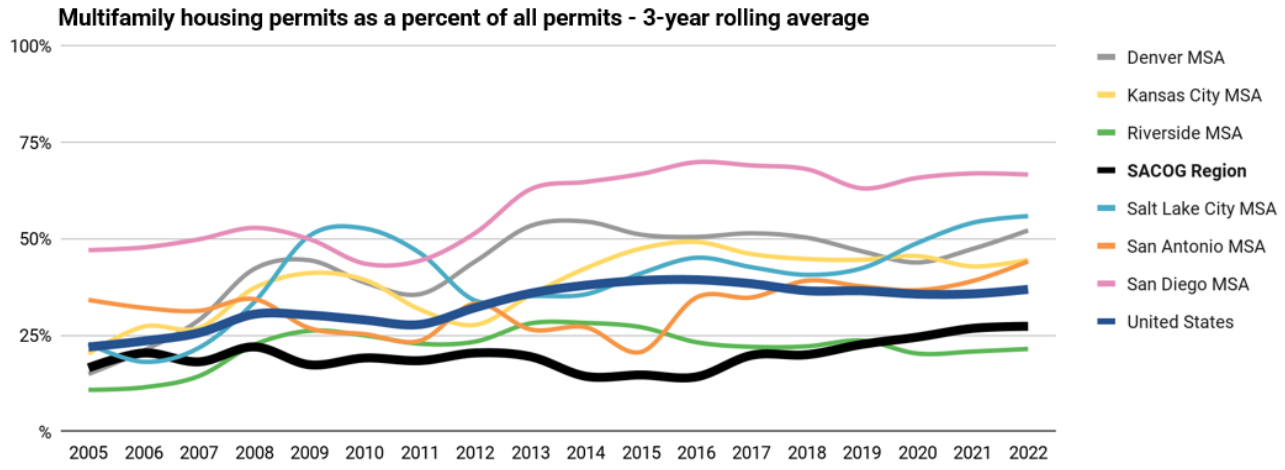


Figure 1. Multifamily housing permits as a percent of all permits.
Source: HUD "State of the Cities Data Systems" (SOCDS) Permit Data (2005-2022). SACOG region defined as combination of Sacramento and Yuba City MSAs. Multifamily permits include housing units in buildings with two or more units.

The SACOG region was slow to match the nationwide trend

While this trend toward more multifamily and attached housing production took hold nationwide, the SACOG region itself was slow to experience it. Multifamily permitting generally declined during the first half of the 2010s. Between 2008 and 2018, the SACOG region's share of permitted housing classified as multifamily was less than, not only the nation as a whole, but all of the peer regions examined: Denver, Salt Lake City, San Antonio, Kansas City, Riverside, and San Diego. As a result, between 2005 and 2022, the SACOG region cumulatively permitted about *half* as many multifamily units per resident as the nation as a

[1] Federal Reserve Bank of St. Louis' Economic Research Division's "UNDCON1USA" and "UNDCON5MUSA" data series.

[2] The Federal Reserve Bank data series cited above indeed show this trend.

whole and roughly a *quarter* as many as its peer Denver. The sole region among peers with similarly low multifamily-housing production was the Riverside, which is influenced by the Greater Los Angeles metropolitan area in much the same way that SACOG is influenced by the Bay Area.

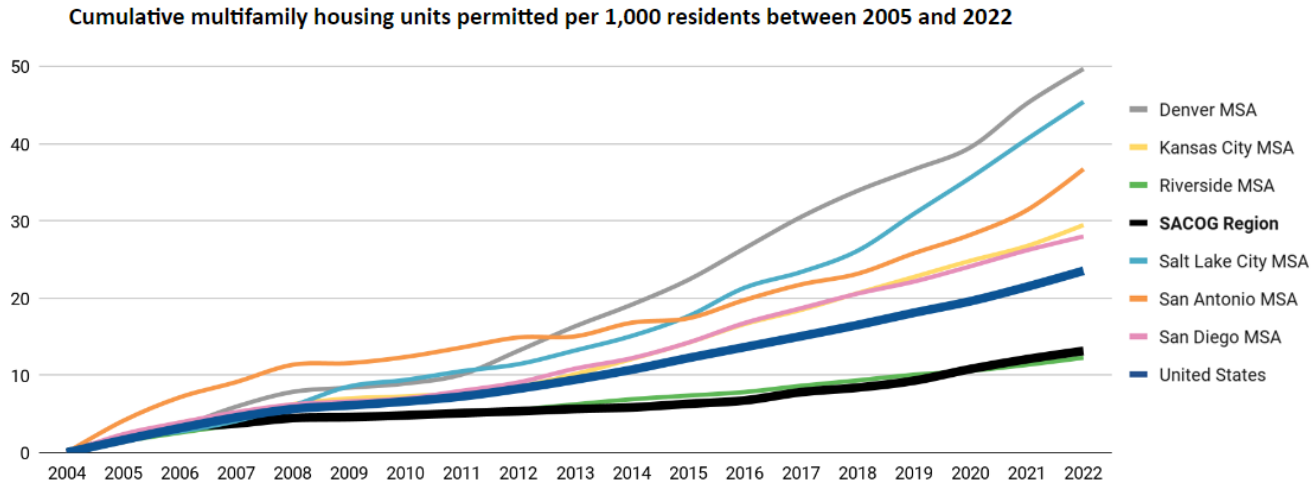


Figure 2. Cumulative multifamily housing units permitted per 1,000 residents
Sources: HUD "State of the Cities Data Systems" (SOCDS) Permit Data (2005-2022) and American Community Survey 1-year population estimates, Table B01001. SACOG region defined as combination of Sacramento and Yuba City MSAs. Multifamily permits include housing units in buildings with two or more units.

Multifamily and attached housing finally accelerates in the SACOG region

Around 2016, the SACOG region's permitting and production of multifamily housing began to grow to resemble national trends. According to RealPage, Inc., in 2016 roughly 1,000 apartments were under construction in the Sacramento Region. That rose to roughly 6,000 apartments under construction in 2022. And beyond the total number of apartments, the *share* of new housing that was attached or multifamily

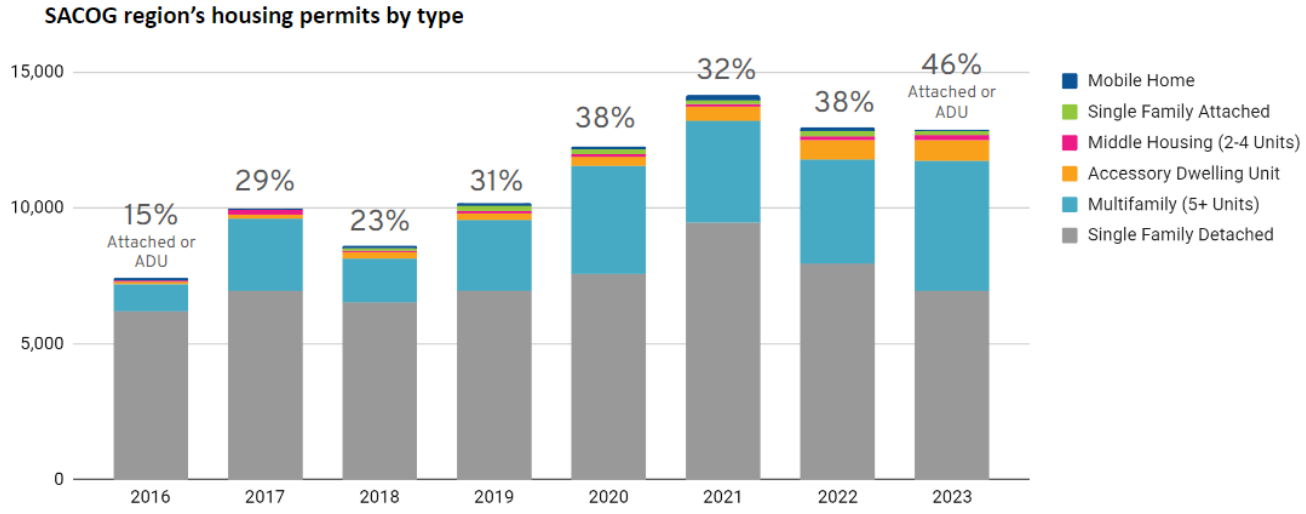


Figure 3. Housing permits by type for the SACOG region
Source: California Department of Housing and Community Development, annual progress report permitting data

rose. California's Department of Housing and Community Development's (HCD) permitting data, generally considered more accurate than HUD's State of the Cities permitting data, shows that the SACOG region's mix of permitted units rose from 15% attached or ADUs in 2016 to 46% in 2023, a *tripling* of the share. This is nearly the unit mix that will be required for the region to fulfill the adopted land use assumptions in the 2025 Blueprint Plan. This bodes well for plan implementation and demonstrates market capability and demand for multifamily and attached product types.

Rising Demand for Smaller & Attached Housing, Walkable Areas

The SACOG region's growth of attached housing reflects changing preferences

The trend toward more attached housing did not appear out of thin air. Rather, it was a response to a shift in consumer preferences and price sensitivity. The National Association of Realtors (NAR) "Community and Transportation Preferences Survey" tracks those changes over time. They find that since the early 2010s more consumers have voiced preferences for walkable areas over car-dependent ones, and those consumers are willing to pay more or accept a tradeoff of a smaller lot or less space in their home.

For example, in 2017, 69% of Millennials and 60% of Gen Xers said they would pay at least a little more to live in a walkable community. Asked the same question in 2023, a higher percentage—85% of Millennials and 74% of Gen Xers—said they would pay at least a little more.[3] This suggests these generations' willingness to pay has been durable over time despite their aging and the pandemic. Another durable and growing preference is one for smaller lots in walkable areas over larger lots in car-dependent areas. The NAR finds the percentage of consumers preferring the former rose from 37% in 2011 to 56% in 2023.

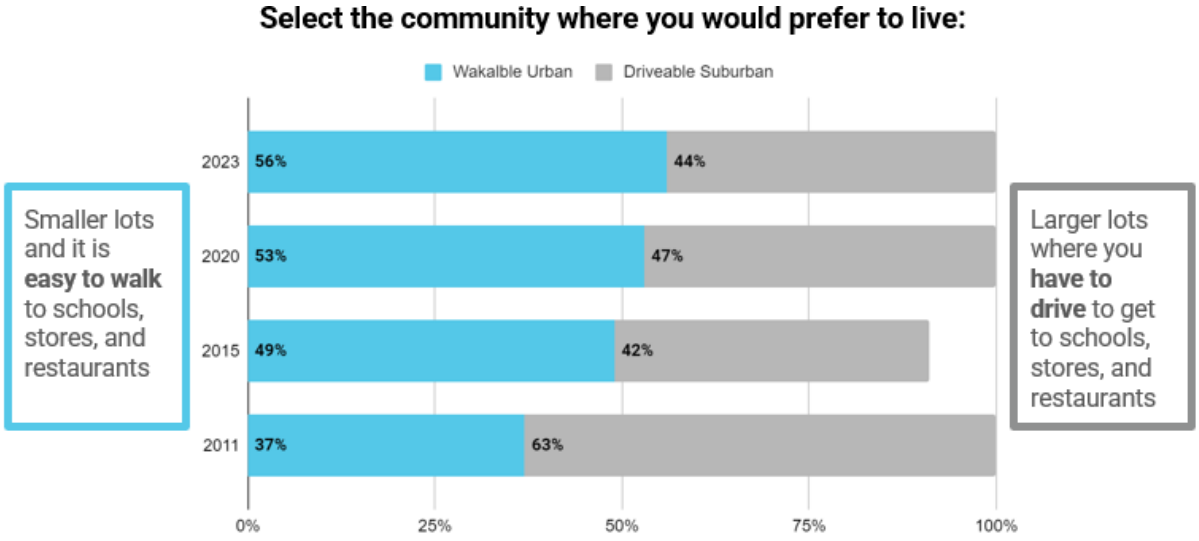


Figure 4. Change in preferences for small lots in walkable areas or larger lots in car-dependent ones
Source: National Association of Realtors, "Community and Transportation Preferences Survey" (2023)

[3] NAR "Community and Transportation Preferences Survey", Analysis and Slides, Question 6 (2023 and 2017 Vintages). See https://www.nar.realtor/reports/nar-community-and-transportation-preferences-surveys.

Gen Z consumers express the strongest preference for walkable areas and attached housing. In the 2023 NAR survey, 69% of Gen Z respondents said that they would prefer to own or rent an apartment or townhouse in a walkable area with a short commute over owning or renting a detached single-family home in a car-dependent area with a longer commute. Most Millennials also shared that preference.

SACOG's existing residents are also supportive of getting more attached housing built. In a survey of residents of regions across the country, Zillow found that roughly 70% of homeowners and 90% of renters in the Sacramento region supported allowing duplexes and triplexes in residential neighborhoods.[4] SACOG's internal polling found that 53% of renters felt the region should prioritize building dense forms of housing, while only 37% of renters felt the region should prioritize single-family homes.[5]

Building Attached Housing Is a Victory for Policy and Principles

The SACOG region's vacancy is low, and renter cost burden is rising

It is easy to think that the core reason most renters support a focus on denser housing is that many of them live in such housing. Perhaps more importantly, renters are highly exposed to the negative impacts of low attached and multifamily housing construction in the SACOG region over the last two decades. Per the American Community Survey, housing vacancy in the SACOG region fell from roughly 5% during the mid-2010s to roughly 2% in 2022—lower than essentially all its peers.[6] Accordingly, since 2005, the SACOG region experienced the *largest* rise in severe renter cost burden among its peer regions. The lack of production is one of the main contributors to the lack of affordable rental housing stock and it reinforces the importance of supporting pro-housing policies.

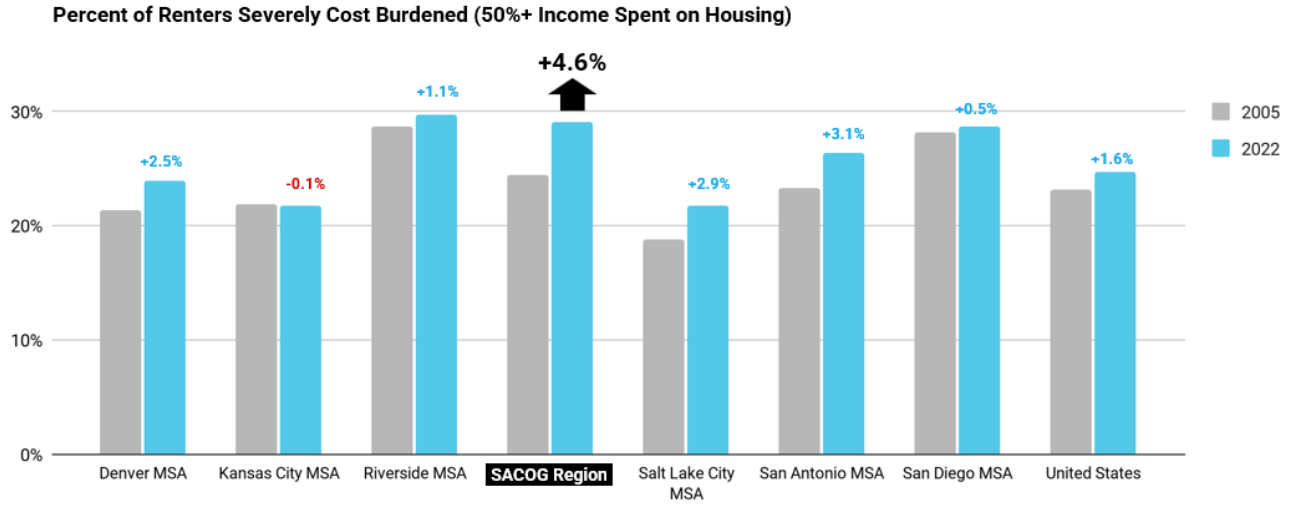


Figure 5. Percent of renters that are severely cost burdened
Source: US Census Bureau American Community Survey 1-Year Estimate, Table B25070

[4] Zillow. Press Releases, "77% of homeowners and renters support adding more housing options in residential neighborhoods to help improve affordability." (April 11, 2022).

[5] SACOG Built Environment Poll Report (2024). https://www.sacog.org/home/showpublisheddocument/2053/638422166267670000.

[6] American Community Survey 1-year estimates, Table B25004. Vacancy calculation excludes recreational and farmworker housing.

Attached housing can help SACOG fulfill its Triple Bottom Line principles

In addition to seeking to implement policies that improve the performance of the region's housing market, SACOG uses a set of principles to guide its decision making. Specifically, SACOG supports a "Triple Bottom Line" of advancing equity, protecting the environment, and growing the local economy. Promoting the production of attached housing can help each of these areas:

- **Equity**. Attached housing supports equity by creating more attainable housing options for lower-income households in desirable, high opportunity neighborhoods with access to amenities, jobs, and good schools.
- **Environment**. Attached housing helps form a denser development pattern, which reduces pollution by promoting shorter vehicle trips and more trips using active transit modes.
- **Economy**. Attached housing supports the local economy by improving housing affordability and lowering transportation costs, growing households' discretionary income.

Challenges Developers See to Building More Attached Housing

Despite the policy and Triple Bottom Line cases for supporting more attached housing, obstacles remain that would prevent a continued ramp-up in attached housing production in the SACOG region. To better understand those dynamics, two focus groups with greenfield and infill developers active in the SACOG region were conducted in May 2024 to better understand the challenges preventing more attached housing from being built. The section below describes their perspectives.

Macroeconomic conditions pose headwinds for attached housing growth

In the near term, developers felt that the development of more multifamily and attached housing would be a difficult prospect and that a slowdown in the SACOG region's recent production trends was likely. Developers felt the following were the main macroeconomic factors at play:

- **Capital & construction costs have skyrocketed.** Higher building and borrowing costs reduce the financial feasibility of development across all product types. However, high capital costs hurt multifamily projects more than single family projects because some single-family home buyers are not deterred by high rates and are willing to purchase despite the increased expense. Renters tend to fall lower on the income spectrum than buyers, and thus are less likely and able to shoulder the increased rents that accompany higher interest rates and construction costs. Put another way, developers felt rents were out of sync with increasing development costs and the math only worked in a handful of submarkets.
- **California's development market remains high-risk.** The state's environmental quality act (CEQA) and construction defect liability laws make various forms of multifamily and attached housing very risky to build. The possibility of facing a protracted legal battle that delays, halts, or otherwise bankrupts a project is significant. Investment capital is mobile and thus can demand a higher return in California to offset those risks—otherwise, it will move elsewhere. When rents and sales prices can't cover that risk-adjusted return, development activity stops.

Developers felt that the above factors were reducing development activity in the near term. However, the 2025 Blueprint is a long-range plan with a horizon year of 2050. Over that long time horizon, there will be years with improved macroeconomic conditions where building multifamily and attached housing in line with the plan's land use assumptions is significantly more feasible. The conditions to focus on most are local ones that the SACOG region's constituent jurisdictions can control.

Unique local conditions that pose challenges to more attached housing

Developers cited three areas as posing challenges to the SACOG region's aim to add more attached and multifamily housing: cost factors, land availability, and its single-family-focused development ecosystem.

Unique cost factors

- **Infill infrastructure solutions are needed.** Developers reported that some cities have had a "first mover" – private or public – that invested in critical infrastructure in central areas primed for infill development. One example given was the San Diego Redevelopment Agency, which invested in critical sewer upsizing along San Diego's waterfront in the 1990s. Developers asserted that the SACOG region had not seen such investment, leaving upgrades of district infrastructure to individual development projects.
- **Higher investor returns needed.** Developers indicated that the SACOG region is not a superstar market, like the Bay Area or Los Angeles. There are fewer multifamily projects to prove the market's viability, and less prestige associated with investing in Sacramento. As a result, higher profit margins are needed to attract capital, and those margins get passed on buyers and renters.
- **Construction labor is uniquely expensive**. The SACOG region's proximity to the Bay Area means local construction labor can serve Bay Area projects. As a result, when working in the SACOG region, construction labor demands higher wages, which are sometimes out of line with local rents.

Unique land availability factors

- **Surplus of entitled greenfield land**. Several developers shared that the SACOG region has a deep well of available greenfield land, often within Specific Plans entitled long ago for large quantities of detached single family housing. Single-family homes within those Specific Plan areas tend to get developed first *even if multifamily is also part of the Specific Plan*. This is because Specific Plans' buildouts often prioritize single family for-sale housing to create bonding capacity for the infrastructure that supports more intensive uses like multifamily.
- **Not enough viable infill sites**. One developer reported there were not enough sites with size and zoning to make medium and high-density residential construction feasible, to say nothing of difficulties within the approval process and broader housing policy ecosystem.

Unique single-family-focused development ecosystem

- **The SACOG region's pool of single-family developers is well-established and shifting to multifamily is seen as risky**. Several developers indicated that they, their banking partners, and their investors were comfortable with detached single-family housing products but less so with attached or multifamily housing. They felt the ecosystem tends to see single family as lower risk,

since it can be built and sold incrementally and is well understood by practitioners, given their extensive history building the product. This focus is reinforced by developers' sense that the SACOG region tends to attract homebuyers from Bay Area seeking more affordable options.

- **Innovation is often limited to detached single-family products**. Some developers expressed openness, even excitement about building denser products. But they above all want to avoid having to seek rezonings and undergo new rounds of costly, risky, and time-consuming environmental review. As such, when developers do need to pivot, they stay with detached single-family products, but adjust on the margin, either to smaller single-family homes or to detached single-family rentals that can be sold to an investor. Both of those paths are seen as less risky than pivoting to attached housing and undergoing accompanying reviews.

Checklist of Actions to Support Attached Housing Production

The challenges developers cited represent real obstacles. However, they can be overcome. The SACOG region's constituent jurisdictions can work to reduce costly construction requirements, support targeted infrastructure investment, create more opportunities and flexibility for dense housing, and offer a less risky approval process for attached and multifamily housing. The list below describes actions jurisdictions should consider taking. Widespread adoption would significantly aid in helping the 2025 Blueprint's land use assumptions come to fruition, supporting a healthier housing market regionwide.

Invest in the public realm to attract development in infill areas

- ✓ **Fill infrastructure gaps that prevent development in walkable areas**. Land and even whole districts with strong redevelopment potential are sometimes limited by the fact that underground infrastructure needs upgrades prior to development. SACOG's Green-Means-Go program uses state funds as patient capital to fund infrastructure needed for attached housing in walkable areas. Where Green Means Go isn't applicable, cities should consider providing extra support in development flexibility and fees when developers act as the "first movers" investing in a district's infrastructure.
- ✓ **Invest in an attractive public realm**. Continue economic development initiatives that support adding amenities where they're needed—whether private ones like grocery stores or public ones like parks—to make our shared spaces more attractive. Continue to invest in shelter, services, and supportive housing to reduce unsheltered homelessness as well.

Manage the development cost and risk factors you can

- ✓ **Allow more small apartments in high demand places**. Changes to promote attached housing production won't matter if jurisdictions don't allow multifamily and attached housing in many places. Jurisdictions should revise zoning to allow small apartments where prices are high and many people want to live. Jurisdictions should also reduce or waive development standards that act as obstacles to multifamily and attached housing.
- ✓ **Implement impact fees formulas that don't penalize attached & multifamily**. AB 602 requires that jurisdictions—when updating their fee schedules—scale impact fees (i.e. system development

charges) by the square foot to avoid overcharging projects with small units. Jurisdictions should proactively take on such adjustments. SACOG should also work with special districts on the issue.

- ✓ **More policy carrots and fewer sticks. More flexibility and options when possible.** New housing policies to protect tenants or create affordable housing can offer great benefits, but also have the unintended consequence of discouraging new construction. Jurisdictions should carefully weigh policy tradeoffs that increase costs and risks associated with developing multifamily projects.

Join SACOG in advocating for state and federal actions

- ✓ **Support cost-saving building code changes**. In some parts of the country and many parts of the world, building code requirements for sprinklers, stairs, and elevators are less costly and stringent than in California. Changing those and other commercial code requirements state or regionwide would not only reduce construction costs, but potentially allow projects to access a deeper construction labor pool by lowering the regulatory barriers to qualifying for work.
- ✓ **Support attached ownership options**. Statewide reforms to allow lot splitting for fee-simple sales (such as in Oregon) and ministerial approvals for subdivisions (SB 684) would speed up the construction of small lot single-family homes and townhomes. Likewise, changes to construction defect liability law and condo deposit rules (SB 1462, SB 1470) would reduce the long-term risk held by developers for their contractors and suppliers, making condo projects more attractive.
- ✓ **Support CEQA reform**. CEQA is intended to protect the environment but is often used to oppose projects that would reduce greenhouse gas emissions by adding housing in low rather than high VMT areas. A statewide conversation is needed to reform California's environmental protections.

Adopt speedy and predictable permitting and approval processes

- ✓ **Faster, less discretionary permitting**. Offer ministerial review to more attached and multifamily projects, helping them avoid unnecessary CEQA review. Similarly, elevate fewer projects to discretionary review processes, whether design review or otherwise. In general, set ambitious timelines for permit processing as a jurisdiction, and support statewide "shot clocks" for all jurisdictions to keep within for approvals. Though more speculative, jurisdictions with many acres of entitled land without development activity should explore the possibility of "use it or lose it" policies that incentivize starting construction within a given time horizon or risk losing entitlements.
- ✓ **Support developers who would pivot**. Stay in contact with developers, particularly those whose projects are stuck. Some may be interested in pivoting their product type to a something denser that aligns with state and local goals. Jurisdictions can support those developers by offering speedy rezonings and application review, as well as non-discretionary approval processes.

Encourage fellow jurisdictions to earn an HCD pro-housing designation

- ✓ **Meet HCD's requirements** by achieving compliance with state housing laws and demonstrating pro-housing policies that accelerate production. In exchange, your jurisdiction will be able to access HCD's Pro-housing Incentive Program (PIP) and will receive priority and additional points during review of affordable housing and other funding applications to state programs.

SACOG PLACETYPE MENU

SACOG

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PLACETYPE MENU GUIDE

HOW TO READ THE PLACETYPE MENU:
Each placetype will include images to show how the placetype looks and feels, a description, a breakdown of the community types in which the placetype can be found, development patterns, density, and use. The organization of the information is consistent for each placetype and follows the structure seen below.



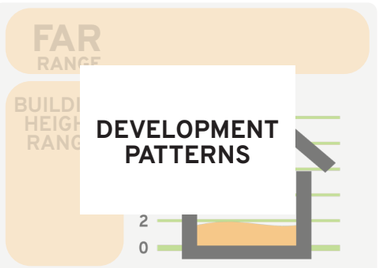


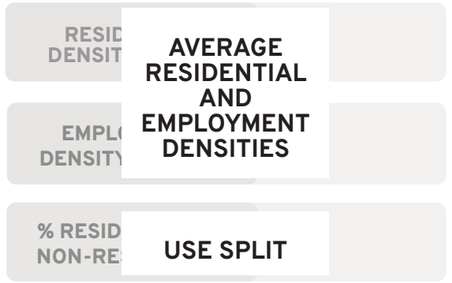
DESCRIPTION:

This section identifies the community types where the placetype is located and describes the types of housing and employment in the placetype. It also includes some information about the character of neighborhoods where the placetype is found.

COMMUNITY TYPES:





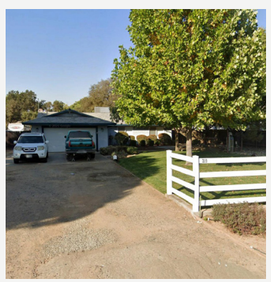


RESIDENTIAL PLACETYPES

SACOG

1 RURAL RESIDENTIAL

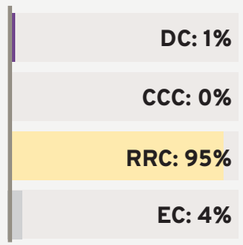




DESCRIPTION:

The **1 Rural Residential** placetype covers rural residential areas that tend to be outside of established communities within the region. It is characterized by single-family homes on large lots that are at least 1 acre in size. It is most commonly found in Yolo, Sutter, and Yuba counties and can include some agricultural uses such as nurseries or hobby farms.

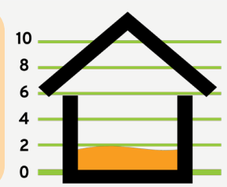
COMMUNITY TYPES:



FAR RANGE 0.0 - 0.1

BUILDING HEIGHT RANGE

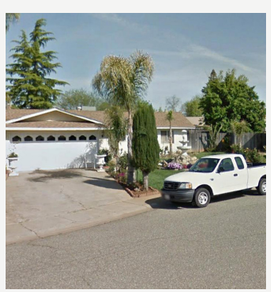
1-2 STORIES



RESIDENTIAL DENSITY (du/ac)	1 du/ac
EMPLOYMENT DENSITY (emp/ac)	0 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	100% / 0%

4 VERY LOW DENSITY DETACHED RESIDENTIAL

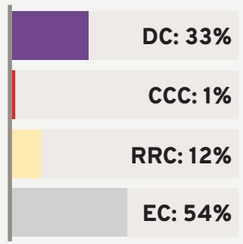




DESCRIPTION:

The **4 Very Low Density Detached Residential** placetype includes rural residential, developing, and established communities. These areas feature detached single-family homes on large lots ranging from 8,000 square feet to half an acre in size with an average density of roughly four dwelling units per acre. Neighborhoods assigned to this placetype tend to have large blocks and may lack sidewalks.

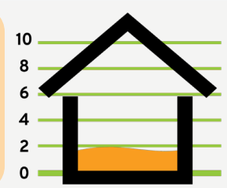
COMMUNITY TYPES:



FAR RANGE 0.1 - 0.4

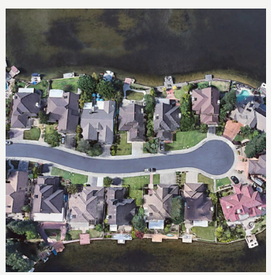
BUILDING HEIGHT RANGE

1-2 STORIES



RESIDENTIAL DENSITY (du/ac)	4 du/ac
EMPLOYMENT DENSITY (emp/ac)	0 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	100% / 0%

6 LOW DENSITY DETACHED RESIDENTIAL

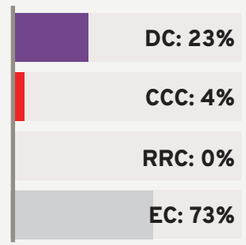




DESCRIPTION:

6 Low Density Detached Residential is a placetype that is commonly found in the region's established and developing communities. It features detached single-family homes on lots from 6,000 to 10,000 square feet in size with an average density of roughly six dwelling units per acre. The neighborhoods where this placetype tends to exist are characterized by relatively large blocks, curved streets, and cul-de-sacs.

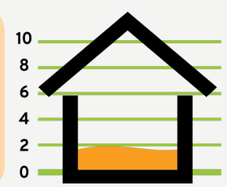
COMMUNITY TYPES:



FAR RANGE 0.4 -0.5

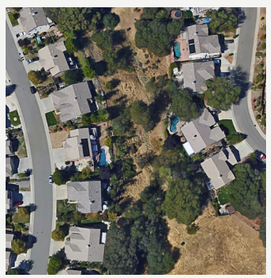
BUILDING HEIGHT RANGE

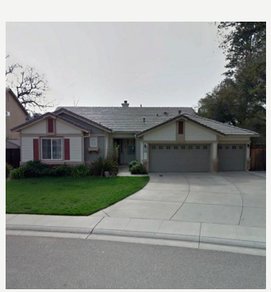
1-2 STORIES



RESIDENTIAL DENSITY (du/ac)	6 du/ac
EMPLOYMENT DENSITY (emp/ac)	0 emp/ac
% RESIDENTIAL vs. COMMERCIAL	100% / 0%

8 LOW-MEDIUM DENSITY RESIDENTIAL

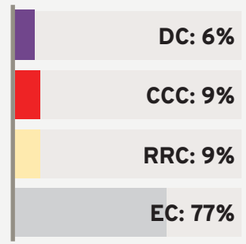




DESCRIPTION:

The **8 Low-Medium Density Residential** placetype is most commonly found in the region's established communities. This placetype includes detached single family homes on medium-sized lots ranging from 4,000 to 8,000 square feet in size. Neighborhoods covered by this placetype tend to have smaller blocks and a street network resembling a grid with relatively few cul-de-sacs.

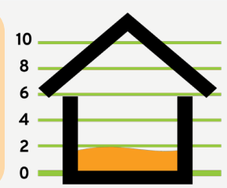
COMMUNITY TYPES:



FAR RANGE 0.4 - 0.5

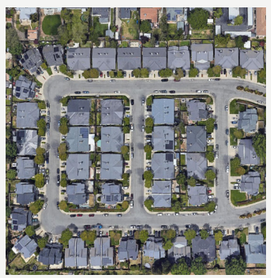
BUILDING HEIGHT RANGE

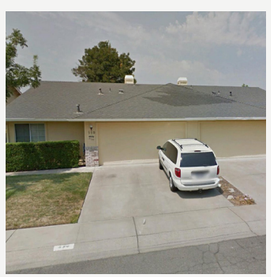
1-2 STORIES



RESIDENTIAL DENSITY (du/ac)	8 du/ac
EMPLOYMENT DENSITY (emp/ac)	0 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	100% / 0%

12 MEDIUM DENSITY RESIDENTIAL

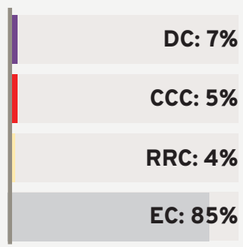




DESCRIPTION:

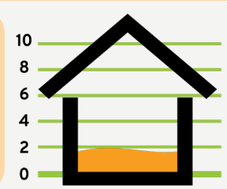
The **12 Medium Density Residential** placetype is primarily found in established communities. The placetype typically includes small lot single family and duplex homes, on lots ranging from 2,500 to 4,000 square feet in size. Neighborhoods in this placetype tend to have more diversity in housing types and narrower streets.

COMMUNITY TYPES:



FAR RANGE 0.5 - 0.6

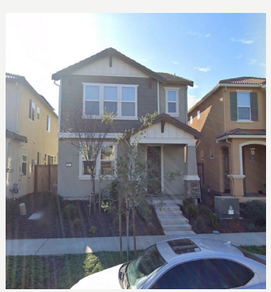
BUILDING HEIGHT RANGE 1-2 STORIES



RESIDENTIAL DENSITY (du/ac)	12 du/ac
EMPLOYMENT DENSITY (emp/ac)	0 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	100% / 0%

16 MEDIUM-HIGH DENSITY RESIDENTIAL

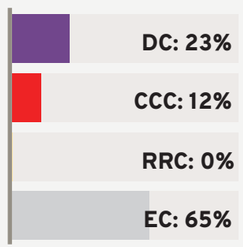




DESCRIPTION:

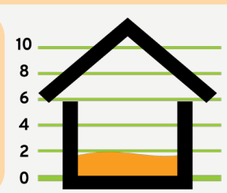
The **16 Medium-High Density Residential** placetype is found across different community types, primarily established, developing, and center and corridor communities. This placetype includes some small apartments, townhomes, and single family homes, at an average density of 16 dwelling units per acre.

COMMUNITY TYPES:



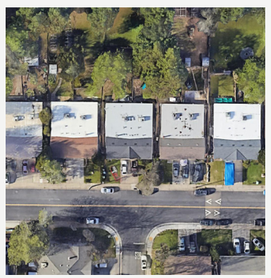
FAR RANGE 0.5 - 0.6

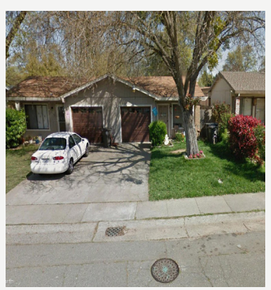
BUILDING HEIGHT RANGE 1-2 STORIES



RESIDENTIAL DENSITY (du/ac)	16 du/ac
EMPLOYMENT DENSITY (emp/ac)	0 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	100% / 0%

20 MEDIUM-HIGH DENSITY RESIDENTIAL

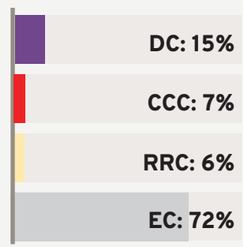




DESCRIPTION:

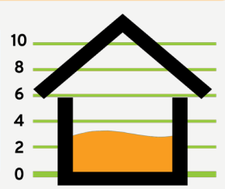
The **20 Medium-High Density Residential** placetype is found in a variety of community types, primarily in established communities but also in center and corridor, developing, and rural residential communities. Within this placetype are smaller apartments, townhomes, and small-lot single family homes, at an average denisty of 20 dwelling units per acre.

COMMUNITY TYPES:



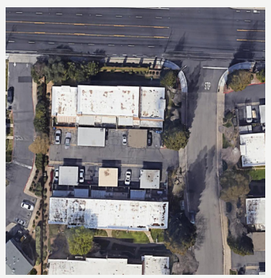
FAR RANGE 0.5 - 0.8

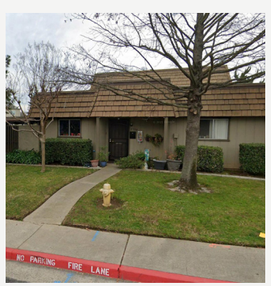
BUILDING HEIGHT RANGE 1-3 STORIES



RESIDENTIAL DENSITY (du/ac)	20 du/ac
EMPLOYMENT DENSITY (emp/ac)	0 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	100% / 0%

30 HIGH DENSITY RESIDENTIAL

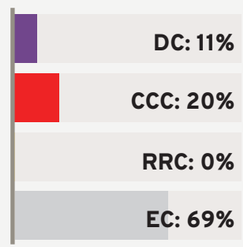




DESCRIPTION:

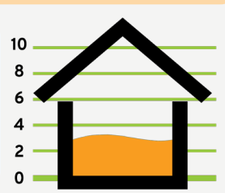
The **30 High Density Residential** placetype is mainly found within established communities. It includes smaller apartments and townhomes, with little to no single family housing. Neighborhoods within this placetype are often characterized by proximity to main roads, at an average density of 30 dwelling units per acre.

COMMUNITY TYPES:



FAR RANGE 0.5 - 0.8

BUILDING HEIGHT RANGE 1-3 STORIES



RESIDENTIAL DENSITY (du/ac)	30 du/ac
EMPLOYMENT DENSITY (emp/ac)	0 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	100% / 0%

40 HIGH DENSITY RESIDENTIAL

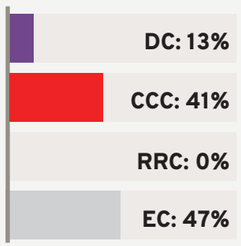




DESCRIPTION:

The **40 High Density Residential** placetype is mainly found within center and corridor and established communities. Housing includes medium sized, 3-5 story apartments and some townhomes, with no single family housing. These neighborhoods often have short blocks.

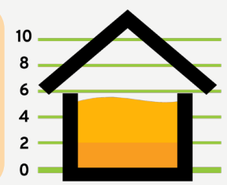
COMMUNITY TYPES:



FAR RANGE 0.5 - 2.3

BUILDING HEIGHT RANGE

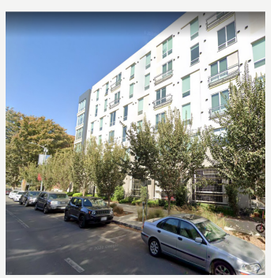
2 - 5 STORIES



RESIDENTIAL DENSITY (du/ac)	40 du/ac
EMPLOYMENT DENSITY (emp/ac)	0 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	100% / 0%

60 VERY HIGH DENSITY RESIDENTIAL

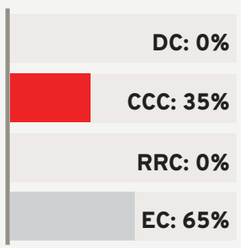




DESCRIPTION:

The **60 High Density Residential** placetype covers center and corridor and established communities. Here, there are larger apartments and townhomes, with no single family housing, at an average density of 60 dwelling units per acre. Neighborhoods where this placetype exists are characterized by smaller blocks, higher trafficked roads, and closer proximity to amenities and shops. Neighborhoods assigned to this placetype may have larger streets.

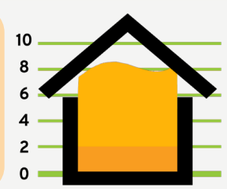
COMMUNITY TYPES:



FAR RANGE 1.0 - 2.3

BUILDING HEIGHT RANGE

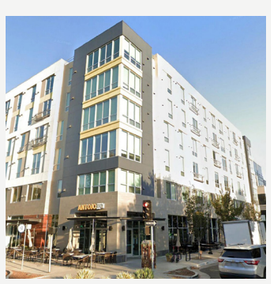
2 - 8 STORIES



RESIDENTIAL DENSITY (du/ac)	60 du/ac
EMPLOYMENT DENSITY (emp/ac)	0 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	100% / 0%

80 VERY HIGH DENSITY RESIDENTIAL

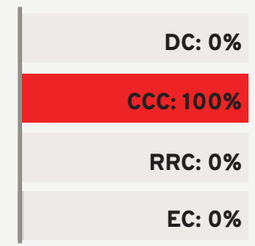




DESCRIPTION:

The **80 Very High Density Residential** placetype solely exists in center and corridor communities. Medium-large style apartments between 5 and 8 stories are the main housing type, with some other types of attached housing and no single family housing, at an average density of 80 dwelling units per acre.

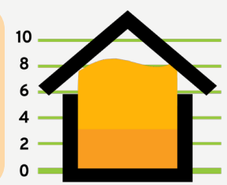
COMMUNITY TYPES:



FAR RANGE 1.0 - 3.9

BUILDING HEIGHT RANGE

3 - 8 STORIES

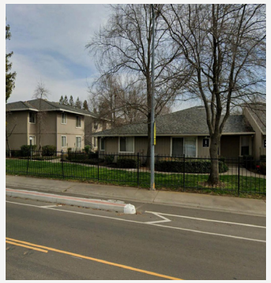


RESIDENTIAL DENSITY (du/ac)	81 du/ac
EMPLOYMENT DENSITY (emp/ac)	0 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	100% / 0%

MIXED USE PLACETYPES

MIXED USE VERY LOW

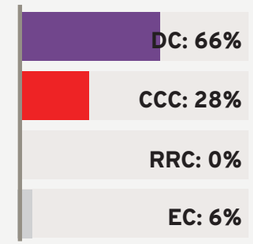




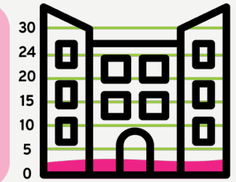
DESCRIPTION:

The **Mixed Use Very Low** placetype is located in center and corridor, developing, and established communities. Building types include medium townhomes, cottage homes, and small-lot single family homes mixed with small office and some arterial commercial uses. Neighborhoods are characterized by their large, curved streets, cul-de-sacs, and proximity to schools, parks, and services.

COMMUNITY TYPES:



FAR RANGE	**0.2 - 0.6**
BUILDING HEIGHT RANGE	**1-2 STORIES**



RESIDENTIAL DENSITY (du/ac)	**≤10 du/ac**
EMPLOYMENT DENSITY (emp/ac)	**≤10 emp/ac**
% RESIDENTIAL vs. COMMERCIAL	**60% / 40%**

MIXED USE CENTER / CORRIDOR LOW

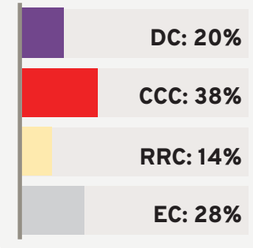




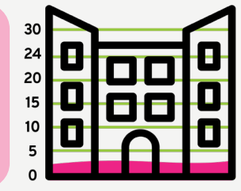
DESCRIPTION:

The **Mixed Use Center/Corridor Low** placetype exists in many community types, from center and corridor, to developing, to established, as well as rural residential communities. It includes a range of apartment types, offices, and retail and service commercial employment. These neighborhoods are characterized by auto-oriented design with a mix of medium density residential and neighborhood uses.

COMMUNITY TYPES:



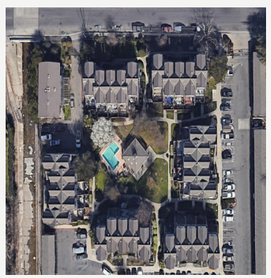
FAR RANGE	**0.2 - 2.3**
BUILDING HEIGHT RANGE	**1-2 STORIES**

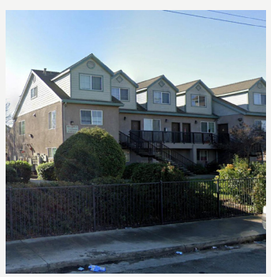


RESIDENTIAL DENSITY (du/ac)	**20 du/ac**
EMPLOYMENT DENSITY (emp/ac)	**10 -15 emp/ac**
% RESIDENTIAL vs. NON-RESIDENTIAL	**77% / 23%**

SACOG

TOWN CENTER

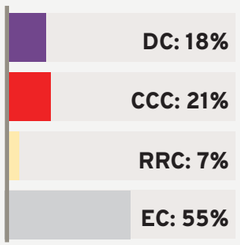




DESCRIPTION:

The **Town Center** placetype is found in most community types, though mainly in established communities. This placetype hosts a range of medium density residential uses as well as offices, government, and commercial employment. These neighborhoods are often characterized by higher capacity roads and arterial corridors, smaller blocks, and closer proximity to retail centers.

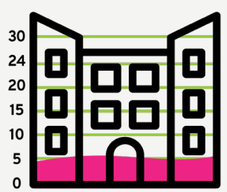
COMMUNITY TYPES:



FAR RANGE 0.2 - 2.3

BUILDING HEIGHT RANGE

1-5 STORIES



RESIDENTIAL DENSITY (du/ac)	20 du/ac
EMPLOYMENT DENSITY (emp/ac)	25 - 30 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	67% / 33%

TOWN NEIGHBORHOOD LOW

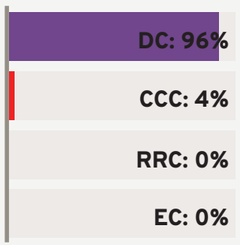




DESCRIPTION:

The **Town Neighborhood Low** placetype is primarily found in developing communities. Here, there are a mix of government, office, and service uses along with denser apartments, townhomes, and cottage homes. Neighborhoods where this placetype exist are characterized by their large, curved streets and proximity to schools, parks, and shopping.

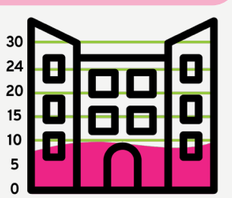
COMMUNITY TYPES:



FAR RANGE 0.2 - 3.9

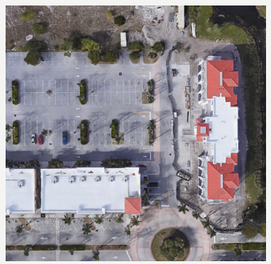
BUILDING HEIGHT RANGE

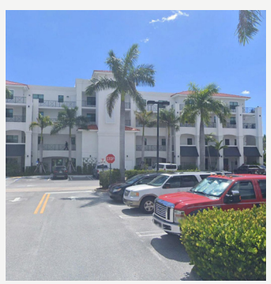
1-8 STORIES



RESIDENTIAL DENSITY (du/ac)	35 - 40 du/ac
EMPLOYMENT DENSITY (emp/ac)	≤10 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	87% / 13%

TOWN NEIGHBORHOOD HIGH

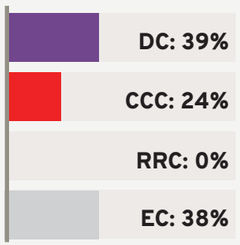




DESCRIPTION:

The **Town Neighborhood High** placetype is located in developing, established, and center and corridor communities. This placetype includes apartments, townhomes, arterial commercial areas and traditional main street retail. These neighborhoods can be characterized by their grid-like street network.

COMMUNITY TYPES:



FAR RANGE 0.4 - 3.9

BUILDING HEIGHT RANGE

1-8 STORIES



RESIDENTIAL DENSITY (du/ac)	40 - 45 du/ac
EMPLOYMENT DENSITY (emp/ac)	25 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	80% / 20%

MIXED USE CENTER / CORRIDOR HIGH

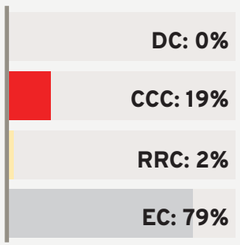




DESCRIPTION:

The **Mixed Use Center/Corridor High** placetype is largely found in established communities. This placetype includes a variety of apartments, offices, and traditional main street retail. These neighborhoods are characterized by larger, winding streets, close proximity to parks, restaurants, and community amenities.

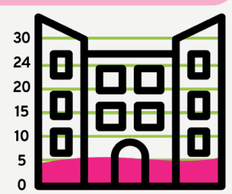
COMMUNITY TYPES:



FAR RANGE 0.5 - 3.2

BUILDING HEIGHT RANGE

1-5 STORIES



RESIDENTIAL DENSITY (du/ac)	20 - 25 du/ac
EMPLOYMENT DENSITY (emp/ac)	55 - 60 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	49% / 51%

RESIDENTIAL / RETAIL MIXED USE HIGH

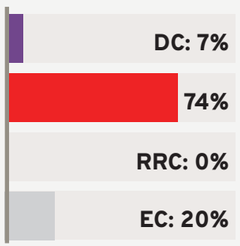




DESCRIPTION:

The **Residential/Retail Mixed Use High** placetype is primarily found in center and corridor and established communities. This placetype is dominated by high density residential uses found in mixed-use and apartment buildings mixed with office and suburban and arterial commercial uses.

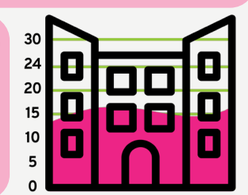
COMMUNITY TYPES:



FAR RANGE 0.2 - 10

BUILDING HEIGHT RANGE

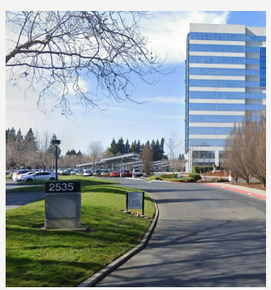
1-15 STORIES



RESIDENTIAL DENSITY (du/ac)	55 - 60 du/ac
EMPLOYMENT DENSITY (emp/ac)	40 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	76% / 24%

RESIDENTIAL / RETAIL MIXED USE LOW

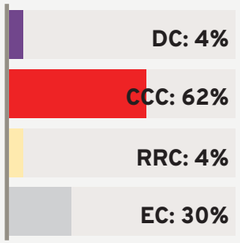




DESCRIPTION:

The **Residential/Retail Mixed Use Low** placetype is most often found in center and corridor and established communities. This placetype is dominated by medium-high density employment uses found in mixed use office buildings as well as suburban and arterial commercial development that is surrounded by medium density apartments.

COMMUNITY TYPES:



FAR RANGE 0.2 - 3.9

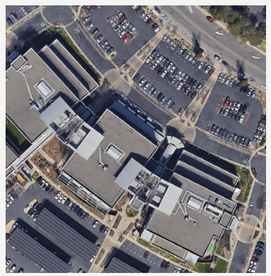
BUILDING HEIGHT RANGE

1-8 STORIES



RESIDENTIAL DENSITY (du/ac)	25 du/ac
EMPLOYMENT DENSITY (emp/ac)	70 - 75 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	46% / 54%

EMPLOYMENT FOCUS MIXED USE CENTER / CORRIDOR

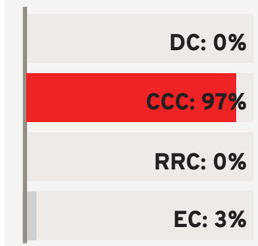




DESCRIPTION:

The **Employment Focus Mixed Use Center/ Corridor** placetype is mainly found in center and corridor communities. Though mixed use, this placetype is dominated by high density employment uses found primarily in mixed use commercial and office buildings. Neighborhoods with this placetype are characterized by larger blocks and a grid-system.

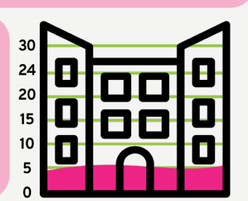
COMMUNITY TYPES:



FAR RANGE 0.3 - 3.2

BUILDING HEIGHT RANGE

1-5 STORIES



RESIDENTIAL DENSITY (du/ac)	≤10 du/ac
EMPLOYMENT DENSITY (emp/ac)	90 - 95 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	24% / 76%

URBAN ATTACHED RESIDENTIAL

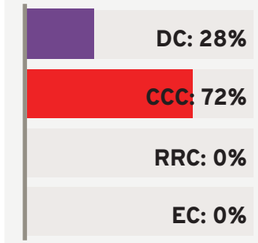




DESCRIPTION:

The **Urban Attached Residential** placetype is found in center and corridor and developing communities. This placetype is dominated by high density residential uses found in condo and mixed use buildings. Neighborhoods with this placetype may have large roads and proximity to shopping and amenities.

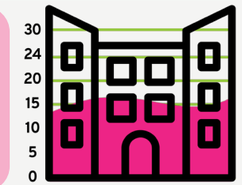
COMMUNITY TYPES:



FAR RANGE 0.2 - 10.6

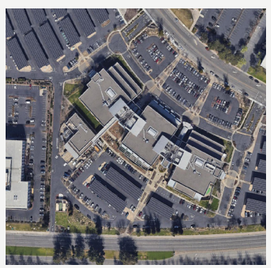
BUILDING HEIGHT RANGE

1-15 STORIES



RESIDENTIAL DENSITY (du/ac)	120 du/ac
EMPLOYMENT DENSITY (emp/ac)	≤10 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	97% / 3%

CITY CENTER MIXED USE HIGH





DESCRIPTION:

The **City Center Mixed Use High** placetype is solely found in center and corridor communities. The majority of building types here are mixed use residential and commercial office buildings between 15 and 30 stories tall. Neighborhoods where this placetype exist are characterized by higher trafficked roads and good access to amenities and services.

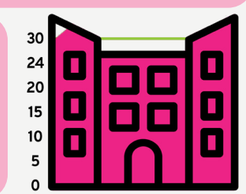
COMMUNITY TYPES:

- DC: 0%
- CCC: 100%
- RRC: 0%
- EC: 0%

FAR RANGE 0.2 - 19.5

BUILDING HEIGHT RANGE

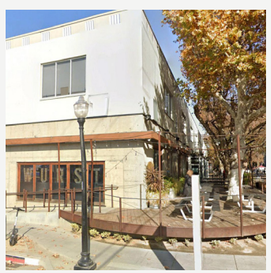
1-30 STORIES



RESIDENTIAL DENSITY (du/ac)	250 du/ac
EMPLOYMENT DENSITY (emp/ac)	120 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	84% / 16%

CITY CENTER MIXED USE LOW





DESCRIPTION:

The **City Center Mixed Use Low** placetype is mainly found in center and corridor as well as some established communities. The placetype is dominated by mixed use residential and commercial office buildings between 5 and 15 stories tall. Neighborhoods where this placetype exist are characterized by higher trafficked roads and good access to amenities and services.

COMMUNITY TYPES:

- DC: 0%
- CCC: 93%
- RRC: 0%
- EC: 7%

FAR RANGE 0.5 - 10

BUILDING HEIGHT RANGE

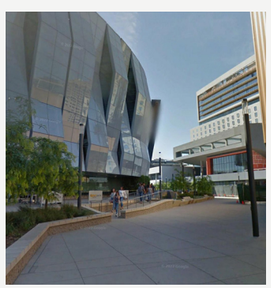
1-15 STORIES



RESIDENTIAL DENSITY (du/ac)	100 du/ac
EMPLOYMENT DENSITY (emp/ac)	105 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	74% / 26%

CBD MIXED USE





DESCRIPTION:

The **CBD Mixed Use** placetype is only found in center and corridor communities, typically Central Business Districts. The placetype is dominated by mixed use residential and commercial office buildings up to 30 stories tall. Neighborhoods where this placetype exist are characterized by higher trafficked roads and good access to amenities and services.

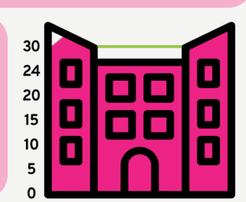
COMMUNITY TYPES:

- DC: 0%
- CCC: 100%
- RRC: 0%
- EC: 0%

FAR RANGE 18.7 - 18.9

BUILDING HEIGHT RANGE

1-30 STORIES



RESIDENTIAL DENSITY (du/ac)	425 du/ac
EMPLOYMENT DENSITY (emp/ac)	500 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	69% / 31%

COMMERCIAL PLACETYPES

SACOG

LOW DENSITY RETAIL





DESCRIPTION:

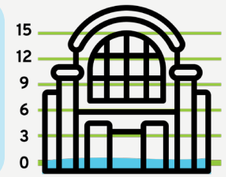
The **Low Density Retail** placetype is mainly found in rural residential communities. This placetype consists of arterial commercial areas and parking and includes a mix of retail and service employment. Neighborhoods of this placetype may have wide, winding roads, cul-de-sacs, and a very suburban feel.

COMMUNITY TYPES:

- DC: 7%
- CCC: 0%
- RRC: 87%
- EC: 6%

FAR RANGE 0.2 - 0.8

BUILDING HEIGHT RANGE 1 STORY



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	≤10 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

COMMUNITY / NEIGHBORHOOD RETAIL





DESCRIPTION:

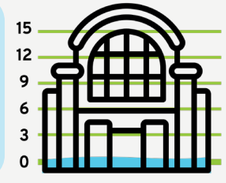
The **Community/Neighborhood Retail** placetype is found within a variety of communities, with the highest concentration found in established communities. This placetype is dominated by office uses and also includes government, retail and service employment, at an average density of around 20 jobs per acre.

COMMUNITY TYPES:

- DC: 3%
- CCC: 8%
- RRC: 29%
- EC: 60%

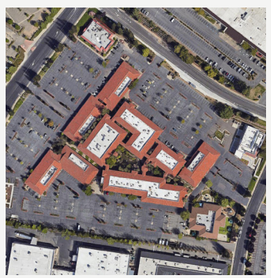
FAR RANGE 0.2 - 0.5

BUILDING HEIGHT RANGE 1 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	20 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

COMMUNITY / NEIGHBORHOOD COMMERCIAL / OFFICE

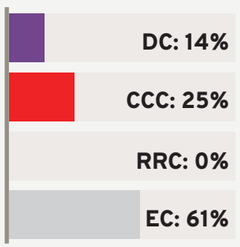




DESCRIPTION:

The **Community/Neighborhood Commercial/ Office** placetype is found in center and corridor, established, and developing communities. This placetype is dominated by office uses and also includes government, retail and service employment, at an average density of around 35 jobs per acre.

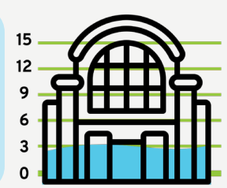
COMMUNITY TYPES:



FAR RANGE 0.2 - 1.6

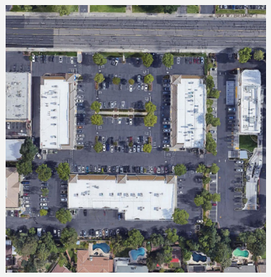
BUILDING HEIGHT RANGE

1-3 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	35 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

COMMUNITY / NEIGHBORHOOD COMMERCIAL

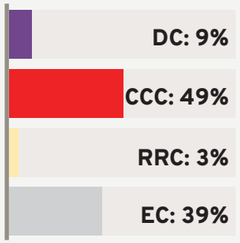




DESCRIPTION:

The **Community/Neighborhood Commercial** placetype is found within a variety of communities, from center and corridor, to developing, established, and rural residential. This placetype is mainly made up of offices, regional retail malls, suburban main street retail, and arterial commercial areas. Such neighborhoods may have smaller roads and offer a medium dense suburban feel.

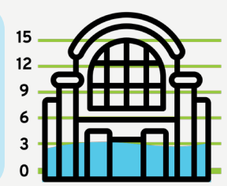
COMMUNITY TYPES:



FAR RANGE 0.3 - 1.6

BUILDING HEIGHT RANGE

1-3 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	35 - 40 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

COMMERCIAL

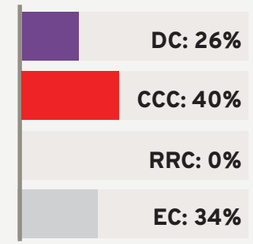




DESCRIPTION:

The **Commercial** placetype is largely located in center and corridor, developing, and established communities. This placetype includes offices, government, retail and service uses. Areas assigned with this placetype may be dominated by commercial arterials, with an average employment density of around 50 jobs per acre.

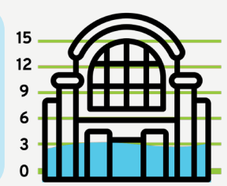
COMMUNITY TYPES:



FAR RANGE 0.2 - 1.6

BUILDING HEIGHT RANGE

1-3 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	50 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

HIGH DENSITY COMMERCIAL

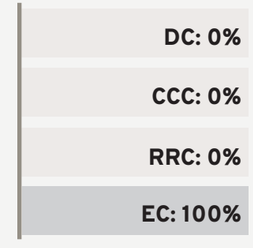




DESCRIPTION:

The **High Density Commercial** placetype is found in established communities. It is characterized by a combination of government, medical, office, retail and service commercial uses, with an average employment density of around 135 jobs per acre. Areas within this placetype may have wide main streets and be bounded by dense housing.

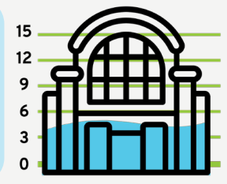
COMMUNITY TYPES:



FAR RANGE 0.5 - 3.2

BUILDING HEIGHT RANGE

1-5 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	135 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

BUSINESS AND PROFESSIONAL

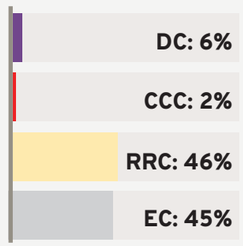




DESCRIPTION:

The **Business and Professional** placetype is found within most community types, including center and corridor, developing, established, and rural residential communities. It is characterized by offices and business and professional uses.

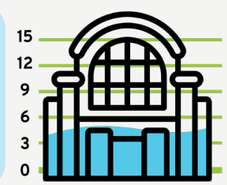
COMMUNITY TYPES:



FAR RANGE 0.5 - 3.2

BUILDING HEIGHT RANGE

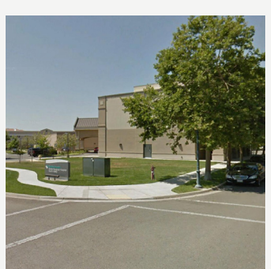
1-5 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	80 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

LIGHT INDUSTRIAL OFFICE

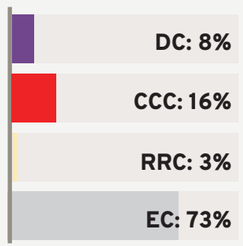




DESCRIPTION:

The **Light Industrial/Office** placetype is found within a variety of communities, including center and corridor, developing, and rural residential, with the largest portion in established communities. This placetype is mainly made up of offices, flex/ tech office spaces, light industrial warehouses, and heavy industrial uses. Such neighborhoods may have wide streets and lack sidewalks.

COMMUNITY TYPES:



FAR RANGE 0.2 - 1.6

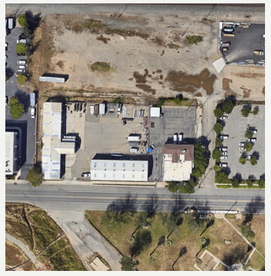
BUILDING HEIGHT RANGE

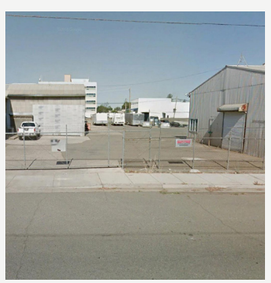
1-3 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	45 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

LIGHT INDUSTRIAL

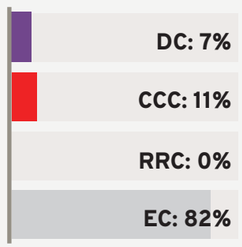




DESCRIPTION:

The **Light Industrial** placetype can be found in center and corridor communities and developing communities, but mainly in established communities. This placetype has offices, flex/tech office spaces, and light industrial warehouses.

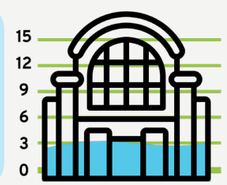
COMMUNITY TYPES:



FAR RANGE 0.2 - 1.6

BUILDING HEIGHT RANGE

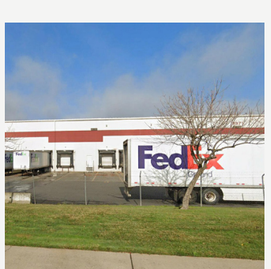
1-3 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	25 - 30 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

HEAVY INDUSTRIAL

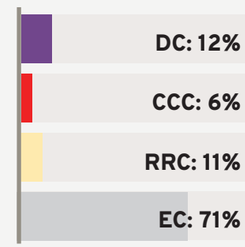




DESCRIPTION:

The **Heavy Industrial** placetype is mainly found within established communities, as well as center and corridor and developing communities. This placetype only features heavy industrial uses. Such neighborhoods are defined by major roads, long blocks, and little to no sidewalks.

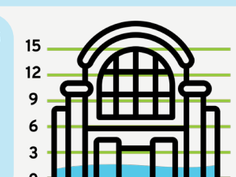
COMMUNITY TYPES:



FAR RANGE ≤0.2

BUILDING HEIGHT RANGE

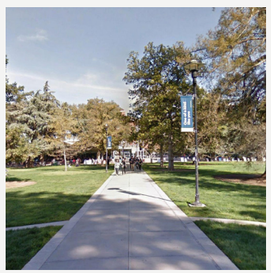
1 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	≤15 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

COLLEGE / UNIVERSITY

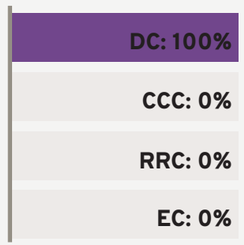




DESCRIPTION:

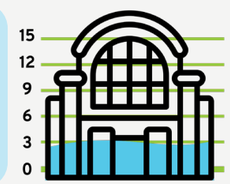
The **College/University** placetype is only found in developing communities and includes university and campus buildings.

COMMUNITY TYPES:



FAR RANGE < 1.2

BUILDING HEIGHT RANGE 1-3 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	100 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

PUBLIC / QUASI-PUBLIC

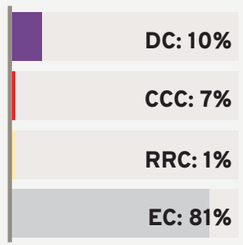




DESCRIPTION:

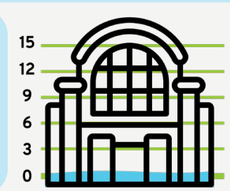
The **Public/Quasi-Public** placetype is found in most community types, including center and corridor, developing, established, and rural residential. Public/civic buildings are the only development type found here, at an average employment density of around 20 jobs per acre.

COMMUNITY TYPES:



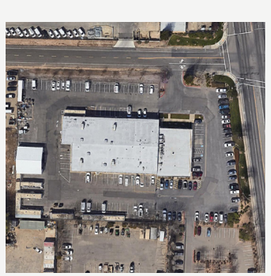
FAR RANGE ≤0.4

BUILDING HEIGHT RANGE 1 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	20 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

LOW PUBLIC / QUASI-PUBLIC

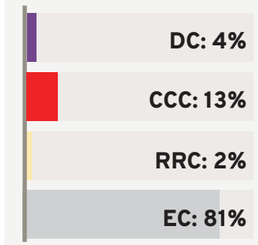




DESCRIPTION:

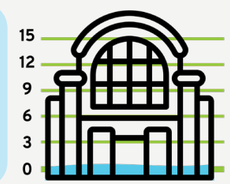
The **Low Public/Quasi-Public** placetype is found in most community types, including center and corridor, developing, established, and rural residential. Public/civic buildings are the only development type found here, at an average employment density of 12.5 jobs per acre.

COMMUNITY TYPES:



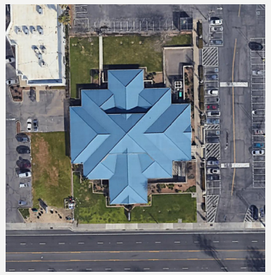
FAR RANGE 0.2 - 0.4

BUILDING HEIGHT RANGE 1 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	≤15 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

HIGH PUBLIC / QUASI-PUBLIC

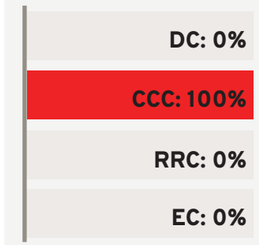




DESCRIPTION:

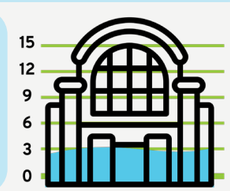
The **High Public/Quasi-Public** placetype is only found in center and corridor communities. Public/civic buildings are the only development type found here, at an average employment density of around 60 jobs per acre.

COMMUNITY TYPES:



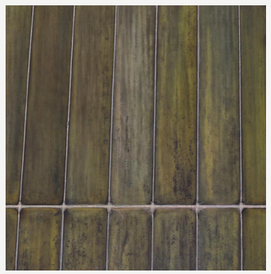
FAR RANGE 0.4 - 1.6

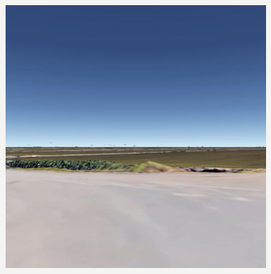
BUILDING HEIGHT RANGE 1-3 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	60 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

AGRICULTURE EMPLOYMENT





DESCRIPTION:

The **Agriculture Employment** placetype is mainly found in rural residential communities. This placetype consists of agricultural industrial employment on farms. Neighborhoods assigned to this placetype are likely to be rural in character.

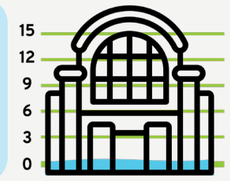
COMMUNITY TYPES:

- DC: 0%
- CCC: 0%
- RRC: 95%
- EC: 1%

FAR RANGE 0

BUILDING HEIGHT RANGE

1 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	0.3 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

K-12 SCHOOL





DESCRIPTION:

The **K-12 School** placetype is only found in established communities and includes K-12 schools.

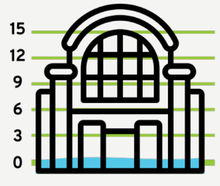
COMMUNITY TYPES:

- DC: 0%
- CCC: 0%
- RRC: 0%
- EC: 100%

FAR RANGE ≤0.29

BUILDING HEIGHT RANGE

1 STORIES



RESIDENTIAL DENSITY (du/ac)	0 du/ac
EMPLOYMENT DENSITY (emp/ac)	15 - 20 emp/ac
% RESIDENTIAL vs. NON-RESIDENTIAL	0% / 100%

Land Use Forecast by Jurisdiction

As part of the Metropolitan Transportation Plan / Sustainable Communities Strategy (MTP/SCS), known as the 2025 Blueprint, SACOG develops a regional growth projection, estimating new population, employment, and housing for the region, and a land use forecast, which is the distribution of this growth around the region. The purpose of this section is to describe the general use, density and intensity of the land use forecast for each jurisdiction. It is a narrative description of land use forecast control totals outlined in Appendix C and shown spatially in this map.

As noted above, growth rates and patterns within an area are influenced by various local, regional, and national forces that reflect ongoing social, economic, and technological changes. Ultimately, the amount and location of population growth and economic development that occurs within a specific area is regulated by city and county governments through zoning, land use plans and policies, and decisions regarding development applications. Local government and other regional, state, and federal agencies also make decisions regarding the provision of infrastructure (e.g., transportation facilities, water facilities, sewage facilities) and protection of natural resources that may influence growth rates and the location of future development.

At any point in time, the 28 jurisdictions in the Sacramento Region are at various stages of updating or augmenting their local land use plans. Since the adoption of the Blueprint Vision by the SACOG Board of Directors in December 2004, a number of jurisdictions in the region have been voluntarily implementing the Blueprint smart growth principles into their planning processes. The general plan and specific plan development activities occurring in the region by the local jurisdictions are reflected in the population, housing, and employment forecasts for the 2025 Blueprint. At the same time, the 2025 Blueprint land use forecast must be reasonable, based on the best information available (93 C.F.R. § 93.122). The resulting growth patterns are a combination of local policies, many of which reflect or are influenced by Blueprint principles, and market forces.

Each summary will describe growth within the community types of the jurisdiction, which are described in detail at the top of Appendix C. Community types help illustrate the distribution of growth and the various development contexts across the region. Local land use plans such as general plans, specific plans, master plans, corridor plans, and more are categorized into one of five community types based on characteristics of the existing or planned form of the community. The summaries below also reference the type of growth within each community type at a more granular level, using “placetypes.” Placetypes are

the parcel level land use categories that SACOG uses to build the land use forecast and are described in detail in the Placetype Library, included as Appendix D7. The Placetype Library includes images to show how the placetype looks and feels, a description, a breakdown of the community types in which the placetype can be found, development patterns, density, and use. When used below, placetypes will be bolded, and can be explored in the Placetype Library for more details.

El Dorado County

Placerville

Land development in the City of Placerville is significantly limited by topography, as the city is in a narrow valley surrounded by steep hills. As the county seat and a major stop along the tourist routes into the Sierra Nevada foothills and mountains, Placerville has also maintained a relatively strong jobs base in the county. Today, the city is primarily characterized as an Established Community in the MTP/SCS. The MTP/SCS also designates a Center and Corridor Community along Placerville Drive and Highway 50 within the city limits.

Growth in the Center and Corridor Community includes **30 High Density Residential** and some **Commercial** and **Community/Neighborhood Retail**. The Established Community has a larger range of residential placetypes, from **4 Very Low Density Detached Residential** to **20 Medium-High Density Residential,** with non-residential uses ranging from office, industrial, retail, and civic uses.

El Dorado (Unincorporated County)

El Dorado County's unique topography encompasses over 1,800 square miles of rolling hills and mountainous terrain. The County is divided into two zones: the "East Slope" region encompasses the Tahoe National Forest Area and Lake Tahoe Basin, while the "West Slope" contains part of Folsom Lake and is where most residential development is concentrated. Within the last decade, robust residential and employment growth has occurred near the County's suburban clusters, including the Established Communities of Cameron Park, El Dorado Hills, and Shingle Springs. These areas are characterized by a range of residential placetypes, from **4 Very Low Density Detached Residential** to **30 High Density Residential**. New jobs in these communities include commercial, light industrial, and medical uses.

The 2025 Blueprint Land Use Forecast includes continued job and housing growth occurring in the El Dorado Hills Town Center, south of Highway 50 and just east of the El Dorado-Sacramento County border. As the county's only Center and Corridor Community,

growth in this area is characterized by compact, infill development at higher densities, as high as 60 units per acre, in addition to new jobs in the medical and commercial sectors.

The Developing Communities, including Carson Creek, Valley View, and Bass Lake Hills are anticipated to accommodate additional housing, mostly at low to medium densities ranging from **4 Very Low Density Detached Residential** to **12 Medium Density Residential,** with some opportunities for denser multifamily development in Bass Lake Hills. New jobs are largely in the commercial, light industrial, and public sectors.

While still an important component of the overall region's job and housing growth projections, the county's Rural Residential Communities are anticipated to experience lower amounts of growth due to market forces, policies to protect and promote agricultural uses, insurance costs, and wildfire risk. Residential growth in these areas ranges from **1 Rural Residential** to **4 Very Low Density Detached Residential**, with some supporting office and retail uses.

Placer County

Auburn

The City of Auburn is a historic Sierra foothills community along I-80 that maintains its small-town character despite being the seat of Placer County. Most of the residential development in the past decade has occurred in the area south of I-80, especially along Auburn Folsom Road and in the North Auburn area. The MTP/SCS designates the area north of I-80 along State Route 49 as a Center and Corridor Community. New residential development in this area is characterized by **16 Medium-High Density Residential**, limited **Mixed Use Center/Corridor Low, Residential/Retail Mixed Use Low**, and supporting retail and commercial uses. With the continued relocation of County government uses to the Placer County Government Center, the Center and Corridor Community could redevelop with other uses in the future. For example, the Domes Infill Area Project, which is partially funded by SACOG's Green Means Go program, envisions infill housing and increased mobility options across 17.5 acres of the site located at Fulweiler Avenue and Nevada Street.

The 2025 Blueprint Land Use Forecast identifies the remainder of the city as Established Communities and assumes that more than half of the projected development will occur in these areas. Consistent with existing trends and patterns, residential projects range from **4 Very Low Density Detached Residential** to **6 Low Density Detached Residential** with mixed-use developments up to two stories that include small office and commercial uses alongside residential typologies such as townhomes, cottage homes, and small-lot single family homes. Non-residential projects also include commercial and light industrial developments.

Loomis

Located on either side of I-80, the Town of Loomis is a distinct, small town adjacent to the fast-growing parts of Placer County. Compared to its neighbors to the west, Loomis experienced modest development. Emphasis remains on retaining small-town character

and preserving existing rural residential and agricultural uses, while also encouraging compact development in and around the downtown area. While the area north of I-80 is home to most of the town's existing office, retail, industrial and higher density residential developments, the area south of I-80 is home to mostly large-lot and semi-rural residential developments. Existing commercial developments are primarily located along Taylor Road and in the downtown area.

The area a between Taylor Road and I-80, which the General Plan designates as commercial or high density residential, is the Town's Center and Corridor community type. The 2025 Blueprint Land Use Forecast assumes development in this area will include **8 Low-Medium Density Residential** and **16 Medium-High Density Residential**, and **Town Center** with community and neighborhood retail uses.

Most of the Town's remaining area is designated as Established Communities and includes existing medium density housing, office, and industrial uses. This area is assumed to grow at a modest rate and includes low to low-medium density projects between **6 Low Density Detached Residential** and **8 Low-Medium Density Residential** with new job growth in commercial, office, and community and neighborhood uses. The areas farthest from the downtown that are developed with large-lot rural and agricultural uses make up the rural residential community type. The MTP/SCS assumes these areas will continue to add large, single-family housing units at a modest rate, as they have done in the past two decades. Some new jobs are projected in service and retail sectors.

Colfax

The City of Colfax is one of the smallest cities in the region. It is located along I-80 and is surrounded by unincorporated Placer County. Over the past two decades, much of the city has remained unchanged, with relatively modest development activity aside from a few housing and infill commercial projects. While most of the land is planned for low density residential development, the 2040 General Plan also designates the City's downtown, including adjoining parcels between the Union Pacific Railroad and I-80 as suitable for mixed-use development. The 2025 Blueprint Land Use Forecast designates these areas as the city's Center and Corridor Communities, with new residential projects largely **4 Very Low Density Detached Residential** and surrounded by office, government, retail, and service uses. The rest of the city is designated as an Established Community and where almost all residential development projects in the past few years have been located. New residential projects are largely **4 Very Low Density Detached Residential** and **8 Low-Medium Density Residential**, with supporting office, retail, and light industrial uses.

Lincoln

The City of Lincoln is bounded by Rocklin in the south and unincorporated Placer County to the east, west, and north. The City experienced steady growth in the last two decades, with an uptick in development in the last couple of years. With the recent annexations of SUB-B Northeast Quadrant and Village 7, some westward expansion is expected during the 2025 Blueprint planning period. Within the Established Communities, residential growth ranges from **4 Very Low Density Detached Residential** to **30 High Density Residential** with

some mixed use uses as well. Significant job growth is projected across commercial, office, and industrial placetypes.

The City's downtown, Twelve Bridges Main Village, and land along Lincoln Boulevard is designated as the City's Center and Corridor community type in the 2025 Blueprint Land Use Forecast. Although much of the development in the past two decades occurred within the Established Communities, new job and housing growth continues in the Center and Corridor Communities, largely from the Twelve Bridges development and supporting commercial at Ferrari Pavillion and along Lincoln Boulevard. A unique mixed-use project located at 583 F Street is also expected to open in August 2025. Consistent with current trends, residential growth ranges from **4 Very Low Density Detached Residential** to **30 High Density Residential** and some mixed use placetypes. Jobs are forecasted in retail and supporting commercial sectors.

The Highway 65 Area, Northeast Quadrant Specific Plan, Village 1, Village 2, Village 5, and Village 7 are Developing Communities in the land use forecast. The General Plan identifies the area between Lincoln Boulevard and Highway 65, as predominantly planned for commercial uses. Village 1, located in the northeastern corner of the City, began developing with predominantly single-family detached residential uses, with mixed-use developments under review in subsequent phases. New housing units are interspersed with office, retail, and service commercial uses. A small lower density residential portion of Village 2 that has already been annexed is included in the forecast. The growth that occurs in Village 5, located in the southwestern portion of the City, is largely **6 Low Density Detached Residential**. Village 7, which was annexed in 2021 and is currently in grading, is located at the southern portion of the City. Village 7 is at the cusp of construction activity and can accommodate relatively higher densities than the other villages, up to 30 units per acre, with new job growth in community and neighborhood serving retail, school, and public uses. The Northeast Quadrant Specific Plan, another developing community planned predominantly for commercial use, is assumed to add some new single-family detached housing, typically at six to eight units per acre.

Rocklin

The City of Rocklin, surrounded by Lincoln to the north, Loomis on the east, and Roseville on the south and southeast, has limited opportunities for outward expansion and is looking for opportunities to expand its commercial base. The City continued to add housing in the past few years, with most of the major development within the Established Communities, due in part to residential projects such as Stanford Ranch and Whitney Ranch reaching their buildout. These developments included a mix of small and large lot single-family detached, townhomes, and multifamily projects at medium to high densities ranging from **4 Very Low Density Detached Residential** to **30 High Density Residential** with supporting commercial and public uses. Central and southeast Rocklin, also part of the Established Communities, continues to grow with development that includes mixed-use projects, such as College Park. A significant portion of the City's jobs and housing growth is forecasted to occur in these areas, according to the **4 Very Low Density Detached Residential** to **30 High Density Residential**.

The City's downtown, which is designated as a Center and Corridor Community in the MTP/SCS, is planned for mix of uses at higher densities. This community type includes a wide range of residential densities with projects ranging between **4 Very Low Density Detached Residential** all the way to **80 Very High Density Residential, Mixed Use Center/Corridor Low,** and **Mixed Use Center/Corridor High**. The 2025 Blueprint Land Use Forecast assumes the area will continue to attract infill development at higher density ranges while still making room for smaller infill projects in the low- to mid- density ranges.

The Highway 65 Corridor, a Developing Community, is envisioned as one of the City's employment centers. Over the past years, the area did undergo some rezoning of land originally planned for non-residential uses into residential and mixed-use projects, such as the Placer Creek Apartments and Estia at Rocklin developments. However, in recognition of the need to foster additional job and sales tax growth, the 2025 Blueprint Land Use Forecast assumes limited further conversion of land planned for non-residential uses to residential uses. Non-residential growth is largely oriented around the **Business and Professional** and **Medical Facility** placetypes.

Roseville

The City of Roseville is a significant employment center in southwest Placer County and accounts for almost half of total jobs and over one-third of total housing units in Placer County. In the past few years, the City has continued its westward expansion, while also investing in its downtown and commercial corridors. The westward growth began pre-COVID, and then accelerated rapidly during and after the pandemic with the development of newer communities, including Sierra Vista, Creekview, and Amoruso Ranch. In alignment with the City's growth plans, the 2025 Blueprint Land Use Forecast assumes housing growth will be split between the Developing Communities and infill areas (Centers/Corridors and Established Communities), with job growth predominantly within the Established Communities.

The Established Communities, which include the Fiddyment Ranch area, account for the vast majority of existing housing units and jobs in the City. Apart from population serving commercial and public uses, recent employment growth continued to be focused in community serving commercial and public uses, office, business and professional, industrial, hospitality, and healthcare sectors. The 2025 Blueprint Land Use Forecast includes continued growth at a variety of densities from **4 Very Low Density Detached Residential** to **40 High Density Residential**.

The 2025 Blueprint Land Use Forecast designates the City's downtown, Douglas-Harding-Sunrise, Riverside, and Atlantic commercial corridors as Center and Corridor Communities. These areas were recently rezoned to facilitate re-investment and redevelopment. Accordingly, medium to higher residential densities are included, ranging from **30 High Density Residential** and **40 High Density Residential** to mixed use placetypes like **Mixed Use Center/Corridor Low** and **Residential/Retail Mixed Use Low**. Job growth is assumed in retail mixed-use developments, such as those on Vernon Street and in other areas including commercial and business and professional uses.

In the City's Developing Communities, the 2025 Blueprint Land Use Forecast assumes a mix of housing types largely falling in the lower density residential placetypes like **6 Low Density Detached Residential**, but sometimes (particularly in Sierra Vista) getting into the higher density ranges like **40 High Density Residential**. The commercial uses in these communities are expected to range from community serving commercial and public uses and senior care facilities.

Placer (Unincorporated County)

As a popular tourist destination, the County comprises numerous small towns along Interstate 80 known for their rich and distinct heritage. The County is typically divided into three regions; South Placer comprises the Central Valley and the Sierra Nevada foothills south of Auburn. Gold Country consists of the foothills surrounding Auburn, Colfax, and Foresthill. The Sierra Nevada areas consist of all areas east of Foresthill and northeast of Colfax, including the Lake Tahoe region. Placer County has experienced tremendous growth during the last decade, which is expected to continue. The 2025 Blueprint Land Use Forecast classifies the area north of Auburn as the County's Center and Corridor Community. In 2019, the County adopted the Government Center Master Plan for revitalization of the area, which envisions infill and a mix of uses, including government facilities, affordable housing, communal open spaces, and a vibrant town center. Accordingly, the 2025 Blueprint Land Use Forecast includes **20 Medium-High Density Residential** and **Residential/Retail Mixed Use High** uses in this area. New jobs are projected in retail, office, and government sectors.

The County also includes several Developing Communities, including Bickford Ranch, Placer Vineyards, Riolo Vineyards, Placer One, and Sunset Area Plan. These areas represent significant opportunities for new job and housing growth. New residential development in these communities is largely in the **4 Very Low Density Detached Residential** and **6 Low Density Detached Residential** placetypes with some, but more limited, multifamily uses like **30 High Density Residential**. New jobs include community serving retail, commercial, public, light industrial, and school uses. Of note, the Placer One and Sunset Area Plan allow for the highest densities and most intensive uses among the listed Developing Communities with large anchor institutions like the new university and Thunder Valley. As such, growth in these areas also includes **40 High Density Residential** and **College/University** placetypes.

Established Communities encompass a wide swath of the County and include Granite Bay, as well as portions of North Auburn, Colfax, and as far to the eastern boundaries near the City of Truckee. New residential development is at a range of densities, from **1 Rural Residential** to **12 Medium Density Residential** . While most of the employment generating uses are commercial or heavy industrial, other non-residential uses include light industrial, medical, community/neighborhood retail and business and professional developments.

The 2025 Blueprint Land Use Forecast assumes that the County's Rural Residential Communities will include some job and residential growth, largely in the **1 Rural**

Residential placetype. Non-residential uses could include community serving retail, commercial, and public uses.

Sacramento County

Citrus Heights

The City of Citrus Heights is located 15 miles northeast of Sacramento and is bounded by development in unincorporated Sacramento County and to the north by Roseville. With the recent completion of the Mitchell Farms subdivision in 2023, most of the new job and housing growth is forecasted to occur in the City's Center and Corridor Communities. Most of the City's land area is designated in the 2025 Blueprint Land Use Forecast as an Established Community. Most residential growth is projected to occur at a range of densities between eight to 30 units per acre with new jobs in supporting neighborhood commercial and medical sectors.

Two of the City's City and Corridor Communities are located along Auburn Boulevard and Greenback Lane. Residential density in these areas ranges between **6 Low Density Detached Residential** to **20 Medium-High Density Residential** for residential uses and mixed uses such as office and retail integrated with apartments. The final center/corridor is the Sunrise Tomorrow Specific Plan, which was adopted in 2021 and prioritizes the revitalization of the Sunrise Mall area by creating additional capacity for infill development and mixed uses on the 100 acre site. Forecasted placetypes include **30 High Density Residential, Business and Professional, High Density Commercial, Residential/Retail Mixed Use High, and Residential/Retail Mixed Use Low.**

Elk Grove

The City of Elk Grove is bordered by Sacramento to the northwest and by the unincorporated county in all other directions. Elk Grove is a primarily residential community, providing homes and a family-based lifestyle for a regional workforce and has continued to experience major housing and employment growth over the past few years.

Much of the city is classified as an Established Community in the 2025 Blueprint Land Use Forecast. The forecast indicates that these areas will accommodate a significant portion of the city's total job and housing growth by 2050. New housing could develop at densities between **4 Very Low Density Detached** Residential and **40 High Density Residential**. New job growth is predominantly in supporting neighborhood office, retail, medical, and light industrial uses.

Elk Grove's Center and Corridor Communities encompass the areas along Elk Grove Boulevard on both side of Highway 99, Laguna West, and the intersection of Big Horn, Bruceville, and Laguna Boulevards. The forecast accommodates new housing growth at densities ranging from **6 Low Density Detached Residential** to **40 High Density Residential**, with commercial and business and professional uses. The Laguna West and Elk Grove Boulevard area allows for a higher range of densities. New housing in Laguna West is anticipated at the **30 High Density Residential** and **40 High Density Residential** placetypes. Housing in the Elk Grove Boulevard area includes densities as high as **60 High Density Residential**, with supporting community and neighborhood commercial, light

industrial, and medical facilities. Mixed-use is also permitted, typically characterized by the **Town Center** and **Town Neighborhood** placetypes.

The city's Developing Communities include the Sterling Meadows, Southeast Planning Area, and the Livable Employment Area. Residential development in these areas include residential placetypes between **4 Very Low Density Detached Residential** and **40 High Density Residential**. Some mixed-use growth is projected in the Southeast and Livable Employment Areas and is typically characterized by the **Town Center**, **Residential/Retail Mixed Use Low** and **Town Neighborhood Low** placetypes. With the exception of Sterling Meadows, which will remain an exclusively residential community, much of the job growth forecasted by the 2025 Blueprint Land Use Forecast is in office, light industrial, and neighborhood commercial uses.

Very minor job and housing growth is forecasted in Rural Residential Communities, consistent with the City's General Plan, which continues to limit these areas to rural residential uses and preserving agricultural assets. Housing typically is low-density and characterized by the **1 Rural Residential** placetype. New jobs are associated with supporting neighborhood retail and public uses.

Folsom

A former gold mining community, the City of Folsom has retained much of its historic and small-town charm, despite having experienced major residential and employment growth over the past decade. The city is also home to several historical landmarks and several major employers in the region, including Historic Sutter Street and the Folsom State Prison.

The 2025 Blueprint Land Use Forecast includes significant growth will occur within the Folsom Plan Area, which is located south of Highway 50 and designated as the City's Developing Community. New residential development could occur at densities between **4 Very Low Density Detached Residential** and **30 High Density Residential**. Mixed-use is characterized by the **Mixed Use Center/Corridor Low** placetype. Employment growth includes office, commercial, school, medical, and public uses.

Approximately 30 percent of total residential growth and 20 percent of total job growth is forecasted to occur within the City's Center and Corridor Communities. These communities encompass the Bidwell Corridor and the Gold Line Station area. Permitted densities range from **12 Medium Density Residential** to **40 High Density Residential**, with much higher densities in the Gold Line Station area at **60 High Density Residential** and **80 Very High Density Residential**. Surrounding non-residential uses include light industrial, medical offices and facilities, commercial, and government.

Much of the existing city north of Highway 50 is characterized as an Established Community in the 2025 Blueprint Land Use Forecast. Approximately 20 percent of new housing growth is forecasted to occur in these areas, with complimentary, but minor job growth. Emphasis is on infill opportunities and the continued expansion of subdivisions in the eastern portion of the city where allowable densities range from **4 Very Low Density Detached Residential** to **30 High Density Residential**. Some low density mixed-uses are

also present, consistent with the **Mixed Use Center/Corridor Low** placetype. New jobs are concentrated in office and business and professional uses.

Galt

The City of Galt is located along Highway 99, between the cities of Sacramento and Stockton. Galt retains much of its small-town atmosphere and strong agricultural roots, despite having experienced moderate housing and employment growth within the last several decades. Most of the growth and development in Galt has been suburban in nature.

Most of the City is characterized as an Established Community and the MTP/SCS forecasts significant job and housing growth to continue occurring in this area. Typical densities for new residential development are in the low to moderate range, from four to 16 dwelling units per acre. Housing typologies including single-family detached, duplexes, apartments, and townhomes. Job growth is anticipated in retail, service, government, and industrial sectors

The City's historic downtown and the adjacent Lincoln Way and C Street, as well as the area along Twin Cities Road are identified as Center and Corridor Communities in the 2025 Blueprint Land Use Forecast. Within the Downtown/Lincoln Corridor, residential growth is forecasted at densities between 12-20 dwelling units per acre, with medical and commercial uses. The area north of Twin Cities Road is characterized as a small, rural residential community.

The remaining areas of the City known as Liberty Ranch and the Sphere of Influence (SOI) are characterized as a Developing Community in the 2025 Blueprint Land Use Forecast. New residential development located in Liberty Ranch is largely **6 Low Density Detached Residential** and consists primarily of single-family detached homes with supporting neighborhood and commercial, including office, retail, and public uses. Marginal residential growth is forecasted within the SOI.

Isleton

The City of Isleton is in the southernmost portion of Sacramento County and is one of the oldest historical towns nestled along the Sacramento River Delta. The entire city is characterized as an Established Community in the MTP/SCS. Over the past two decades, much of the city has remained unchanged. However, the City recently updated its 2040 General Plan, which emphasizes compact growth, downtown revitalization, and preserving Isleton's unique charm and natural resources. The 2025 Blueprint Land Use Forecast forecasts minor growth in these areas at an average of 16 dwelling units per acre with housing developments such as small apartments, townhomes, and single-family homes. Nonresidential uses could include community serving retail, commercial, and public uses.

Rancho Cordova

The City of Rancho Cordova has undergone significant development in recent years, reflecting its status as a regional job hub and growing urban center. In September 2025, the City approved the Cordova City Center project, an expansive mixed-use and sports and entertainment district that will feature a 7,500 seat arena near Sunrise Boulevard and

Highway 50. The Center and Corridor Communities along Folsom Boulevard and Station Areas includes balanced job and housing growth, with residential development at **12 Medium Density Residential** to **40 High Density Residential** and also includes mixed uses within the **Mixed Use Center/Corridor High** and **Residential/Retail Mixed Use High** placetypes. Other new job growth is forecasted in office, public, commercial, and industrial uses.

A significant portion of the City's total job growth will occur in the Established Communities. These are the northwestern areas of the city boundary, bisected by Highway 50. This community type is largely made up of **16 Medium-High Density Residential** to **40 High Density Residential** placetypes with limited higher density and mixed use placetypes like **Urban Attached Residential**, **Mixed Use Center/Corridor Low**, and **Residential/Retail Mixed Use High**. Other non-residential uses could include **Business and Professional**, **Light Industrial**, and **High Public/Quasi-Public** uses.

The City's Developing Communities include Rio Del Oro, Suncreek, Sunridge, and The Ranch which accommodate most of the City's housing growth. Rio Del Oro accommodates new housing at densities between **4 Very Low Detached Residential** to **30 High Density Residential** and includes non-residential uses such as office, school, industrial, and commercial uses. Suncreek and The Ranch accommodate densities between **6 Low Density Detached Residential** to **40 High Density Residential** and are largely residential-only communities, with some limited job growth related to surrounding **K-12 school uses. The Sunridge subdivision includes placetypes as dense as 60 High Density Residential**. Surrounding non-residential uses include school, public, and supporting community retail and service.

Sacramento City

The City of Sacramento is centrally located within the county and is the largest city in the SACOG region. In 2024, the city adopted its 2040 General Plan and Climate Action and Adaptation Plan, which guides land use and development policies for the coming decades. The General Plan outlines a vision for sustainable growth, emphasis on housing near transit hubs, prioritizing infill and redevelopment opportunities, and fostering environmental resilience. New jobs and housing will be distributed among activity centers of various sizes (neighborhood, sub-regional, and regional), transportation corridors, and new growth areas.

In comparison to most of the region's other jurisdictions, Sacramento is unique in that Center and Corridor Communities cover much of the city areas where most new growth is concentrated. The 2025 Blueprint Land Use Forecast designates the following as Centers and Corridors: the areas encompassing both sides of 16th Street - Downtown and Midtown Sacramento; to the north, the Railyards, the River District, and the Natomas I-5 Corridor; several Station Areas including the Gold Line, North Blue Line, South Blue Line, and the future Green Line; and portions of Oak Park and Stockton Boulevard, Arden and Exposition Boulevard, and the West Broadway Specific Plan. These areas constitute approximately 70 and 85 percent, respectively, of the city's total housing and job growth and continue to be populated with an influx of high density residential and mixed-use projects. Generally

speaking, typical densities in these areas offer the highest allowable densities, ranging from **12 Medium Density Residential** to **80 Very High Density Residential**. Residential mixed-use projects could develop according to the following placetypes: **City Center Mixed Use High**, **City Center Mixed Use Low**, **Urban Attached Residential**, **Mixed Use Center/Corridor Low**, **Town Neighborhood High**, and **Town Neighborhood Low**. Non-residential growth includes a wide variety of uses, including office commercial, medical, retail and service, and public uses. The areas that envelop the city's Center and Corridor Communities are designated in the 2025 Blueprint Land Use Forecast as Sacramento's Established Communities and account for the most landmass. Placetypes include densities as low as **4 Very Low Density Detached Residential** and as high as the **80 Very High Density Residential**, with new jobs in medical, light industrial, and supporting community and neighborhood retail and office uses.

The city's Developing Communities include continued the Delta Shores, Northlake, and Panhandle areas, located at the northern and southern end of the city's limits. The remaining housing growth in these communities includes **4 Very Low Density Detached Residential** to **30 High Density Residential** placetypes. New job growth in these communities could include school, supporting neighborhood retail and commercial, and mixed-use office buildings.

Sacramento (Unincorporated County)

The unincorporated areas of the county are the most urbanized of the unincorporated counites in the Greater Sacramento region. The majority of its population resides in the Urban Policy Area (UPA), which lies within the Urban Services Boundary (USB) or the ultimate boundary for urbanization in the unincorporated county. The County's General Plan facilitates infill and revitalization in targeted commercial corridors within the existing UPA and employs a smart growth management framework in considering proposed UPA expansions.

A significant proportion of growth in the county will be located in its Center and Corridor Communities across the 11 corridors, which include the Arden-Arcade, Auburn Boulevard/ Madison Avenue, Fair Oaks Boulevard Central-El Camino to Winding, Fair Oaks Boulevard East-Fair Oaks Village, Florin Road, Franklin Boulevard, Greenback Lane, Stockton Boulevard, the Gold Line Station Areas from Watt to Butterfield and from Hazel to Easton, and the North Watt and Antelope Acres Light Rail Station Area. Residential densities across the 11 corridors varies widely, with the highest allowable densities in the Arden-Arcade, Auburn Boulevard/Madison Avenue, Fair Oaks Boulevard Central-El Camino to Winding, North Watt and Antelope Acres Light Rail Station Area, and Gold Line Segments 4 (Watt/ Butterfield) and 5 (Hazel/Easton) as high as **60 High Density Residential** and **80 Very High Density Residential**. In comparison, the communities of Fair Oaks Boulevard East-Fair Oaks Village, Franklin Boulevard, Florin Road, Greenback Lane, and Stockton Boulevard allow residential densities between **12 Medium Density Residential** to **30 High Density Residential**. Mixed-uses and non-residential uses are also varied, but common placetypes with the most job growth within these communities include **Business and Professional**, **Residential/Retail Mixed Use High**, **City Center Mixed Use Low**,

Community/Neighborhood Commercial/Office, **City Center Mixed Use Low**, **Heavy Industrial**, and **Commercial** placetypes.

The County's Developing Communities include Cordova Hills (now called Braden), Mather South, Glenborough at Easton, Florin Vineyard, North Vineyard Station, and Vineyard Springs. Typical residential densities in the Cordova Hills and Glenborough at Eastern areas range from **12 Medium Density Residential** to **20 Medium-High Density Residential**. Some K-12 school uses are present, although Cordova Hills also includes additional mixed-use development in the **Town Neighborhood Low** placetype and job growth in supporting neighborhood commercial and business and professional uses. The Florin Vineyards and North Vineyard Station accommodate a wider range of low to high densities, from the **4 Very Low Density Detached Residential** to the **30 High Density Residential** placetypes. Job growth in the Florin Vineyards area is in commercial and industrial sectors. Job growth in the North Vineyard Station is characterized by school and supporting neighborhood commercial uses. The Mather South and Vineyard Springs areas include residential densities between **4 Very Low Density Detached Residential** to **20 Medium-High Density Residential** and typical uses include office, school, public, light industrial, and supporting neighborhood retail and services.

The County's Established Communities includes, but is not limited to, the residential communities of Arden-Arcade, Carmichael, Fair Oaks, Florin, Lemon Hill, North Highlands areas. The 2025 Blueprint Land Use Forecast assumes a variety of placetypes in this community type, including **1 Rural Residential** to **40 High Density Residential**. New jobs are primarily in office, commercial, and light and heavy industrial uses.

Very limited residential and non-residential growth could occur in the county's Rural Residential Communities. These areas are located in the northern and southern areas of the county boundary with residential development occurring at densities between **1 Rural Residential** and **8 Low-Medium Density Residential** with limited government, office, public, retail, and service uses.

Sutter County

Live Oak

Live Oak is a small, rural city surrounded by farmlands and located along the Highway 99 corridor between Yuba City and Chico. Development in Live Oak is primarily suburban and typically consists of rural, low density housing, often large-lot single family homes. Compact infill development and revitalization of the City's downtown along Highway 99 is a key priority identified in the City's General Plan. This area is also designated in the MTP/SCS as a Center and Corridor Community and forecasted to have minor housing growth, characterized by low-medium to medium-high densities between eight to 16 dwelling units per acre, and typically includes detached single-family housing, with some small apartments and townhomes, as well as mixed-uses up to two stories with small office and townhomes, cottage homes, and small-lot single family homes. A significant number of jobs are expected in retail, service, office, and government sectors.

The remainder of the City is characterized as an Established Community, where most residential development has occurred in the past decade. The MTP/SCS forecasts a mix of densities from **4 Very Low Density Detached Residential** to **20 Medium-High Density Residential** for new housing opportunities with typical housing typologies such as small-lot single family detached, duplexes, apartments, and townhomes. New jobs are anticipated in supporting commercial sectors, including office and retail uses.

Yuba City

Yuba City is located near the Feather River, just 40 miles north of Sacramento, and as the county seat, functions as a major agricultural, economic, and social hub for the Yuba-Sutter region. A majority of the City is designated as an Established Community in the MTP/SCS, except for the City's downtown and the area along Highways 20 and 99, which is characterized as a Center and Corridor Community. Most of the forecasted growth in the MTP/SCS will occur in the City's Established Communities. Job growth in these areas is primarily in the commercial and industrial sectors and with most of the new residential development at densities between four to 12 dwelling units per acre and includes housing typologies such as detached single-family, small-lot single family, and duplexes. Clusters of new apartments and townhomes are anticipated between **20 Medium High Density Residential** to **30 High Density Residential**. Remaining job and housing growth in the Established Communities includes limited mixed uses, typically cottage homes, townhomes, and small-lot single family surrounded by small office, retail, and commercial uses.

Within the City's Center and Corridor Community, new residential development from **12 Medium Density Residential** to **30 High Density Residential** with surrounding medical offices, retail, service, government, and light industrial uses.

Minor growth is forecasted in the City's Developing Communities, which are located in the southern portions of the City and include Bogue Stewart, Lincoln East, and the South Sphere of Influence (SOI) along the Highway 99 Corridor. These areas are anticipated to include some additional housing at densities ranging from **8 Low-Medium Density Residential** to **16 Medium-High Density Residential** with new job growth in office, retail, service, government, and light industrial sectors.

Sutter (Unincorporated County)

Most of the development in unincorporated Sutter County is focused within the SOIs of Live Oak and Yuba City. Some growth occurs in the towns of Nicolas, East Nicolas, Meridian, Rio Oso, Robbins, and Tudor, which are also characterized as Established Communities in the MTP/SCS. New residential development in these areas is typically **1 Rural Residential** to **6 Low Density Detached Residential**. New but minimal employment is forecasted in retail and industrial uses. The remaining growth is anticipated in Sutter Pointe, the County's only Developing Community. Located at the southern edge of the County's boundary, Sutter Pointe includes a range of densities between **4 Very Low Density Detached Residential** to **20 Medium-High Density Residential**. Non-residential growth in these areas is characterized by the **Light Industrial/Office**, **K-12 School**,

Community/Neighborhood Retail, and **Community/Neighborhood Commercial/ Office** placetypes.

Yolo County

Davis

The City of Davis is a university-oriented city of approximately 66,000 residents and is considered one of the most bike-friendly communities in the nation. Davis has limited outward growth opportunities and as such, most of the city is classified as an Established Community in the MTP/SCS. Approximately half of the job and residential growth will occur in these areas at a wide range of allowable densities, from **6 Low Density Detached Residential** to **80 Very High Density Residential**. Mixed-use development is also prevalent and characterized by the **Town Neighborhood Low** and **Urban Attached Residential** placetypes. Non-residential uses include supporting community and neighborhood commercial, light industrial, and office buildings.

The remaining job and housing growth is projected to occur within the city's Center and Corridor Communities. These areas are designated as the City's downtown (also known as the Core Area), in addition to the annexed Nishi property. The downtown area is anticipated to contain the majority of job and housing growth, where mixed-use and redevelopment of existing office and commercial to accommodate higher densities will continue into 2050. Thus, typical densities are between **16 Medium-High Density Residential** to **40 High Density Residential** and includes surrounding mixed-uses like **City Center Mixed Use High** and **Employment Focus Mixed Use Center/Corridor**. Non-residential growth includes office, medical, light industrial, and business and professional uses. The Nishi site will also include residential growth averaging out to the densities in the **16 Medium-High Density Residential** placetype.

West Sacramento

The City of West Sacramento is a vibrant riverfront community that has seen much residential and employment growth in recent years, due to its proximity to Sacramento's farm-to-fork culture and has emerged as a hub for the food industry. The presence of Sutter Health Park, the City's ballpark and entertainment venue, is also a driver for new job and housing growth.

The City continues to prioritize infill and higher mixed-use density, particularly along the riverfront. As such, there is an emphasis on job and housing growth in the Center and Corridor Communities. The MTP/SCS projects that approximately 50 percent of the growth will occur in these areas. These areas are in the northeastern portion of the City and include the Bridge District, Pioneer Bluff, and the Washington Specific Plan areas. Residential densities can range between **12 Medium Density Residential** and **80 Very High Density Residential** and with residential mixed-uses at even higher densities including ground floor office and retail.

Relative to the City's Center and Corridor Communities, the Established Communities include a wider variety of permitted densities and housing types, including small and large detached single-family, apartments, townhomes, in addition to projects at higher densities

(30-60 units per acre) where larger apartments and townhomes are prevalent. The MTP/SCS assumes that significant job growth will occur in existing commercial and industrial centers.

The southern areas of the City, namely the remaining undeveloped areas of Southport, including Liberty, River Park, and Yarborough are classified in the MTP/SCS as Developing Communities. New housing development in these communities ranges between **4 Very Low Density Detached Residential** and **20 Medium-High Density Residential**. There is minor job growth projected in Liberty and Yarborough from K-12 school and supporting neighborhood and commercial uses.

Winters

Winters is a small, historic city situated on Putah Creek in the western Sacramento Valley. Over the past decade, the completion of several residential subdivisions has resulted in job and housing growth in the City. Additionally, the City adopted a form-based zoning code for Downtown, allowing for significantly higher densities and additional opportunities for infill and redevelopment. This area, located along Grant Avenue, is also classified as a Center and Corridor Community in the 2025 Blueprint Land Use Forecast. New housing development is largely **20 Medium-High Density Residential** to **40 High Density Residential** and includes a mix of housing typologies such as apartments and townhomes at three to five stories and some small-lot single family homes. Job growth is forecasted in medical, business and professional, and commercial sectors, with some mixed-use residential and neighborhood uses.

The rest of the City is classified as an Established Community. New residential growth encompasses a wide variety of densities and some mixed-uses, largely between **4 Very Low Density Detached Residential** and **30 High Density Residential**. Supporting commercial and community uses are present, with sectors including government, service, retail, and office.

Woodland

The City of Woodland is the county seat and located 20 miles northwest of Sacramento at the intersection of Interstate 5 and State Route 113. Woodland has a strong historic heritage and its ideal climate and fertile farmland has generated a strong and thriving food and agriculture industry. Most of the City is classified as an Established Community in the 2025 Blueprint Land Use Forecast. New job and residential growth is emphasized with infill opportunities throughout this area and encompasses a wide range of low to high density development from **4 Very Low Density Detached Residential** to **30 High Density Residential**. Mixed-use residential is also prevalent, typically **Town Center** or **Mixed Use Very Low** with office, government, and commercial uses. Significant job growth is projected in supporting neighborhood commercial, retail, office, and industrial uses.

The 2025 Blueprint Land Use Forecast classifies the City's downtown, along Main and East Streets, as a Center and Corridor Community. Within this area, the forecast includes **12 Medium Density Residential** to **60 High Density Residential** with some mixed use, including **Mixed Use Center/Corridor High, Mixed Use Center/Corridor Low, Mixed Use**

Very Low, Town Center, and **Town Neighborhood High.** Non-residential growth in this area is forecasted in supporting commercial, industrial, and office space.

The proposed Research and Technology Park area is the designated Developing Community in the MTP/SCS and located near the City's southern boundary. With the adoption of the Specific Plan in 2023, the area is envisioned as the City's new technology hub, intended to serve an array of research and technology companies interested in locating and growing near UC Davis and other major research and technology institutions within the Greater Sacramento region. The plan envisions approximately 350 acres of mixed-use town center that will accommodate a range of housing options as well as a park and multi-modal street network with pedestrian and bicycle trail systems. The forecast includes a variety of densities in this area from **6 Low Density Detached Residential** to **40 High Density Residential** with significant **Light Industrial/Office**.

Yolo (Unincorporated County)

Yolo County is nestled on the western edge of the Greater Sacramento region and is an important part of the Interstate 80 corridor linking Sacramento to the Bay Area region. The County is predominantly agricultural in nature, and the General Plan continues to direct all residential growth to the incorporated cities and unincorporated towns. These areas are designated as the County's Established Communities in the MTP/SCS and include Capay, Clarksburg, Esparto, Guinda, Knights Landing, Madison, Monument Hills, Yolo, and Zamora. Moderate job growth is projected in these communities, primarily related to retail, light industrial, and other neighborhood commercial uses. The forecast includes **8 Low-Medium Density Residential** to **20 Medium-High Density Residential** placetypes in these areas. The UC Davis campus is designated as the County's Center and Corridor Community and includes housing growth in the **30 High Density Residential** placetype. Anticipated job growth is largely attributed to the campus workforce.

Yuba County

Yuba (Unincorporated County)

The unincorporated areas of Yuba County have historically been characterized as rural and agricultural in nature. However, significant growth has occurred within the last decade due to the adoption of several specific plans and updates to the General Plan and the MTP/SCS forecasts that additional buildout in these areas will occur moving forward.

Significant job and housing growth is forecasted in the County's Developing Communities, located along Highways 65 and 70, and include East Linda, Highway 65 Employment Center, North Arboga Study Area, and the Plumas Lake Specific Plan. The planned expansion of the Hard Rock Hotel and Casino is also anticipated to become a significant driver of economic growth in the County. New housing is typically characterized by the **4 Very Low Density Detached Residential**, **6 Low Density Detached Residential**, and **8 Low-Medium Density Residential** placetypes, with some medium to higher densities permitted in East Linda and Plumas Lake areas at **12 Medium Density Residential** and **30**

High Density Residential. Non-residential growth could include supporting neighborhood commercial, including retail, office, school, and light industrial uses.

A portion of Linda known as the North Beale Corridor and areas of Olivehurst are classified as Center and Corridor Communities in the 2025 Blueprint Land Use Forecast. In the past few years, the County has made progress within these areas to spur revitalization and attract additional investment in the community. Several infrastructure projects are underway, including the West Linda Safe Routes to Schools and East Linda Corridor Revitalization projects. As such, new residential growth includes **12 Medium Density Residential** and **40 High Density Residential**, with some mixed-uses that include retail. New jobs are projected in retail, office, light industrial, and public sectors.

The 2025 Blueprint Land Use Forecast classifies the Beale Air Force Base as an Established Community. The base is the only active military base in the region and a significant employer in the Yuba/Sutter region. The County's other Established Communities include Linda and Olivehurst, on either side of State Route 70. Within these areas, new housing is projected to develop at a variety of densities, ranging from **4 Very Low Density Detached Residential** to **30 High Density Residential**. Non-residential growth in these areas is in government, office, retail, service, and industrial uses.

The County's Rural Communities are in the central and northeastern portions of the county boundary. General Plan policies continue to support the rural character of these communities and the MTP/SCS projects minimal job and housing growth to occur in these areas. Residential growth includes **1 Rural Residential** and **4 Very Low Density Detached Residential** with some job growth in supporting **Community/Neighborhood Commercial**.

Marysville

The City of Marysville is one of California's oldest cities, steeped in history from the days of the California Gold Rush. Located just 50 miles north of Sacramento and situated at the junction of the Yuba and Feather Rivers, Marysville is also the county seat and a significant cultural and commercial hub, with agricultural and transportation driving new growth. Due to flooding constraints, the City has focused new growth in dense, compact areas, primarily through infill and redevelopment opportunities in the historic downtown core, also designated as a Green Zone and the City's Center and Corridor Community. The MTP/SCS forecasts new residential growth in these areas to include **12 Medium Density Residential** to **30 High Density Residential** with some **Mixed Use Center/Corridor Low**. Surrounding uses include office, service, retail, and light and heavy industrial.

Aside from downtown, the remaining areas of the City are classified as Established Communities. These communities are also expected to add more infill development between **12 Medium Density Residential** and **30 High Density Residential**. New jobs include office, light industrial warehouses, and supporting community and commercial job types, including retail, service, and government uses.

Wheatland

The City of Wheatland is a small, historic city located along Highway 65. Marysville and Yuba City are north of the City, with Beale Air Force Base located to the northeast. The City

has a strong agricultural presence in the region and is surrounded by agricultural lands. The 2025 Blueprint Land Use Forecast designates the City's downtown as its Center and Corridor Community, which is also designated as a Green Zone and presents additional opportunities for infill development over time. However, the 2025 Blueprint Land Use Forecast assumes that most new residential developments will continue to be built at low densities, often single-family detached, typically between four to six dwelling units per acre. New jobs are mostly in commercial sectors, including retail, office, and government uses.

The City's Established Communities are bifurcated on either side of Highway 65 and D Street. New growth is these areas are projected to continue toward building out existing, newer subdivisions and new neighborhood-serving commercial and public uses. New housing development is forecasted between **4 Very Low Density Detached Residential** and **16 Medium-High Density Residential**. New jobs are projected in retail, service, government, and educational sectors.

The MTP/SCS forecasts the greatest proportion of the City's job and housing growth in its Developing Communities, namely the Caliterra Ranch/Heritage Oaks subdivision to the southwest. New housing ranges between **4 Very Low Density Detached Residential** and **16 Medium-High Density Residential** with new jobs in supporting community and commercial sectors, including retail, service, and government uses.