

# MEMORANDUM

## COUNTY OF SAN MATEO PLANNING AND BUILDING DEPARTMENT

**DATE:** July 14, 2020  
**TO:** Midcoast Community Council  
**FROM:** Joe LaClair, Planning Services Manager  
**SUBJECT:** Summary of Development Projections Informing Connect the Coastside

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Connect the Coastside is a comprehensive transportation management plan (CTMP) to improve safety and mobility for residents, businesses and visitors of the San Mateo County Midcoast. The plan focuses on the areas surrounding Highway 1 and Highway 92, including the unincorporated communities of Montara, Moss Beach, El Granada, Princeton and Miramar. The public working draft of Connect the Coastside recommends a diverse range of road, highway and trail improvements, which address the present and future mobility needs of Coastside communities.

An important early step in developing Connect the Coastside was to evaluate the existing and future development potential of the Study Area. A development forecast was needed to create travel demand forecasts, which in turn helped to identify needed transportation improvements. The transportation improvements recommended in Connect the Coastside are limited to the unincorporated areas under San Mateo County's jurisdiction but are based on development projections and impacts inclusive of Half Moon Bay. The process of creating the development forecast used in Connect the Coastside is summarized below and described in more detail in the "Development Forecast for the San Mateo County Comprehensive Transportation Management Plan Public Review Draft" (November 2015) and the "Buildout Analysis and Traffic Projections Report" (November 2014), both available on the Connect the Coastside – Documents & Meeting Materials webpage (<https://planning.smcgov.org/connect-coastside-documents-meeting-materials>).

### **ZONING-BASED (MAXIMUM) BUILDOUT ANALYSIS**

An initial zoning-based Buildout Analysis was completed in the fall of 2014. This analysis identified vacant and underutilized sites and applied potential densities and intensities of future residential and non-residential development on those sites to estimate the amount of possible future development. Expected densities and intensities were based on the residential density allowed by zoning and the average density of development in the zoning district. Jobs were estimated using assumed ratios of square feet per job for various categories of development (e.g., retail commercial, visitor-serving commercial, industrial). For more detail on the identification of potential development sites and the assumptions used in projecting future development, please refer to the "Buildout Analysis and Traffic Projections Report" (November 2014).

Table 1: Zoning-Based (Maximum) Buildout Analysis - Jobs Projections

Jobs by Type	Half Moon Bay		Unincorporated Midcoast <sup>1</sup>		Total <sup>2</sup>	
	Existing	Buildout	Existing	Buildout	Existing	Buildout
Agriculture & Natural Resources	357	335	71	75	428	410
Manufacturing, Wholesale & Transportation	244	452	401	698	645	1,150
Retail	848	1,138	426	660	1,274	1,798
Service	3,455	4,691	1,148	1,766	4,603	6,457
<b>Total Jobs</b>	<b>4,904</b>	<b>6,616</b>	<b>2,046</b>	<b>3,199</b>	<b>6,950</b>	<b>9,815</b>

Notes:

1 Unincorporated Midcoast is comprised of Princeton and Midcoast Subareas.

2 Also included in the projection is 82 jobs classified as Agriculture & Natural Resources for both Existing and Buildout Conditions for the rural area outside of Half Moon Bay and the Unincorporated Midcoast regions. This region has no corresponding region in the ABAG projection.

Source: ABAG Projections, 2013, Dyett & Bhatia, 2014.

Table 2: Zoning-Based (Maximum) Buildout Analysis - Non-Residential Development and Jobs in Study Area by Subarea

Subarea	Non-Residential Sq. Ft.	Total Jobs	Retail	Services	Agricultural & Natural Resources	Manufacturing	Wholesale & Trade
Half Moon Bay	5,097,000	6,616	1,138	4,691	335	155	297
Princeton	2,276,000	1,987	249	1,015	25	481	217
Midcoast	1,161,100	1,212	411	718	50	-	-
Rural Lands	-	82	-	-	82	-	-
<b>Total (% growth)</b>	<b>8,533,906 (46%)</b>	<b>9,897 (41%)</b>	<b>1,798 (41%)</b>	<b>6,457 (40%)</b>	<b>492 (-4%)</b>	<b>636 (81%)</b>	<b>514 (75%)</b>

Table 3: Zoning-Based (Maximum) Buildout Analysis - Residential Development in Study Area by Subarea

Subarea	Existing			Buildout		
	Total Units	Single-Family	Multifamily	Total Units	Single-Family	Multifamily
Half Moon Bay	4,072	3,084	988	5,258	3,960	1,298
Princeton	264	251	13	384	260	124
Midcoast	3,961	3,679	282	6,558	5,319	1,240
Rural Lands	76	76	0	152	152	0
<b>Total (% growth)</b>	<b>8,373</b>	<b>7,090</b>	<b>1,283</b>	<b>12,352 (48%)</b>	<b>9,691 (37%)</b>	<b>2,661 (107%)</b>

## **CONSTRAINED DEVELOPMENT FORECAST**

The zoning-based Buildout Analysis was modified in 2015 to account for updated data and assumptions, including corrections to data on existing and proposed development, and reconsideration of employment density assumptions to more realistically match typical conditions. The Constrained Development Forecast uses the updated Zoning-based Buildout Analysis as a starting point, and then takes into account the following potential constraints:

- The growth management limitations in the San Mateo County Midcoast Local Coastal Plan and the City of Half Moon Bay's Measure D;
- The market demand for new housing and non-residential development in Half Moon Bay based on the market analysis conducted in 2014 for the Half Moon Bay General Plan Update.

This Constrained Development Forecast is a 25-year forecast, consistent with other local and regional forecasts being produced. With regard to growth control measures, Policy 1.23 in the Midcoast LCP limits residential development in the unincorporated Midcoast to 40 units per year, while Measure D limits residential growth to 1 percent annually in Half Moon Bay, or 1.5 percent in Downtown. For Half Moon Bay, the zoning-based forecast resulted in a lower level of residential development than would be allowed under Measure D. Thus, zoning would be the most limiting factor for residential development in Half Moon Bay, while the LCP's growth management protocol would be the most limiting growth factor in the unincorporated Midcoast.

As of 2014, there were 8,781 residential units in the Study Area, including 4,300 in the unincorporated Midcoast and 4,481 in Half Moon Bay. The Constrained Development Forecast finds an estimated capacity for 1,094 future units in the unincorporated Midcoast and 694 future units in Half Moon Bay. Together with units currently in the development pipeline, this would result in a total of 5,416 units in the unincorporated Midcoast and 5,335 units in Half Moon Bay, or 10,750 housing units in the Study Area by 2040 (see Table 4 below). This represents a 26% increase in residential units in the unincorporated Midcoast - an average of 42.9 units per year. The average increase in the unincorporated Midcoast includes new units in rural areas not subject the LCP limit of 40 units per year. The average increase in the area subject to the LCP policy is 40 units per year. The forecast represents a 19% increase in Half Moon Bay - an average of 32.8 units per year, and a 22% increase overall in the Study Area - an average of 75.7 units per year. Existing housing, pipeline development, future development, and total residential development are summarized in Table 4, including the proportion of development in unincorporated San Mateo County and Half Moon Bay, and the proportion of single- and multifamily units.

The Study Area would be expected to have 1,980 fewer units in 2040 using the Constrained Development Forecast compared to the updated Zoning-Based (Maximum) Buildout Analysis. The Constrained Forecast results in 1,620 fewer units in the unincorporated Midcoast and 359 fewer units in Half Moon Bay compared to zoning-based buildout.

Table 4: Constrained Residential Development Forecast (2040)

Subarea	Existing (2014)			Pipeline <sup>4</sup>			Forecast (2040)			Total (2040)			Percent Change
	Total Units <sup>1</sup>	Single-Family <sup>2</sup>	Multi-family <sup>3</sup>	Total Units	Single-Family	Multi-family	New Units <sup>5, 6</sup>	Single-Family <sup>7</sup>	Multi-family <sup>7</sup>	Total Units (2040)	Single-Family	Multi-family	
Unincorporated Midcoast	4,300	4,005	295	22	19	3	1,094	716	378	5,416	4,740	676	26%
Half Moon Bay	4,481	3,493	988	160	105	55	694	508	186	5,335	4,106	1,229	19%
<b>Total</b>	<b>8,781</b>	<b>7,498</b>	<b>1,283</b>	<b>182</b>	<b>124</b>	<b>58</b>	<b>1,787</b>	<b>1,224</b>	<b>564</b>	<b>10,750</b>	<b>8,846</b>	<b>1,905</b>	<b>22%</b>

Notes:

1 Existing development in Half Moon Bay has been corrected since November 2014 Existing Conditions Report. Existing mobile homes were not accounted for in that report; this results in increase of 409 single-family units.

2 Includes manufactured homes.

3 Includes housing in mixed-use buildings, and caretaker units.

4 Development projects under review as identified by San Mateo County in 2013-15 and the City of Half Moon Bay in 2014.

5 New residential development in unincorporated Midcoast limited to 40 units per year under Policy 1.23 of the San Mateo County Midcoast LCP (2014). In City of Half Moon Bay, Measure D limits residential growth to 1% per year, or 1.5% in downtown area. However, in Half Moon Bay, existing zoning is projected to result in less development than would be allowed under Measure D.

6 Future development in Half Moon Bay is based on 0.7% average annual growth rate projected in the Economic and Real Estate Conditions and Trends report (2014) prepared by EPS for the Half Moon Bay General Plan Update.

7 Assumes single-family/multifamily split found for zoning-based buildout analysis: 67% single-family and 33% multifamily in the Unincorporated Midcoast, and 75% single-family and 25% multifamily in Half Moon Bay.

Sources: San Mateo County Assessor, 2014; San Mateo County, 2014; City of Half Moon Bay, 2014; EPS, 2014; Dyett & Bhatia, 2015.

Table 5: Constrained Non-Residential Development Forecast (2040)

Subarea	Existing (2014)	Pipeline <sup>3</sup>		Forecast (2040)		Total (2040)	Percent Change
	Existing Jobs <sup>2</sup>	Pipeline Non-Residential Sq. Ft.	Pipeline Jobs <sup>2</sup>	Potential Non-Residential Sq. Ft. <sup>4, 5</sup>	Potential Jobs	Total Jobs	
Unincorporated Midcoast	2,551	303,000	439	851,800	2,003	4,994	96%
Half Moon Bay	5,334	37,500	94	294,000	276	5,704	7%
<b>Total</b>	<b>7,885</b>	<b>340,500</b>	<b>533</b>	<b>1,145,800</b>	<b>2,279</b>	<b>10,698</b>	<b>36%</b>

Notes:

1 Combines the total "known" square footage from County Assessor data with estimated square footage of other parcels with non-residential development. Estimated intensity of existing development is based on that of "known" development.

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2 Estimated based on assumed ratio of jobs per square foot of non-residential development in different categories (e.g., visitor-serving commercial, retail commercial, industrial).

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3 Development projects under review as identified by San Mateo County in 2013-15 and the City of Half Moon Bay in 2014.

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4 Future development in Unincorporated Midcoast based on analysis of vacant and underutilized land; average FAR of existing development in each zoning district, and other factors. Development in Neighborhood Commercial and comparable zones is adjusted downward in proportion to reduction in residential units, to account for lower demand.

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5 Future development in Half Moon Bay is based on average annual growth rates by employment sector as projected in the Economic and Real Estate Conditions and Trends report (2014) prepared by EPS for the Half Moon Bay General Plan Update. Square footage estimated based on assumed ratio of jobs per square foot of non-residential development in different categories (e.g., visitor-serving commercial, retail commercial, industrial), using same assumptions as in zoning-based buildout analysis.

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*Sources: San Mateo County Assessor, 2014; San Mateo County, 2014; City of Half Moon Bay, 2014; EPS, 2014; Dyett & Bhatia, 2015.*

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