

WORKFORCE HOUSING NEEDS ASSESSMENT UPDATE

Prepared for:
Mountain Housing Council

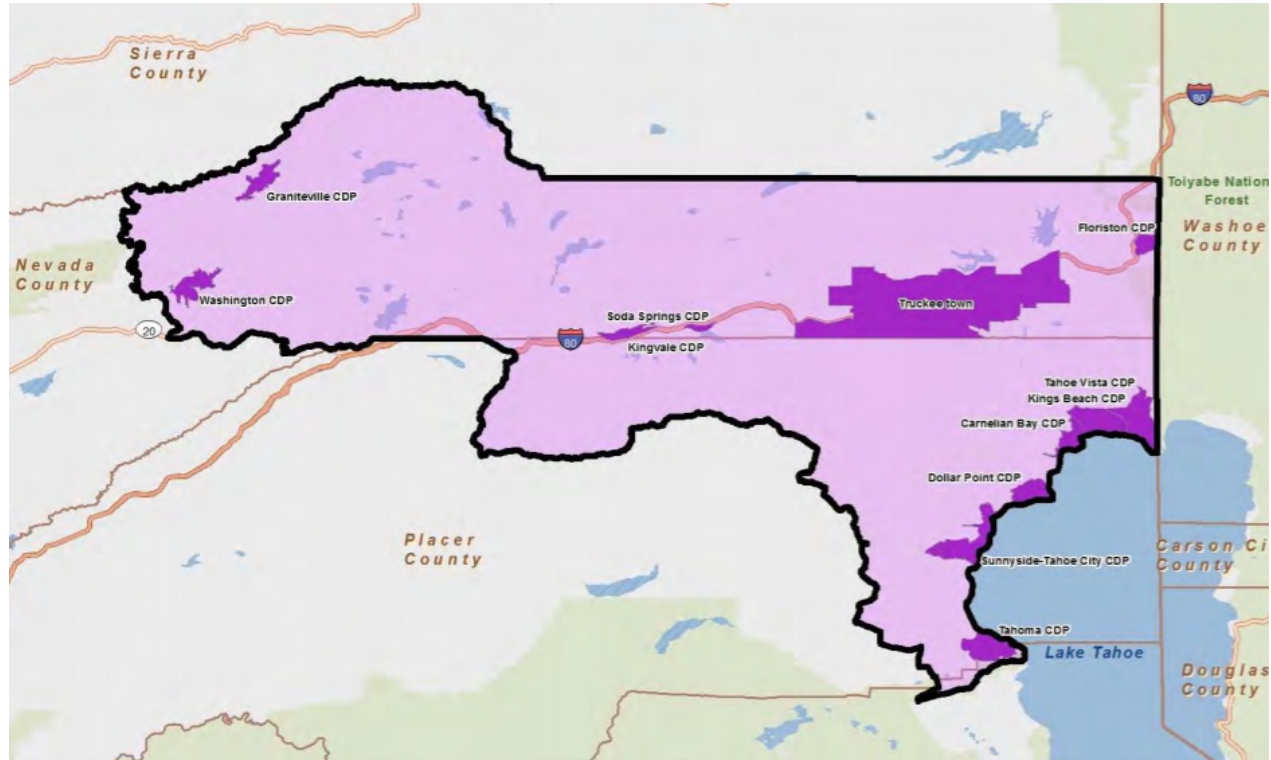
June 2021



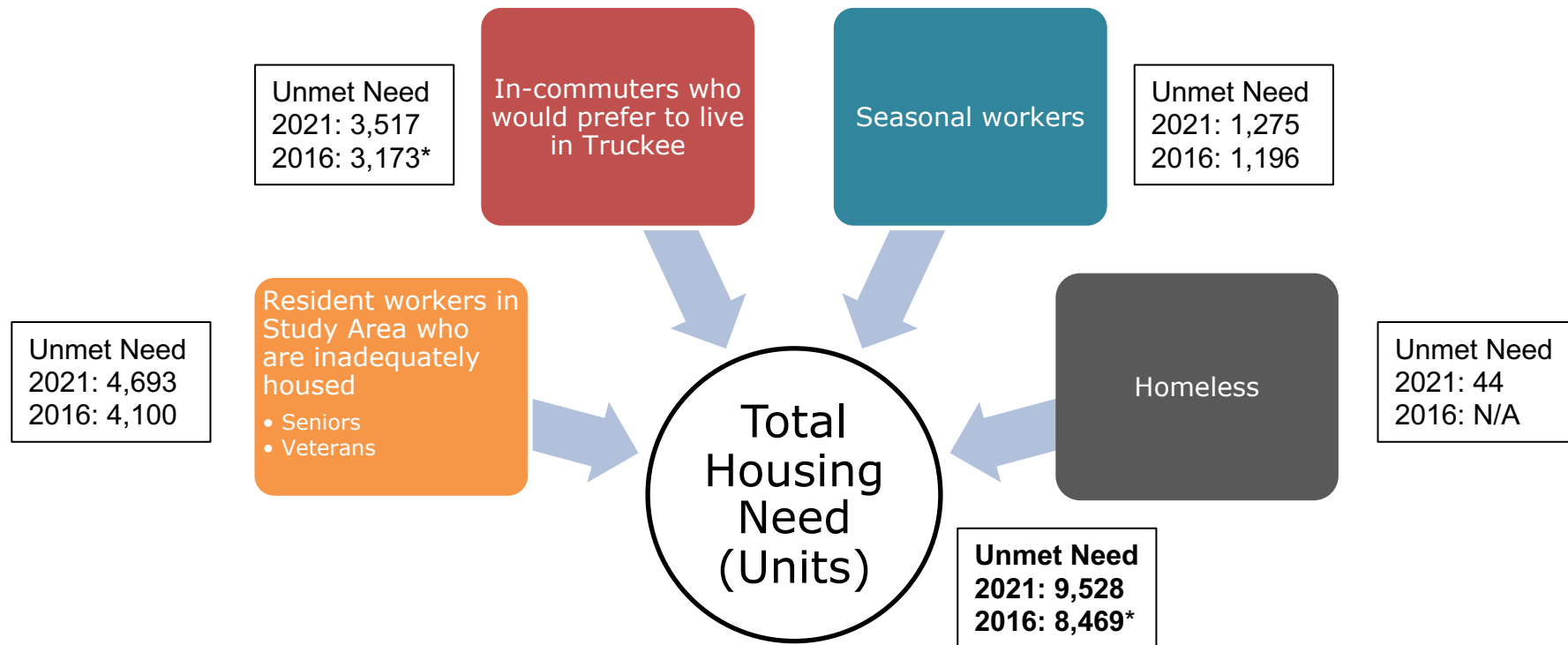
Economic & Planning Systems, Inc.
The Economics of Land Use

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STUDY AREA



HOUSING NEEDS ASSESSMENT – COHORTS

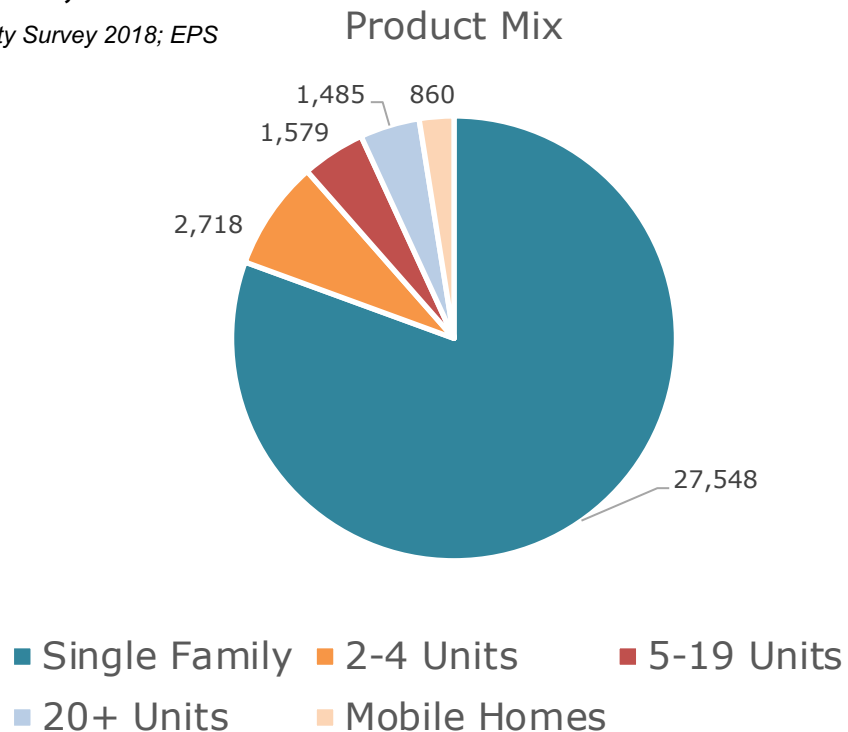


*The 2016 assessment estimated an unmet need of 6,864 for in-commuting households. The 2021 update uses a different methodology, relying on data directly from LEHD's commute pattern estimates. The 2021 methodology was replicated using 2016 data to establish two points in time. The 2016 assessment did not include a count of homeless persons.

HOUSING INVENTORY OVERVIEW (TOTAL)

Total Units in Study Area: **34,191**

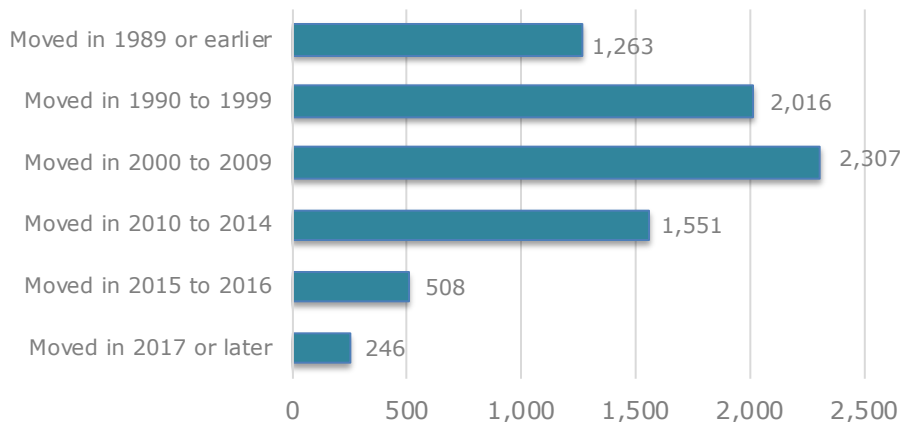
Sources: ESRI; US Census American Community Survey 2018; EPS



HOUSING INVENTORY OVERVIEW (OCCUPIED)

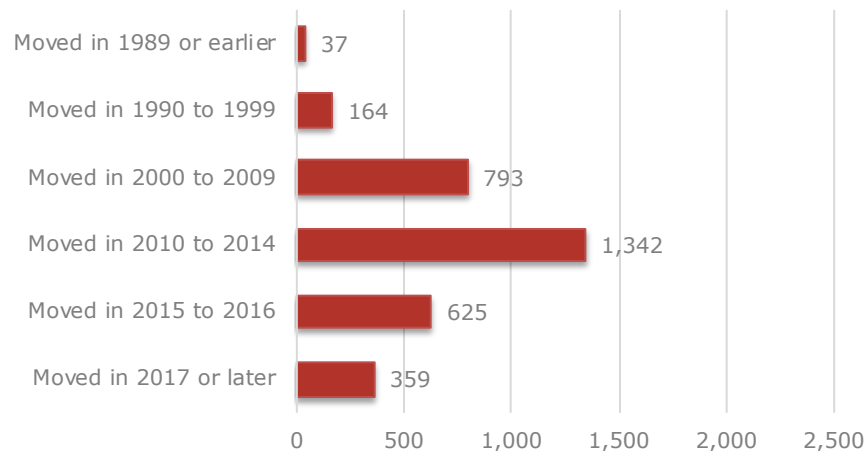
Total Households in Study Area: 11,211
Sources: ESRI; US Census American Community Survey 2018; EPS

Owner Occupied Length of Tenure (Households)



- 70% of owner-occupied households have been living in the same place for more than 10 years.

Renter Occupied Length of Tenure (Households)



- 70% of renter-occupied households have been living in the same place for fewer than 10 years.

HOUSING NEEDS – OVERVIEW

- The total unmet need for the Study Area increased by 1,064 units between 2016 and 2021, an increase of approximately 12%
- Much of this additional unmet demand was due to the Resident Workforce cohort, which has seen an increase in unmet demand of nearly 600 units

Percent of AMI	Resident Workforce		In-Commuting Workforce		Seasonal Workers		Homeless	Total	
	Total Demand	Inadequately Housed HHs	HH Demand	Inadequately Housed HHs	HH Demand	Inadequately Housed HHs	Inadequately Housed HHs	HH Demand	Inadequately Housed HHs
Up to 30%	1,132	953	667	420	535	451	44	2,378	1,868
Between 30% and 60%	1,887	1,368	1,112	700	487	353	0	3,486	2,421
Between 60% and 80%	1,048	587	618	389	292	163	0	1,958	1,139
Between 80% and 120%	2,348	1,198	1,383	871	292	149	0	4,023	2,218
Between 120% and 160%	1,467	281	864	544	487	93	0	2,818	918
Between 160% and 195%	879	168	518	326	146	28	0	1,542	522
Between 195% and 245%	<u>719</u>	<u>138</u>	<u>423</u>	<u>267</u>	<u>195</u>	<u>37</u>	<u>0</u>	<u>1,337</u>	<u>442</u>
Total	9,479	4,693	5,584	3,517	2,434	1,275	44	17,542	9,528

RESIDENT WORKER HOUSEHOLDS – DEFINING NEED

Income Category

Overburdened, Overcrowded, and/or Underhoused

Income by Housing Problems (Owners and Renters)

Household Income \leq 30% HAMFI	84.19%
Household Income >30% to \leq 60% HAMFI	72.47%
Household Income >60% to \leq 80% HAMFI	55.95%
Household Income >80% to \leq 120% HAMFI	51.04%
Household Income >100% HAMFI	19.16%

Source: HUD CHAS 2017

HAMFI: HUD Area Median Family Income

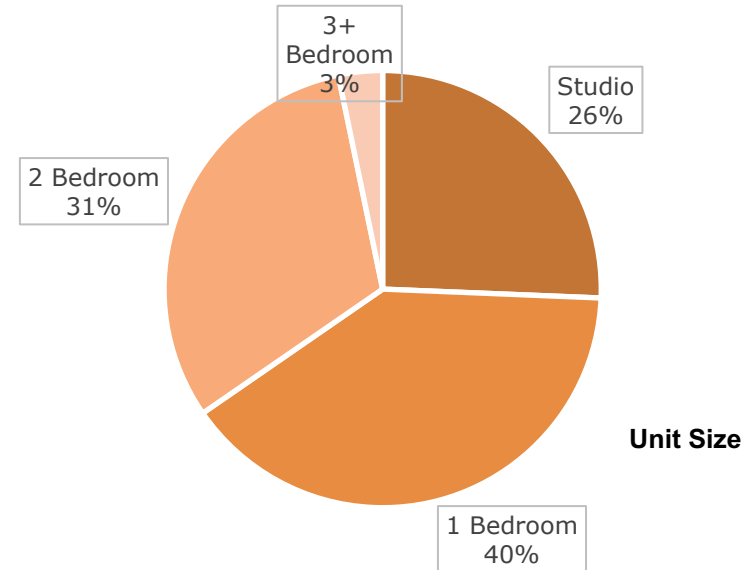
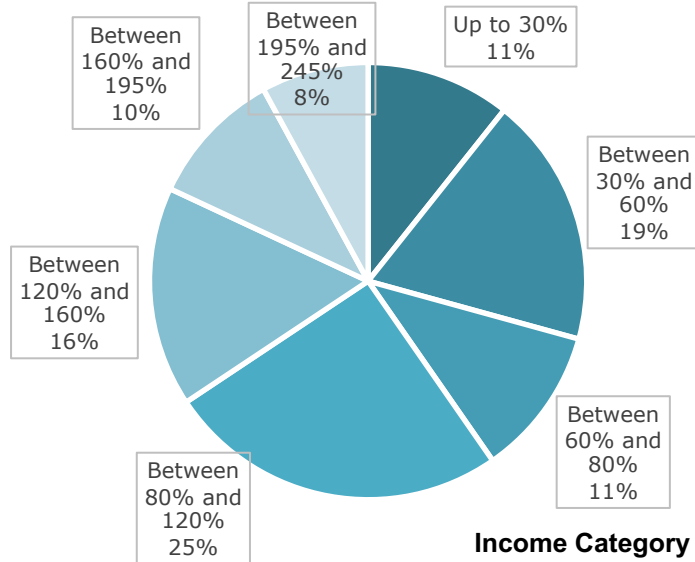
RESIDENT WORKER HOUSEHOLD CURRENT NEED (REGION)

Percent of AMI	Studio	1-Bedroom	2-Bedroom	3+ Bedrooms	Total Units
Up to 30%	265	127	101	9	502
Between 30% and 60%	343	315	197	18	872
Between 60% and 80%	135	225	146	13	519
Between 80% and 120%	240	505	399	43	1,188
Between 120% and 160%	134	310	289	31	764
Between 160% and 195%	52	195	206	21	474
Between 195% and 245%	35	187	133	18	373
Total	1,204	1,865	1,471	153	4,693

** Assumes households will occupy smallest unit without triggering overcrowding.*

RESIDENT WORKER HOUSEHOLD CURRENT NEED (REGION)

- More than half of working households in the Study Area fall between 60% and 120% of AMI
- Nearly three quarters of units needed are either 1 or 2 bedroom



RESIDENT WORKER HOUSEHOLD CURRENT NEED (SUB-REGION)

Truckee

Percent of AMI	Studio	1-Bedroom	2-Bedroom	3+ Bedrooms	Total Units
Up to 30%	139	67	53	5	264
Between 30% and 60%	180	166	103	9	459
Between 60% and 80%	71	118	77	7	273
Between 80% and 120%	126	266	210	23	625
Between 120% and 160%	71	163	152	17	402
Between 160% and 195%	27	103	108	11	249
Between 195% and 245%	19	98	70	9	196
Total	633	981	774	80	2,469

East Placer County

Percent of AMI	Studio	1-Bedroom	2-Bedroom	3+ Bedrooms	Total Units
Up to 30%	104	50	40	3	198
Between 30% and 60%	135	124	77	7	343
Between 60% and 80%	53	89	57	5	204
Between 80% and 120%	95	199	157	17	467
Between 120% and 160%	53	122	114	12	301
Between 160% and 195%	20	77	81	8	187
Between 195% and 245%	14	73	52	7	147
Total	474	734	579	60	1,847

** Assumes households will occupy smallest unit without triggering overcrowding.*

RESIDENT WORKER HOUSEHOLD NEED – 2025 (REGION)

Percent of AMI	Studio	1-Bedroom	2-Bedroom	3+ Bedrooms	Total
Up to 30%	276	133	106	9	524
Between 30% and 60%	357	329	205	18	910
Between 60% and 80%	141	235	152	14	542
Between 80% and 120%	251	527	417	45	1,240
Between 120% and 160%	140	324	301	33	797
Between 160% and 195%	54	204	215	22	495
Between 195% and 245%	37	195	139	19	389
Total	1,256	1,946	1,535	159	4,896

- Reflects current proportion of worker households that are cost burdened, overcrowded, or underhoused. Assumes a 4.3% total increase in jobs, based on CA EDD projections.

RESIDENT WORKER HOUSEHOLD NEED – 2025 (SUB-REGION)

Truckee

Percent of AMI	Studio	1-Bedroom	2-Bedroom	3+ Bedrooms	Total
Up to 30%	145	70	56	5	276
Between 30% and 60%	188	173	108	10	479
Between 60% and 80%	74	123	80	7	285
Between 80% and 120%	132	277	219	23	652
Between 120% and 160%	74	170	158	17	420
Between 160% and 195%	28	107	113	12	260
Between 195% and 245%	19	102	73	10	205
Total	661	1,024	808	84	2,576

East Placer County

Percent of AMI	Studio	1-Bedroom	2-Bedroom	3+ Bedrooms	Total
Up to 30%	109	52	42	4	206
Between 30% and 60%	141	129	81	7	358
Between 60% and 80%	55	92	60	6	213
Between 80% and 120%	99	208	164	18	488
Between 120% and 160%	55	127	118	13	314
Between 160% and 195%	21	80	85	9	195
Between 195% and 245%	15	77	55	7	153
Total	494	766	604	63	1,927

- Reflects current proportion of worker households that are cost burdened, overcrowded, or underhoused. Assumes a 4.3% total increase in jobs, based on CA EDD projections.

HOUSING NEEDS ESTIMATES: VETERANS AND SENIORS

Veterans

Percent of AMI	Studio	1-Bedroom	2-Bedroom	3+ Bedrooms	Total
Up to 30%	24	11	9	1	45
Between 30% and 60%	30	28	17	2	77
Between 60% and 80%	12	20	13	1	46
Between 80% and 120%	21	45	35	4	106
Between 120% and 160%	12	28	26	3	68
Between 160% and 195%	5	17	18	2	42
Between 195% and 245%	3	17	12	2	33
Total	107	166	131	14	417

Seniors

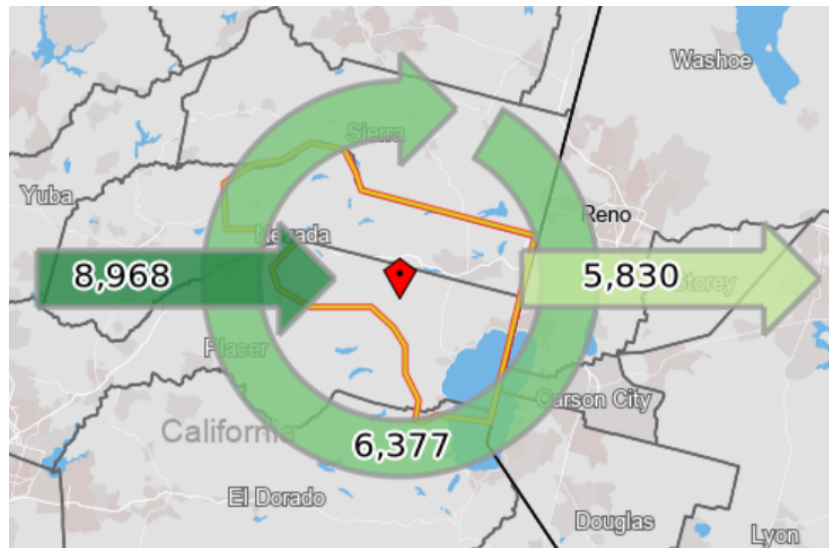
Percent of AMI	Studio	1-Bedroom	2-Bedroom	3+ Bedrooms	Total
Up to 30%	43	21	17	1	82
Between 30% and 60%	56	51	32	3	142
Between 60% and 80%	22	37	24	2	85
Between 80% and 120%	39	83	65	7	194
Between 120% and 160%	22	51	47	5	125
Between 160% and 195%	8	32	34	3	77
Between 195% and 245%	6	30	22	3	61
Total	197	305	240	25	767

- Based on number of working veterans and seniors residing in the Study Area

HOUSING NEEDS ESTIMATES – IN-COMMUTERS

- Relocation preferences are based on employee survey asking how likely respondent would be to relocate to the study area should adequate housing become available; respondents could select Very Likely, Somewhat Likely, or Not Likely
 - 2016 survey offered a binary choice – “Would Relocate” or “Wouldn’t Relocate” – 85% indicated “Would Relocate”

LEHD 2018 Inflow-Outflow (Total Workers)



	2021*	2016*
In-Commuting Workers	8,968	8,060
Workers per HH	1.6	1.6
In-commuting Households	6,927	6,249

“Very Likely” to Relocate (63%)	3,517	3,173
“Somewhat Likely” or “Very Likely” to Relocate (84%)	4,618	4,166
5-Year Change	9.8%	

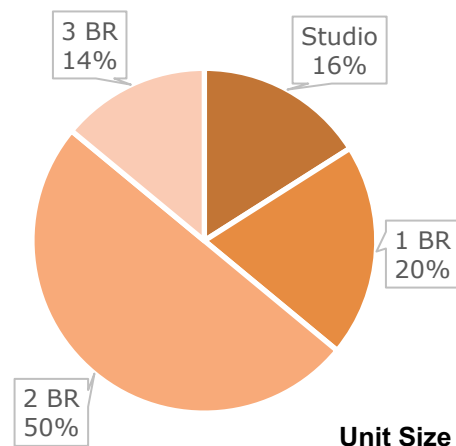
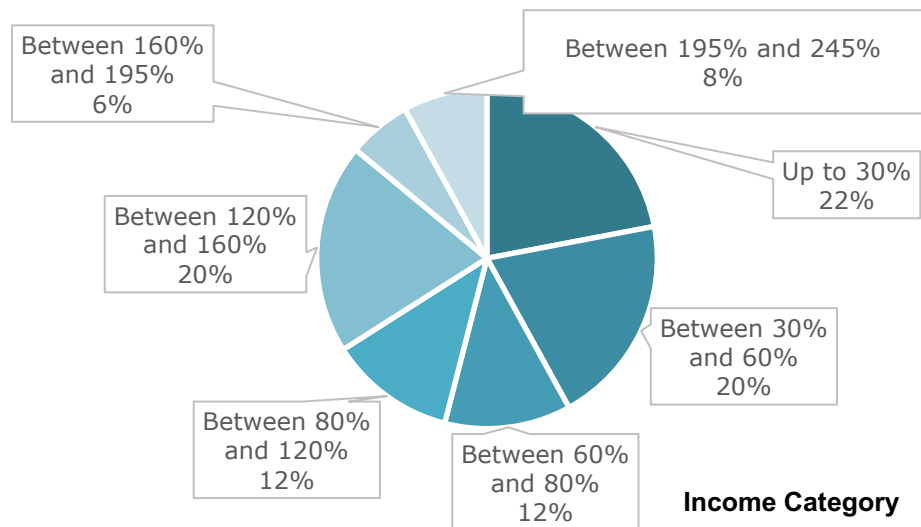
*There is a 3-year lag with LEHD data.

HOUSING ESTIMATES – IN-COMMUTER HOUSEHOLDS

Percent of AMI	Studio	1-Bedroom	2-Bedroom	3+ Bedrooms	Total Units
Up to 30%	198	95	76	6	376
Between 30% and 60%	257	236	147	13	653
Between 60% and 80%	101	169	109	10	389
Between 80% and 120%	180	379	299	32	890
Between 120% and 160%	101	232	216	24	573
Between 160% and 195%	39	146	154	16	355
Between 195% and 245%	26	140	100	13	280
Total	902	1,398	1,103	115	3,517

HOUSING NEEDS – SEASONAL WORKERS

- Estimated unmet need for seasonal worker households is 1,275 units at 1.6 workers per HH, BUT perhaps appropriate to think of in terms of beds
 - Unmet need for approximately 2,000 beds / individuals
 - Opportunity for employer-led assistance
- Up from 2016 by approximately 80 units



HOUSING NEEDS – SEASONAL WORKER HOUSEHOLDS

- Based on ratio of seasonal workers to year-round resident workers as reported by the employee survey

Percent of AMI	Studio	1-Bedroom	2-Bedroom	3+ Bedrooms	Total Units
Up to 30%	72	90	225	63	451
Between 30% and 60%	56	71	176	49	353
Between 60% and 80%	26	33	82	23	163
Between 80% and 120%	24	30	75	21	149
Between 120% and 160%	15	19	47	13	93
Between 160% and 195%	4	6	14	4	28
Between 195% and 245%	6	7	19	5	37
Total	327	507	400	42	1,275

SOURCES

- Bureau of Labor Statistics Wage Data by Occupation
- California Economic Development Department Employment Projections 2020–2035
- ESRI ArcGIS Business Analyst
- Sierra Business Council 2021 Regional Employee Survey
- U.S. Census American Community Survey 2019
- U.S. Census Longitudinal Employment–Household Dynamics Survey 2018
- U.S. Census Public Use Microdata Survey 2019
- U.S. Housing and Urban Development Comprehensive Housing Affordability Strategy Survey 2013–2017