

REGIONAL WORKFORCE HOUSING NEEDS ASSESSMENT

2023 UPDATE

Presented September 15, 2023



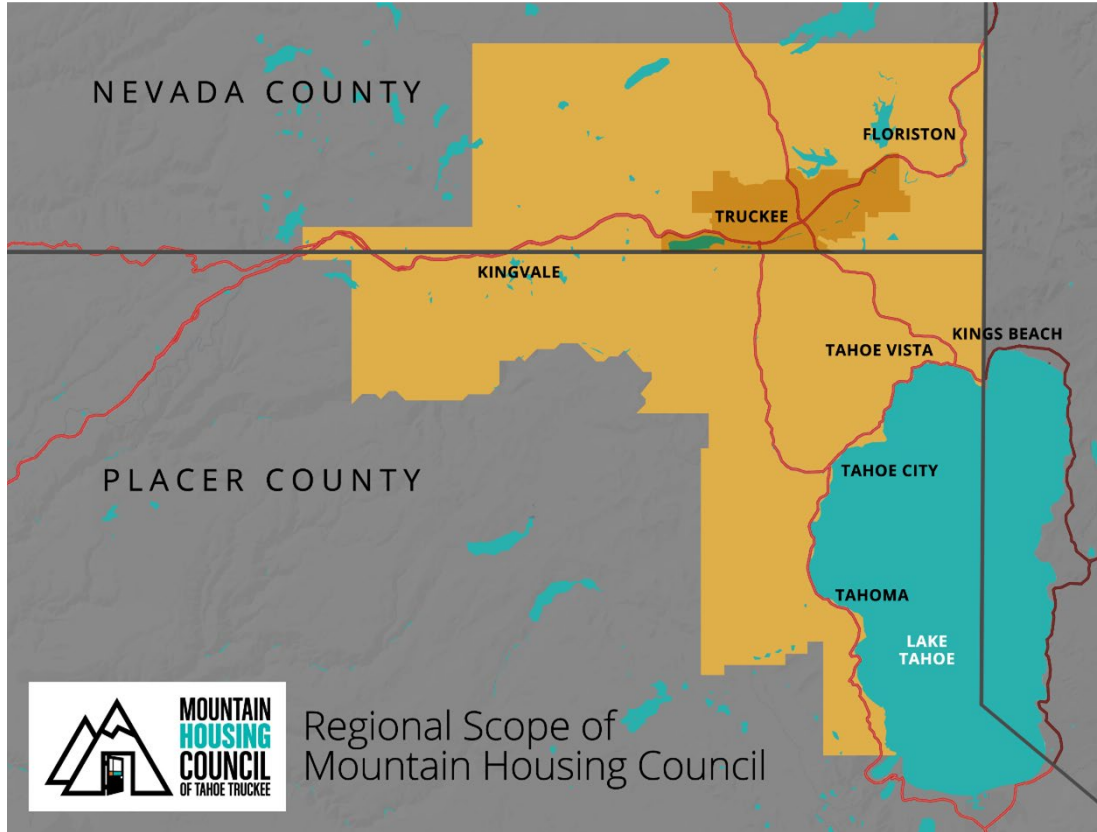
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AGENDA

- **Introduction**
 - Regional Context
 - Methodology
 - Key Findings
- **Community Housing Survey**
 - Employee
 - Employer
- **Regional Workforce Housing Needs Assessment 2023**
 - Resident Workers
 - In-Commuters
 - Seasonal Workers
 - Homeless
- **Trendline Analysis (2016, 2021, 2023)**

REGIONAL CONTEXT



The North Tahoe-Truckee region, as defined by the Mountain Housing Council, is approximately **550 square miles** and is characterized by the same boundaries as the Tahoe Truckee Unified School District and the Truckee Tahoe Airport District.

METHODOLOGY



Survey

- Obtain data on housing need directly from community members
- Employer and employee surveys
- Maintains questions from 2016 and 2021 surveys to establish trends



Housing Needs Model

- Provides population estimates for the Study Area geography and generates estimate of inadequately housed workforce
- Data sources: U.S. Census, ESRI, U.S. Department of Housing and Urban Development

KEY FINDINGS



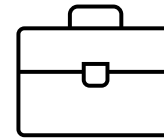
Total unmet housing demand in the region declined since 2021 to approximately 8,200 units.



Households between 30 to 60% Area Median Income (AMI) and 80 to 120% AMI have the most unmet need. Subsidies are most available for < 80% AMI.

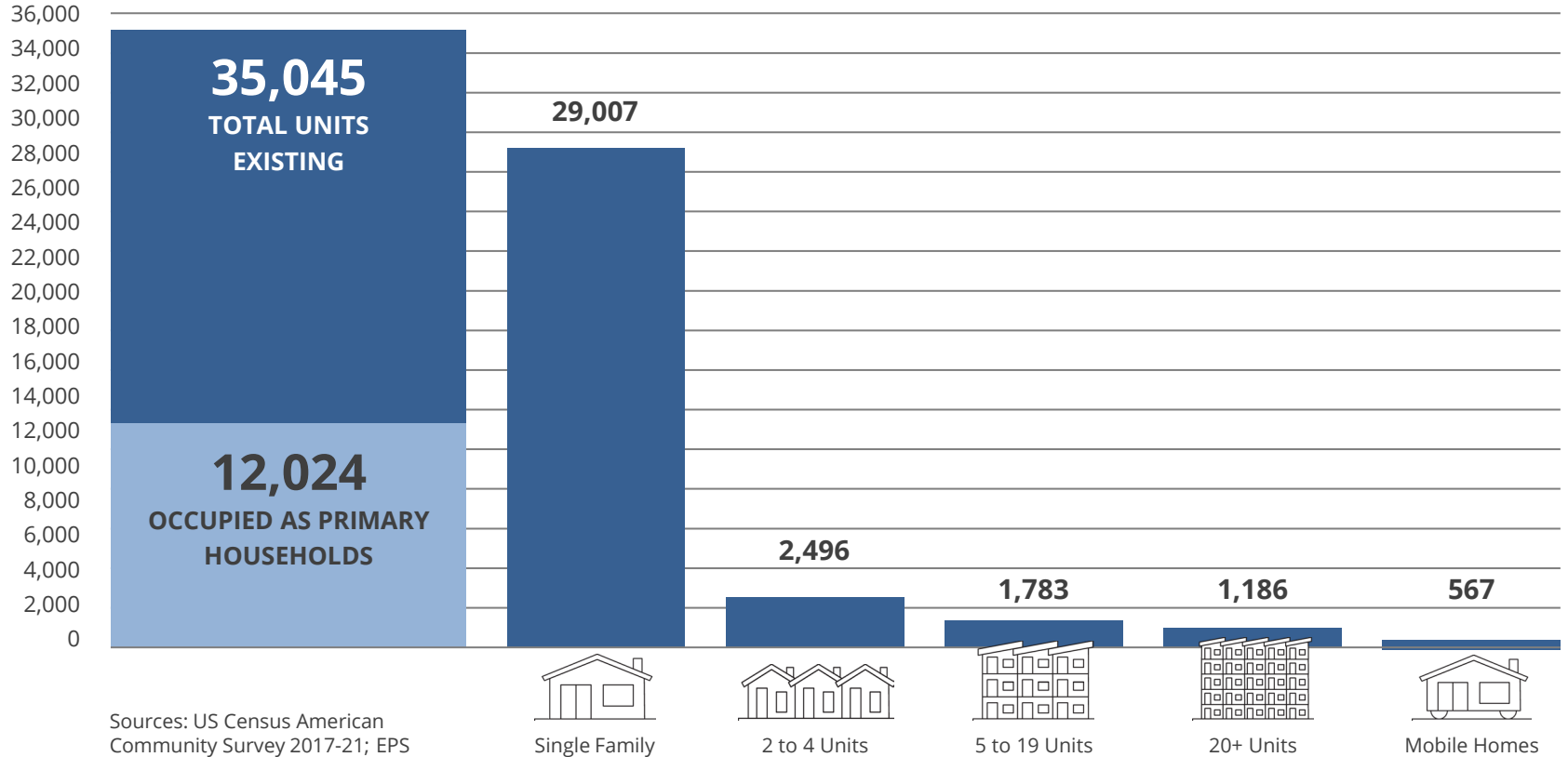


Approximately 66% of units in the Study Area are not occupied on a full-time basis.



Housing issues are negatively affecting both employees and employers in the region.

OVERVIEW OF EXISTING HOUSING INVENTORY



Sources: US Census American Community Survey 2017-21; EPS

COMMUNITY HOUSING SURVEY (2023)

EMPLOYER AND EMPLOYEE RESPONSES

COMMUNITY HOUSING SURVEY - METHODOLOGY



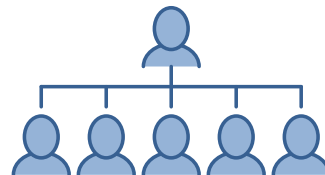
Employee and employer surveys



Online in English & Spanish



Conducted April and May 2023



1,274 total respondents

→ **1,173 employee** survey respondents (170 Spanish survey)

→ **101 employer** survey respondents (2 Spanish survey)

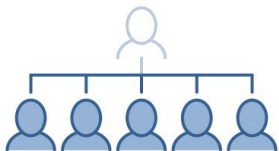
COMMUNITY HOUSING SURVEY - RESULTS

EMPLOYEE SURVEY

90% of respondents who are renters had trouble finding housing. (**85%** Spanish survey)

53% of respondents spend more than 30% of income on housing costs (not including utilities). (**88%** Spanish survey)

35% of respondents report trouble finding housing for year-round occupancy.



EMPLOYER SURVEY

56% of employers surveyed are anticipating that their peak number of employees will grow in the next 5 years.

79% of employers surveyed say current housing conditions detract from the success of their business.



2023 REGIONAL WORKFORCE HOUSING NEEDS ASSESSMENT

UNMET HOUSING NEEDS IN OUR REGION

REGIONAL WORKFORCE UNMET HOUSING NEED



Totals For Sub-Geographies:

Resident Workforce Households

Truckee: 2,121

East Placer County: 1,832

East Nevada County (non-Truckee): 228

In-Commuter Households

Truckee: 1,250*

East Placer County: 1,698*

Seasonal Workers Households

Truckee: 843

East Placer County: 535

East Nevada County (non-Truckee): 67

Homeless

East Placer County: 12

East Nevada County: 76

* Numbers do not sum to total in-commuter housing need due to commuter flows within region

INSIGHTS INTO UNMET NEED BY COHORT

4,180 HHs Resident Workers

Current worker households that are inadequately housed

- Inadequately housed HHs have one or more of the following:
 1. Overburdened
 2. Overcrowded
 3. Underhoused
- Lower-income households are more likely to face inadequate housing

2,485 HHs In-Commuters

Current in-commuters who would prefer to live in the region

- Commutes to the Tahoe-Truckee region can be costly and time-consuming
- 55% of in-commuters identified in the employee survey responded they are "Very Likely" to relocate if adequate housing were available

1,444 HHs Seasonal Workers

Part-time seasonal workers who are inadequately housed

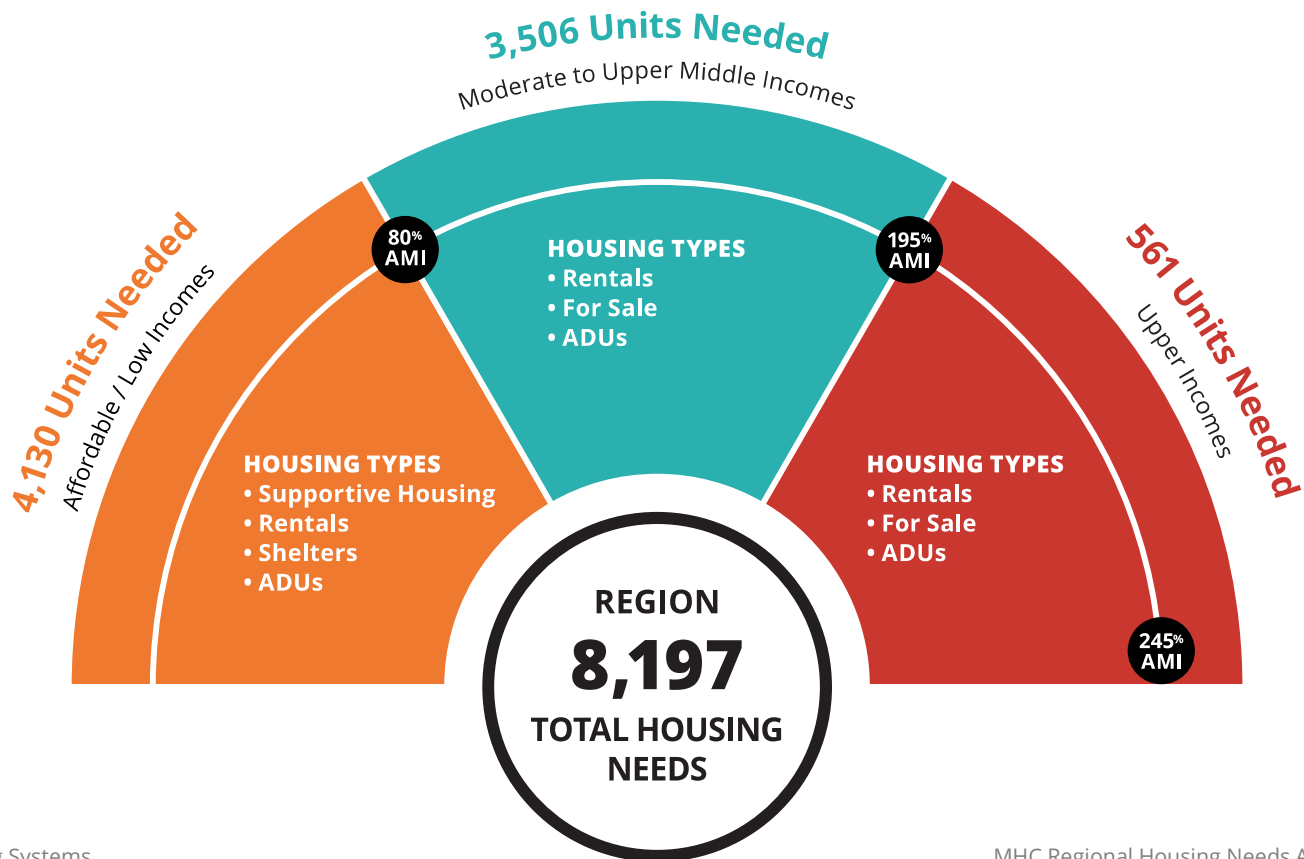
- Many lifestyle types (students, retirees, vanlifters) requiring different housing needs and preferences
- In terms of "beds", this need would be 2,300 beds (at 1.6 workers per HH)

88 HHs Homeless

Individuals identified by HUD Point-in-Time count

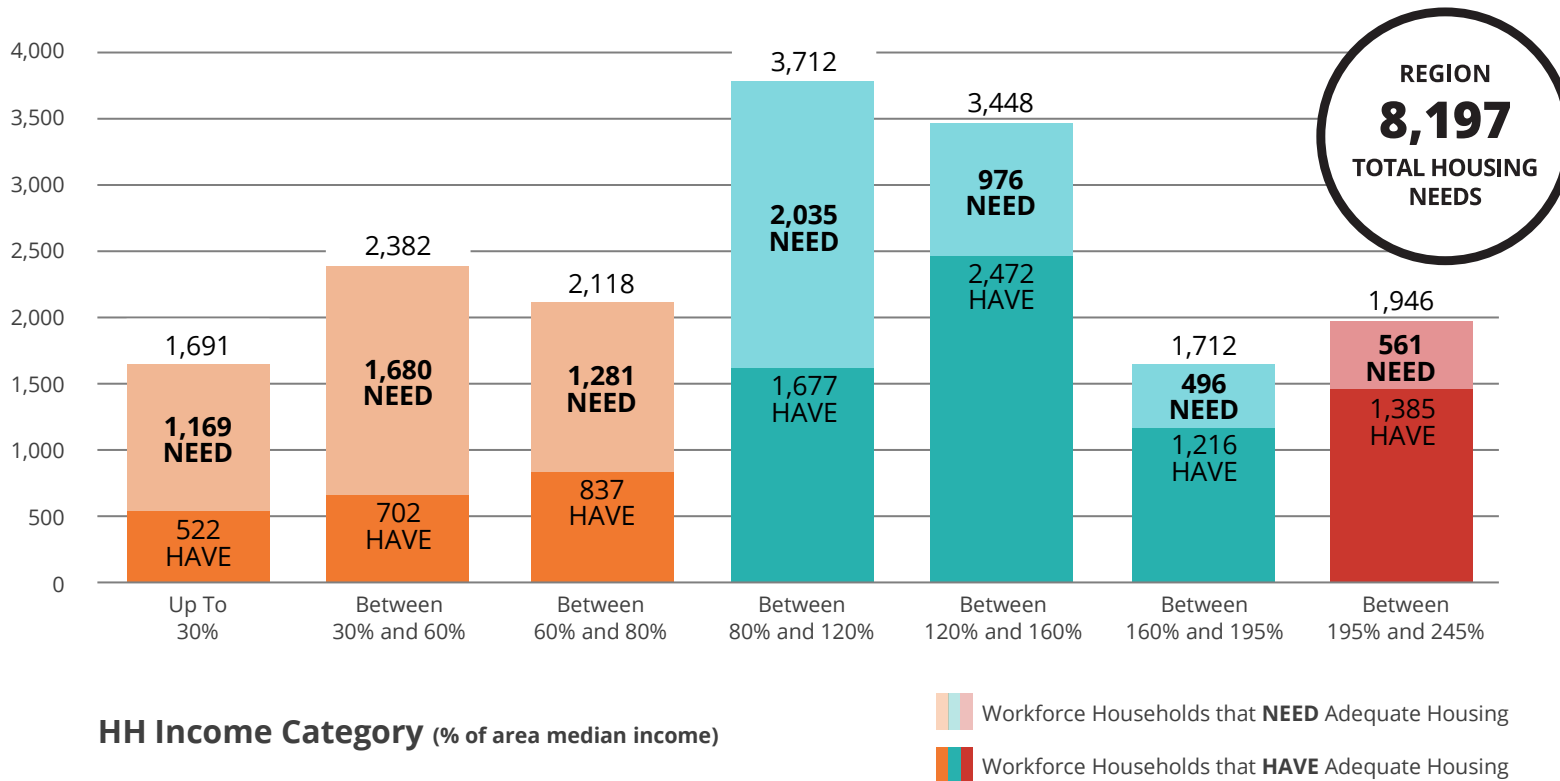
- Includes individuals in our community without dependable shelter
- Additional funding at time of count resulted in more people using available resources

REGIONAL UNMET NEED BY INCOME

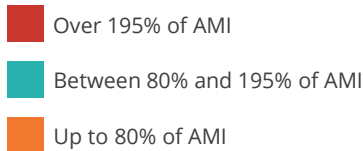
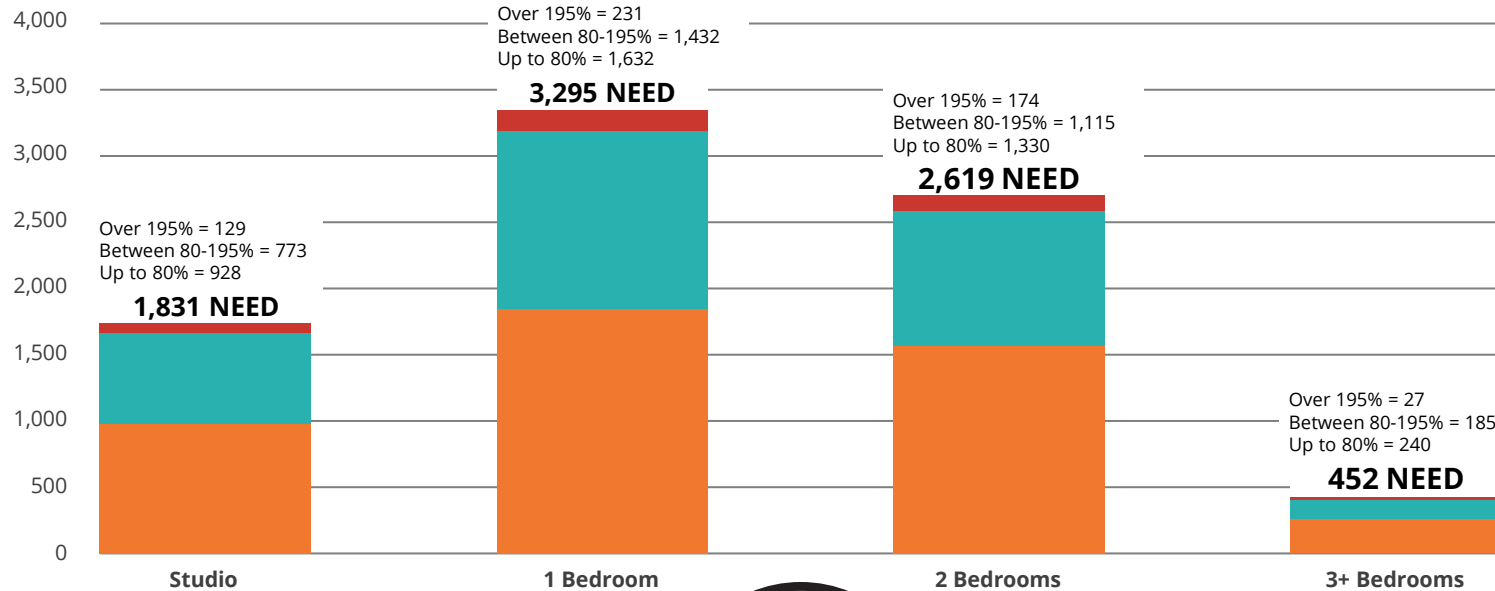


REGIONAL HOUSEHOLD NEED BY INCOME CATEGORY

All Workforce Households in Study Area



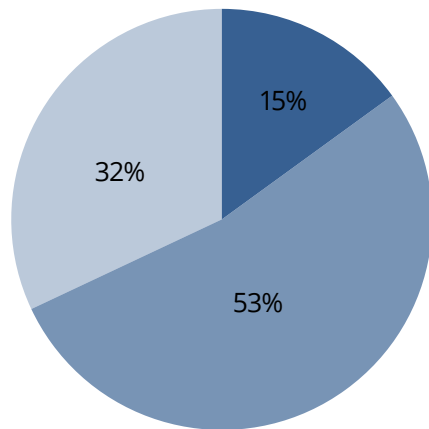
HOUSING NEEDS ESTIMATES – UNIT SIZES REQUIRED



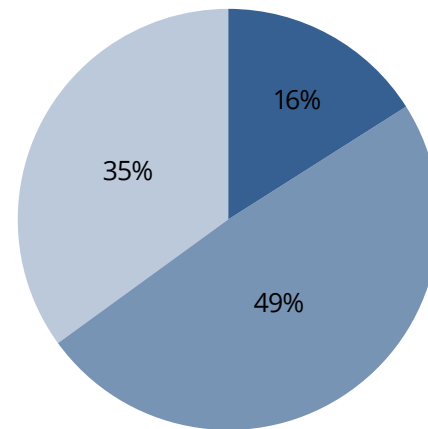
REGION
8,197
TOTAL HOUSING
NEEDS

REGIONAL HOUSEHOLD NEED BY AGE

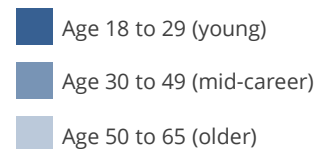
All Workforce Households in Study Area



Survey Respondents
Dissatisfied with Housing Situation



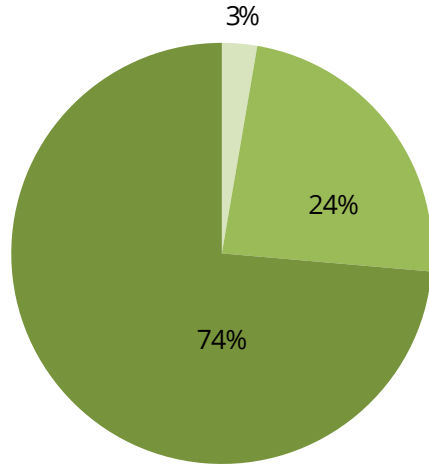
Population Total
in Study Area



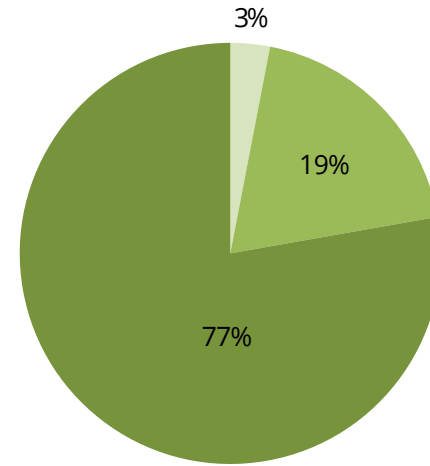
Source: MHC survey 2023, US Census American Community Survey 2017-21

REGIONAL HOUSEHOLD NEED BY RACE

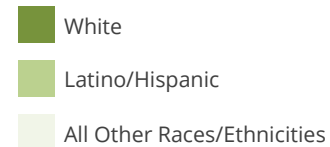
All Workforce Households in Study Area



Survey Respondents
Dissatisfied with Housing Situation



Population Total
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Source: MHC survey 2023, US Census American Community Survey 2017-21

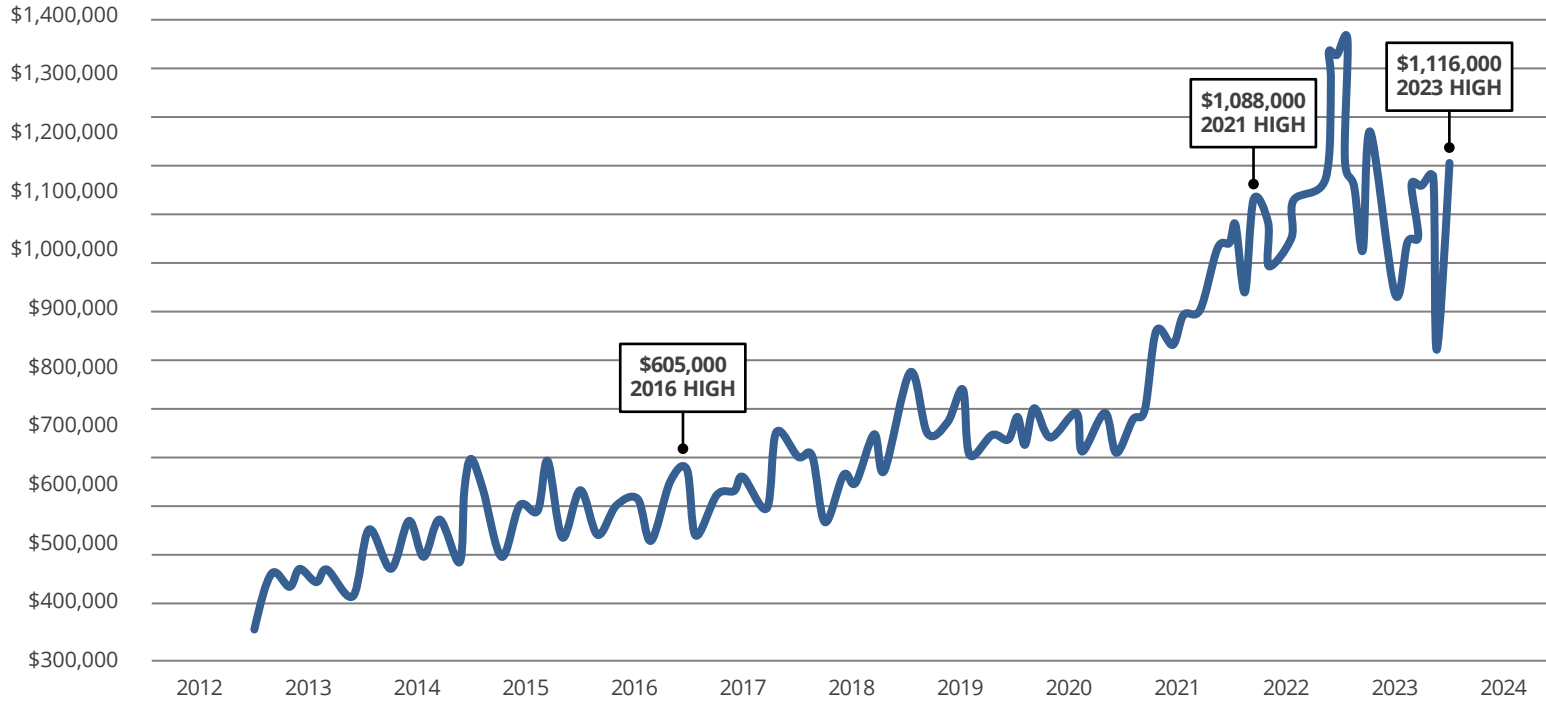
TRENDLINE ANALYSIS

2023 RESULTS vs. PRIOR STUDY YEARS (2016, 2021)

REGIONAL UNMET HOUSING NEED



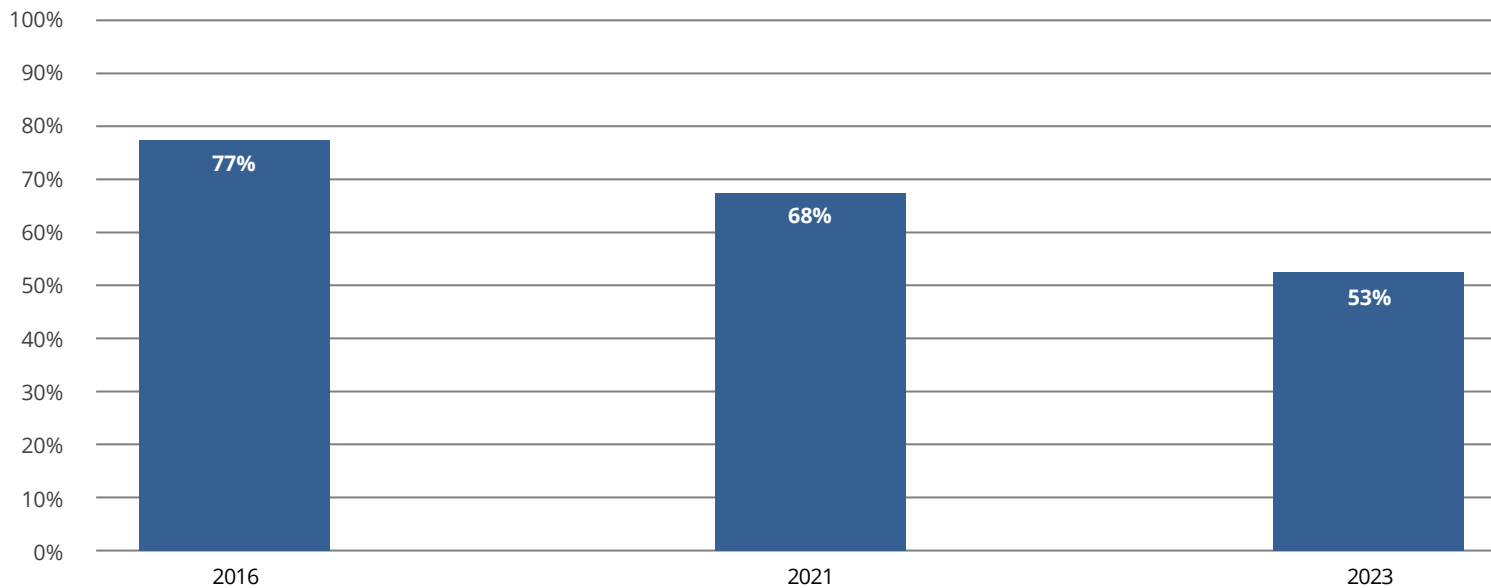
HOME SALE PRICES IN TRUCKEE



Source: Redfin Monthly Housing Market Data

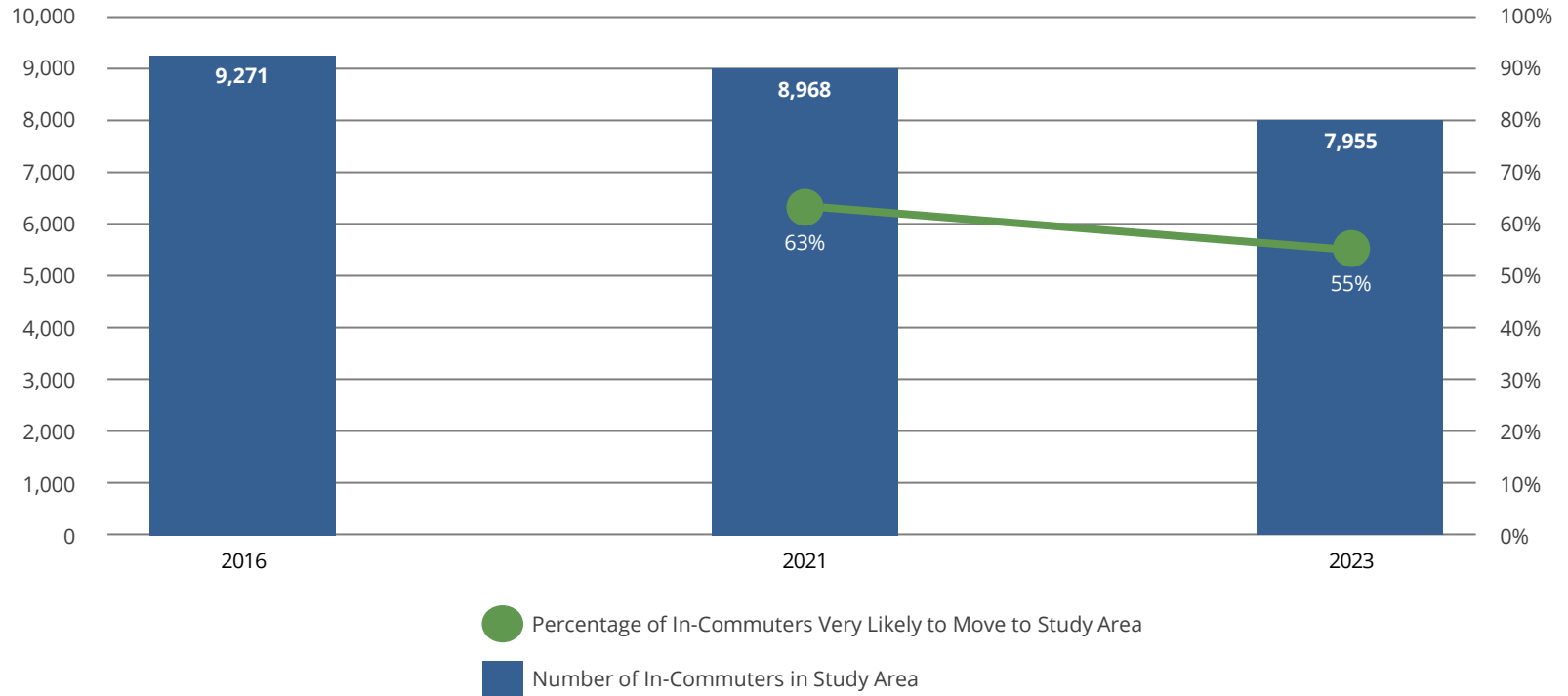
PERCENT OF OVERBURDENED HOUSEHOLDS

Households paying more than 30% of income towards housing costs



Source: Survey Response

IN-COMMUTERS



Source: MHC Employee Survey, 2023; LEHD, 2020

WHAT DID WE LEARN?



The study area's workforce faces varied housing needs – residents, in-commuters, seasonal workers, unhoused.



Survey data reveal that both employees and employers continue to struggle with housing and see it as a major issue.



However, as the region emerges from the pandemic, unmet housing need has declined since the last assessment in 2021.



Regular tracking of data can help inform MHC of program effectiveness and ongoing policy needs.

KEY TERMS AND DEFINITIONS

Resident Workforce. Working households, already residing in the Study Area

In-Commuting Workforce. Workers who are employed in the Study Area but live elsewhere

Seasonal Workforce. Workers who work in the Study Area on a seasonal basis

Homeless Population. People living and potentially working in the Study Area without a safe, secure, consistent place to live.

Households (HH). A household includes all the people who occupy a housing unit. (per U.S. Census Bureau)

Unit. A housing unit is a house, an apartment, a mobile home, a group of rooms, or a single room that is occupied (or if vacant, is intended for occupancy) as separate living quarters. Separate living quarters are those in which the occupants live and eat separately from any other persons in the building and which have direct access from the outside of the building or through a common hall. (U.S. Census Bureau)

Unmet Housing Needs (or inadequately housed households) refers to households who face 1 or more of these problems:

- 1) Overburdened (> 30% of income spent on housing)
- 2) Overcrowded (> 1 person per room)
- 3) Underhoused (lack of plumbing or kitchen facilities)

Adequate Housing: refers to households who do not face any of these housing problems:

- 1) Overburdened (> 30% of income spent on housing)
- 2) Overcrowded (> 1 person per room)
- 3) Underhoused (lack of plumbing or kitchen facilities)

SOURCES

- California Economic Development Department Employment Projections, 2020
- ESRI ArcGIS Business Analyst, 2022
- Mountain Housing Council, Employee and Employer Housing Survey, 2023
- U.S. Census, American Community Survey 5-Year estimates, 2017-2021
- U.S. Census, Longitudinal Employment-Household Dynamics Survey, 2020
- U.S. Census, Public Use Microdata Survey, 2021
- U.S. Housing and Urban Development, Comprehensive Housing Affordability Strategy Survey, 2015-2019
- U.S. Housing and Urban Development, Point-In-Time Count, 2023