



HOUSING NEEDS ASSESSMENT

MONO COUNTY

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Presented by

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BBC
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AGENDA

Study methodology

Preliminary research findings

Policy options

TOPICS

- § How difficult is it for permanent residents and workers to find housing in the county?
- § Do housing challenges limit employers' ability to retain and recruit workers?
- § What are the economic impacts of housing challenges?
- § What policy options are available to address housing needs?

METHODOLOGY

- § Employer survey
- § Permanent resident survey
- § In-commuter survey
- § Seasonal resident survey
- § Affordability analysis

Study complements town housing survey

Note: Survey was extended through spring months in order to get greater participation from residents and businesses whose communities and operations are closed during the winter.

EMPLOYER SURVEY

Purpose: To understand how housing challenges affect employment and employers' support for housing policies and programs

Methodology and response:

- § Available online
- § Marketed to employers by Mono County staff
- § 41 employers responded

EMPLOYER SURVEY

➤ Primary Industries Represented by Employer Survey

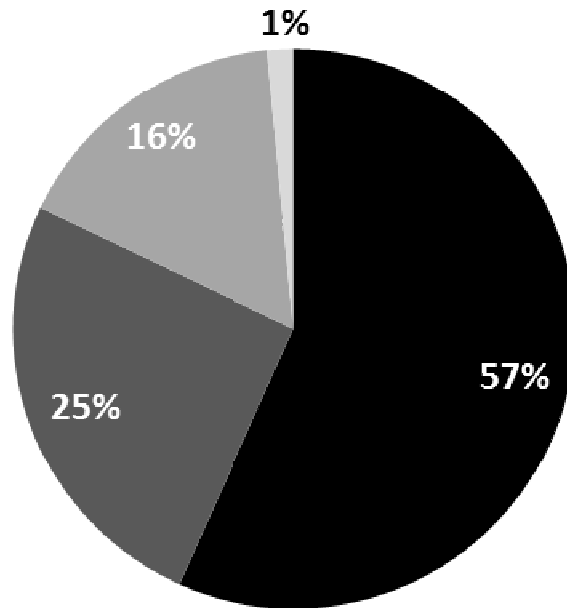
	No. of Responses
Housekeeping	14
Tourism	9
Government/Education	8
Retail/food	4
Ski industry	5
Nonprofit	4

➤ Most Common Location of Operations, Employer Survey

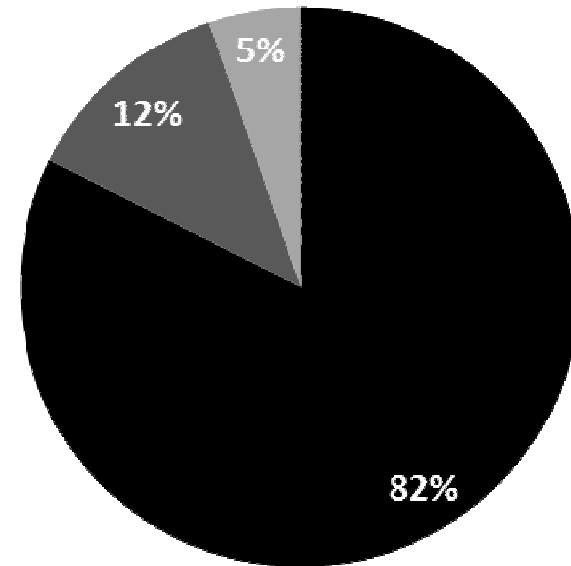
	No. of Responses
Mammoth Lakes	32
Lee Vining	7
June Lake	7
Bridgeport	6

EMPLOYER SURVEY

➤ How difficult is it for your employees to find a place to rent?



➤ How difficult is it for your employees to find a place to buy?

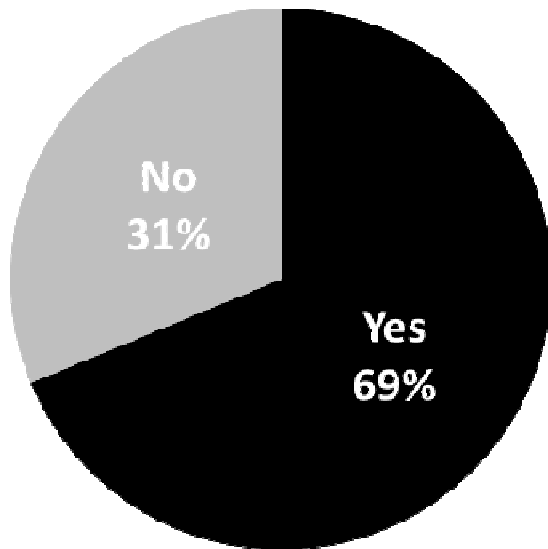


■ Very difficult
■ Difficult
■ Easy
■ Very easy

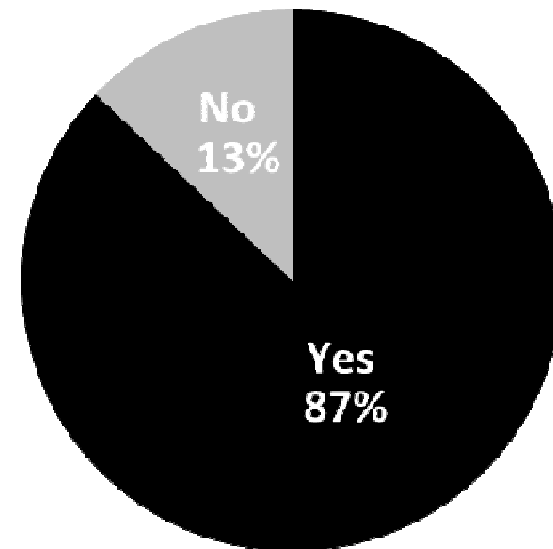
“ ‘Impossible’ is closer to the fact rather than ‘Very Difficult’ ”

EMPLOYER SURVEY

➤ In the past two years, have you had trouble retaining employees due to housing conditions in Mono County?

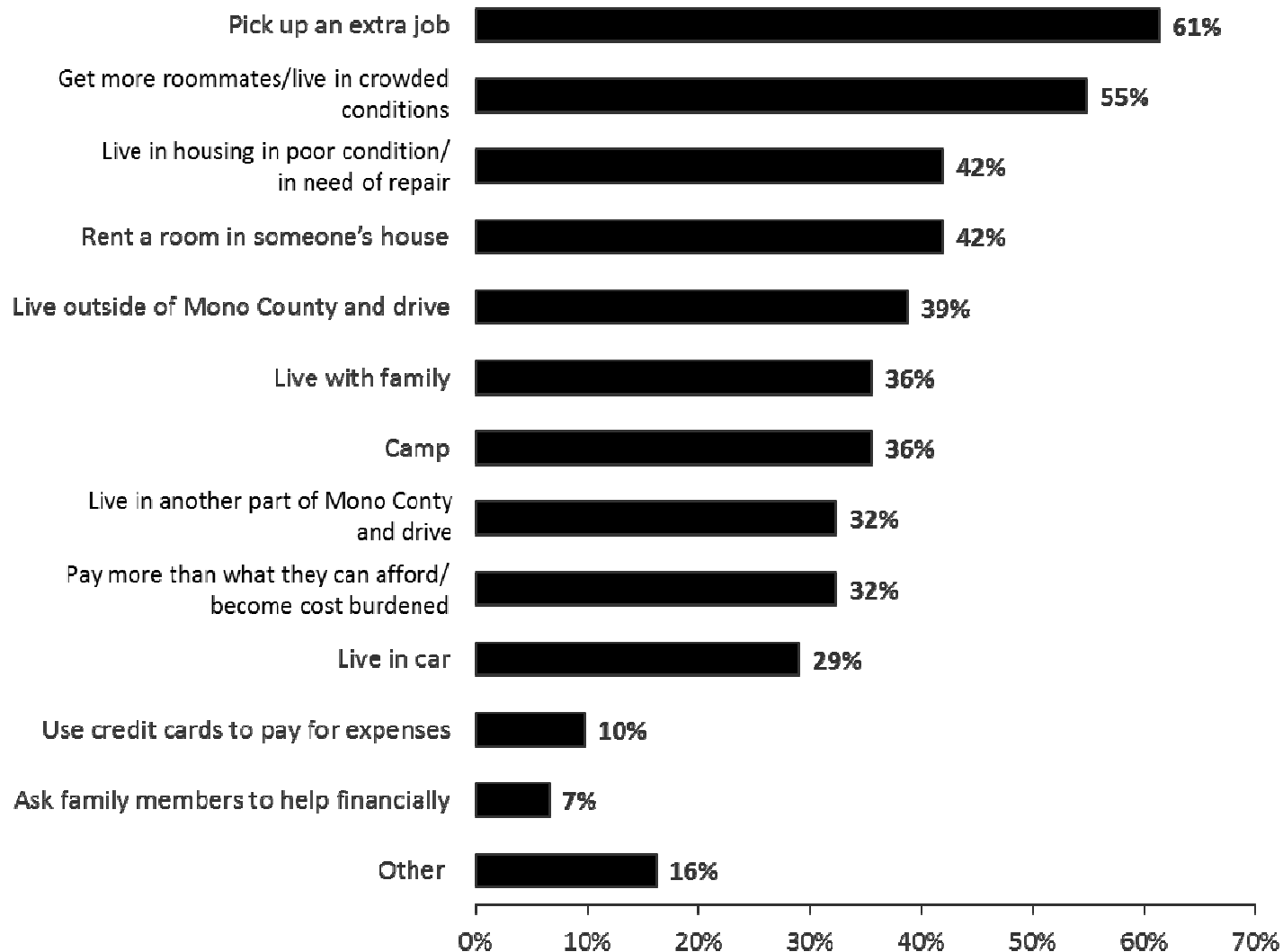


➤ In the past two years, have you had trouble recruiting employees due to housing conditions in Mono County?



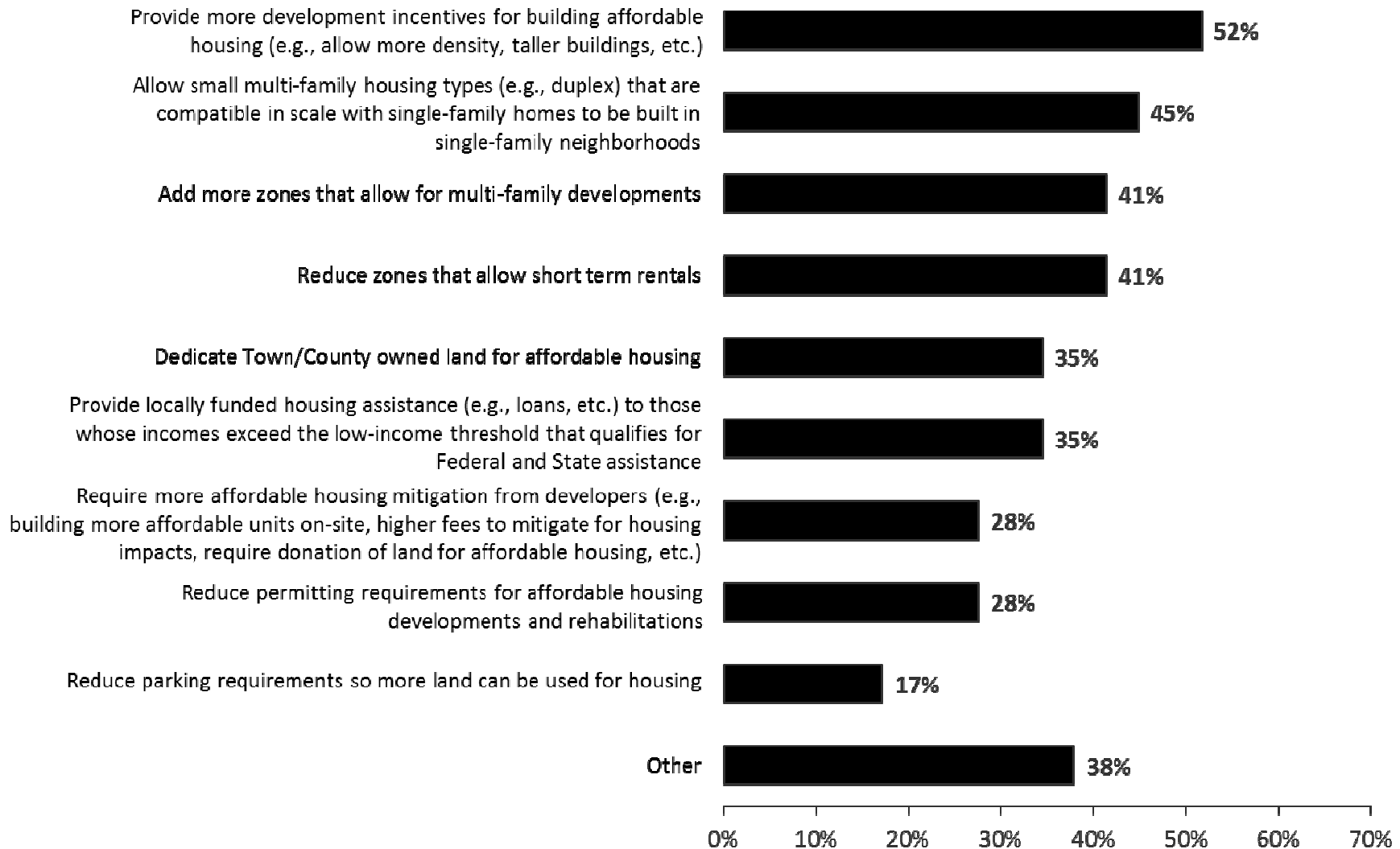
EMPLOYER SURVEY

➤ What are the most common ways your employees adjust when they cannot find housing to meet their affordability needs and/or preferences?



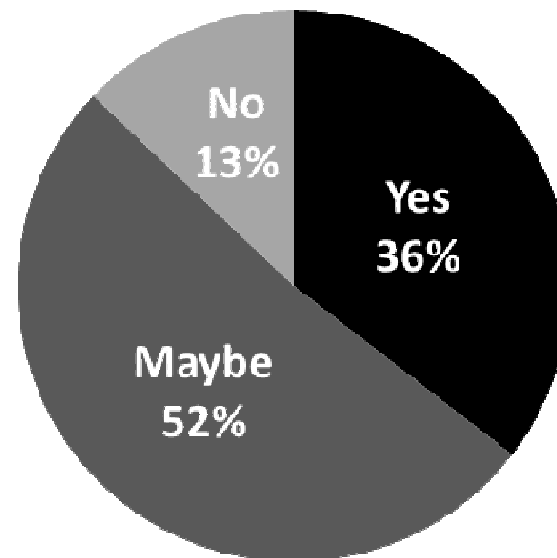
EMPLOYER SURVEY

➤ Are there any Town or County policies you would change to increase housing affordability and availability?



EMPLOYER SURVEY

- Would you be interested in contributing to finding solutions for workforce housing challenges in Mono County?



EMPLOYER ESTIMATE OF EMPLOYMENT GROWTH

Twenty of the 41 employer respondents expect their workforce to grow in the next 5 years

Estimate of need:

- § 64 new FTEs year around,
- § 70 new PTEs year around,
- § 84 new FTEs during peak season,
- § 76 new PTEs during peak season

RESIDENT SURVEY

Purpose: To collect data on housing costs, housing affordability challenges, and greatest housing needs

Methodology and response:

- § February 2017 telephone survey targeted to low income areas and low income residents
- § March-May 2017 Online survey targeted to Mono County residents
- § Available in English and Spanish
- § 868 online survey respondents, 301 telephone survey

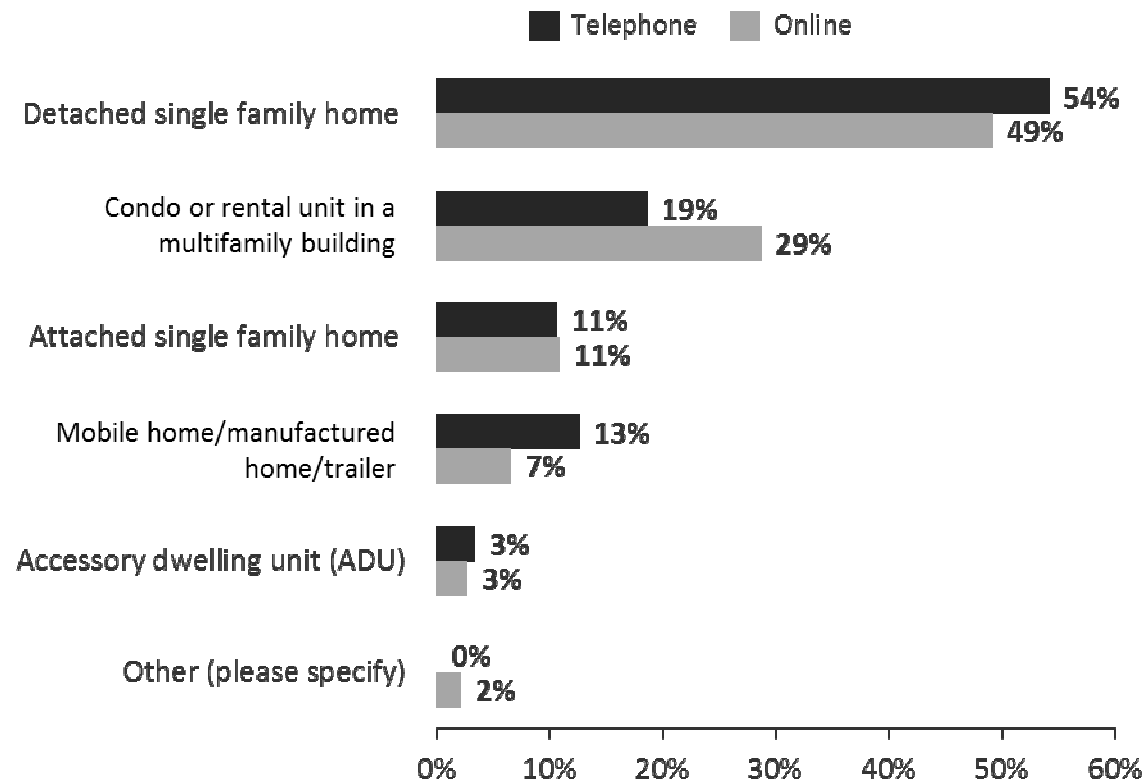
RESIDENT SURVEY

➤ Where do resident survey respondents live in Mono County?

Place of Residence	Online survey	Telephone survey
Mammoth Lakes	66%	55%
Crowley	8%	2%
June Lake	7%	7%
Bridgeport	6%	0.3%
Walker	2%	5%
Sunny Slopes	2%	0.3%
Lee Vining	2%	1%
Swall Meadows	2%	-
Coleville	1%	8%
Chalfant Valley	1%	5%
Benton	1%	3%
Other Mono County	2%	13%

RESIDENT SURVEY

➤ What type of housing do you currently live in?



About half of respondents live in single family homes.

4% of online and 6% of telephone respondents live in **employer-provided** housing.

4% of online and 10% of telephone respondents live in **affordable (subsidized)** housing.

51% of online and 70% of telephone respondents are **homeowners**.

RESIDENT SURVEY

➤ Who lives in subsidized and employer housing?

Compared to other Mono County residents:

§ Residents living in **employer-provided** housing are:

More likely to be single or living with roommates

As likely to have children

More likely to live alone *or* to live in households of five or more

§ Residents living in **subsidized housing** are:

More likely to be living with a partner and children

More likely to have children

More likely to live in households of three or four members

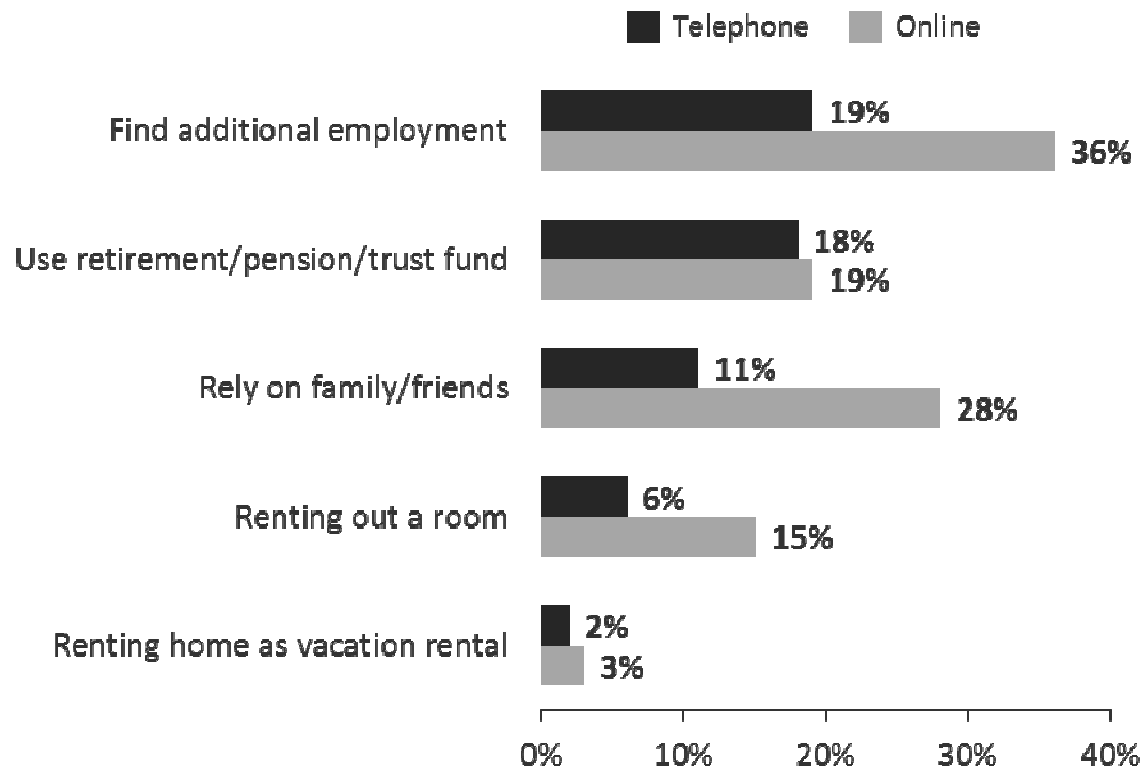
RESIDENT SURVEY

Housing preferences and displacement:

- § Permanent residents place high value on ownership (unusual for resort area)
- § Cost of housing is top consideration across resident types
- § In the past three years between 13% (telephone) and 29% (online) of renters have had to move out of a Mono County unit when they did not want to move due to. Top reasons include:
 - Owner selling the unit
 - Damage to unit/unit became unlivable
 - Rent increased more than I could pay
 - Personal reasons

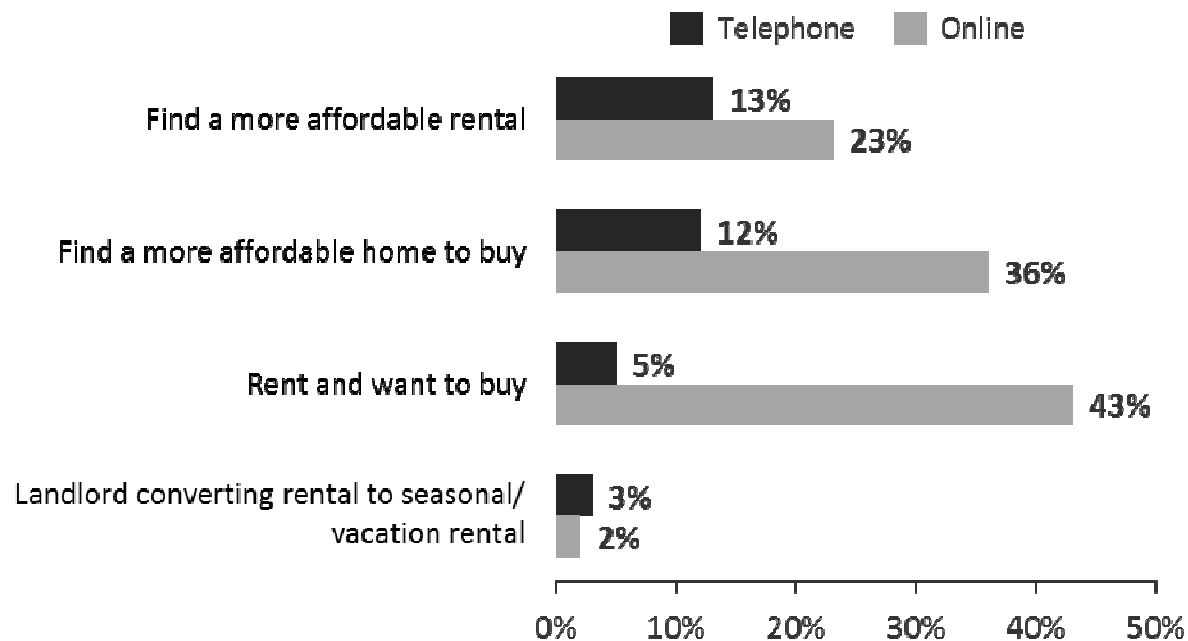
RESIDENT SURVEY

➤ Other strategies to afford housing:



RESIDENT SURVEY

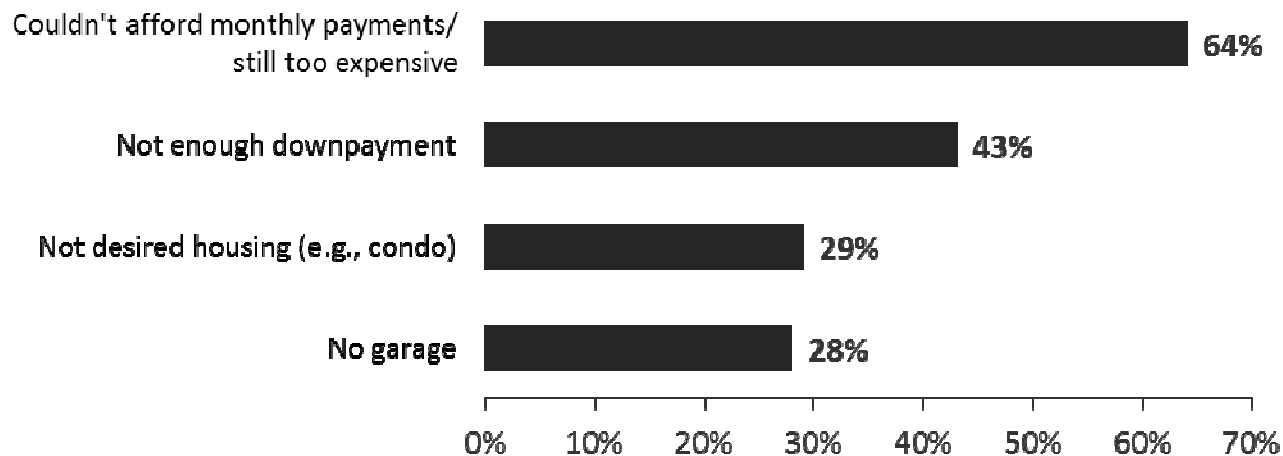
Plan to move in the next five years—25% phone, 32% online. Primary reasons residents plan to move (note, online could choose up to three responses, phone only their top reason):



RESIDENT SURVEY

Interest in assisted ownership:

- § Among renters, 1/3 would be very interested in buying an affordable home in Mono County with a deed restriction (no difference between phone and online)
- § One in five renters who responded to the online survey have looked into affordable ownership in the past. Top reasons why they did not buy:



RECAP

- § How difficult is it for permanent residents and workers to find housing in the county? Very difficult. Too few units available to rent or buy and those that are available are too expensive.
- § Do housing challenges limit employers' ability to retain and recruit workers? Yes: 69% of employers say housing challenges limit their ability to retain workers; 87% say housing challenges inhibit their ability to recruit workers

RECAP

- § What are the economic impacts of housing challenges? Limited housing could inhibit economic growth and the ability of employers to retain and recruit workers.
- § What policy options are available to address housing needs? For discussion, next slide

POLICY OPTIONS

Could more housing be created through...

- § Promote acquisition of homes that may come for sale in the next 5 years?
- § Incentivizing property owners to convert vacation homes or short term rentals into long term rentals?
- § Incentivizing homeowners to build ADUs for long term affordable rentals?

Could more housing be created through leveraging state funding?

- § NOFA issued in September. Pairing downpayment assistance with new development and leveraging land donations for new construction

POLICY OPTIONS

How can the county work with employers? Top policy options supported by employers:

- § Development incentives for building (60%)
- § Allow small multi-family housing types (e.g., duplex) that are compatible in scale with single-family homes to be built in single-family neighborhood (48%)
- § Add more zones that allow for multi-family developments (48%)

Employers want to help find solutions for workforce housing. About 10% would contribute financially to support affordable housing. Two in five would join a task force. 70% would come to a meeting or receive email updates.

NEXT STEPS

In the process of evaluating survey findings against policies and programs that have been successful in peer communities to determine the most feasible, effective, and successful options for Mono County.

Will take into account recommendations from Mammoth Lakes Community Housing Action Plan, released July 2017

QUESTIONS FOR THE COUNTY TO CONSIDER

1. What is the appetite and capacity to donate land to support affordable housing development?
2. What is the county's appetite for acquiring seasonal units when they are for sale and deed-restricting them for affordable use?
3. What is the county's appetite for encouraging ADU development?
4. How can the county convince employers to participate in housing creation and preservation?

QUESTIONS AND DISCUSSION