
APPENDIX B
GRASS VALLEY EMPLOYEE AND
EMPLOYER SURVEYS

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Grass Valley Employer Needs Assessment And Employee Housing Study 2004

INTRODUCTION

The City of Grass Valley initiated a study in February 2004 to understand commercial space needs of local employers and the housing needs of the local workforce. The purpose of the Employer Study was to gain a more detailed understanding of Grass Valley's supply of business park land and to determine whether it is adequate and suitable to meet the present and future needs of local employers. The purpose of the Employee Study was to understand the local housing needs of the workforce in terms of current housing, preferred types of housing and locational considerations. This report provides an overview of the results of these surveys and highlights the key findings from responses.

METHODOLOGY

Two surveys were conducted to assess employer business needs and employee housing needs in the Grass Valley region: an Employer Survey (sent randomly to 200 businesses) and an Employee Survey (distributed randomly to at least 2,000 employees with the help of each employer surveyed). While the surveys were primarily focused on Grass Valley businesses (both in the incorporated city and unincorporated surrounding area), surveys were also distributed to businesses in Nevada City, Penn Valley and Rough and Ready. Given that employee housing needs tend to be a regional issue and that many Grass Valley residents work in other communities, survey distribution was designed to include a sampling of businesses from these regional communities. Further, Grass Valley was also interested in understanding the needs of business-park businesses in particular. As a result, a separate list of 100 business-park establishments in the Grass Valley area were sent only Employer Surveys to help boost this sample of responses. In total, 300 employer surveys distributed.

The goal in distributing the surveys was to ensure that each employer and employee (in both the private and public sectors) in the region had an equal chance of being surveyed. At the same time, it was also recognized that in Nevada County a relatively small number of establishments have a comparatively large number of employees and that special efforts needed to be made to ensure that such firms, and a portion of their employees, were represented in the results. Therefore, a list of the top 20 employers in the Grass Valley/Nevada City area was acquired and the research team personally contacted each of these employers to explain the study and request their participation. These businesses were also provided the option of paper surveys (to be distributed randomly among their employees) or a web survey, which could be sent to all their employees with email/internet access. There were generally positive response to both methods, with many businesses electing to participate using a mix of paper and web surveys.

Another 180 businesses were selected at random throughout the Grass Valley/Nevada City region from lists acquired from the Grass Valley Chamber of Commerce and the Nevada County Economic Resource Council. These businesses were contacted by phone, then mailed a packet of surveys, including one Employer Survey and Employee Surveys for each employee of their business.

Finally, about 100 businesses in business parks were selected in the Grass Valley area to receive an employer survey only.

In total, 104 employer surveys and 557 employee surveys were completed. This represents a solid response rate of 35 percent for the employer survey and an estimated 26 percent employee response rate (based on the 2,000 survey distribution goal¹). About 78 percent of the responding businesses were located in Grass Valley and the remaining 22 percent were in Nevada City.

Upon review of the employee survey responses, it was found that single-family home households were slightly overrepresented and, correspondingly, mobile homes and households in multi-family units (apartments, condominiums/duplexes, etc.) were underrepresented for residents of Grass Valley compared to the 2000 US Census. Therefore, the data was weighted based on type of unit to more closely resemble the mix of housing unit types existing in the area.

AN OVERVIEW OF THE SURVEY RESPONSES

The results of the two survey programs are summarized in the Appendix. Questionnaires are provided with responses noted. Typically responses are identified as percentages with the symbol “N” used to identify the number of responses to a particular question. Average or “mean” responses, along with median responses, are also provided where appropriate.

In the following analysis it should be noted that the survey results were intended to be used together with other sources of information. These include U.S. Census results and other data that have been summarized in the Grass Valley Annexations Study Baseline Report, May, 2004, prepared by Applied Development Economics. The method used to collect survey data, that is, the combination of employer and employee surveys, is designed to target working households. The survey results, therefore, cannot be generalized to all residents of the area given that seniors and other groups that are often not employed will be underrepresented. However, because the focus of the research was on issues related to expansion of employment, and the related topics of jobs and housing balance, it was felt that the appropriate research technique should emphasize the perceptions and experiences of employed households.

For reference, a summary of existing occupancies of housing units is presented below. Based on the U.S. Census, this table provides an estimate of owned and rented units in Grass Valley, Nevada City and the County as a whole.

¹ The employee survey response rate is not known precisely, since we cannot be sure that every contacted employer distributed all of their employee surveys. Also, for the web survey version, it is not clear what proportion of the employees who have email took the survey. Regardless, for purposes of this study, the key issue is that a large, representative sample was obtained and can be used for analysis.

Rental/Owner Occupancies in Grass Valley and Region – 2000

| | Total Housing Units | Owner Occupied Housing Units | Renter Occupied Housing Units | Total Occupied Units | Percent Owner Occupied |
|---|---------------------------|---------------------------------------|--|----------------------------|------------------------------|
| Nevada County | 44,282 | 27,958 | 8,936 | 36,894 | 75.8% |
| Western Nevada County | 33,234 | 23,560 | 7,448 | 31,008 | 76.0% |
| Grass Valley/Highway 49 Corridor Sub-Area (1) | 20,549 | 14,321 | 5,145 | 19,466 | 73.6% |
| Grass Valley (City) | 5,266 | 2,209 | 2,807 | 5,016 | 44.0% |
| Sub-Area Remainder | 15,283 | 12,112 | 2,338 | 14,450 | 83.6% |
| Nevada City Sub-Area (2) | 8,093 | 5,639 | 1,665 | 7,304 | 77.2% |
| Nevada City (City) | 1,399 | 794 | 519 | 1,313 | 60.5% |
| Sub-Area Remainder | 6,694 | 4,845 | 1,146 | 5,991 | 80.9% |
| Highway 20 Corridor Sub-Area (3) | 4,592 | 3,600 | 638 | 4,238 | 84.9% |

The Employer Survey

Profile of Responding Businesses

As noted above, 104 local employers responded to the Employer Survey. They ranged in size from 1 to 870 employees, employing a combined total of 3,250 employees in the area.

As summarized on the Survey instrument (see Appendix), the respondents included a mix of professional/business services – 31 percent, manufacturing – 25 percent, retail – 9 percent, construction/trades – 7 percent, transportation/communication/utilities – 4 percent, real estate – 4 percent, etc. The sizes of responding businesses are summarized in the table below.

Size of Responding Businesses

| Number of Employees | U.S. Census | | 2004 Employer Survey | |
|---------------------|-------------|-------------|----------------------|-------------|
| | # Responses | % Responses | # Responses | % Responses |
| 1-4 | 567 | 54% | 37 | 36% |
| 5-9 | 211 | 20% | 18 | 17% |
| 10-19 | 158 | 15% | 21 | 20% |
| 20-49 | 88 | 8% | 17 | 16% |
| 50-99 | 22 | 2% | 5 | 5% |
| 100-249 | 8 | 1% | 4 | 4% |
| 250-499 | 1 | 0.1% | 1 | 1% |
| 500+ | 1 | 0.1% | 1 | 1% |
| TOTAL: | 1,056 | 100% | 104 | 100% |

As shown above, a good representation of middle-sized firms (between 10 to 49 employees) responded to the survey, comprising 36 percent of responses. In comparison, middle-sized firms represent about 23 percent of firms in community based on the US Census. In reviewing the results, keep in mind that the tenants of business parks were over-sampled in this process in an effort to more fully understand the special needs of the manufacturing sector and those businesses that might have special spatial needs.

Business Space Needs

The primary objective of the Employer Survey was to improve our understanding of business space needs in Grass Valley and in the greater Western Nevada County area. Based on survey results:

- Current Space. About 33 percent of respondents reported that their present occupied space “meets current requirements and allows for future expansion.” About 57 percent reported that their space “meets current space requirements, but does not allow for future expansion.” About 9 percent reported that their present space does not meet current needs.
- Expansion Plans. About 34 percent of respondents reported they anticipate expanding either their exterior or interior space within the next three years. About 87 percent of the respondents that anticipate expanding reported that they will be able to meet their expansion needs in Grass Valley. In other words, the strong majority of respondents believe that they will be able to meet their expansion needs in Grass Valley.
- Availability of Space. When asked to comment on the availability of space for future planned expansion needs, respondents indicated some concern for prices and available parking, with a few indicating a need for more business park land, as shown below. However, survey respondents did not indicate great concern for expansion opportunities, either in the quantitative measurement of those anticipating expanding or in the comments.
 - ♦ Earmark more space (with adequate zoning) for business growth
 - ♦ Ease restrictions on commercial development
 - ♦ It is very limited for land in light mfg. sites
 - ♦ More public parking/structures
 - ♦ Not enough space now and what is available has a "triple-net" lease clause! Not desirable
 - ♦ Our plans are for people who will work from home exclusively - we contract out all physical warehouse and distribution so that our core is customer care and operations and R&D
 - ♦ Parking is always an issue
 - ♦ Supply of commercial land and buildings is diminishing quickly and prices are high
 - ♦ Too expensive
 - ♦ We need a "planned" industrial area - water, power, natural gas etc.
 - ♦ We need more commercial/business lands in Grass Valley/Nevada County - more business park property and keep fees down

Likelihood Of Leaving The Area

Employers were asked, “Looking to the future, what is the likelihood that your business will leave the Western Nevada County area?” About 10 percent responded “somewhat likely,” but no respondents selected “very likely.” In other words, there is a segment of the business community that believes additional land for expansion would be beneficial, but the data indicate that less than one in ten local businesses would consider moving from the area. A profile of businesses “somewhat likely” to leave is provided below:

- Businesses “somewhat likely to leave” include manufacturing (30 percent), professional/business services (20 percent), and personal services (20 percent). In other words, those likely to leave are not concentrated in a particular sector.

- About 67 percent of businesses indicating they are “somewhat likely to leave” the area believe they would be able to meet their expansion needs in Grass Valley/Nevada County. This indicates that factors other than space needs are driving their decision to move their business.
- In a separate question most businesses anticipate leaving the area entirely (70 percent), with 10 percent saying they are likely to move to Placer County. This suggests that most businesses are not looking to move elsewhere in Western Nevada County; rather, they anticipate leaving the County.
- Anticipated space needs of these businesses vary between 3,000 and 20,000+ square feet of additional interior space.
- Businesses “somewhat likely to leave” report peak employment in 2003 of an average of about 7 employees; these are not large employers, but they are also not single person enterprises. This is positive in that survey results do not suggest that large employers are intending to leave the area due to space needs.

Preferred Type of Building

The survey asked respondents that are looking to expand their space what type of building/addition they would most likely use. Responses indicated a mix of building types is desired, with no single form of construction dominating over others. This suggests, from a policy standpoint, that efforts should be made to continue to provide a mix of commercial building options rather than concentrating on any single type of product or space. These findings merit consideration as zoning and design guidelines are considered within newly developing areas.

Most Likely Type of Building/Addition

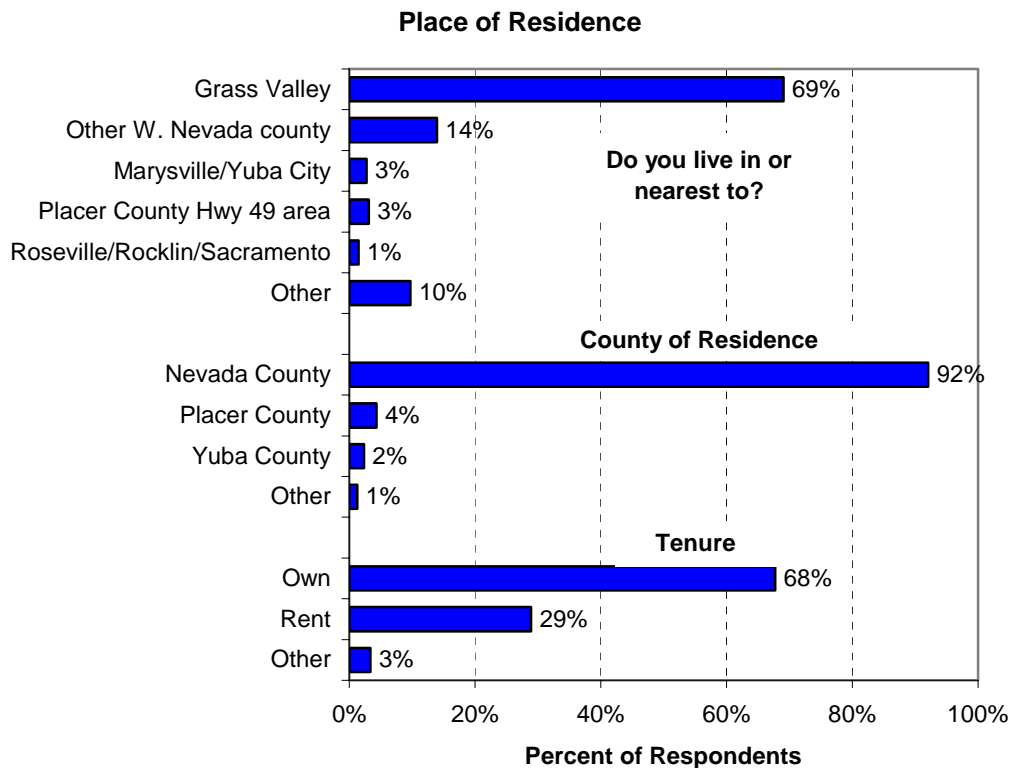
| | % of Respondents |
|-------------------------------------|-------------------------|
| A metal or concrete “tilt up” | 32% |
| Flex space with truck doors in back | 26% |
| Traditional office building | 24% |
| Front loaded office space | 3% |
| Other (“cool space downtown” etc.) | 15% |

Source: 2004 Employer Survey

The Employee Survey

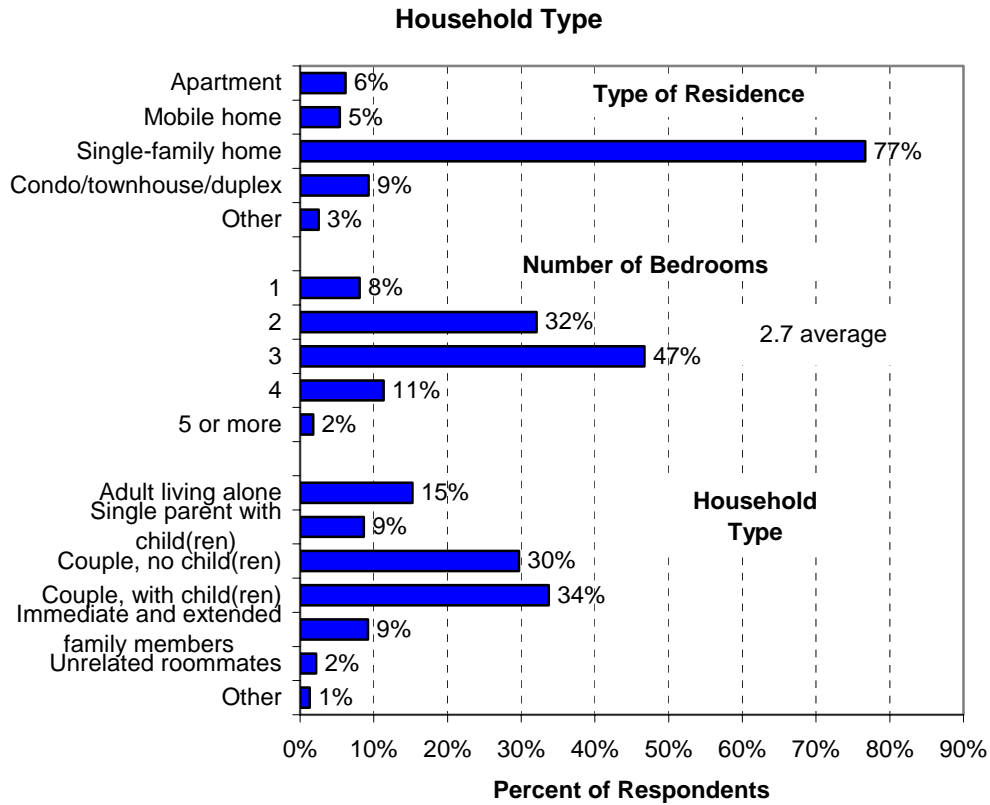
Demographics

- Place of Residence of Respondents.** The employee survey included responses from residents of Grass Valley (69 percent) as well as other local communities including “Western Nevada County” (14 percent), Marysville/Yuba City (3 percent) and the Placer County Highway 49 area (3 percent). About 41 percent of respondents reported that they live within city/town limits, and 59 percent reported they reside in the unincorporated areas. About 92 percent live in Nevada County.
- Tenure.** Survey respondents represented a good mix of owner and renter households, where 68 percent of respondents own their home, including 45 percent of City of Grass Valley residents and 79 percent of respondents living elsewhere. These ratios are similar to those represented by the 2000 US Census.



Source: 2004 Employee Survey

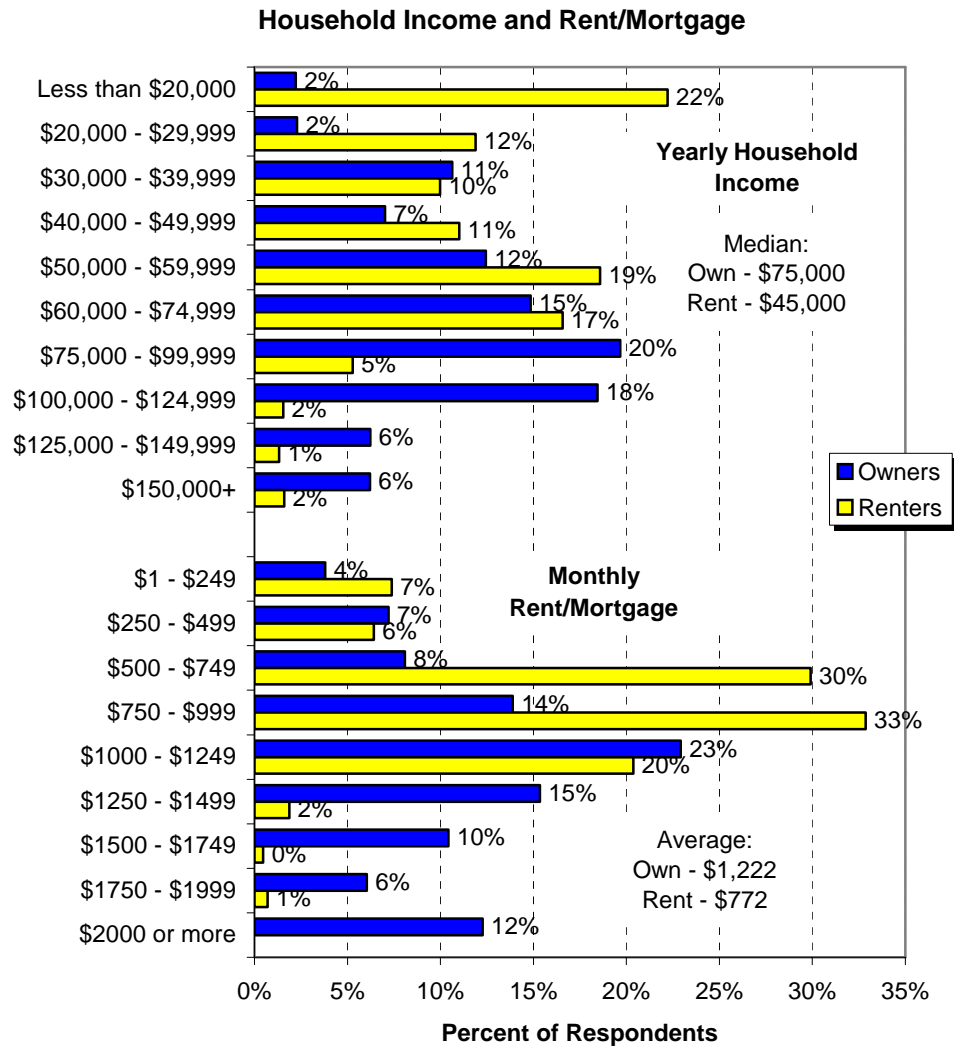
- Household Characteristics.** The majority of respondents reside in single-family homes (77 percent), reside in 2 and 3-bedroom units (79 percent) and are couples (30 percent) or couples with children (34 percent).



Source: 2004 Employee Survey

Household Income and Housing Payments

- Income and Rent/Mortgage.** Owner households, not surprisingly, are generally more affluent (\$75,000 median household income) than renter households (median households income \$45,000). Mortgages are also generally higher (\$1,222 on average) than rents (\$772 on average).



Source: 2004 Employee Survey

- **Cost Burdened Households.** Comparing housing costs to household income, we can determine the percentage of respondents that are “cost-burdened,” defined in this analysis as households paying over 30 percent of their income for housing costs. As shown below, about 19 percent of owners and 28 percent of renters pay over 30 percent of their income toward housing.

| Percent of Household Income Used to Pay Rent/Mortgage | Owners | Renters |
|--|--------|---------|
| Less than 30% | 81% | 72% |
| 30 to 49% | 16% | 20% |
| 50% or more | 3% | 7% |

Source: 2004 Employee Survey

- **Households By Area Median Income (AMI) - Definition.** Using the results from the employee survey, we are able to evaluate how incomes are distributed throughout Area Median Income (AMI) categories, as defined by the Department of Housing and Urban Development (HUD). Area Median Incomes (AMI) by household size for Nevada County, as reported by HUD, are as follows:

**HUD AMI Household Income Levels:
Nevada County, 2004**

| AMI Category | Size of Household | | | | |
|--------------|-------------------|----------|----------|----------|----------|
| | 1-Person | 2-Person | 3-Person | 4-Person | 5-Person |
| 30% AMI | \$13,350 | \$15,250 | \$17,150 | \$19,100 | \$20,600 |
| 50% AMI | \$22,250 | \$25,450 | \$28,600 | \$31,800 | \$34,350 |
| 60% AMI | \$26,700 | \$30,540 | \$34,320 | \$38,160 | \$41,220 |
| 80% AMI | \$35,600 | \$40,700 | \$45,800 | \$50,900 | \$54,950 |
| 100% AMI | \$44,500 | \$50,900 | \$57,200 | \$63,600 | \$68,700 |
| 120% AMI | \$53,400 | \$61,080 | \$68,640 | \$76,320 | \$82,440 |

Source: Department of Housing and Urban Development (HUD)

These income guidelines are important because they are typically used to establish housing targets and thresholds for different local housing efforts, where programs and policies needed to target community housing needs vary within each AMI group. For example,

- At the lowest income levels (less than 50% AMI), homelessness and the threat of homelessness are important issues. Additionally, special populations who are unable to work (e.g. seniors and the disabled) may require assistance at the lower income levels. Affordability problems, especially for renters, may also be present in this group. These are typically households who would be eligible for different forms of housing assistance.
- As incomes near the median (80 to 120% AMI), households begin to approach the point where they can buy their first home. Policies at this level are typically designed to help bring homeownership within reach.

- Finally, at the higher levels (120% AMI and higher), upper income groups fuel the market for step-up and high-end housing.

Further, given their broad application, these income guidelines are used for many housing programs and assistance, including Private Activity Bond Allocations, Low Income Housing Tax Credits, and Section 8 Rent Subsidy and related housing programs.

Despite the unique needs of households within different AMI groups, it is important to note that their housing issues are interrelated – as households gain in income and buy larger or more expensive units, they free up housing resources for lower income groups. What has been occurring over time in most communities, however, is that the value of homes and rising rental rates have increased faster than increases in wages. This results in a greater challenge for households earning incomes that fall within the low to moderate- income ranges to be able to purchase their first home. This is one reason that more local housing strategies are focused on this income group than in the past. Typically, housing that is affordably priced within the low to moderate income range is targeted toward the majority of a community's workforce.

- Households By Area Median Income (AMI) – Survey Results. Based on employee survey results, households fall into the following AMI categories. Owner households are most likely to earn over 120% of the area AMI (57 percent), compared to only 19 percent of renters. Renters are more likely than owners to earn less than 80% AMI (56 percent) than owners (18 percent). Of interest is that a similar percentage of owners and renters earn between 80 and 120% AMI (25 percent each).

| AMI Category | Overall | Own | Rent |
|-----------------|---------|-----|------|
| 30% or less AMI | 2% | 1% | 5% |
| 30.1% - 50% AMI | 10% | 3% | 28% |
| 50.1% - 60% AMI | 6% | 5% | 8% |
| 60.1% - 80% | 11% | 9% | 15% |
| 80.1 to 120% | 25% | 25% | 25% |
| OVER 120% AMI | 46% | 57% | 19% |

Source: 2004 Employee Survey

It should be noted that household incomes of survey respondents are generally higher, on average, than exist in the community as a whole. Given that the survey methodology incorporated only worker households and did not specifically seek to survey the unemployed population in Grass Valley (retirees, etc.), we expect survey responses to skew toward higher incomes than exist in the community as a whole. However, the survey results permit us to look at needs and preferences of households earning different AMI levels by breaking the results into AMI segments, as shown above. In other words, taken as a whole, survey responses under-represent households earning less than 50% AMI, but sufficient response exists for us to analyze the housing requirements, preferences and needs of these lower income households in the community.

Employment and Commuting

- **Place of Work of Respondents.** A majority of respondents (80 percent) reported they work in Grass Valley. However, frequently other adults in the household work elsewhere in the area with 53 percent working in Grass Valley and 23 percent in “other Western Nevada County areas,” 14 percent in Roseville/Rocklin/Sacramento metro area, 8 percent in Placer County, etc. In other words, it is not uncommon to have two workers in a household with one of the two working in Grass Valley and the other working somewhere else.
- **Where Grass Valley Workers Live.** Given that the largest percentage of surveys were distributed through Grass Valley area businesses, information on where Grass Valley workers live can be evaluated through survey responses. Results show that about 75 percent of employees in Grass Valley live in or nearest to the City of Grass Valley, with another 13 percent living in another Western Nevada County area and about 2 percent living in Marysville/Yuba City. This shows that the vast majority of Grass Valley workers tend to live in the local area.

| Where Grass Valley Workers Live | Percent of Respondents |
|--|------------------------|
| Grass Valley | 75% |
| Other Western Nevada county | 13% |
| Marysville/Yuba City | 2% |
| Placer County Highway 49 - Auburn to Nevada County | 2% |
| Roseville/Rocklin/Sacramento metro area | 1% |
| Other | 7% |

Source: 2004 Employee Survey

Based on the 2000 US Census County-to-County Worker Flow files, about 87 percent of workers in Nevada County also live in Nevada County. Of interest is that the percentage of Grass Valley workers that live in Nevada County is similar, at about 88 percent, based on employee survey results.

- **Where Grass Valley Residents Work.** Because the employee survey was distributed through place of work rather than through households, the employee survey is not a good indicator of where Grass Valley residents work. However, based on the 2000 US Census, only about 43 percent of Grass Valley residents reported working within the City of Grass Valley. At the county level, about 72 percent of Nevada County residents work within the County, with about 13 percent working in Placer County, 5 percent in Sacramento County and about 3 percent in Washoe County, Nevada. This indicates that the Grass Valley area and other regions of Nevada County also provide housing for persons that work outside of the region.
- **Travel Time to Work.** Based on employee survey responses, the current travel time to work averages about 15.7 minutes. This is lower than that for Nevada County as a whole (about 24 minutes) and for the state of California (about 27 minutes) as determined from the 2000 Census.
- **Persons and Employees Per Household.** The survey also asked how many persons lived in each household and how many adults (age 18 or over) in respondents’

households were currently employed. Based on responses, it was found that each household has about 2.7 persons on average, with 1.7 employed adults. This varies by household type, where, not surprisingly, adults living alone show the lowest number of household members and employed adults (1.0 on average). Couples with children and households with immediate and extended family members have the largest households (3.8 and 3.6 persons on average, respectively) and unrelated roommates have the largest number of employed adults in their household (2.6 on average).

| Household Type | Average Number of Persons Per Household | Average Number of Employed Adults Per Household |
|---------------------------------------|---|---|
| Adult living alone | 1.0 | 1.0 |
| Single parent with child(ren) | 2.7 | 1.3 |
| Couple, no child(ren) | 2.0 | 1.7 |
| Couple, with child(ren) | 3.8 | 2.0 |
| Immediate and extended family members | 3.6 | 2.0 |
| Unrelated roommates | 2.6 | 2.6 |
| OVERALL AVERAGE | 2.7 | 1.7 |

Source: 2004 Employee Survey

Housing Perceptions

- Evaluation of the Problem of Finding Affordable Housing.** The survey evaluated the “problem of finding affordable housing for people who work in Grass Valley,” through which it was found that housing is viewed as a “serious” or “critical” problem by a very high 72 percent of respondents. It is notable that this question has been asked in a number of other communities through similar housing surveys and, in our experience, the perception of an affordable housing problem is more strongly held in the Grass Valley area than in many of the other communities where this question has been asked.

It was also found that housing was identified as a serious or critical problem by many households regardless of their length of time in the area, household income, type of unit currently resided in, and a series of other questions. The following chart shows these results by tenure. As is typically seen in most communities, a larger percentage of renters find housing to be a more serious problem than owners (86 percent “more serious” or “most critical” problem). However, in the Grass Valley area, a significant percentage of owners are still likely to feel housing is a critical or serious issue (65 percent). This finding is important in that it provides an indication that housing issues resonate with most in the Grass Valley community, regardless of household type, tenure and economic position.

“How do you feel about the problem of finding housing in Grass Valley that is affordable for people who work in the City of Grass Valley?”

| | All Respondents | Owners | Renters |
|--|-----------------|--------|---------|
| It is the most critical problem in the city | 27% | 19% | 47% |
| One of the more serious problems in the city | 45% | 46% | 39% |
| A problem among others needing attention | 22% | 26% | 12% |
| One of our lesser problems | 4% | 5% | 1% |
| I don't believe it is a problem | 3% | 4% | 1% |

Source: 2004 Employee Survey

Finally, comparing responses from those residing within the City of Grass Valley and those in other areas of Western Nevada County, we find that there is strong sentiment that housing is the “most critical” problem in Grass Valley (45 percent), whereas only 18 percent of respondents living elsewhere felt the same. However, one-half of households living outside of the City of Grass Valley still felt the problem was one of the “more serious,” as did 31 percent of Grass Valley households. On the other end of the scale, only 1 percent of incorporated Grass Valley residents selected “I don’t believe it’s a problem.”

“How do you feel about the problem of finding housing in Grass Valley that is affordable for people who work in the City of Grass Valley?”

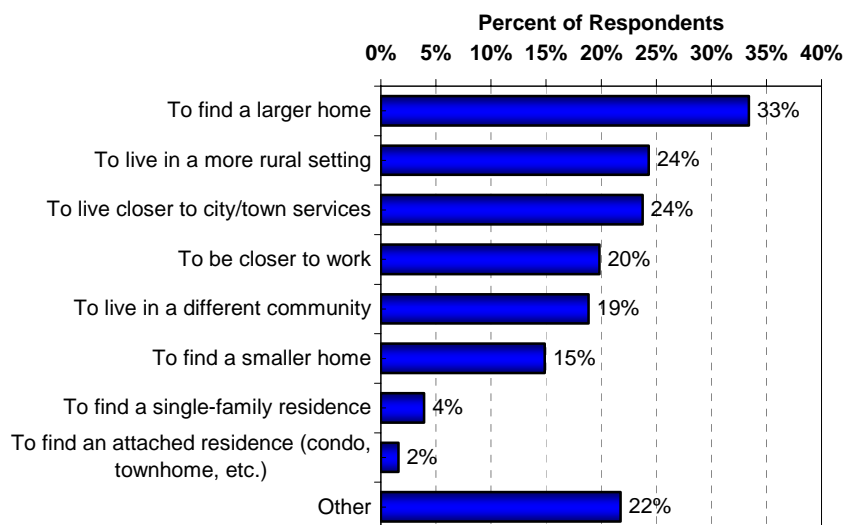
| | Incorporated Grass Valley | Other Area |
|--|------------------------------|---------------|
| It is the most critical problem in the city | 45% | 18% |
| One of the more serious problems in the city | 31% | 50% |
| A problem among others needing attention | 20% | 23% |
| One of our lesser problems | 2% | 5% |
| I don't believe it is a problem | 1% | 4% |

Source: 2004 Employee Survey

Housing Preferences

- **Interest in a New or Different Home.** The data measure current interest in new homes or different homes by owners and renters alike. About 28 percent of current owners indicated interest in a new or different home. Among those that are interested, 33 percent would like to find a larger home and an equal 24 percent would like to live in a more rural area or closer to city/town services. About 15 percent are looking for a smaller home. Additional reasons are summarized below:

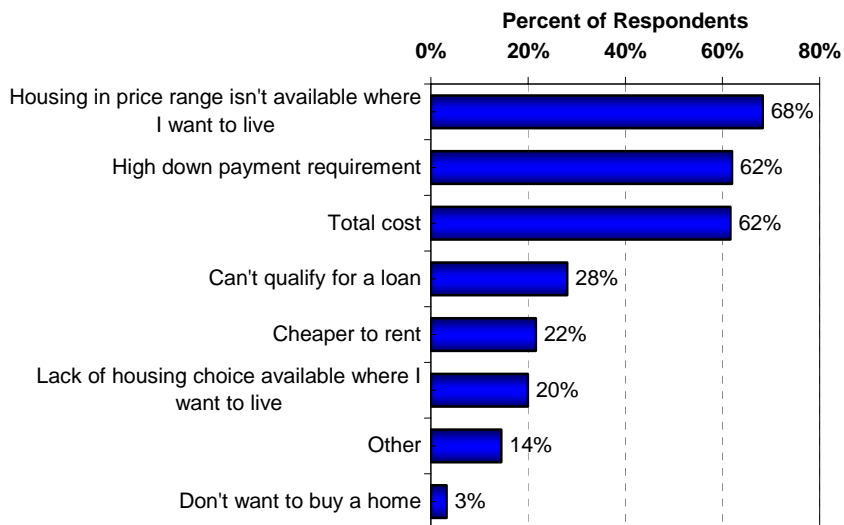
“If you own a home and would consider buying a different one, why?”



Source: 2004 Employee Survey

- Reasons Renters Do Not Own.** The survey also asked renters about their reasons for not purchasing a residence. As summarized below, price, down payment and total cost factors were most often identified. In addition, some reported that they could not qualify for a loan, and a lesser number indicated that it is cheaper to rent. Only 3 percent identified the fact that they did not want to buy a home. Taken in total, the results show very clearly that cost factors are the greatest impediment to renters obtaining housing in Grass Valley.

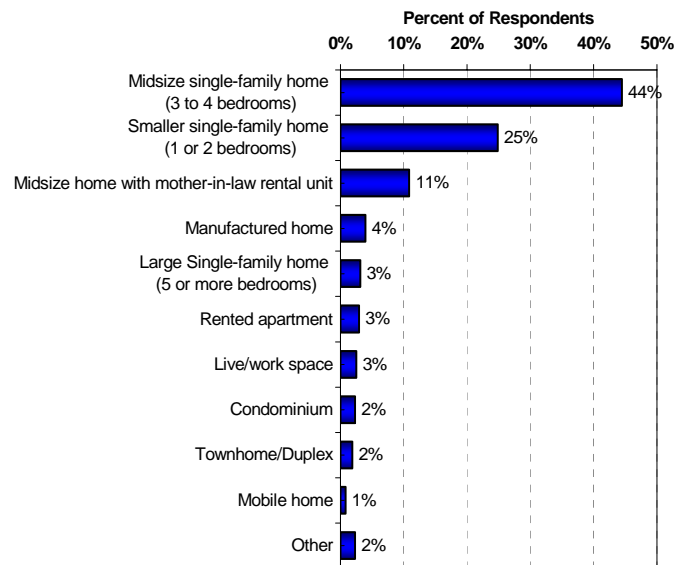
"IF YOU ARE A RENTER OR DO NOT OWN YOUR RESIDENCE:
Why have you not bought a home?"



Source: 2004 Employee Survey

- Types of Homes Preferred.** The survey also probed interest in homes of various types. The most popular choice for respondents was a "midsize single family home" (58 percent) followed by a "smaller single family home – 1 or 2 bedrooms" (35 percent). When asked, "realistically, which type of home would you most likely choose from the list above," the most identified choices by far were the modest sized single family residences. Other choices such as attached units (condominiums and townhouses), as well as manufactured and mobile homes were relatively low rated choices.

“REALISTICALLY, which type of home would you MOST likely choose from the list above?”



Source: 2004 Employee Survey

The following section identifies the type of residence that respondents who indicated they are interested in buying a new home (28 percent of owners and 97 percent of renters) would “realistically most prefer.” These preferences are broken out by household incomes of respondents, providing a general sense of price ranges of units that would need to be considered for these households to afford their preferred units.

| Preferred Residence | Yearly Household Income | | | | |
|---|-------------------------|----------------------|----------------------|----------------------|-------------------|
| | Less than \$35,000 | \$35,000 thru 49,999 | \$50,000 thru 74,999 | \$75,000 thru 99,999 | \$100,000 or more |
| Rented apartment | 5% | 9% | 1% | 7% | 2% |
| Mobile home | 13% | 3% | 0% | 0% | 0% |
| Manufactured home | 17% | 6% | 4% | 4% | 0% |
| Condominium | 0% | 0% | 1% | 4% | 0% |
| Townhome/Duplex | 2% | 3% | 1% | 0% | 0% |
| 1 or 2 bedroom single-family home | 38% | 19% | 26% | 15% | 24% |
| Live/work space | 5% | 0% | 1% | 0% | 7% |
| 3 to 4 bedroom single-family home | 13% | 56% | 51% | 52% | 52% |
| Midsize home with mother-in-law rental unit | 5% | 3% | 10% | 15% | 7% |
| 5+ Bedroom Single-family home | 2% | 0% | 3% | 4% | 7% |
| N= | 45 | 37 | 64 | 30 | 45 |

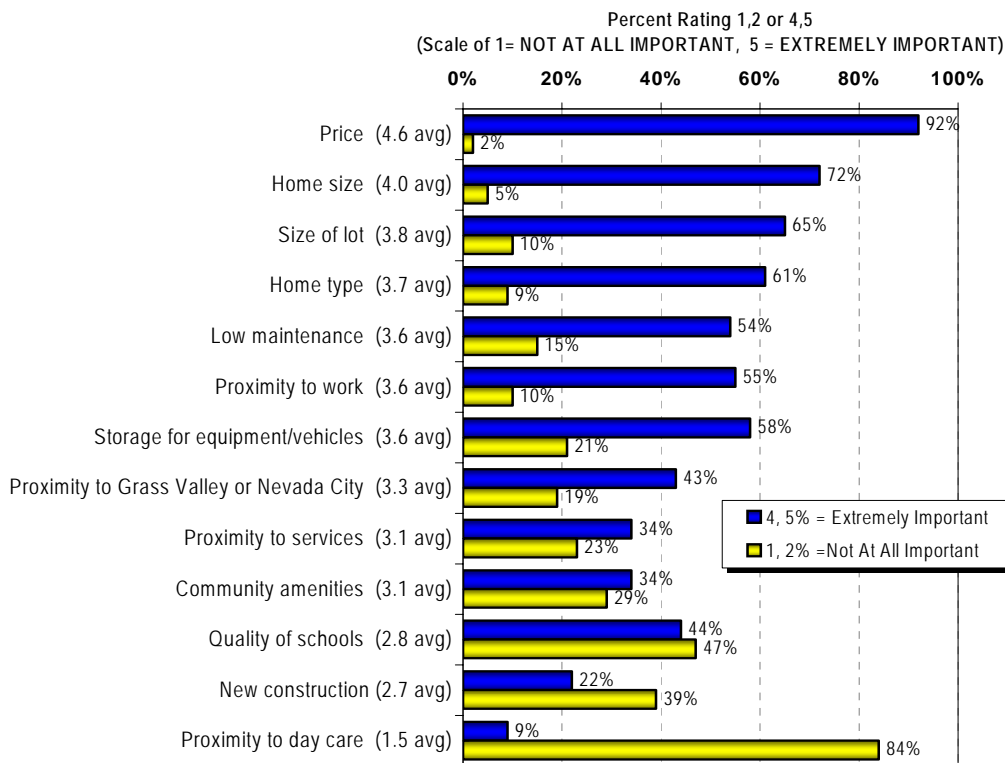
Source: 2004 Employee Survey

These results merit attention as Grass Valley considers various options for providing or assisting in the creation of workforce housing. The data suggest that there is a mix of unit types in demand, but there are also significant limitations on the capacity of local workers to afford more expensive products because of limited incomes (wages). Therefore, any strategies that are adopted will have to take into account income thresholds. Similarly, as the relationship between jobs and housing are considered from

a policy standpoint, it will be appropriate to consider the likely wage structure associated with new jobs and to anticipate the associated needs of work force that may need to be housed in Grass Valley or the surrounding areas.

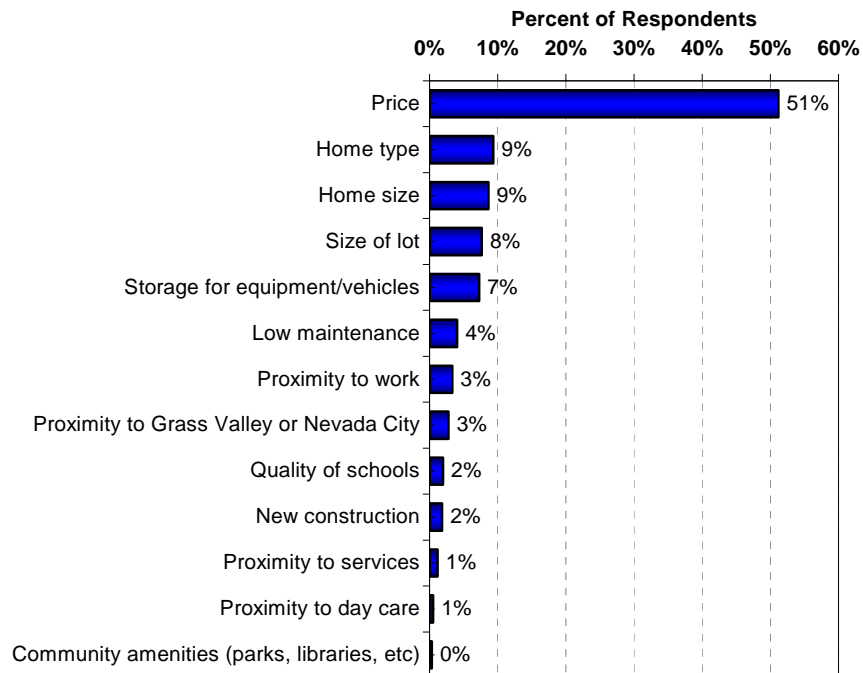
- Importance of Factors in Choosing a Home.** The survey also asked respondents to identify the importance of various factors in choosing a home, and also the most important single factor in home choice. The results show clearly the importance of price. While proximity to work is a factor for many (55 percent) proximity to community amenities and day care were relatively unimportant. In other words, in the constrained market of Grass Valley today, price and home/lot size are the primary considerations. Other factors are of relatively less importance. These results are further illustrated by the graph below which portrays the “most important factor” for looking for a different home. It shows clearly the domination of price and size as primary factors.

“Please indicate how important the following factors are to you if you were looking for a different home.”



Source: 2004 Employee Survey

“From the list above, what do you expect would be the one most important factor in choosing a new home?”



Source: 2004 Employee Survey

Comments and Suggestions Concerning the Availability of Housing

The survey also provided an opportunity for locally employed residents to offer comments and suggestions regarding the availability of housing. The comments are dominated by concerns and frustrations with the current housing situation and serve to reinforce the quantitative survey findings regarding the perception of the housing problem, discussed above. Respondents mention lack of choice, escalating rents, low wages, competitive pressure from move-in (retirement) households and the need to take action. These comments provide additional insight and a “real world” perspective that adds to our understanding of the current sentiment of the Grass Valley community concerning housing today. These comments are provided below:

- ◆ Affordable homes are desperately needed for hard working, responsible single parents
- ◆ Affordable housing is really hard to find. Grass Valley is a really expensive place to live and I have lived here for 46 years and cannot afford to buy a home so I'm paying someone else's mortgage instead of my own.
- ◆ Affordable to the "working class" is critical. Low income housing is OK but now we have just the two extremes and VERY little in between.
- ◆ All of the homes in a reasonable price range are small fixer-uppers in pretty poor shape. By the time you spend all the money to repair them it's ridiculous and you're almost better off to just rent. Plain and simple - the home prices in Nevada County need to come down. Also, more condos/townhomes should be built on the outskirts of town so people have more options to buy affordable housing, but it should be owner occ. only so wealthy people don't buy it all and turn into rentals.
- ◆ As a real estate agent, I can say without doubt, that more houses or duplexes, condo's ect. between 190K and 250K are in great demand. Some zoning variances would be helpful. (sic)

- ♦ At today's prices of housing I doubt I will be able to afford housing and feed my family on city wages, but I have to commute and live in pine cone heaven :-) Unfortunate to not be able to afford a house in the town that I work for.
- ♦ Buying a home for a low income family in Nevada City and Grass Valley is impossible!!!!
- ♦ California and Nev County in general is a VERY expensive place to live! We're paying \$1200 for a teeny little house! (Can't get ahead)
- ♦ Cater more to the needs of Grass Valley natives than to new people moving here. We are the reason it has stayed beautiful here, and that is why they want to move here.
- ♦ County needs to clean up crack and meth houses. Too many "junk yard" looking houses.
- ♦ Couples with children need more programs to purchase homes that are affordable realistically - with all the other bills to be paid. Better 1st time buyers loans etc.
- ♦ Create single family housing with decent size lots that through special program (private or public) that working class people can comfortably afford to own via some special financing program. There always seems to be plenty enough money available for war but it's always a problem finding money for people's needs.
- ♦ Home rents and ave. home price too high for working couples
- ♦ Housing costs are going up MUCH faster than wages of the area. I can't afford anything in the area. To buy a home I have to look 40+ miles out of the area. I can barely afford that.
- ♦ Housing in Nevada County is not affordable. People from Bay Area sell their high priced homes and it seems they are the ones who can afford to live here. I have lived here all my life and I really don't want to leave, but may someday be forced to. Hope not because we love it here.
- ♦ Housing is difficult and I will most likely relocate due to this difficulty
- ♦ Housing is not only an issue within the city but county. I'd prefer to live outside city limits due to the traffic congestion and the problem youth that wander around.
- ♦ I am against Grass Valley growing too much with the 4 or 5 proposed annexations. There are too many people here already thank you.
- ♦ I have pets - finding an apartment is impossible. Has to be small house with trees and garden spaces.
- ♦ I love this town, it would be nice if I could live in the same community that I provide service to. Things have gotten too expensive and out of control. It would be nice if the city could find a way to provide cheaper homes for its employees. I've heard of cities offering home repo to employees first. Something like that would be nice.
- ♦ I would like to buy a home but not having a down payment is a large problem
- ♦ In Nevada City there are a lot of people living alone in big houses. This is a poor utilization of resources - if there were more small-but-attractive units - e.g. the duplexes at 600 Searls in N.C. - this would free up the larger dwellings (or so I think).
- ♦ It appears rezoning, or increasing allowed density within or near the city limits, and more aggressive annexations would lower new home costs and allow for more work force housing
- ♦ It is a crisis. My rent went from \$293 to \$570 in only four years! I was retired, but it forced me to go back to work at 71 years of age!
- ♦ I've lived in Nevada County for 20 years and watched the area turn into a retirement/recreation destination for the well to do. I don't believe these types of people have any dedication to the community and their money only drives up the cost of living here. This is not a sustainable arrangement in the long run and I believe we encourage this at the expense of our souls.
- ♦ Many families we know who work in G.V./N.C. area are financially unable to purchase a home here
- ♦ More housing for people on disability
- ♦ More low income homes for families are needed, reasonable rates on rentals
- ♦ Need more workforce housing like the Highland project
- ♦ Not my household but most folks who work in this area and did NOT buy before 1990 are essentially out of luck as far as ownership possibilities go

- ◆ The problem is the availability of low-income apartments, waiting lists are through the roof. And double that for 3 bedroom.
- ◆ There are few availabilities out there, but the quality of the houses are poor in comparison to the price they're asking for
- ◆ Too expensive to live in Nevada County. Pay wages are low.
- ◆ Townhomes are as expensive as a midsize single-family home (\$260,000 to \$350,000) - I'm sure this is due to their low supply in housing market.
- ◆ Wages in G.V. and N.C. do not support the cost of living for lower and middle class families. It's DEPLORABLE. It amazes me that, for the amount of \$ that lives in this county, we have so many families who are barely surviving or on welfare. The unbelievable low wages also bring unwanted crime. I know this because I was in law enforcement for 15 years. The county needs to take a step back and get a good look. Better wages - lower crime!!
- ◆ We are currently in our first house that we've owned. When we began looking (in 2000) we were shocked by how unaffordable housing was in the County. The housing market vs. typical income is completely out of adjustment. We feel that the average young people can not start out in this area unless they commute to work. We were lucky.
- ◆ We only qualify for a \$200,000 home approx. There is so little to choose from that are NOT falling apart or in the middle of nowhere.
- ◆ Workforce housing is not the only need. Truly moderate priced housing is needed.

Other Reason to Purchase a Different Home

- ◆ Build new house
- ◆ Can not deal with the manager's of park (they are awful) (sic)
- ◆ Children's activities
- ◆ Closer to kids' schools
- ◆ Cost less, reduce expenses
- ◆ Different floor plan, more windows
- ◆ Divorce
- ◆ Find home with granny house
- ◆ Find something less expensive
- ◆ Flat grade
- ◆ Home with more acreage
- ◆ Husband wants a big shop and more acreage
- ◆ Larger home to have in home work area
- ◆ Less expensive so we can retire
- ◆ New relationship - we'd like to start out in a place new to us
- ◆ Possibly build a home
- ◆ Smaller for future retirement
- ◆ To have a little more land
- ◆ With a rental unit on site

Other Reason You Have Not Purchased a Home

- ◆ Bad credit
- ◆ Can't afford mortgage payment, but pre-qualify for loan
- ◆ Can't qualify for amount needed
- ◆ Don't make enough to qualify for some loans and make too much to qualify for others! Started a home-based business so we can buy a home because jobs just don't cut it as far as getting you beyond living paycheck to paycheck.

- ◆ Free rent living with parents
- ◆ In Sierra College
- ◆ It's hard to qualify for a high loan
- ◆ Just now able to enter the market
- ◆ Live in home owned by family
- ◆ Live with mom
- ◆ Median home price is WAY out of reach and I am not willing to live in Alleghany!
- ◆ Nearly impossible if you are employed in Nevada County!
- ◆ Nevada County housing is way too high!
- ◆ Not enough money
- ◆ Overpriced
- ◆ The amount of money it costs to purchase a home is outrageous and unaffordable w/our incomes
- ◆ Wages don't meet cost
- ◆ What I qualify for does not buy a house liveable

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EMPLOYER SURVEY

COMMERCIAL SPACE AND EMPLOYEE HOUSING NEEDS

The City of Grass Valley is working on a study of the demand for business park space suitable to meet the needs of commercial land users. In addition, the City is also evaluating the workforce housing needs of local employees. Information from this survey will help us gain an accurate picture of local trends and the requirements of employers in the area.

We are seeking your response to this survey as an employer in the region. Be assured that your responses are completely **CONFIDENTIAL** and will be used for planning purposes only. Your response will NOT be reported individually; rather they will be combined with other employers. If you have any questions, you can contact Wendy Sullivan at RRC Associates, Inc., at 1-888-449-4772 (toll free). Please return your completed survey within **TEN DAYS** in the postage-paid envelope provided.

1. **Name of business:**

 Physical location (city/community and zip code only):

 Contact person (if we have questions): _____
 & Phone # or email: _____

What is the approximate total square footage of interior building space your business occupies in Nevada County only (or total number of rooms/units you manage if a hotel/lodging or property mgt. business)?

| | | |
|-------------------|--------|----|
| Average | Median | N= |
| 12,730 sq. ft. | 2,450 | 74 |
| or 28 rooms/units | | 1 |

2. **Type of business: N=96**
- 31% Professional/business services (*health, medical, legal, etc*)
 - 25 Manufacturing
 - 9 Retail - All other
 - 7 Construction/trades
 - 4 Transportation, Communication, Utilities
 - 4 Real estate and/or Property management
 - 2 Personal services (*dry cleaning, car repair, etc*)
 - 2 Hotel/motel/lodging
 - 2 Banking, Finance, Insurance
 - 2 Agriculture or Mining
 - 1 Recreation/attractions/amusements
 - 1 Education
 - 1 Warehouse/storage
 - 1 Government
 - 1 Retail - Bar/restaurant
 - 5 Other

What is the approximate acreage of the lot space your business occupies in Grass Valley/Nevada County? (Include all lots)

| | | | | | |
|----------------|------------|-------------|--------------|----------------|-------------------|
| <u>Under 1</u> | <u>1-5</u> | <u>5-10</u> | <u>10-15</u> | <u>Over 15</u> | (N=46) |
| 28% | 43 | 15 | 2 | 10 | 8.7 acres average |
| | | | | | 1.5 acres median |

4. **Do you currently own or lease your business property in Nevada County? N=93**
 29% Own 63 Lease 8 Both (*own some & lease some*)

5. **Would you rather own or lease your business property in Nevada County? N=90**
 74% Would rather own 26 Would rather lease

6. **Which of the following best describes the interior and exterior space your business presently occupies:**

| | | |
|--------------|-----------------|--|
| | <i>Interior</i> | <i>Exterior</i> |
| <u>space</u> | <u>space</u> | |
| 33% | 43% | Meets current space requirements and allows for future expansion. |
| 57 | 48 | Meets current space requirements, but does not allow for future expansion. |
| 9 | 10 | Does not meet current space requirements. |
| N=82 | N=87 | |

3. **Size of commercial space occupied:**
 How many business locations do you have? N=92
 1.8 average; 1.0 median

What is the approximate total square footage of interior building space your business occupies at ALL locations (or total number of rooms/units you manage if a hotel/lodging or property mgt. business)?

| | | |
|-------------------|--------|----|
| Average | Median | N= |
| 21,608 sq. ft. | 3,000 | 79 |
| or 20 rooms/units | | 2 |

7. Do you anticipate expanding your business' interior or exterior space in the next three years? N=93
 34% Yes 66 No (GO TO Q. 13)

8. (IF YES) Which best describes the likelihood of expansion: N=31
 26% **Certain**
 35 **Extremely likely**
 32 **Somewhat likely**
 6 **Slight**

9. Please estimate what your expansion needs might be for office/enclosed space? N=30
 14,402 sq. ft. average
 3,250 sq. ft. median
 Approximately how much total area would you ideally occupy (outdoor space)? N=13
 3.5 acres average
 2.0 acres median

10. Which type of building/addition would you be most likely to use? N=31
 32% **A metal or concrete "tilt up" building**
 3 **Front loaded office space**
 26 **Flex space with truck doors in back**
 23 **Traditional office building**
 16 **Other:** _____

11. Do you anticipate you will be able to meet your expansion needs in Grass Valley/Nevada County? N=30
 87% Yes 13% No

12. Do you have any comments or suggestions about the availability of space to meet your needs in Grass Valley/Nevada County? _____

13. Looking to the future, what is the likelihood that your business will leave the Western Nevada County area? N=97
 90% **Not at all likely (GO TO Q. 15)**
 10 **Somewhat likely**
 - **Very likely**

14. If "very" or "somewhat likely" to leave the Western Nevada County area, where are you looking to move? N=10
 10% Elsewhere in Nevada County
 - Marysville/Yuba City
 20 Placer County
 - Other Sacramento metro area
 80 Other _____

15. Any comments on your response concerning leaving or not leaving the area (i.e. reasons you might or might not leave)?

16. How many employees did you have at ALL locations at your peak employment in 2003 (including yourself)? (include contract labor; if sole proprietor, insert "1") N=93

| Peak # of employees: | Average | Median |
|-----------------------|---------|--------|
| Year-round, full-time | 13.7 | 4.0 |
| Year-round, part-time | 3.3 | 0.0 |
| Seasonal, full-time | 0.5 | 0.0 |
| Seasonal, part-time | 0.6 | 0.0 |
| TOTAL EMPLOYEES | 37.4 | 7.5 |

17. And what is your peak number of employees at your business location(s) in Nevada County only? N=95
 30.3 average; 6.0 median

18. How many jobs in your Nevada County location are currently unfilled? N=97

| | Average | Median | "None" |
|--------------------------|---------|--------|--------|
| Full-time jobs available | 0.4 | 0.0 | 81% |
| Part-time jobs available | 0.2 | 0.0 | 89% |

19. How does the number of employees you have today compare to the number of employees you had 5 years ago? N=92
 42% More employees today than 5 years ago

33 Fewer employees today than 5 years ago
 25 No change **GO TO Q. 21**

20. If you have more employees today, please choose the ONE main reason why you have more employees: N=37
 30% Increased the size of space in which you do business
 8 Increased the number of locations for your business
 43 More employees in the same space
 3 More employees in the same space - expanded hours
 16 Other: _____

21. Do you offer housing for any of your employees? N=96
 98% No
 2 Yes - How many do you house? _____

22. Please estimate the percent of your employees that live in the following geographic areas: N=91

| | Average | Median |
|---|---------|--------|
| Grass Valley | 54.2% | 50% |
| Elsewhere in western Nevada County | 38.6% | 40% |
| Placer County Highway 49 corridor, Auburn to Nevada County line | 2.3% | 0% |
| Marysville/Yuba City area | 0.8% | 0% |
| Other Sacramento metro area | 0.7% | 0% |
| Other areas | 3.2% | 0% |

23. Which of the following most accurately describes your company's current policy concerning telecommuting (*that is, working from home or another location using telephone and computer-based communications*)? N=92

- 67% Telecommuting is not a workable option for any of our employees
- 20 Telecommuting is a workable option but we have no significant, regular telecommuting
- 13 Our company encourages and supports telecommuting for certain employees for whom it is workable –

If so, how many employees telecommute at least occasionally? N=11

3.2 average; 2.0 median employees

24. Do you have any suggestions on what your Nevada County business community might do differently to better support your business (attach additional pages if necessary)?

That's all! Thank you very much for taking the time to complete this survey. Please return the survey to ADE, the consulting company assisting the City of Grass Valley, by one of the following methods:

- *Enclosed postage-paid envelope*
- *FAX: (510) 548-6123 (please remember to fax both sides)*

If you have questions about this survey, please call Wendy Sullivan at RRC Associates, Inc., at 1-888-449-4772 (toll free).

EMPLOYEE SURVEY

The City of Grass Valley is evaluating the housing needs of local employees. The purpose of the employee survey is to understand the local housing needs of Grass Valley's workforce in terms of current housing, preferred types of housing and locational considerations. The results of the survey can help the City of Grass Valley plan for existing and future housing needs in the area.

We are seeking your response to this survey as an employee in the region. Be assured that your responses are completely **CONFIDENTIAL** and will be used for planning purposes only. If you have any questions, you can contact Wendy Sullivan at RRC Associates, Inc., at 1-888-449-4772 (toll free). We request that you please return your completed survey within **TEN DAYS** in the postage-paid envelope provided.

1. What is your home ZIP code? _____
2. Do you live in/nearest to: N=540
 69% Grass Valley
 14 Other Western Nevada county
 3 Marysville/Yuba City
 3 Placer County Highway 49 - Auburn to Nevada County
 1 Roseville/Rocklin/Sacramento metro area
 10 Other _____
3. Do you live within city/town limits, or an unincorporated part of your county? N=537
 41% City/town limits 59% Unincorporated county
4. What county do you live in? N=548
 92% Nevada County 2 Yuba County
 4 Placer County 1 Other _____
5. What type of residence do you live in? N=549
 6% Apartment 77 Single-family home
 5 Mobile home 9 Condo/townhouse/duplex
 3 Other _____
6. How many bedrooms are in your home? N=527

| | | | | | |
|----|----|----|----|----|-------------|
| 1 | 2 | 3 | 4 | 5+ | |
| 8% | 32 | 47 | 11 | 2% | 2.7 average |
| | | | | | 3.0 median |
7. How many people including yourself live in your household? N=479

| | | | | | |
|-----|----|----|----|-----|-------------|
| 1 | 2 | 3 | 4 | 5+ | |
| 11% | 37 | 21 | 19 | 11% | 2.9 average |
| | | | | | 3.0 median |
8. How many people in your household are in the following age groups? (include yourself) N=519
 Under 18: 0.7 average
 Age 18-25: 0.3 average
 Age 26-45: 0.6 average
 Age 46-65: 1.0 average
 Age Over 65: 0.1 average
9. How many adults (age 18 or over) in your household are currently employed? (include yourself) N=538

| | | | | | |
|-----|----|---|---|----|-------------|
| 1 | 2 | 3 | 4 | 5+ | |
| 39% | 51 | 8 | 1 | 0% | 1.7 average |
| | | | | | 2.0 median |
10. Where do you and other adults in your household work? (persons 18 or over only) (MARK ALL THAT APPLY)

| <u>You</u> | | <u>Other Adults</u> |
|------------|---|---------------------|
| 80% | Grass Valley | 53% |
| 15 | Other Western Nevada County | 23 |
| 1 | Marysville/Yuba City | 4 |
| 1 | Placer County | 8 |
| 1 | Roseville/Rocklin/Sacramento metro area | 14 |
| 6 | Other: _____ | 10 |
| 105% | total | 112% |
| N=519 | | N=355 |
11. What is the current travel time between your house and your place of work? N=537
 Minutes: 16.0 average; 15.0 median

12. Do you own or rent your residence?

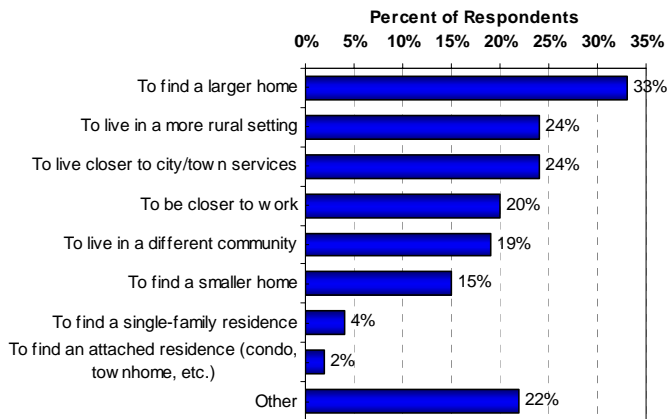
- 68% Own (GO TO Q. 13)
- 29 Rent (GO TO Q. 15)
- 3 Other (GO TO Q. 15)

IF YOU ARE CURRENTLY A HOMEOWNER:

13. Are you looking for a new home or would you consider buying a different home? N=371

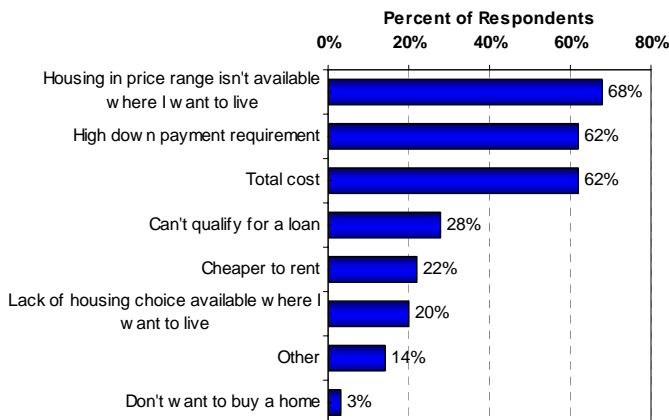
- 72% No (GO TO Q. 16)
- 28 Yes

14. (IF YES) If you own a home and would consider buying a different one, why? (MARK ALL THAT APPLY) N=103



IF YOU ARE A RENTER OR DO NOT OWN YOUR RESIDENCE:

15. Why have you not bought a home? (MARK ALL THAT APPLY) N=164



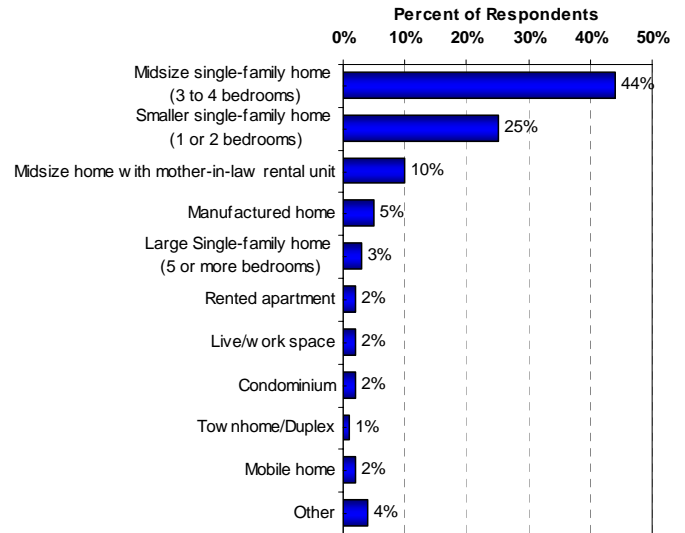
IF YOU WERE TO BUY OR RENT A DIFFERENT HOME:

16. From the list below, realistically, which of the following types of homes would you expect to most likely consider? (MARK ALL THAT APPLY) N=518

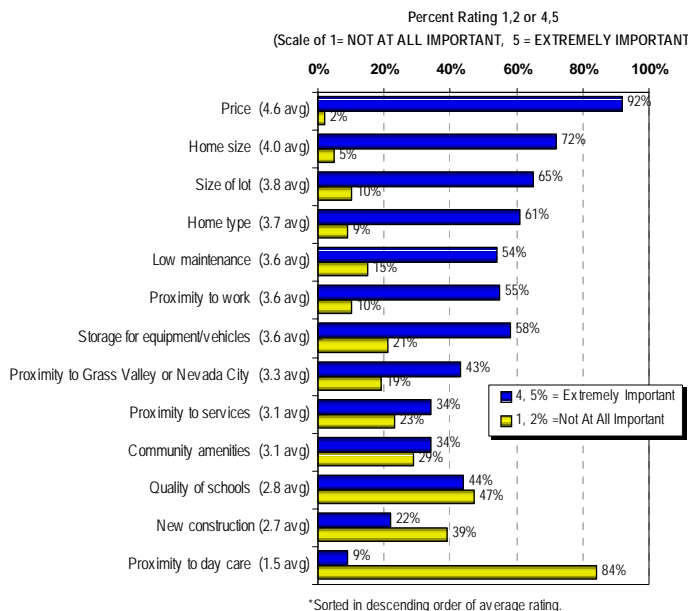
- 5% Large Single-family home (5 or more bedrooms)-
- 56 Midsize single-family home (3 to 4 bedrooms)
- 26 Midsize home with "mother-in-law" rental unit
- 35 Smaller single-family home (1 or 2 bedrooms)
- 10 Condominium
- 10 Townhome/Duplex
- 6 Rented apartment
- 19 Manufactured home
- 5 Mobile home
- 12 Live/work space: (that is, a place to live adjacent or connected to a workspace such as a studio, repair shop, or retail space)
- 6 Other _____

Total - 190%

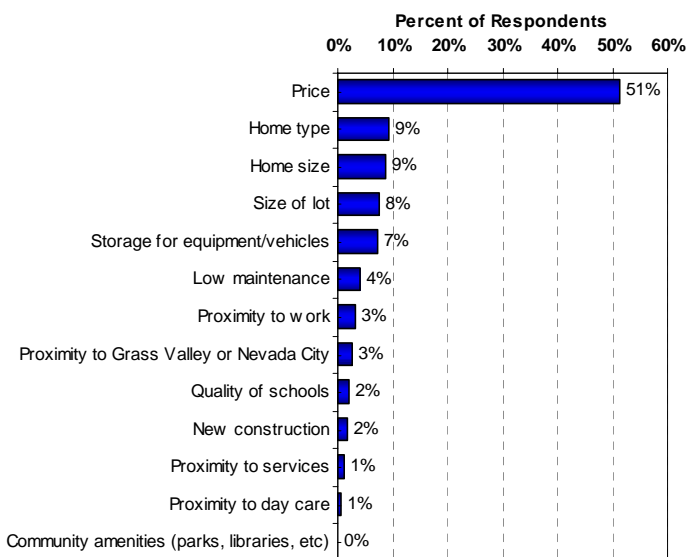
17. REALISTICALLY, which type of home would you MOST likely choose from the list above? N=515



18. Please indicate how important the following factors are to you if you were looking for a different home. (Use a scale where 1=Not At All Important and 5=Extremely Important) N=507 to 523



19. From the list above, what do you expect would be the one most important factor in choosing a new home? N=508



20. What is the approximate size of home you prefer (in square feet)? N=445
1,885 average; 1,800 median sq. ft.

21. What number of the following do you prefer?
Preferred number of:

| | 1 | 2 | 3 | 4 | 5 | 6+ | |
|---------------|---|----|----|----|---|----|---------|
| Bedrooms | 1 | 20 | 57 | 20 | 1 | - | 3.0 avg |
| Bathrooms | 1 | 2 | 3 | 4+ | | | 2.2 avg |
| Garage spaces | 1 | 2 | 3 | 4+ | | | 2.2 avg |

22. How do you feel about the problem of finding housing in Grass Valley that is affordable for people who work in the City of Grass Valley? N=524

- 27% It is the most critical problem in the city
- 45 One of the more serious problems in the city
- 22 A problem among others needing attention
- 4 One of our lesser problems
- 3 I don't believe it is a problem

23. Which of the following best describes your household? N=534

- 15% Adult living alone
- 9 Single parent with child(ren)
- 30 Couple, no child(ren)
- 34 Couple, with child(ren)
- 9 Immediate and extended family members
- 2 Unrelated roommates
- 1 Other

24. How long have you lived in the area where you now live? N=539

- 5% Less than one year
- 29 1 to 5 years
- 16 6 to 10 years
- 24 11 to 20 years
- 26 More than 20 years

It is very important that we know some details about your household to fully understand your needs. Please remember that this survey is confidential.

25. What is your current total monthly RENT and/or MORTGAGE PAYMENT? N=520

- 87% Pay rent or mortgage
- 6 Do not pay rent or mortgage
- 7 Mortgage paid off

| | Average | Median | N= |
|----------|----------|---------|-----|
| Total | \$ 1,078 | \$1,000 | 450 |
| Rent | \$772 | \$795 | 139 |
| Mortgage | \$1,222 | \$1,200 | 304 |

26. What are your monthly homeowner fees? N=326

- 78% Do not pay HOA fees
- 22 Pay HOA fees

Homeowners: \$ 169 average; \$100 median (N=60)

- | | |
|--|--|
| <p>27. What is the combined gross <u>annual</u> income of all household members? N=456</p> <p>\$70,941 average</p> <p>\$60,000 median</p> | <p>And what is your individual <u>annual</u> income? N=469</p> <p>\$41,488 average</p> <p>\$36,000 median</p> |
|--|--|

Do you have any additional comments or suggestions concerning the availability of housing in Grass Valley/Nevada County to meet your household's needs?

THANK YOU VERY MUCH FOR YOUR TIME