

National Association of REALTORS®

*Warren County, NY Smart Growth Survey
June 2019*

American Strategies designed and administered this telephone survey conducted by professional interviewers. The survey reached 400 adults, age 18 or older, who indicated their primary residence is in Warren County, New York. The survey was conducted from June 13 –June 16, 2019. Thirty-two percent of respondents were reached on wireless phones (forty-four percent unweighted), twenty-five percent on VOIP phones, and forty-three percent on landlines. Quotas were assigned to reflect the demographic distribution of voting age adults in Warren County, New York and the data were weighted to ensure an accurate reflection of the population. The sample was drawn from a third-party vendor voter file and based on vote history. The overall margin of error is +/- 4.9%. The margin of error for subgroups is larger and varies. Percentage totals may not add up precisely due to rounding.

Executive Summary: Quality of Life, Important Attributes

A majority of Warren County residents are VERY satisfied with their quality of life. Overall 9-in-10 residents are very or somewhat satisfied with the quality of life in Warren in County, with nearly 6-in-10 (57 percent) saying they are very satisfied with the quality of life. By way of comparison, 37 percent described themselves as very satisfied in the 2017 NAR National Smart Growth poll of the top 50 metropolitan statistical areas.*

Warren County limited in its walkability. While small majorities have parks and bike paths near their homes, fewer have sidewalks or live within a walkable distance to shops and restaurants. Only 37 percent say that having sidewalks on most of the streets is an accurate description of their neighborhood; and only slightly more more (45 percent) say there are shops and restaurants within walking distance. Walkability is highly affected by region: broad majorities in Glens Falls have sidewalks and parks, and many are walkable to shops and restaurants, while the rest of the county is far less walkable – especially in the north and in Queensbury.

Commute time, highway access, and sidewalks important qualities in finding a place to live. Majorities place a high importance on being within a short commute to work (54 percent rank 4 or 5 on a 5-point importance scale), easy access to the highway (53 percent), and sidewalks and places to take walks (51 percent). *The emphasis on sidewalks is notable, as significantly fewer county residents say that they currently live in a place with sidewalks on most of the streets as compared to those who say sidewalks are important.* Millennials are more likely than older generations to prioritize a short commute to work (73 percent important) and walkability (54 percent), with over half of Millennials describing those characteristics as important in determining where to live.

Despite interest in walkability, few are willing to pay more to live in a walkable community. Overall, 42 percent rank walkability to shops and restaurants as a 4 or 5 on a 5-point importance scale. However, only 26 percent say they would be willing to pay even a little more to live in walkable community.

*Comparisons between the two surveys should take into account that the National Survey was conducted online, reaching 3000 adults in the top 50 U.S. metropolitan statistical areas. The Warren County survey was conducted by phone. Differences in mode and sample universe may affect responses.

Executive Summary: Community Choices and Tradeoffs

County residents favor larger single-family home where more driving is required. In general, Warren County residents prefer neighborhoods where driving is required rather than mixed-use, walkable communities with stores and offices nearby – although the preference margin varies greatly depending on the choice. Two communities were described in different ways, focusing on commute time, walking distance to shops and restaurants, and size of the home and yard.

- Residents show a small preference (+13-points) for living in a houses-only, driving required neighborhood (56 percent) versus a walkable neighborhood with shops and restaurants nearby (43 percent).
- The divide is less (+6-points) when the big home and larger lot means a longer commute (52 percent prefer), in contrast to a smaller home with a smaller lot and a shorter commute (46 percent prefer).
- Only a third of residents prefer the walkable neighborhood if it means living in an attached home like a townhouse or a condominium (33 percent) or living in a smaller home but with no mention of a shorter commute (31 percent).
- Higher-income residents and families with kids at home are most drawn to larger homes, while lower-income residents and those who are unmarried without kids at home prefer smaller homes with walkability.
- A majority of Warren County residents live in single-family homes with large yards; another 22 percent live in single-family homes with small yards. Just 17 percent live in attached homes – apartments, townhouses, or condominiums.

Executive Summary: Short Term Rentals and Septic Inspections

Six-in-ten support allowing short-term rentals in Warren County. Most residents (60 percent) are in favor of allowing property owners to rent out their properties for short term stays, while just 27 percent oppose the idea (another 13 percent are unsure). Three-quarters of residents are at least a little familiar with the short-term rental approach. Support for the concept is correlated with familiarity: the more familiar residents are, the more supportive they are. Demographically, younger, wealthier, and more educated residents are more strongly supportive.

Residents favor having short-term rentals pay lodging taxes but are mixed on limiting their use. Over sixty percent of residents support requiring short-term rentals to pay the same local hotel and lodging taxes as small inns and bed and breakfasts. When it comes to limitations, however, residents are torn: about half support limiting density of short-term rentals in an area or limiting the number of nights per year a property can be rented out. In addition, small majorities *oppose* requiring a minimum length of stay – whether it is 3 nights or 5 nights.

Strong support for requiring septic system inspections when selling a home. Eight-in-ten residents support requiring a septic system inspection upon the sale of a home or property so that any problems found can be fixed at that time. Most of those (six-in-ten overall) **STRONGLY** support the proposal. Even among those who own septic systems, 78 percent are in support (55 percent strongly).

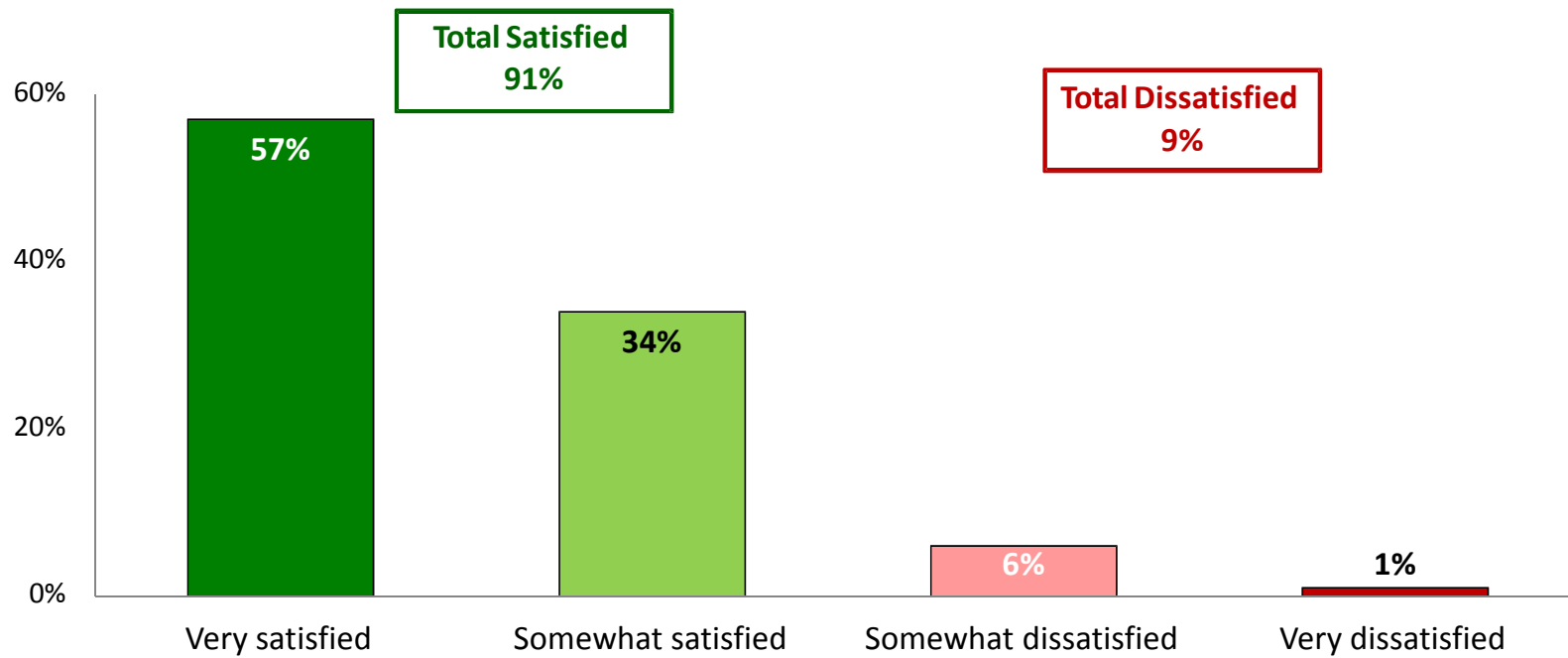
Reducing pollution in local lakes and rivers strongest reason to support inspection requirement. Nearly two-thirds of residents said they are **MUCH** more likely to support the proposal (84 percent more likely overall) when they hear the goal of the law is to make sure broken septic systems are repaired in order to reduce pollution leaking into local lakes and rivers. Only 32 percent say they are *less* likely to support it when they hear that septic system repairs range from a few thousand dollars to tens of thousands of dollars.

Current Living Environment

A Majority of Warren County Residents are VERY Satisfied with Their Quality of Life

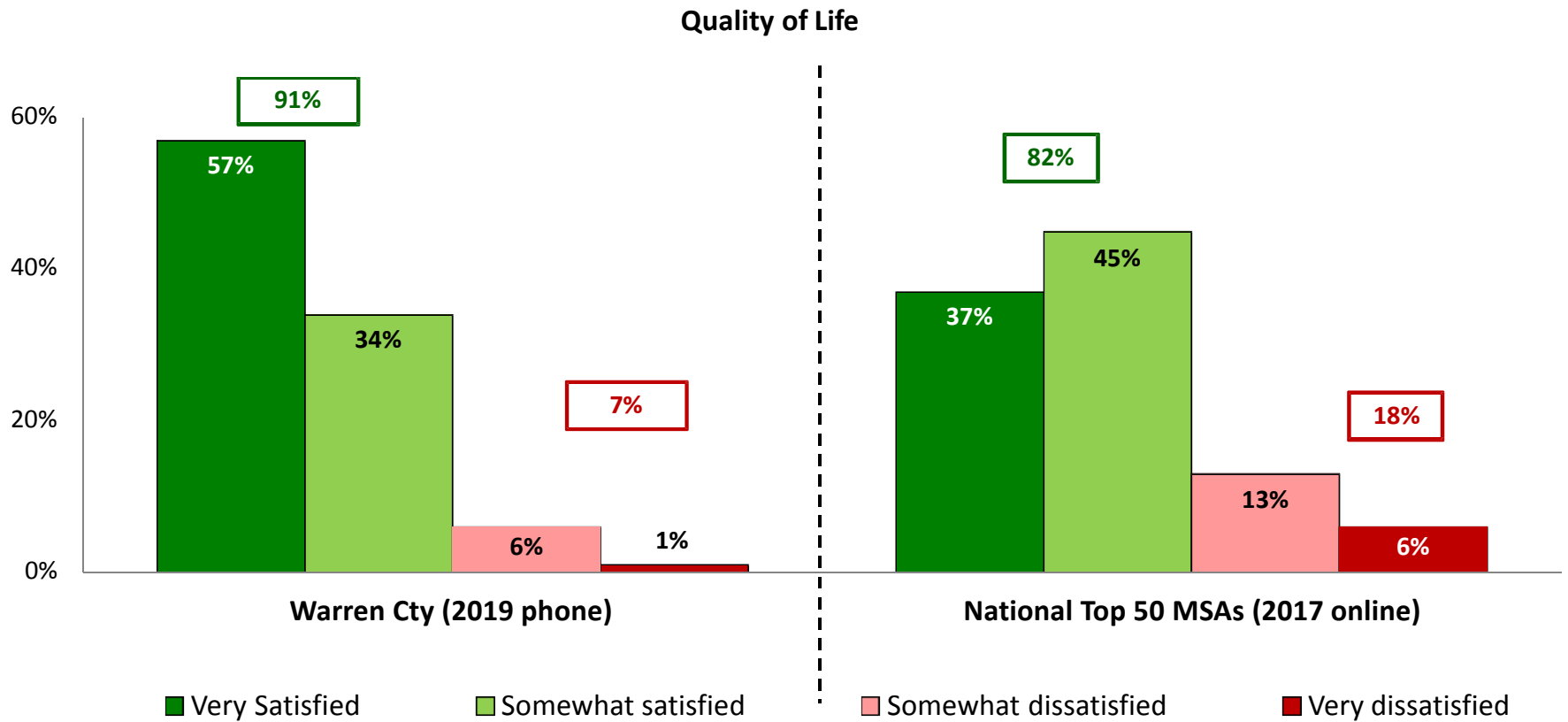
9-in-10 are very or somewhat satisfied.

Quality of Life in Warren County



Q.3 The first question is about the quality of life in your community. Would you say that you are (ROTATE) satisfied or dissatisfied with the quality of life in your community? (FOLLOW UP) And would you say you are very SATISFIED/DISSATISFIED or somewhat SATISFIED/DISSATISFIED?

Warren County Residents are Much More Intensely Satisfied With Their Quality of Life in Comparison to Top 50 U.S. MSAs

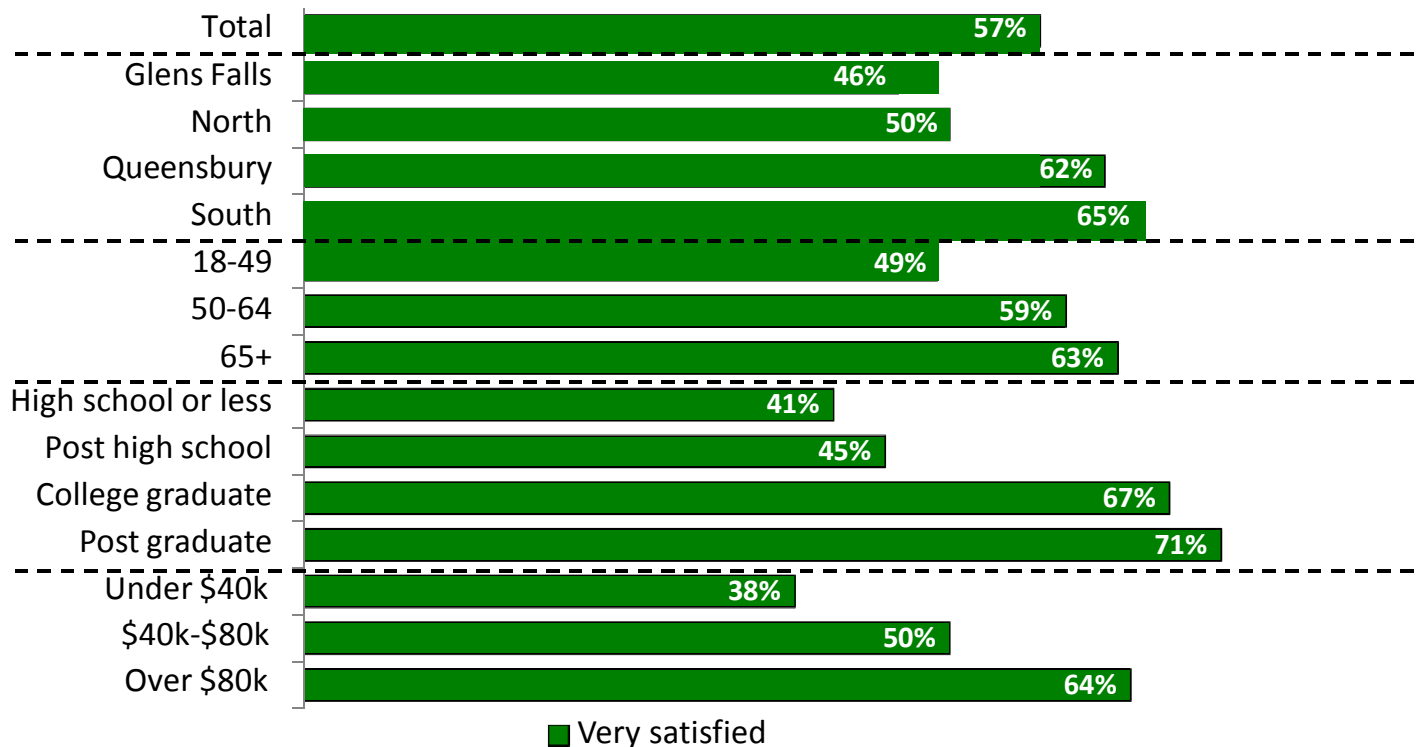


Q.3 The first question is about the quality of life in your community. Would you say that you are (ROTATE) satisfied or dissatisfied with the quality of life in your community? (FOLLOW UP) And would you say you are very SATISFIED/DISSATISFIED or somewhat SATISFIED/DISSATISFIED?

Intensity of Satisfaction With Quality of Life Varies by Region, Age, Education and Income

Under half in Glens Falls and those who are younger and less educated are not as satisfied.

**Quality of Life In Warren County
(Percent Very Satisfied)**

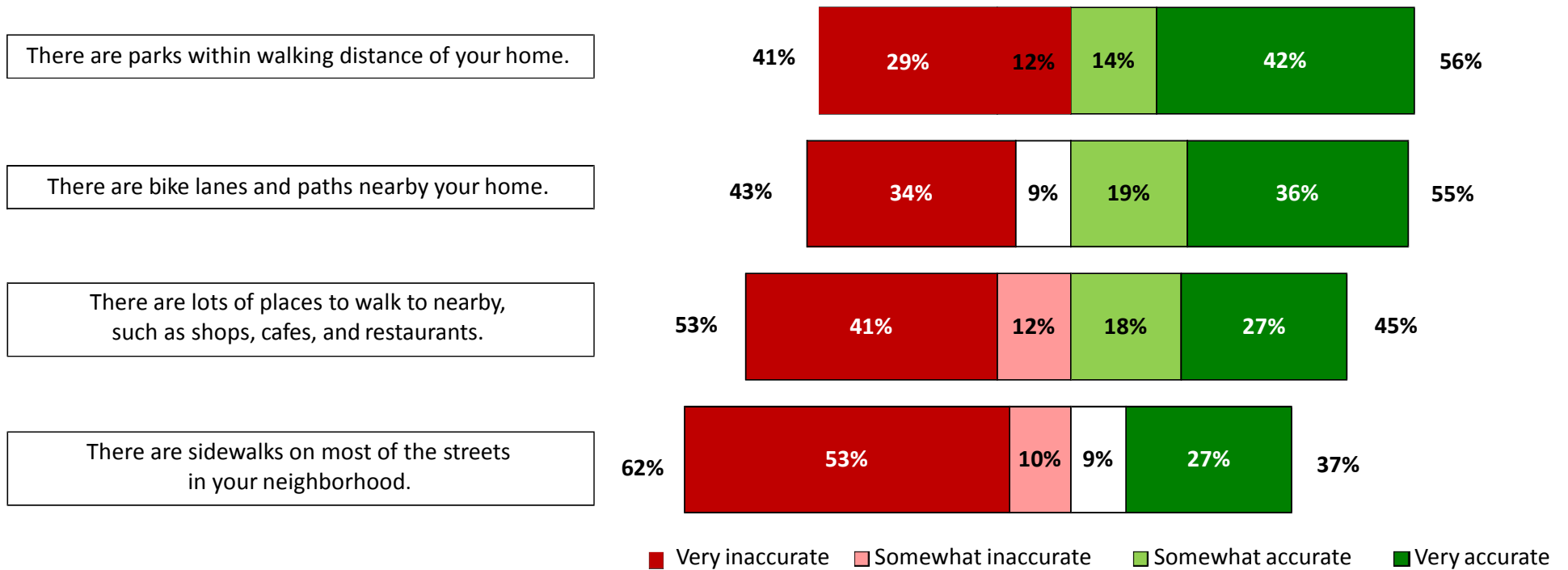


Q.3 The first question is about the quality of life in your community. Would you say that you are (ROTATE) satisfied or dissatisfied with the quality of life in your community? (FOLLOW UP) And would you say you are very SATISFIED/DISSATISFIED or somewhat SATISFIED/DISSATISFIED?

A Majority in Warren County Have Parks and Bike Lanes Nearby

Fewer live in walkable neighborhoods, and just over a third have sidewalks on most of their streets.

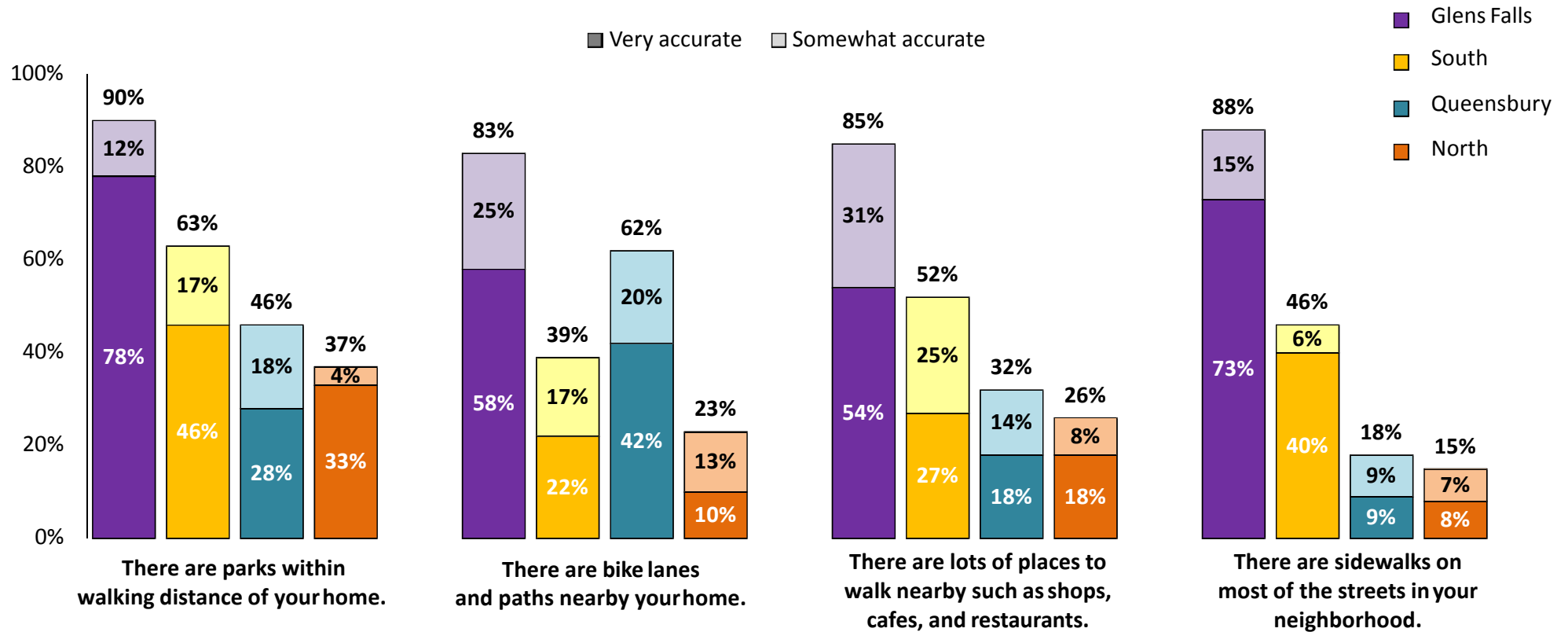
Descriptors of Your Neighborhood and Home



Q.4 Next I am going to read a few statements about homes and neighborhoods. Please think about the place where you currently live and please tell me whether each statement is an accurate description of your neighborhood or an inaccurate description of your neighborhood.

Glens Falls Residents More Likely to Live in Walkable Communities, with Sidewalks, Parks, and Bike Lanes Nearby

Descriptors of the Area Where You Currently Live by Region

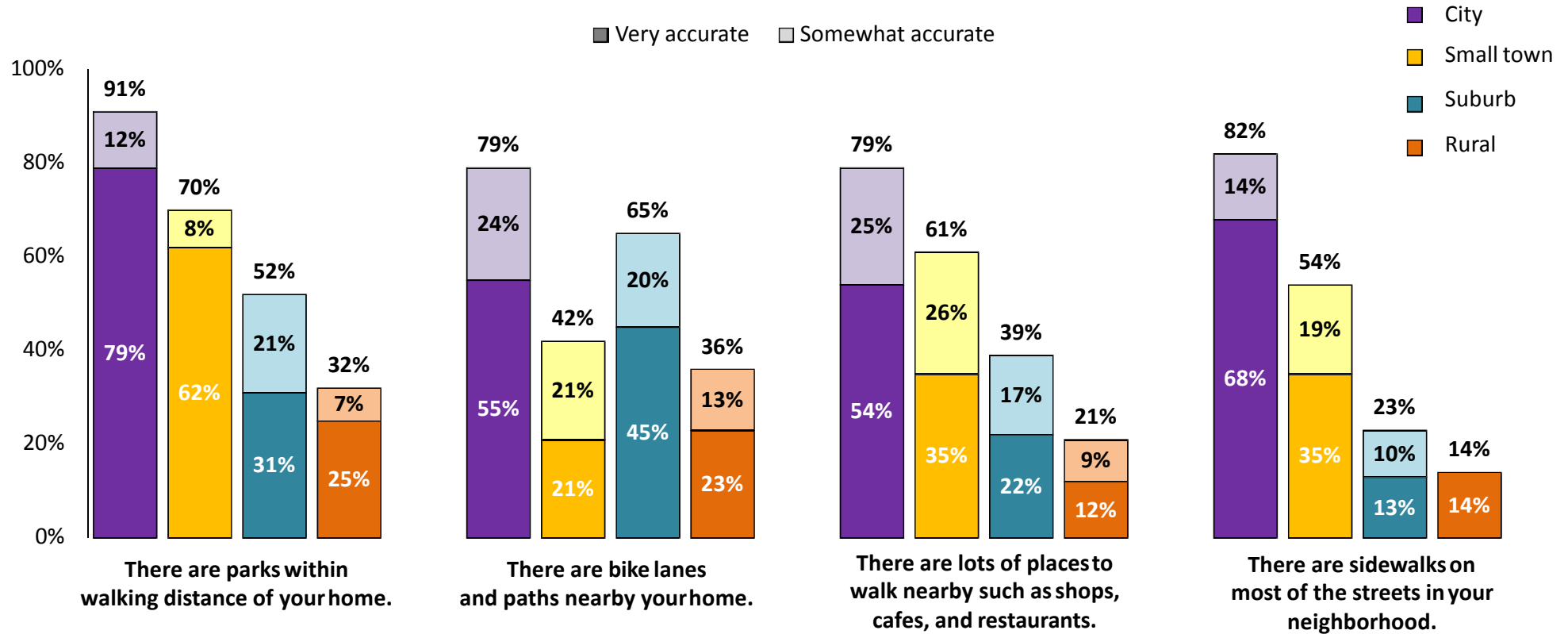


Q.4 Next I am going to read a few statements about homes and neighborhoods. Please think about the place where you currently live and please tell me whether each statement is an accurate description of your neighborhood or an inaccurate description of your neighborhood.

City and Small Town Residents More Likely to Live in Walkable Communities

Suburbs and rural areas have fewer sidewalks and places within walking distance

Descriptors of the Area Where You Currently Live by Place



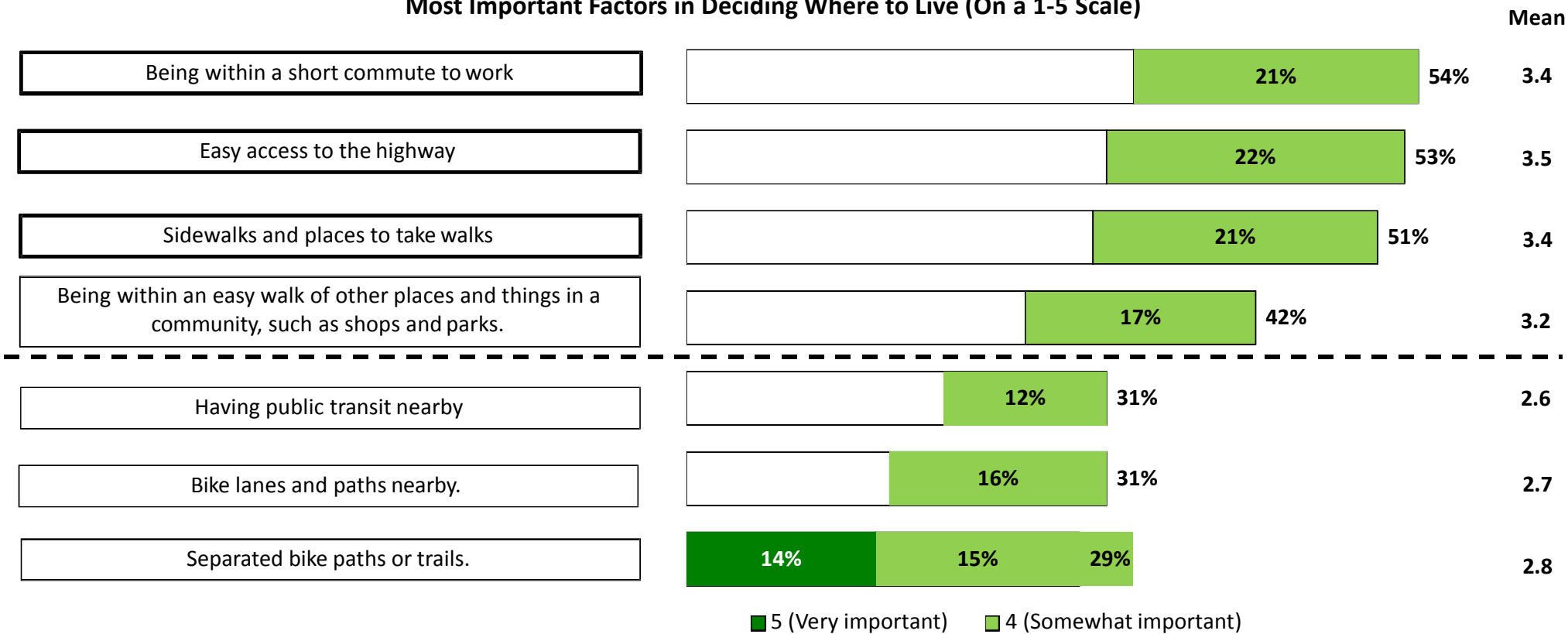
Q.4 Next I am going to read a few statements about homes and neighborhoods. Please think about the place where you currently live and please tell me whether each statement is an accurate description of your neighborhood or an inaccurate description of your neighborhood.

What's Important in Deciding Where to Live

Short Work Commute, Easy Access to the Highway, and Sidewalks Most Important in Deciding Where to Live (of items tested)

Walkability also desirable, but public transit and bike lanes nearby rank lower on the list

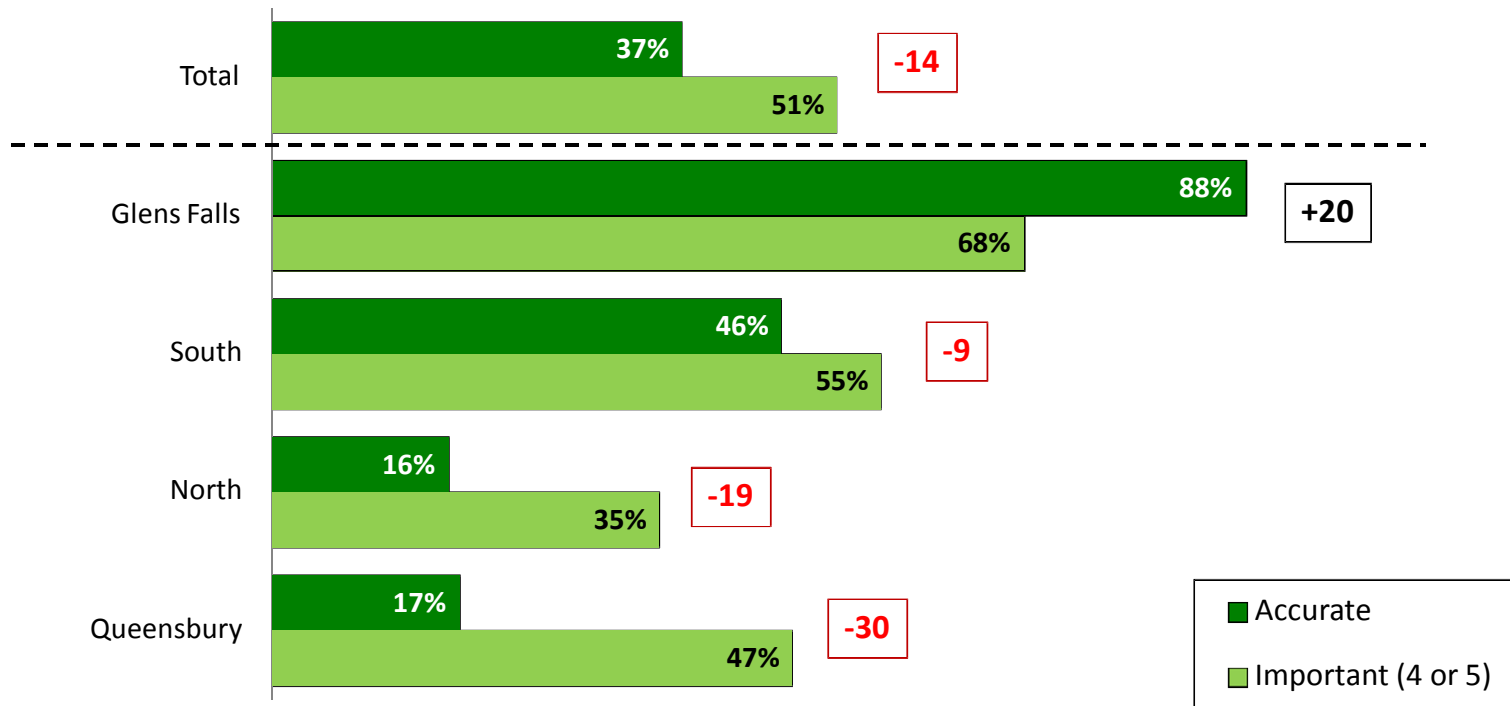
Most Important Factors in Deciding Where to Live (On a 1-5 Scale)



Q.6 Now think for a moment about where you would LIKE to live. It may be your current home, or it may be somewhere new. If you were deciding today where you wanted to live, please tell me how important each of the following would be to you on a scale of 1 to 5, with 1 being not important at all and 5 being very important. You can use any number from 1 to 5, the higher the number, the more important it is in deciding where to live.

Outside of Glens Falls, Warren County Has a Deficit Between Amount of Sidewalks and Importance Residents Place on Them

Difference Between Accuracy of “There are sidewalks on most of the streets in your neighborhood.” and Importance of “Sidewalks and places to take walks”

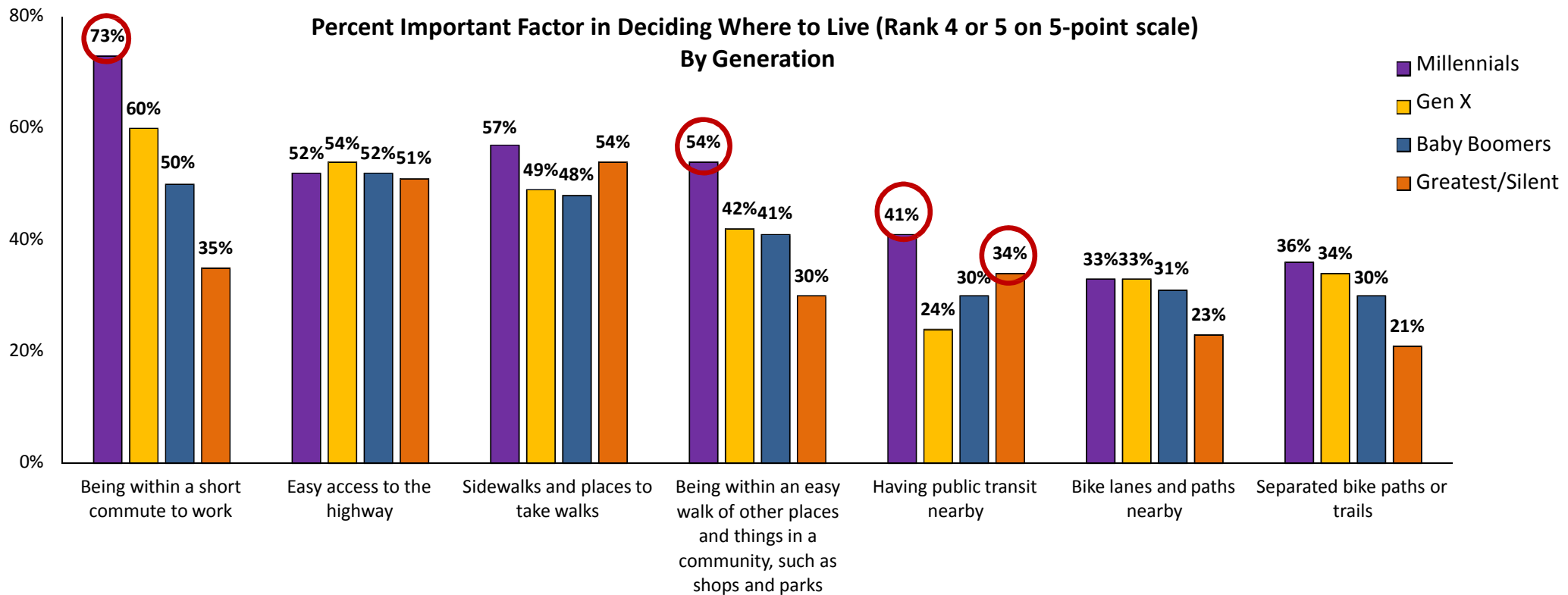


Q.4 Next I am going to read a few statements about homes and neighborhoods. Please think about the place where you currently live and please tell me whether each statement is an accurate description of your neighborhood or an inaccurate description of your neighborhood.

Q.6 Now think for a moment about where you would LIKE to live. If you were deciding today where you wanted to live, please tell me how important each of the following would be to you on a scale of 1 to 5, with 1 being not important at all and 5 being very important.

Younger Residents Prioritize a Short Commute and Walkable Neighborhood More than Older Generations

Public transit more important to younger residents, seniors.

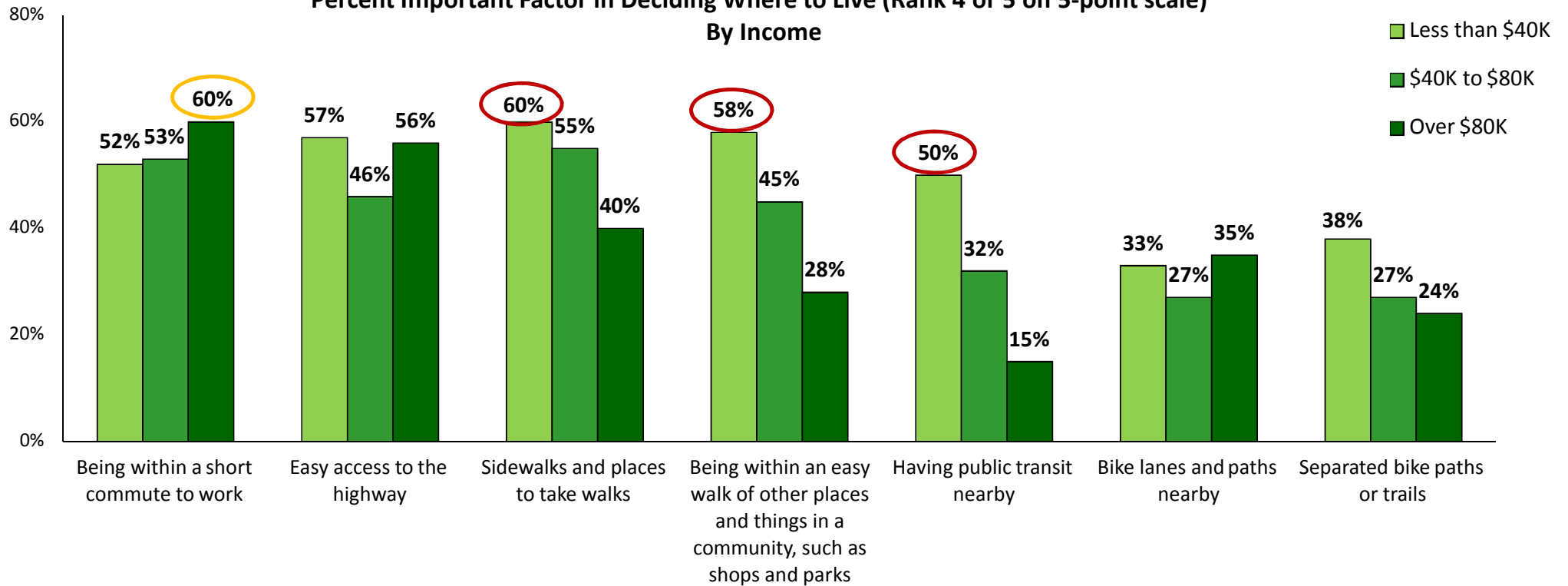


Q.6 Now think for a moment about where you would LIKE to live. It may be your current home, or it may be somewhere new. If you were deciding today where you wanted to live, please tell me how important each of the following would be to you on a scale of 1 to 5, with 1 being not important at all and 5 being very important. You can use any number from 1 to 5, the higher the number, the more important it is in deciding where to live.

Walkability and Public Transit More Important to Lower Income Residents

Higher income residents prioritize short commute to work

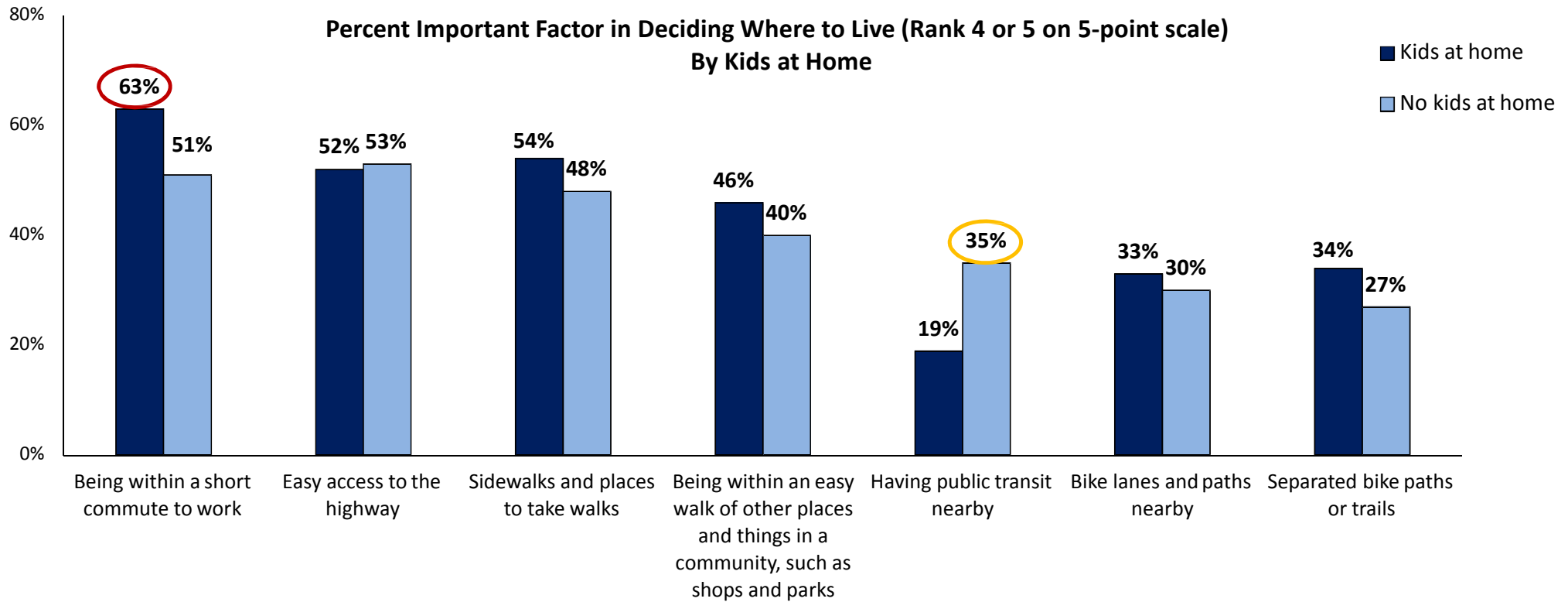
Percent Important Factor in Deciding Where to Live (Rank 4 or 5 on 5-point scale)
By Income



Q.6 Now think for a moment about where you would LIKE to live. It may be your current home, or it may be somewhere new. If you were deciding today where you wanted to live, please tell me how important each of the following would be to you on a scale of 1 to 5, with 1 being not important at all and 5 being very important. You can use any number from 1 to 5, the higher the number, the more important it is in deciding where to live.

Warren County Residents with Children at Home Prioritize a Short Commute More than Those Without

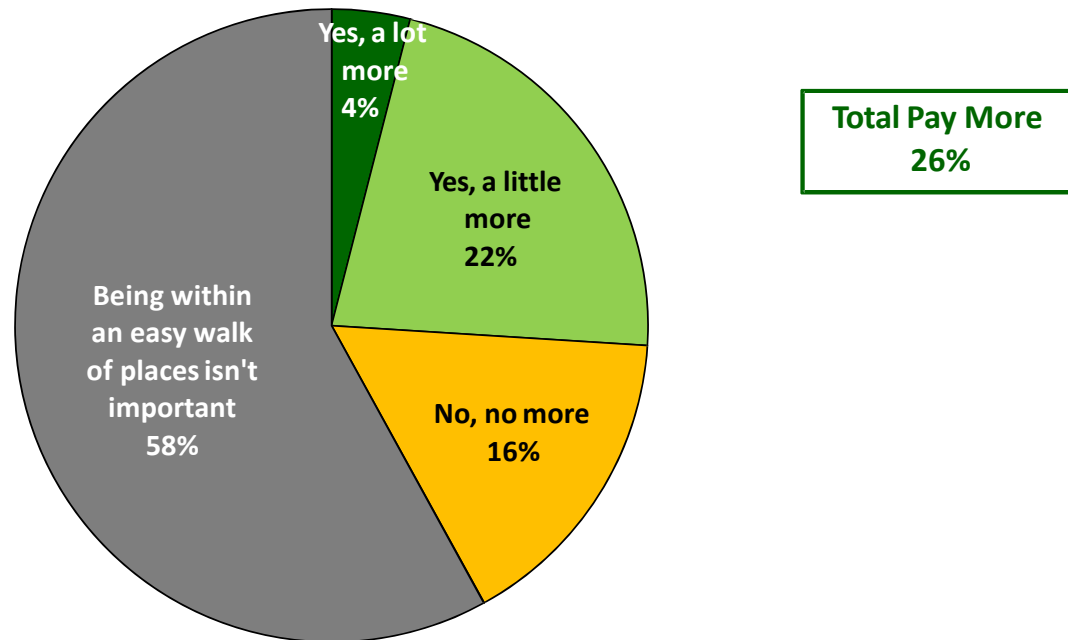
Residents without kids at home see public transit as much more important than those with kids



Q.6 Now think for a moment about where you would LIKE to live. It may be your current home, or it may be somewhere new. If you were deciding today where you wanted to live, please tell me how important each of the following would be to you on a scale of 1 to 5, with 1 being not important at all and 5 being very important. You can use any number from 1 to 5, the higher the number, the more important it is in deciding where to live.

A Quarter of Warren County Residents Would Pay More to Live in a Walkable Community

Willingness to Spend More to Live Within Walking Distance to Parks, Shops, and Restaurants

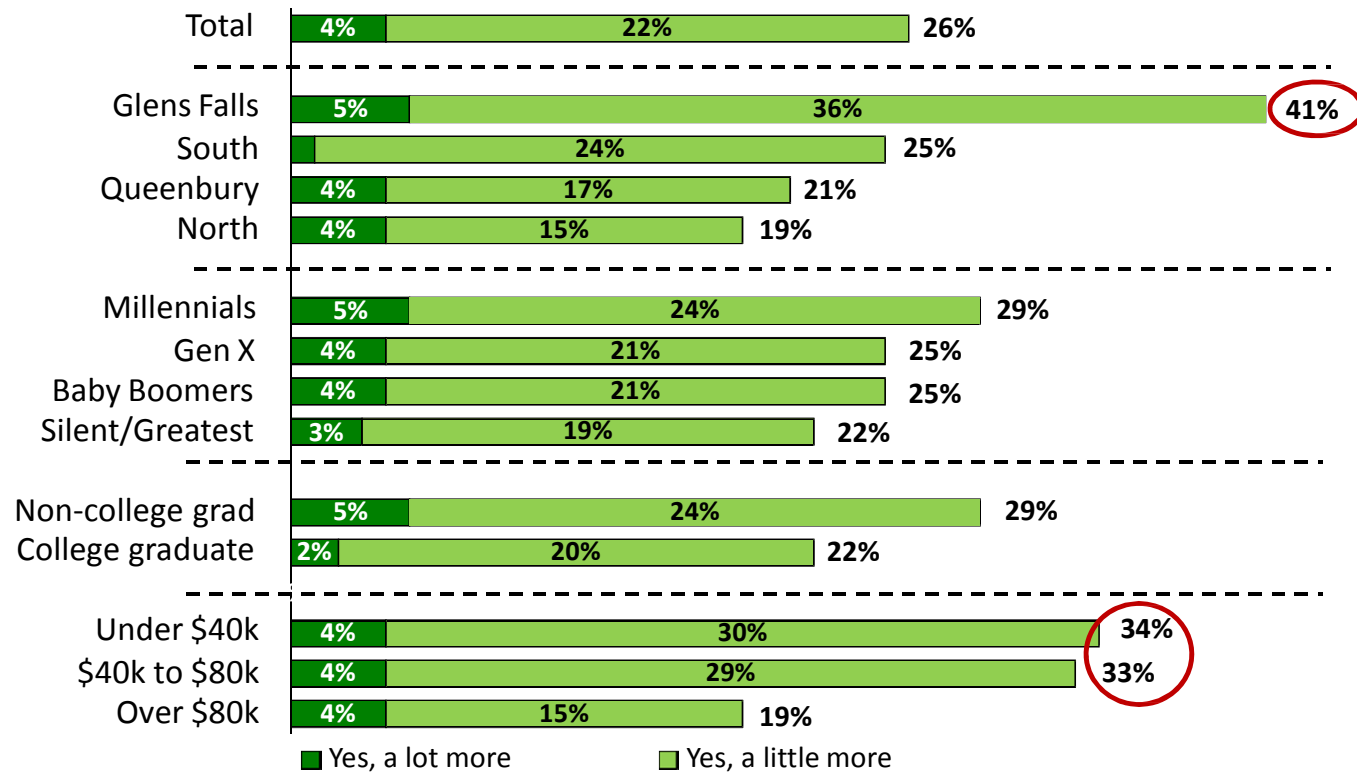


Q.7 (IF 4 or 5 in Q.6A)

And if you were moving to a new home, would you be willing to spend more to live in a community where you could easily walk to parks, shops, and restaurants, (ROTATE) yes or no?C

Glens Falls Residents and Those Earning Under \$80,000 More Willing to Spend More to Live in Walkable Community

Willingness to Spend More to Live Within Walking Distance to Parks, Shops, and Restaurants
By Key Demographics



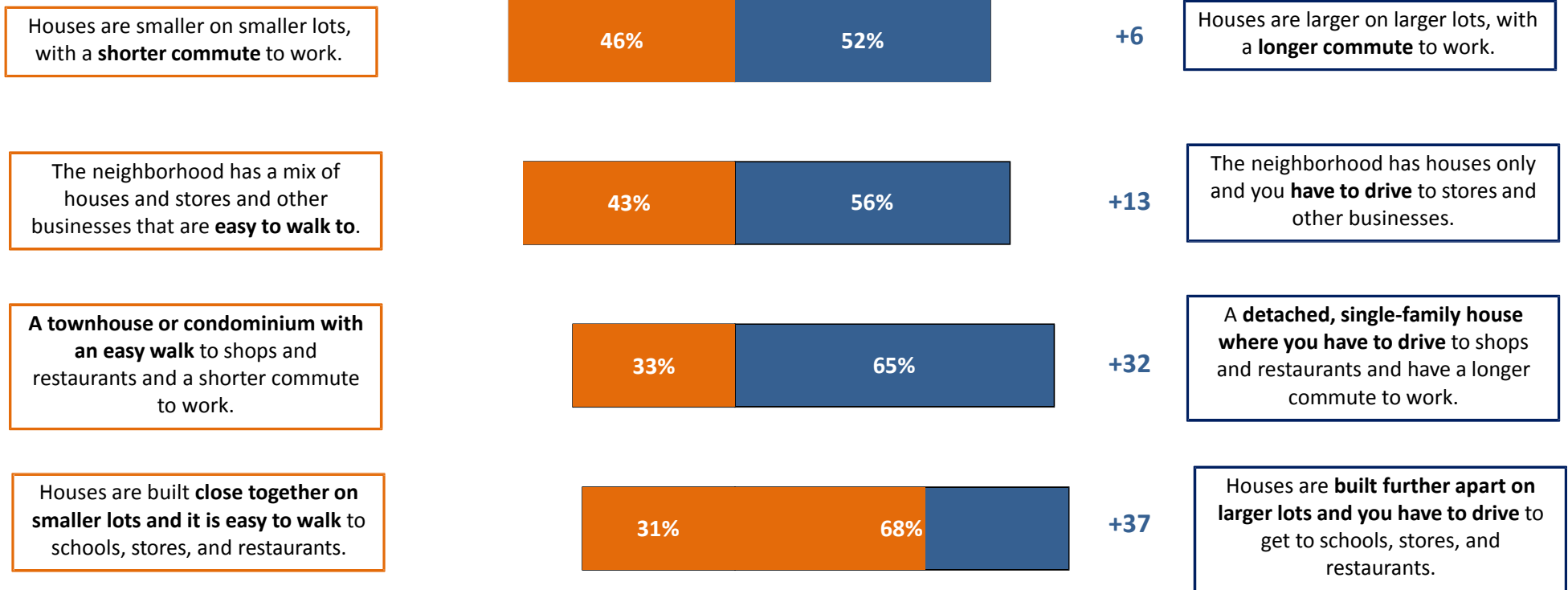
Q.7 (IF VERY OR SOMEWHAT IMPORTANT ON IMPORT_A) If you were moving to a new home, would you be willing to spend more to live in a community where you could easily walk to parks, shops, and restaurants?

*Mixed Use Community vs.
Conventional Suburban Community*

Drivable Communities Usually Preferred in Warren County

Preference varies somewhat depending on trade-off between house size and commute time

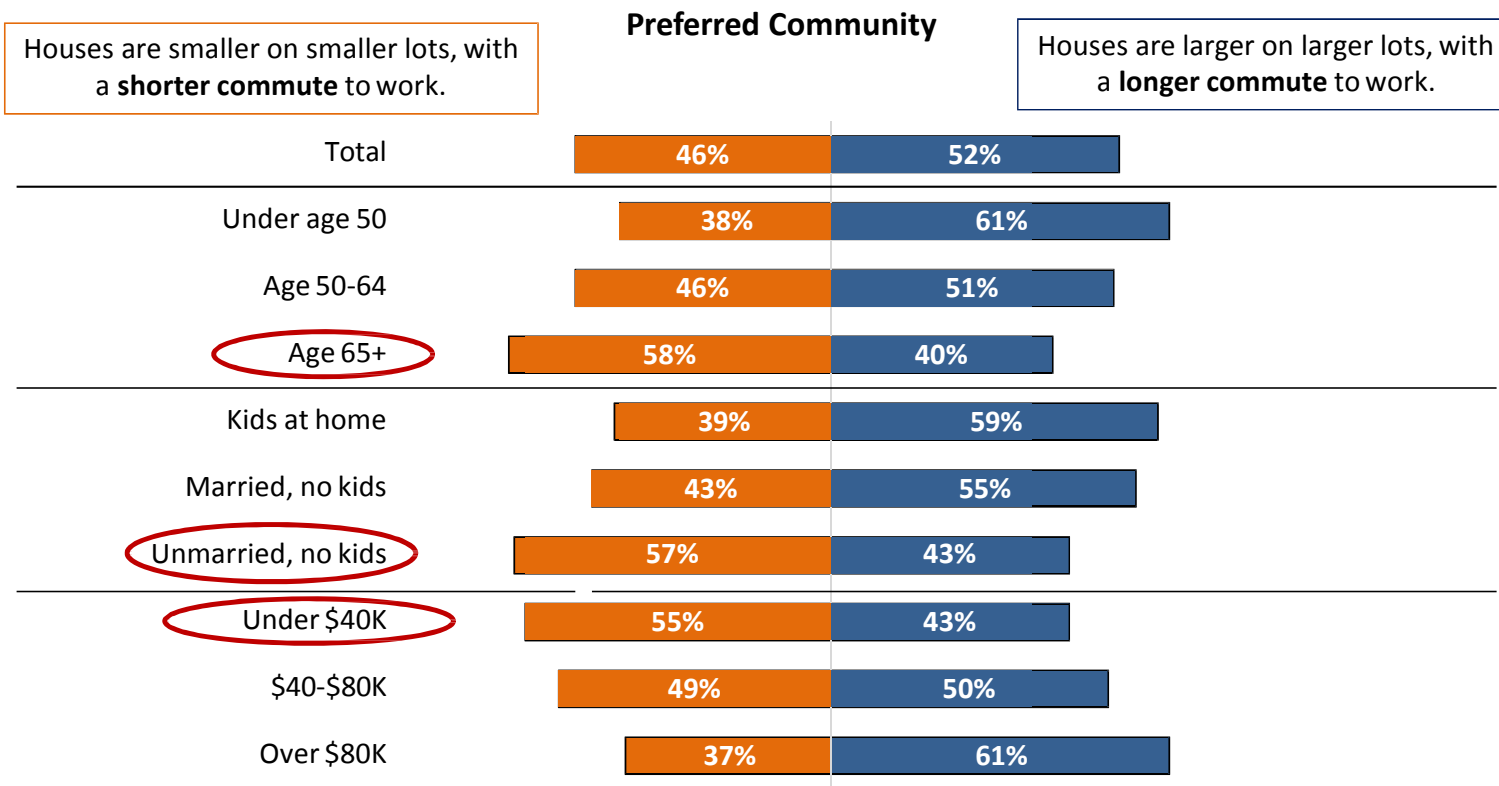
Preferred Community



Q.8 Continue to imagine that you are moving to another home. I am going to read you a series of pairs of different kinds of communities. For each, please tell me in which of the two communities you would prefer to live. The first/next pair of communities is...

Seniors, Unmarried Without Kids at Home, Lower Income Residents More Likely to Prefer Smaller Lots with a Shorter Commute

Wealthier, married, those with kids at home more likely to prefer larger homes even with longer commute



Houses are smaller on smaller lots, with a **shorter commute** to work.

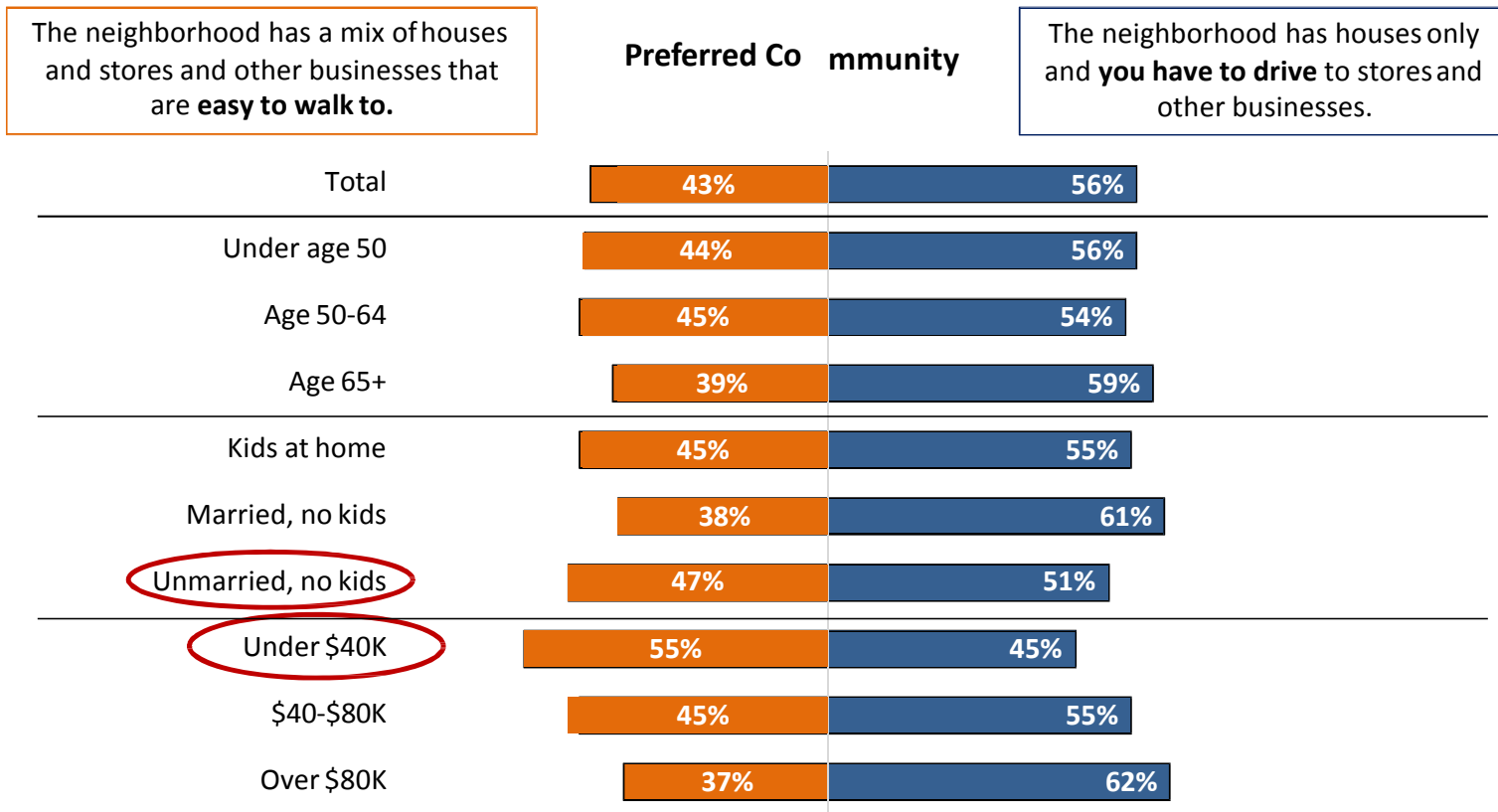
Houses are larger on larger lots, with a **longer commute** to work.

Preferred Community

Q.8 Continue to imagine that you are moving to another home. I am going to read you a series of pairs of different kinds of communities. For each, please tell me in which of the two communities you would prefer to live. The first/next pair of communities is...

Small Majorities Prefer Residential-Only Neighborhoods

Lower income residents more likely to prefer mixed-use neighborhoods; unmarried residents split



The neighborhood has a mix of houses and stores and other businesses that are **easy to walk to**.

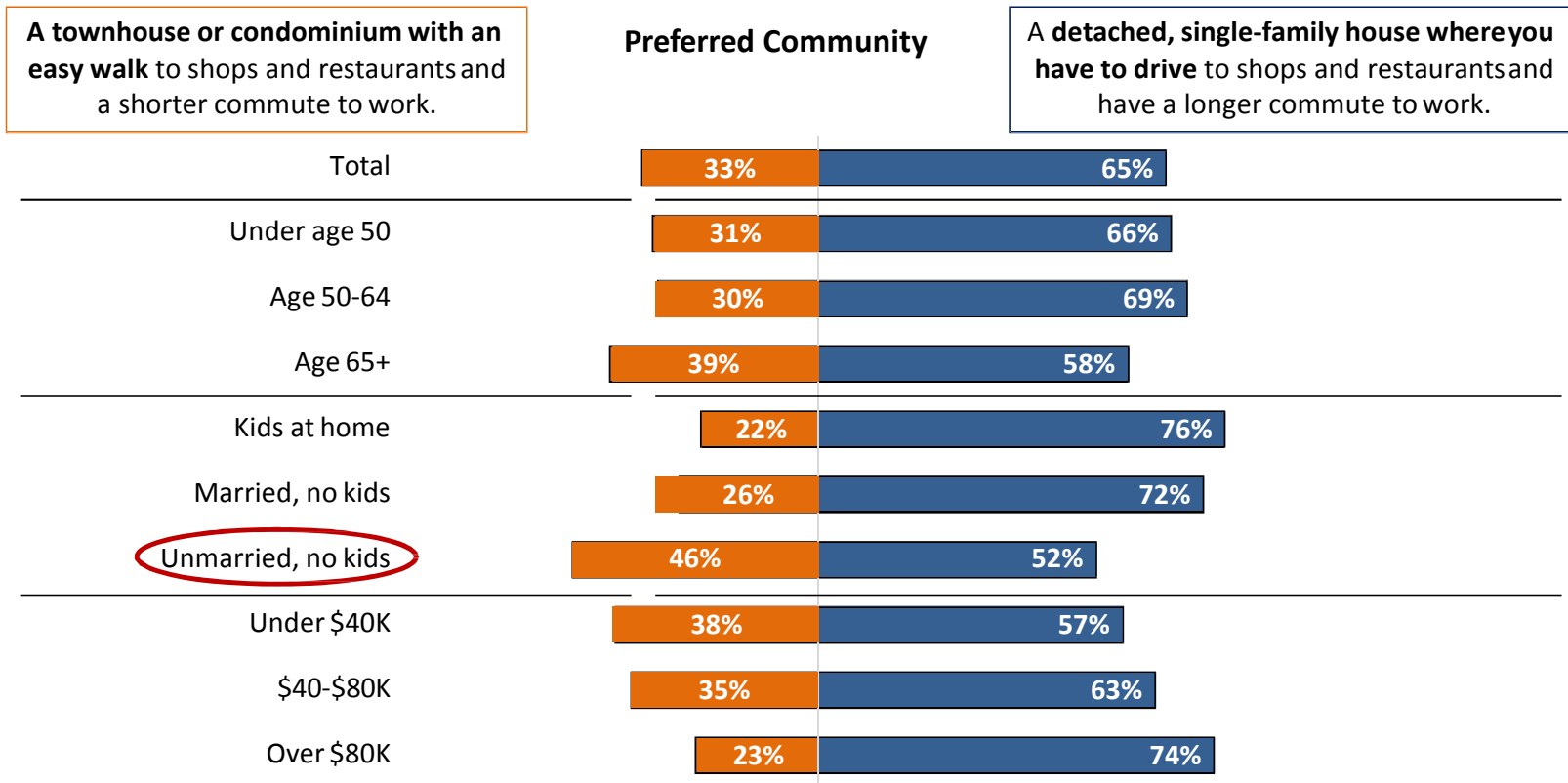
The neighborhood has houses only and **you have to drive** to stores and other businesses.

Preferred Community

Q.8 Continue to imagine that you are moving to another home. I am going to read you a series of pairs of different kinds of communities. For each, please tell me in which of the two communities you would prefer to live. The first/next pair of communities is...

Large Majorities Prefer Detached Home to a Townhouse or Condo, Even if it Means Less Walkability and Longer Commute

Unmarried residents more likely to be split in their preference; seniors also somewhat more interested than younger residents



A townhouse or condominium with an easy walk to shops and restaurants and a shorter commute to work.

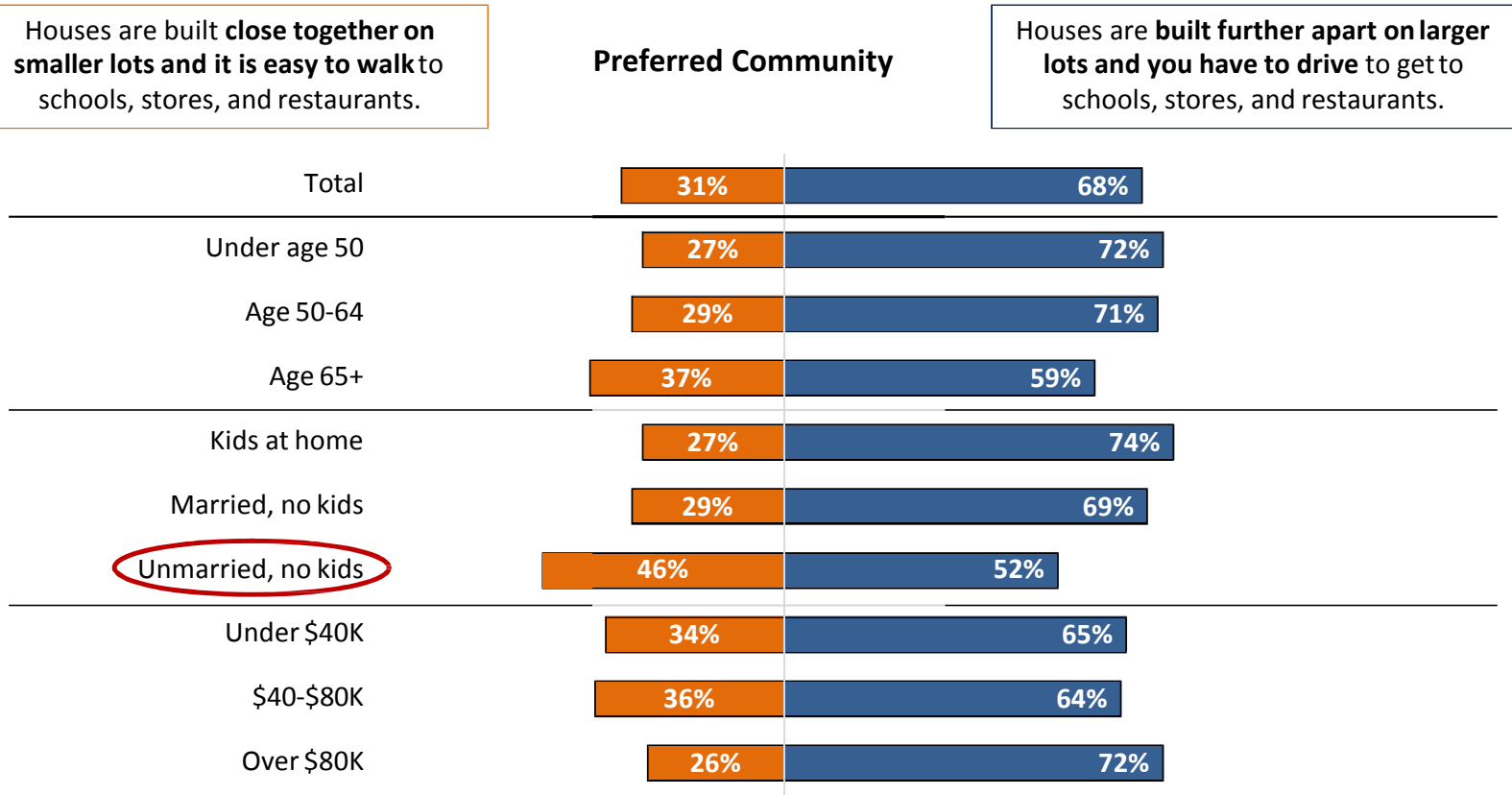
Preferred Community

A detached, single-family house where you have to drive to shops and restaurants and have a longer commute to work.

Q.8 Continue to imagine that you are moving to another home. I am going to read you a series of pairs of different kinds of communities. For each, please tell me in which of the two communities you would prefer to live. The first/next pair of communities is...

Broad Majorities Prefer Larger Lots Even If It Means Less Walkability

Unmarried residents more split in their preference; seniors show somewhat more interest in smaller lots & walkability

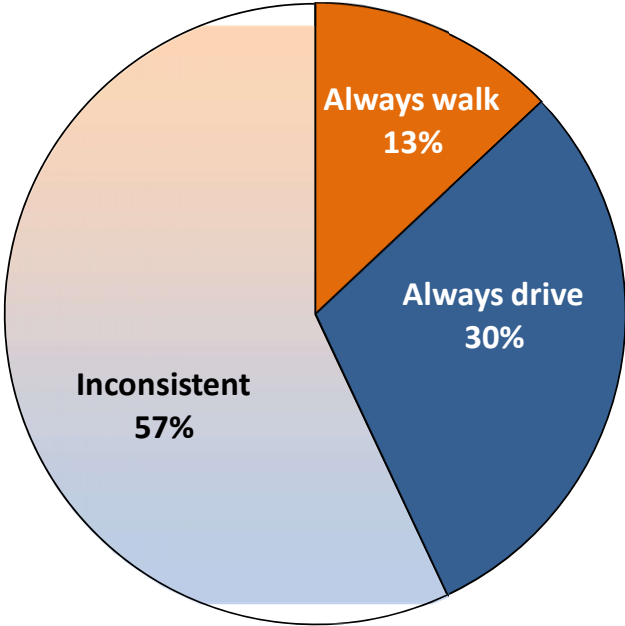


Q.8 Continue to imagine that you are moving to another home. I am going to read you a series of pairs of different kinds of communities. For each, please tell me in which of the two communities you would prefer to live. The first/next pair of communities is...

Over Half are Inconsistent in Their Preference for a Walkable or Non-Walkable Community

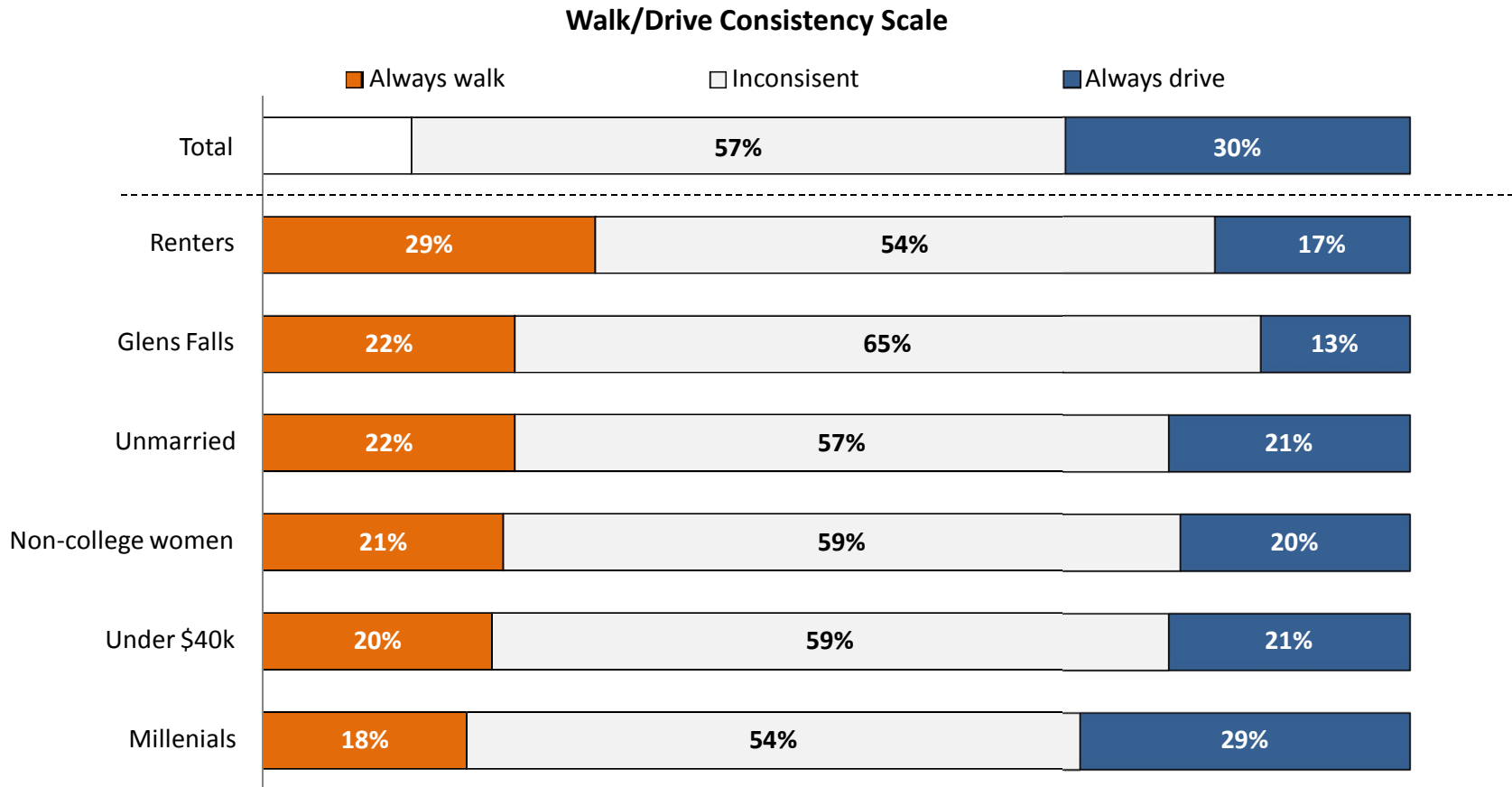
Among the consistent half, Warren County residents prefer larger homes with driving needed more than 2 to 1

Walk/Drive Consistency Scale



Q.8 Continue to imagine that you are moving to another home. I am going to read you a series of pairs of different kinds of communities. For each, please tell me in which of the two communities you would prefer to live. The first/next pair of communities is...

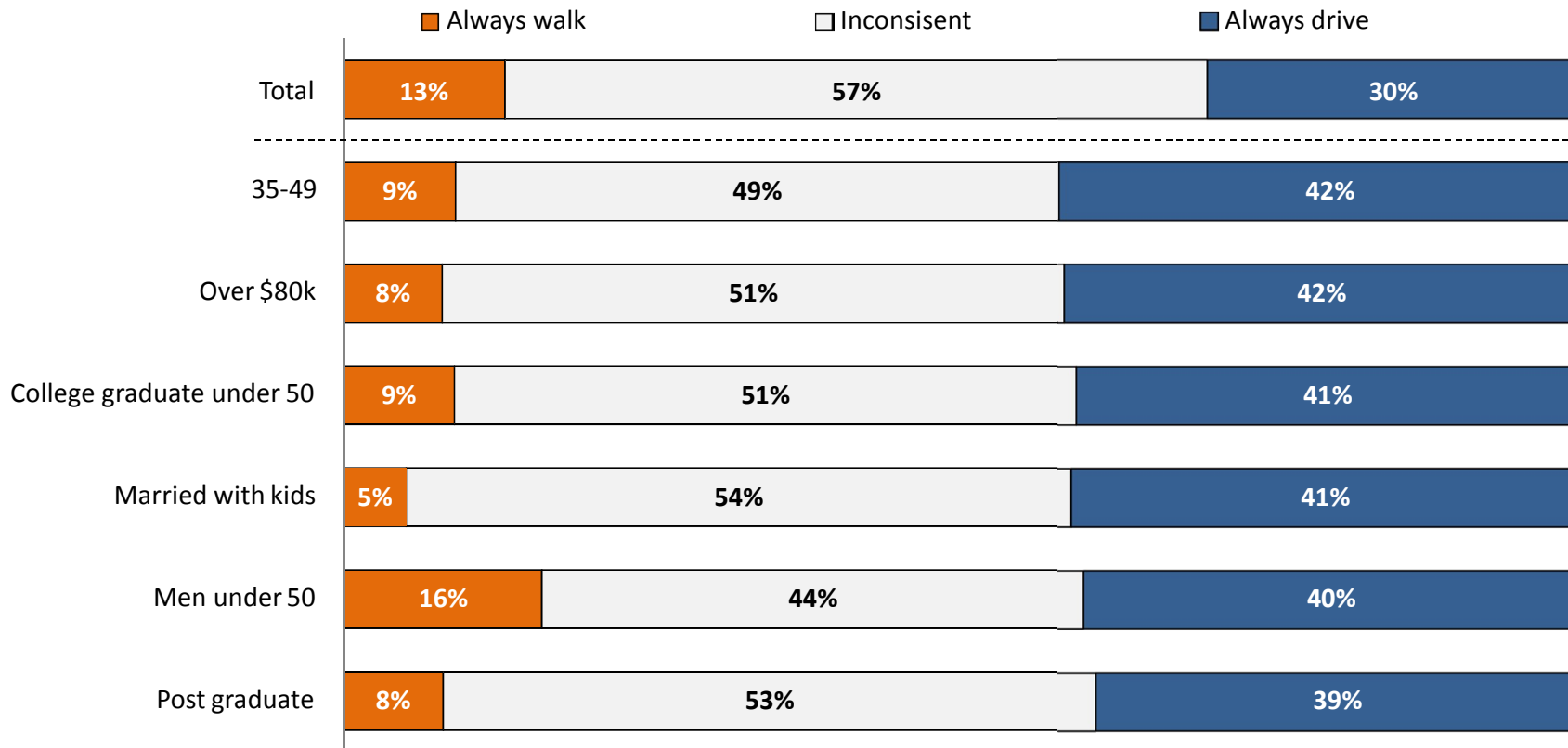
Preference for a Walkable Community Higher among Renters, in Glens Falls, and Unmarried Residents



Q.8 Continue to imagine that you are moving to another home. I am going to read you a series of pairs of different kinds of communities. For each, please tell me in which of the two communities you would prefer to live. The first/next pair of communities is...

Residents Age 35-49, Higher Income Residents, College Grads More Likely to Prefer Larger Homes and Lots in a Residential Community

Walk/Drive Consistency Scale

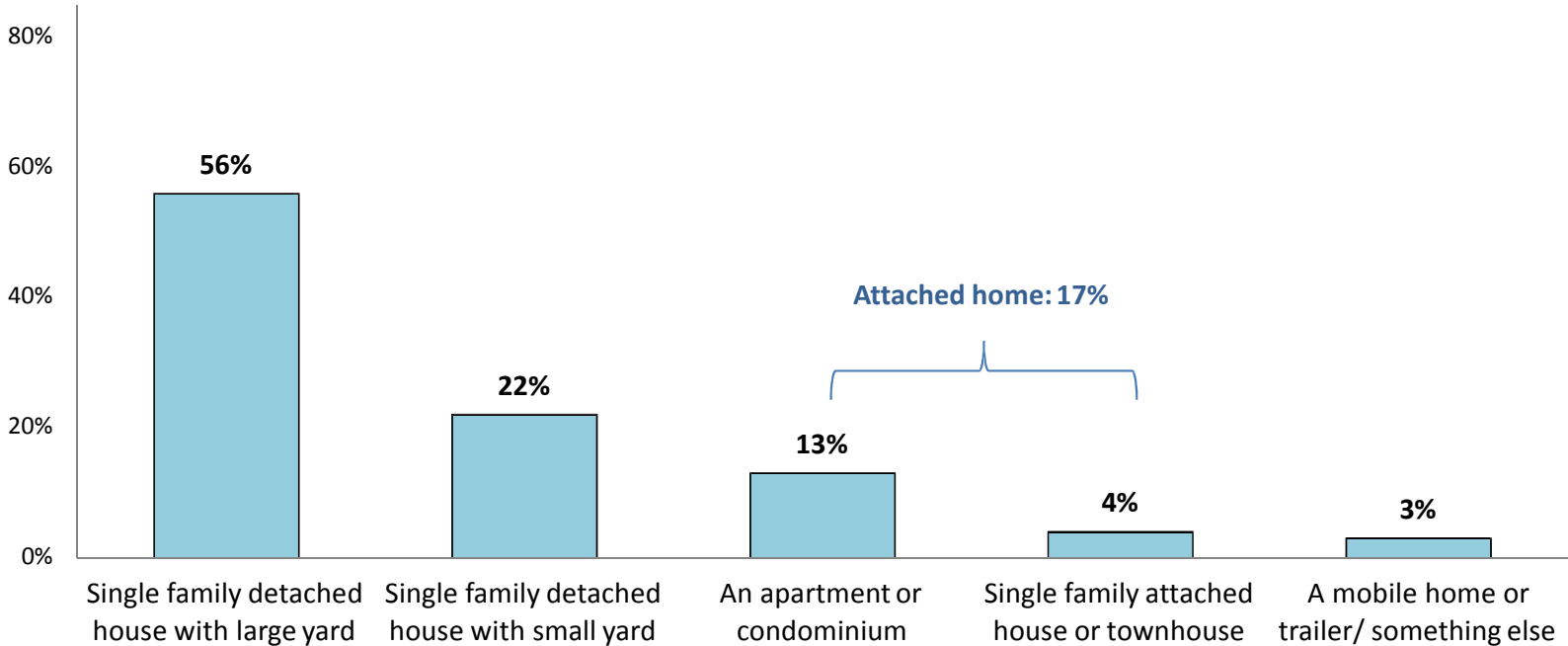


Q.8 Continue to imagine that you are moving to another home. I am going to read you a series of pairs of different kinds of communities. For each, please tell me in which of the two communities you would prefer to live. The first/next pair of communities is...

Over Three Quarters of Warren County Residents Live in Single Family Detached Homes, a Majority with Large Yards

Fewer than 1 in 5 live in attached homes

Type of Home You Currently Live In



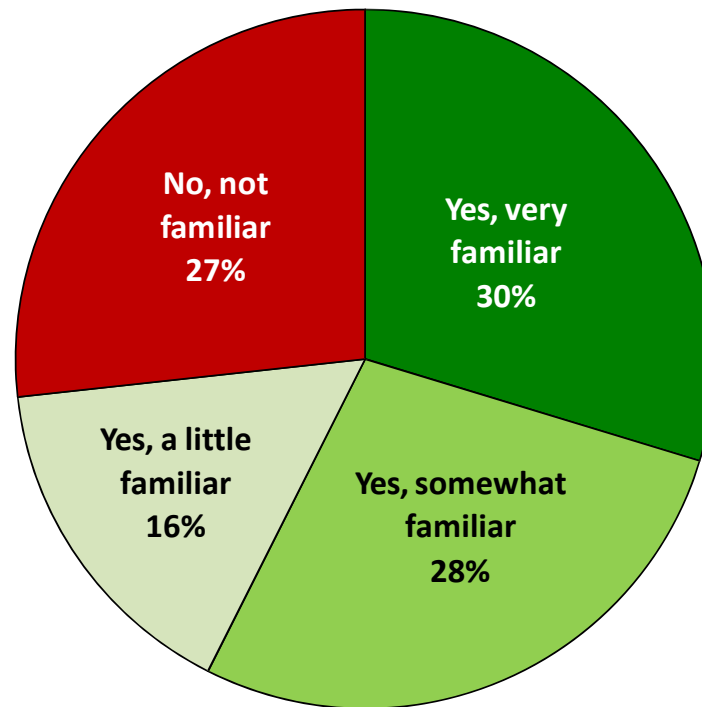
Q.5 And is the home you are currently living in best described as...

Short-Term Rentals

Three Quarters of Residents are at Least a Little Familiar with Short Term Rental Concept

Higher income and younger residents most familiar

Familiarity with Short-Term Rental Companies



<u>Not Familiar</u>	
Income under \$40k:	55%
Renters:	45%
H.S. or less:	43%
Non-college women:	43%
Non-college over 50:	42%

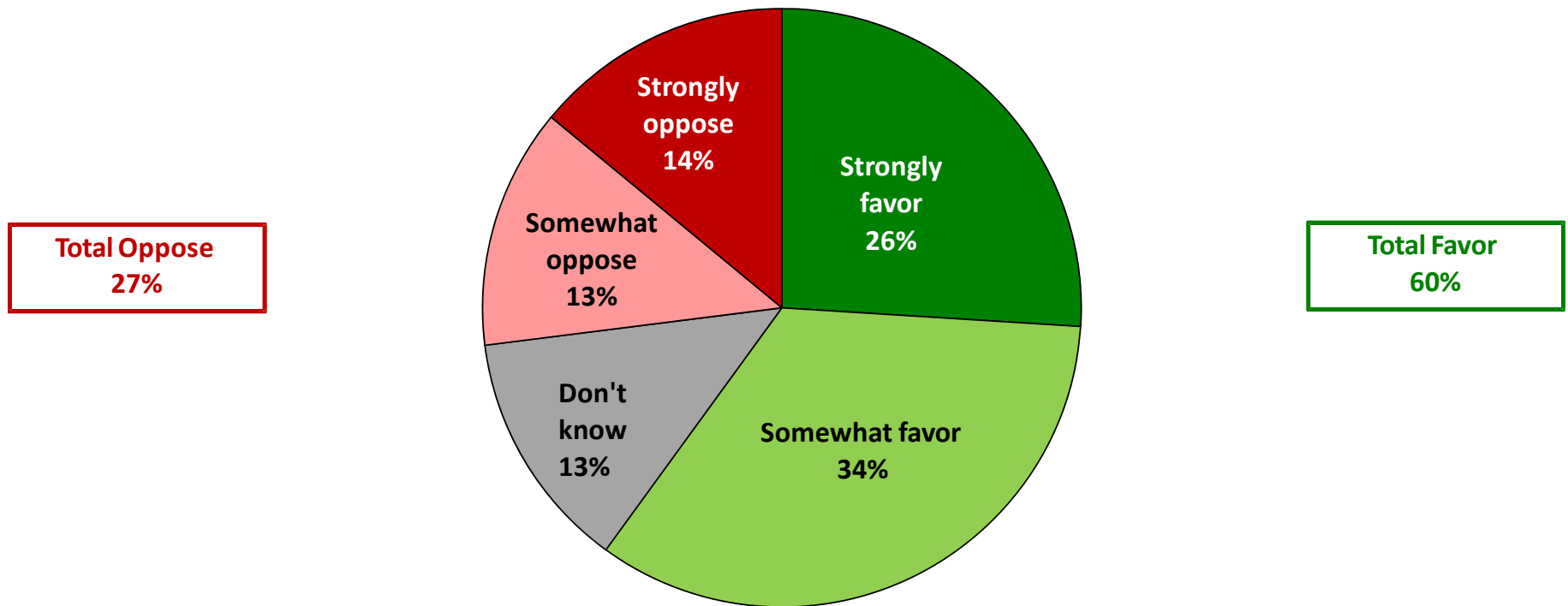
<u>Very Familiar</u>	
Income over \$80k:	48%
School-aged kids at home:	46%
Men under 50:	45%
College graduate:	41%

74% Total Familiar

Q.9 Switching gears a bit, I'd like to ask you about companies that allow people to rent out their homes, apartments, or a room in a house for short-term stays, companies like Air BnB, HomeAway, and V.R.B.O. Are you familiar with this approach to providing short-term room or housing rentals?

Majority Favor Allowing Property Owners to Rent Out Their Property for Short Term Stays

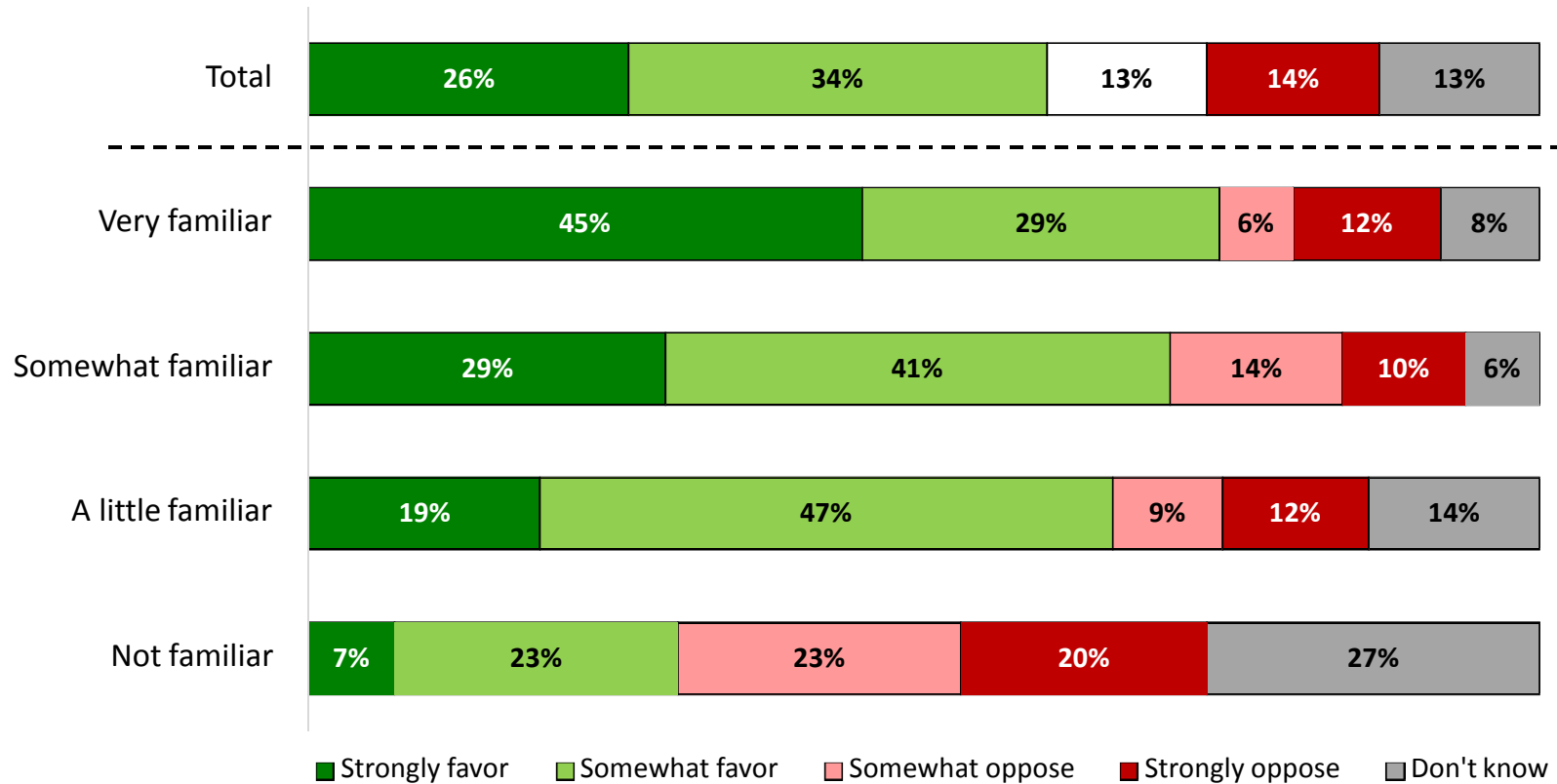
Favor/Oppose Allowing Property Owners to Rent Their Properties for Short-Term Rentals



Q.10 In general, do you (ROTATE) favor or oppose allowing property owners to rent out their property for short-term stays through companies like AirBnB, HomeAway, and V.R.B.O.?

Support for Allowing Short Term Rentals Increases with Familiarity

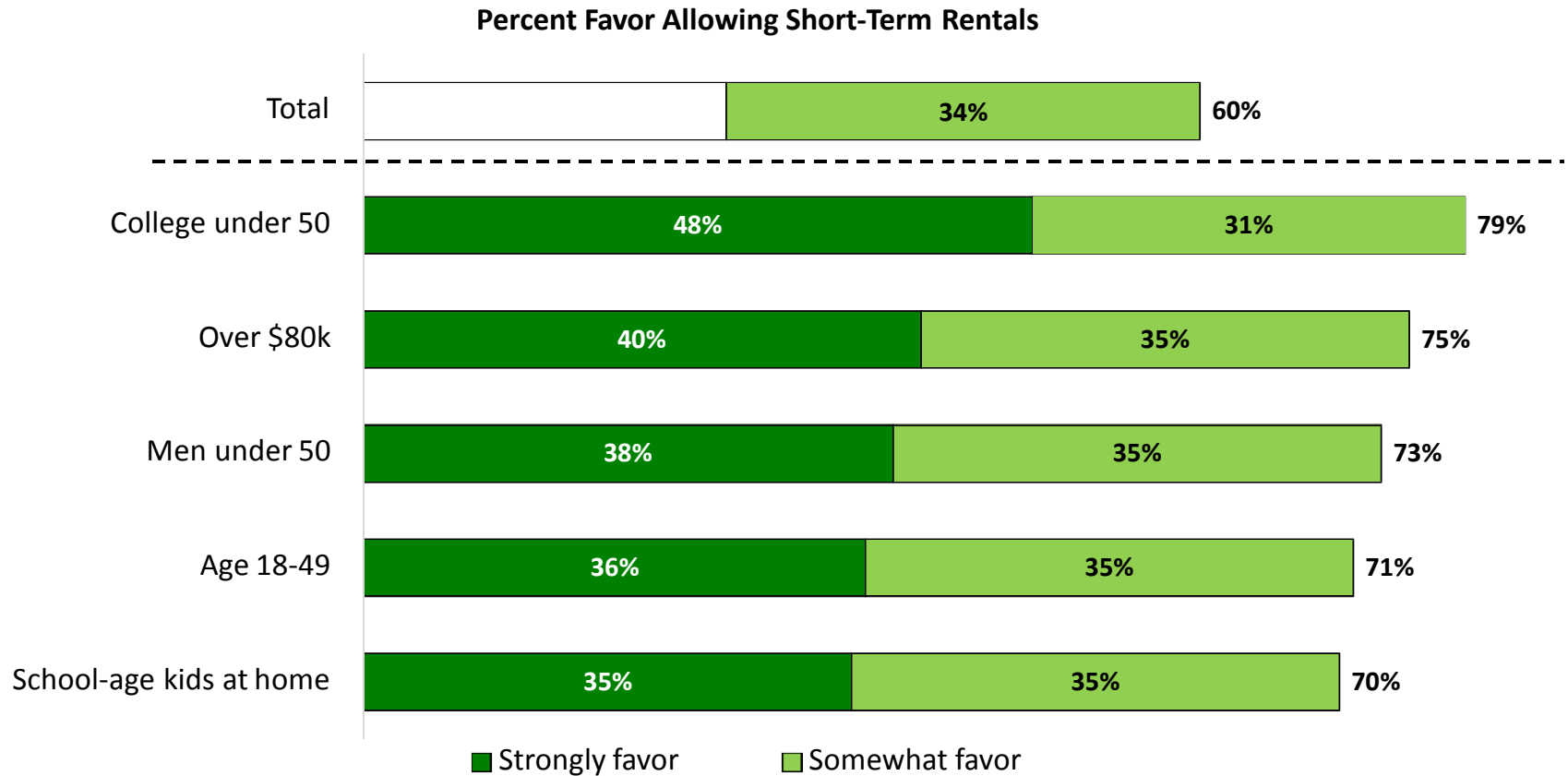
Allow Property Owners to Rent Their Properties for Short-Term Rentals
by Familiarity with Concept



Q.9 Switching gears a bit, I'd like to ask you about companies that allow people to rent out their homes, apartments, or a room in a house for short-term stays, companies like Air BnB, HomeAway, and V.R.B.O. Are you familiar with this approach to providing short-term room or housing rentals?

Q.10 In general, do you (ROTATE) favor or oppose allowing property owners to rent out their property for short-term stays through companies like AirBnB, HomeAway, and V.R.B.O.?

Strongest Support for Allowing Short Term Rentals Comes From Younger and Higher Income Residents

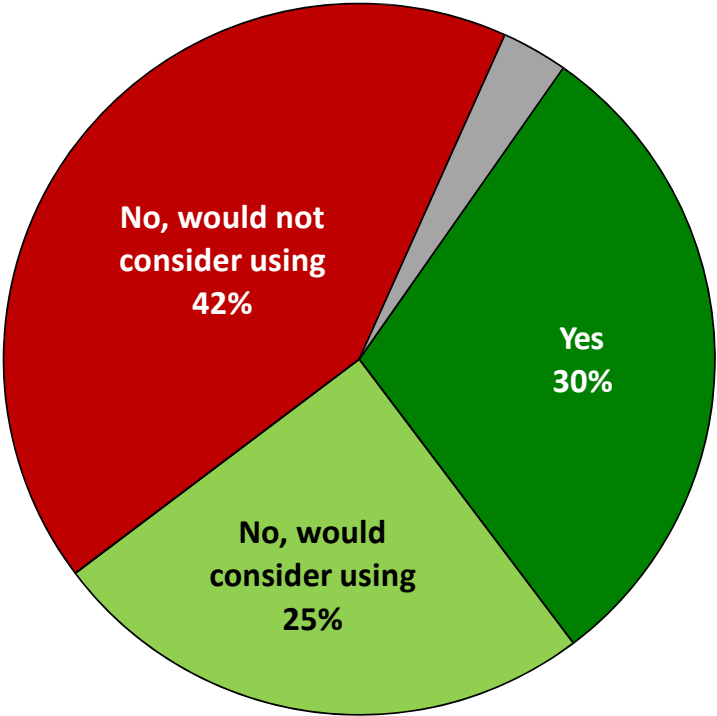


Q.10 In general, do you (ROTATE) favor or oppose allowing property owners to rent out their property for short-term stays through companies like AirBnB, HomeAway, and V.R.B.O.?

A Third of Residents Have Utilized a Service Like Air BnB, HomeAway, or V.R.B.O.

Another quarter of residents are open to using the services

Use of Services like Air BnB



<u>Would Not Consider</u>	
High School or less :	61%
Income \$40k or less:	59%
Over age 64:	53%

<u>Yes, Have Used</u>	
Income \$80k plus:	55%
College grad under 50:	54%
Post Graduate:	49%
Millennials:	41%
Men under 50:	41%

Q.11 Have you or your family ever rented a home, apartment, or room using a service like AirBnB, HomeAway, or V.R.B.O.? (IF NO) Would you consider using one of these services in the future?

Residents Support Requiring Short Term Rentals to Pay Same Taxes as Small Inns and B&Bs; Small Majorities Oppose Minimum Stay Requirements

Short-Term Rental Regulations

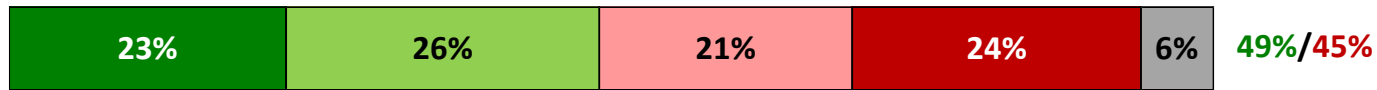
Requiring short term rentals to pay the same local hotel and lodging taxes as small inns and bed and breakfasts.



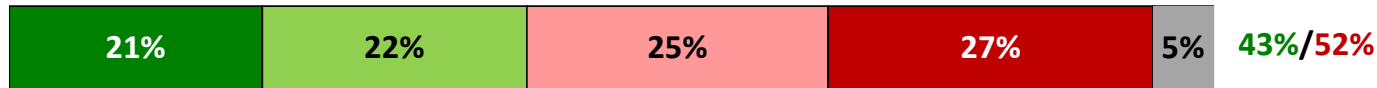
Limiting the number of properties in a neighborhood or apartment building that can be used for short-term rentals.



A limit to the number of nights each year that a room or home can be rented for short-term use.



A minimum stay requirement of three nights or longer. (SPLIT SAMPLE B)



A minimum stay requirement of five nights or longer. (SPLIT SAMPLE A)

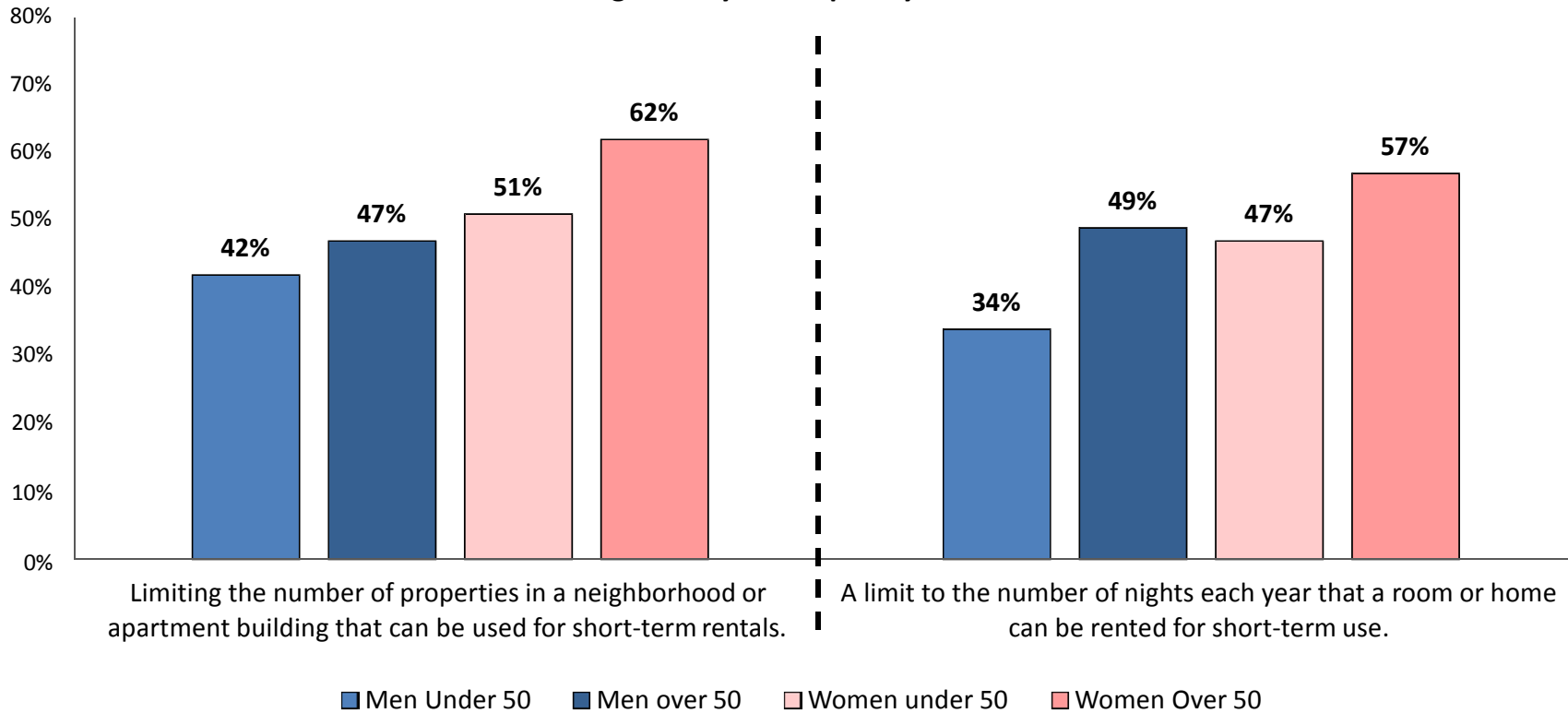


■ Strongly favor
 ■ Somewhat favor
 ■ Somewhat oppose
 ■ Strongly oppose
 ■ Don't know

Q.12 Still thinking about short-term property rentals, as you may know, different cities and towns have different rules and standards for these kinds of rentals. Please tell me if you would (ROTATE) favor or oppose each of the following rules for short-term rentals in Warren County.

Younger Men Less Supportive of Limiting Short-Term Rental Use; Older Women are More in Favor

Percent Total Favor Limiting Density or Frequency of Use for Short-Term Rentals

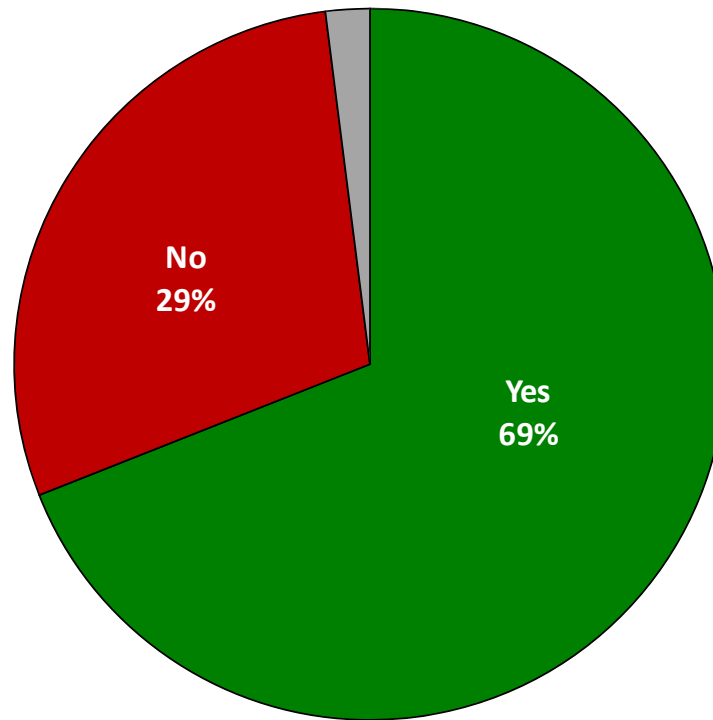


Q.12 Still thinking about short-term property rentals, as you may know, different cities and towns have different rules and standards for these kinds of rentals. Please tell me if you would (ROTATE) favor or oppose each of the following rules for short-term rentals in Warren County.

Septic System Inspection Proposal

Nearly Seven in Ten Have a Septic System at Their Home

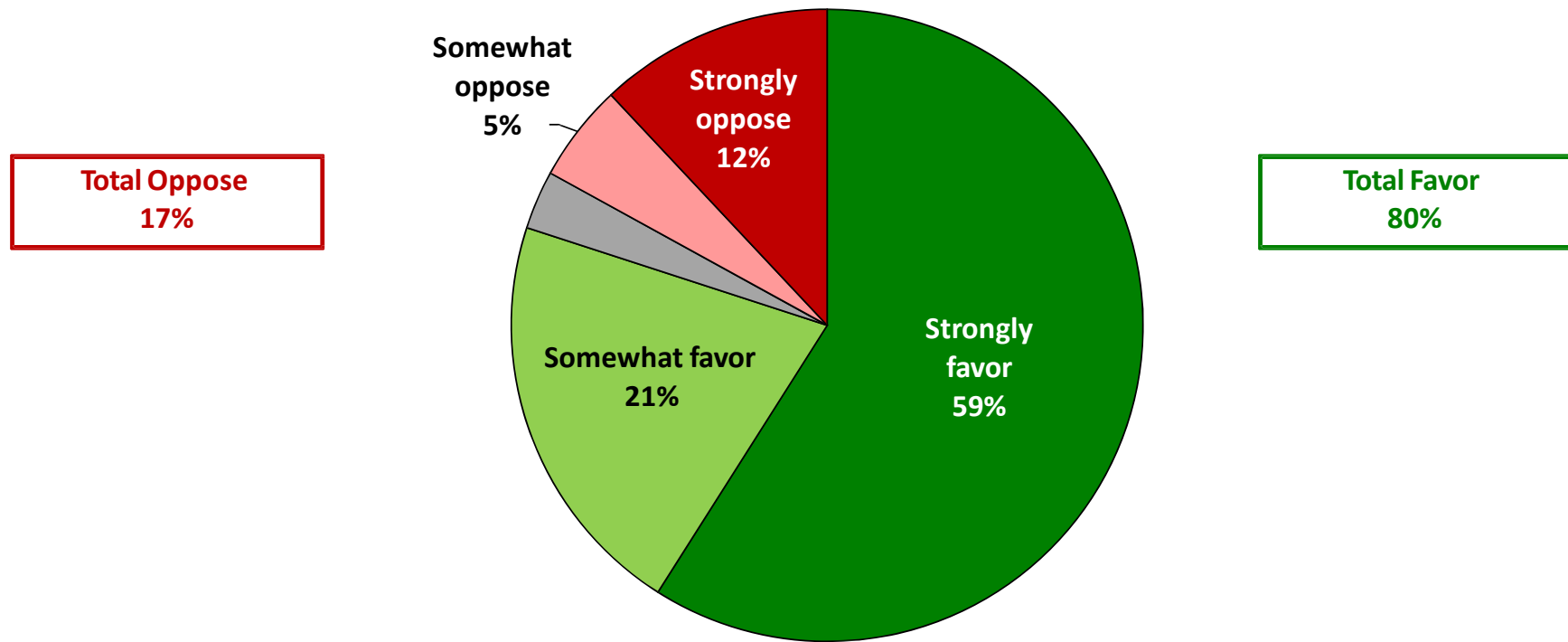
Does Your Home Use a Septic System?



Q.13 Moving on, as you may know, many homes in Warren County use a septic system for their plumbing instead of municipal sewers. Septic systems are underground wastewater treatment structures, commonly used in rural areas without centralized sewer systems. Does your home use a septic system for plumbing and wastewater, yes or no?

Broad Majority Favor Requiring Septic System Inspections for Homes that are Being Sold in Warren County

Require Septic System Inspections for Homes Being Sold

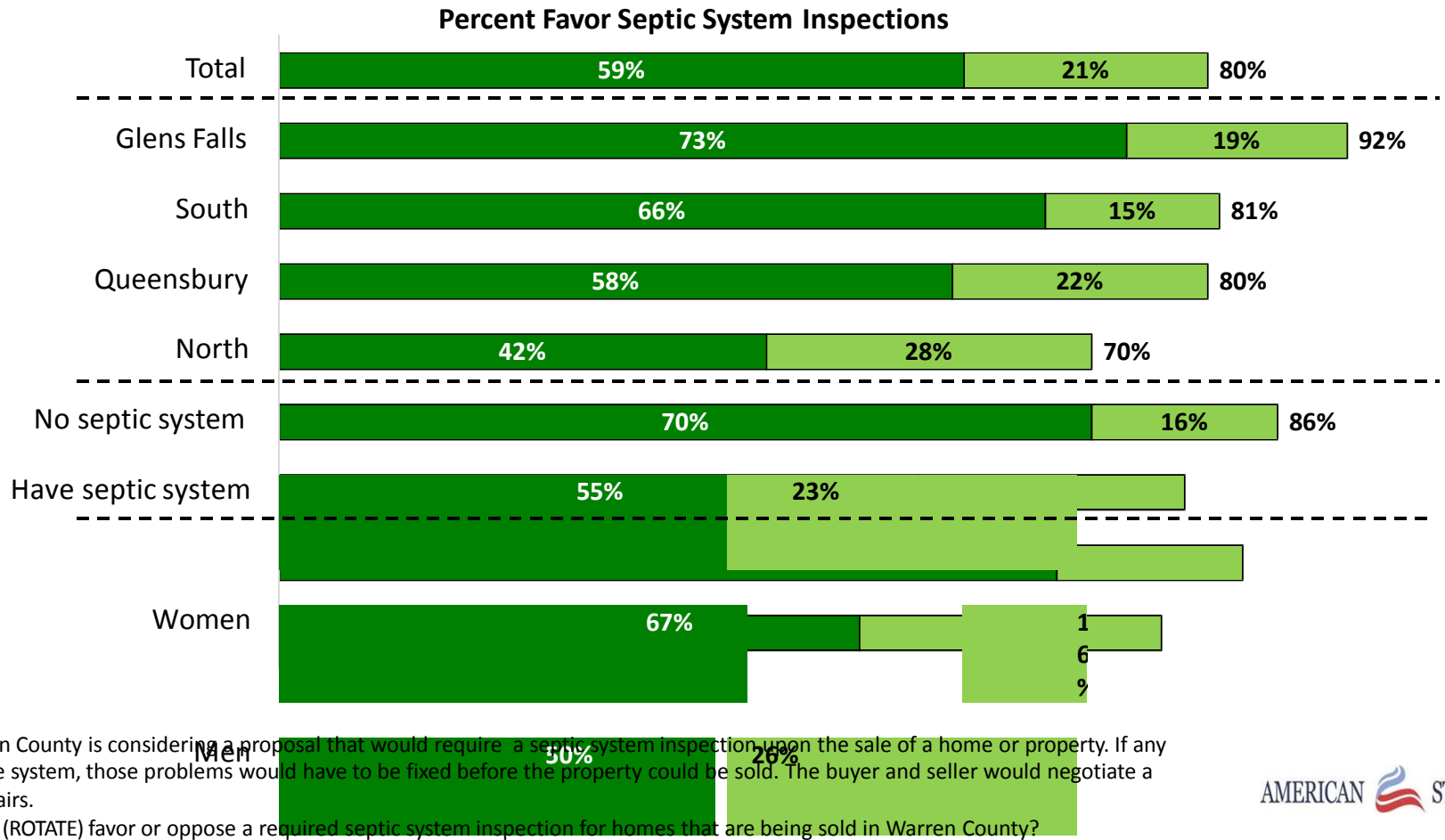


Q.14 As you may know, Warren County is considering a proposal that would require a septic system inspection upon the sale of a home or property. If any problems were found with the system, those problems would have to be fixed before the property could be sold. The buyer and seller would negotiate a process for paying for the repairs.

In general, would you say you (ROTATE) favor or oppose a required septic system inspection for homes that are being sold in Warren County?

Glens Falls Residents and Those Without Septic Systems are Strongest Supporters of Septic System Inspections

Residents in the North are less strongly in favor.



Q.14 As you may know, Warren County is considering a proposal that would require a septic system inspection upon the sale of a home or property. If any problems were found with the system, those problems would have to be fixed before the property could be sold. The buyer and seller would negotiate a process for paying for the repairs.

In general, would you say you (ROTATE) favor or oppose a required septic system inspection for homes that are being sold in Warren County?

Strongly favor

Nearly Two Thirds are Much More Likely to Support Septic Inspection Requirement After Hearing That it is Aimed at Reducing Pollution in Local Lakes and Rivers

Possible price tag is concerning, but even so only half say it makes them less likely to support the proposal

Septic System Inspection Details

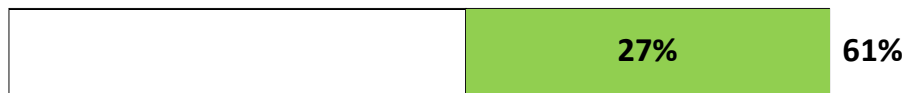
The goal of the law is to make sure broken septic systems are repaired in order to reduce pollution leaking into local lakes and rivers.



All homes in the municipality will be required to have a septic system inspection when the property is transferred. (SPLIT B)



Only homes zoned as waterfront residential in the municipality will be required to have a septic system inspection when the property is transferred. (SPLIT A)



The town of Queensbury recently passed an identical law to this one.



Septic system repairs range from a few thousand dollars to tens of thousands of dollars.



■ Much more likely ■ Somewhat more likely

Q.15 Next, I am going to read to you some more information about the proposal to require an inspection for septic systems upon the sale of a property in Warren County. Please tell me whether hearing each detail makes you (ROTATE) more or less likely to support the proposal, or whether that detail makes no difference to you either way.

National Association of REALTORS®

*Warren County, NY Smart Growth Survey
June 2019*

American Strategies designed and administered this telephone survey conducted by professional interviewers. The survey reached 400 adults, age 18 or older, who indicated their primary residence is in Warren County, New York. The survey was conducted from June 13 –June 16, 2019. Thirty-two percent of respondents were reached on wireless phones (forty-four percent unweighted), twenty-five percent on VOIP phones, and forty-three percent on landlines. Quotas were assigned to reflect the demographic distribution of voting age adults in Warren County, New York and the data were weighted to ensure an accurate reflection of the population. The sample was drawn from a third-party vendor voter file and based on vote history. The overall margin of error is +/- 4.9%. The margin of error for subgroups is larger and varies. Percentage totals may not add up precisely due to rounding.