




Northwest Vermont
REALTOR® Association

HOUSING PREFERENCES POLL REPORT - FRANKLIN AND GRAND ISLE COUNTIES

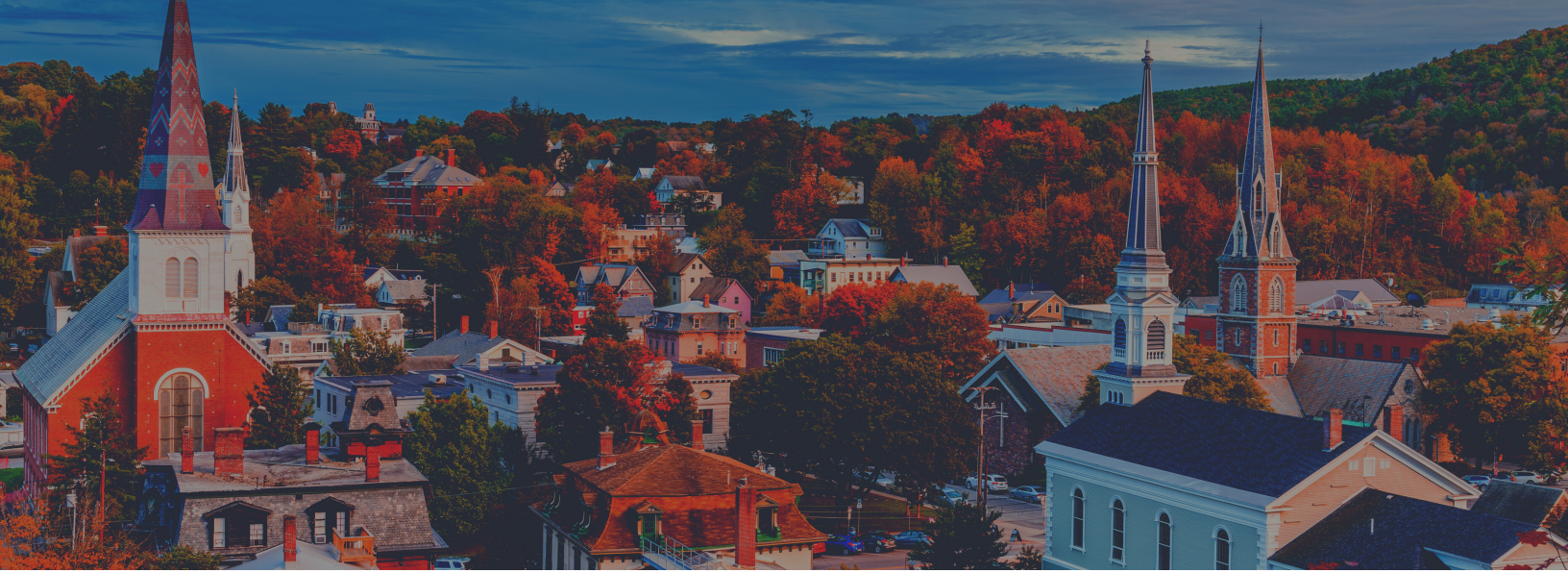
OCTOBER 2023

ABOUT OUR ASSOCIATION



The Northwest Vermont REALTOR® Association (NVRA) is a trade association serving approximately 700 REALTORS®, appraisers, and other real estate professionals in Chittenden, Franklin, and Grand Isle Counties. Founded in 1968, our Association provides a variety of services to our members, including networking events, continuing education, leadership development, community service opportunities, awards and distinctions, as well as advocacy in local and state government.

Because many of the policies made by local, state, and national government entities affect the real estate market, REALTORS® are committed to fostering relationships with elected officials and staff to protect investment in all forms of housing, strong communities, and a vibrant business environment. REALTOR® advocacy emphasizes the importance of homeownership as a driving force of the US economy and as a tool for individual wealth creation.



Introduction

In May 2023, the Northwest Vermont REALTOR® Association partnered with the National Association of REALTORS® and American Strategies to conduct a poll of registered voters in Franklin County and Grand Isle County. As housing supply continues to be an issue in Chittenden County, we expect more people to look at Franklin and Grand Isle for housing options, and these communities face their own unique challenges in terms of housing supply and land use. The survey was intended to provide data on housing preferences and satisfaction, municipal priorities, awareness of Vermont's Act 250, and reception of specific changes to Act 250 so that industry stakeholders can strategize a long-term approach to advocacy and housing development in these areas.

The following report provides highlights, insight, and implications for policy reform based on the polling data.

Methodology and Demographics

The poll was conducted over a series of 10 days via phone and online survey and consisted of 19 substantive questions, excluding the demographic questions. A copy of these questions is included as Appendix A at the conclusion of this report. The poll participants answered basic identifying information to provide demographic context for the data reported. 79% of poll respondents are homeowners, while only 13% are renters, and 8% are living with family or friends. 56% of respondents have an income of over \$75,000 annually which is \$7,326 higher than the median household income of \$67,674 in VT as of 2021 (US Census Bureau).

The age of respondents spanned from 18 to over 65, with the largest percentage of respondents (52%) falling over the age of 50. As with all data collection efforts, it is crucial to understand that the demographics of respondents often affect how they respond. Considering the demographic data, the average respondent can be assumed to be a homeowner over the age of 50.



Wireless (183)
Landline (105)
Online (112)



431 (weighted to 400)
Registered voters in
Northwest, Vermont

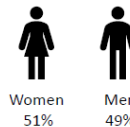


Interviews
conducted
May 1st – 9th

Franklin County: 352
(weighted to 340)
Grand Isle County: 79
(weighted to 60)

Demographics

Gender



Owner/Renter

Homeowner: 79%
Renter: 13%
Lives with Friends/Family: 8%

Income

\$75,000 or less: 38%
Over \$75,000: 56%

Current Residence

Less than 3 years: 23%
3 to 5 years: 17%
6 to 10 years: 17%
11 to 20 years: 15%
More than 20 years: 28%

Age

18-29: 13%
30-39: 16%
40-49: 15%
50-64: 26%
65+: 26%

Region by House District

Franklin County Districts:
1, 2, CHI FRA: 26%
3 and 8: 17%
4 and 6: 21%
5 and 7: 20%
Grand Isle: 15%

Education

High School or Less: 24%
Post H.S.: 31%
College Graduate: 44%

Findings

LIFE IN FRANKLIN COUNTY AND GRAND ISLE

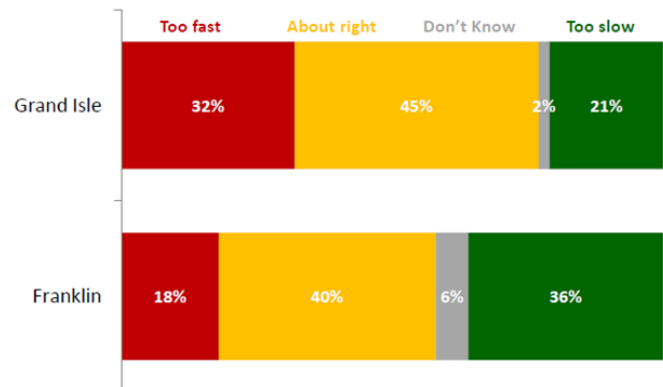
The first portion of the survey asked respondents about general quality of life and priorities in their county of residence:

- Overall, how would you describe the quality of life in [County]: excellent, good, just fair, or poor?
- Rate each of the following issues using a scale of one to five, where one means that issue is not a priority for you at this time, and five means that issue is a top priority: maintaining streets and roads, attracting businesses and good paying jobs to the area, protecting open space like fields, forests, and farmland from development, increasing the amount of housing that is affordable for most families, encouraging the development of more walkable neighborhoods, where offices, stores, and entertainment are close to homes and apartments.
- Would you say that the pace of COMMERCIAL growth and development in [County] is happening too fast, too slow, or is happening at about the right pace?
- Would you say that the pace of RESIDENTIAL growth and development in [County] is happening too fast, too slow, or is happening at about the right pace?

Responses reveal that generally, Franklin County and Grand Isle County voters are happy with quality of life, with 77% of respondents giving a rating of good or excellent. The highest priorities for respondents were street and road maintenance, closely followed by increasing job growth and business growth in the area. Though attracting commercial growth appears to be a priority for these respondents, they were split on satisfaction with the pace of residential growth.

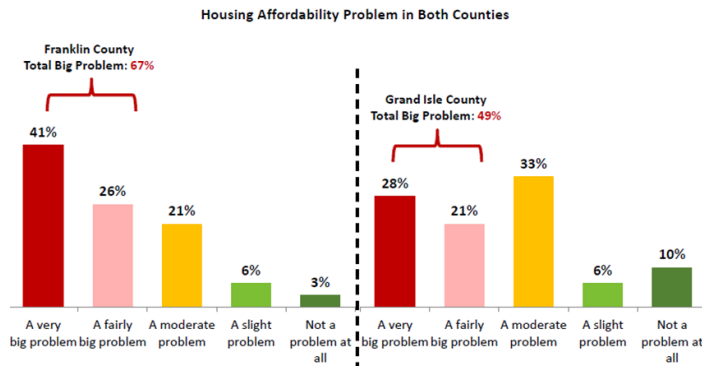
Franklin County Voters Say Residential Growth Is Too Slow, Grand Isle County Voters Say Too Fast

Pace of Residential Growth and Development in Vermont By County

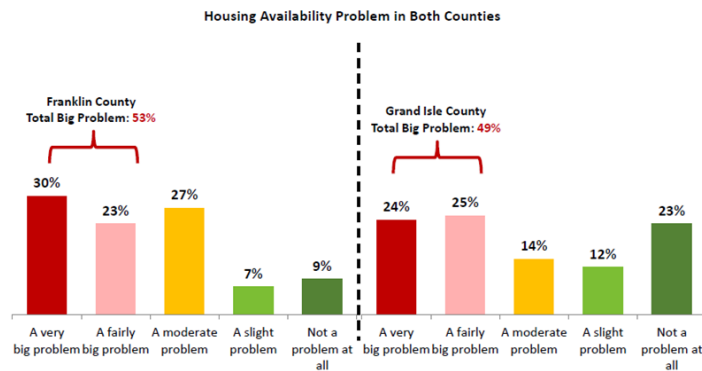


HOUSING IN FRANKLIN COUNTY AND GRAND ISLE COUNTY

Grand Isle County Voters See Housing Affordability as Less of a Problem than Franklin County Voters



Housing Availability Seen as Big or Moderate Problem in Franklin County; Similar Numbers in Grand Isle County

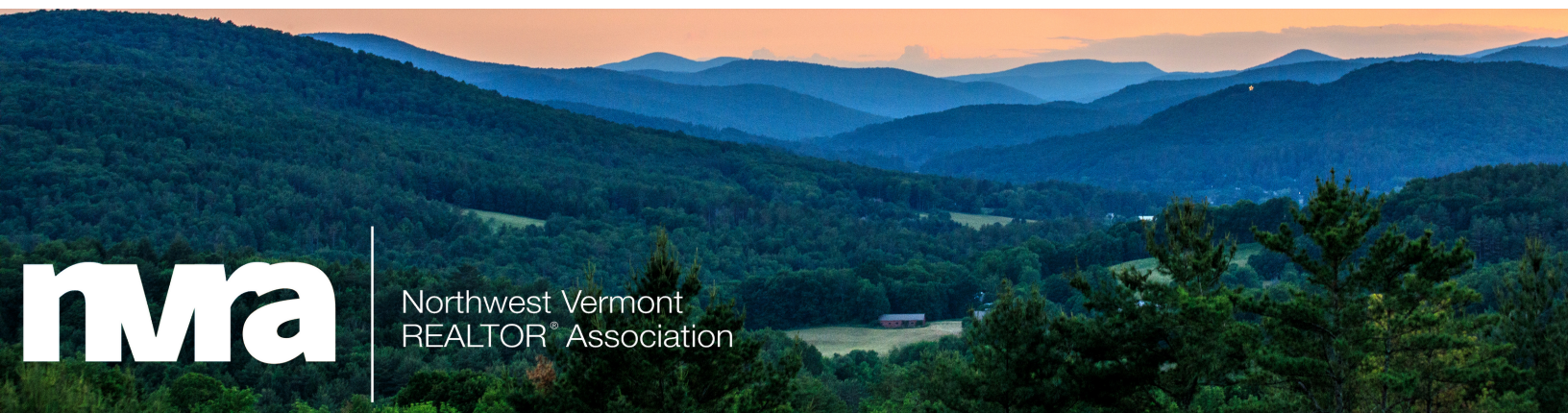
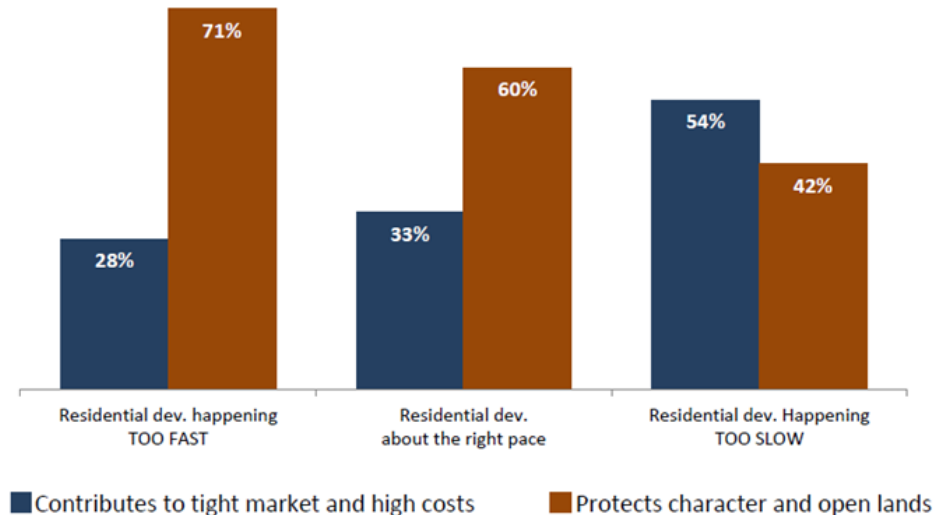


The next portion of the survey asked respondents to consider housing costs and availability as issues in their county. 67% of respondents in Franklin County said that housing affordability is “a big problem” in the area, but only 53% identified housing availability as a big problem. In Grand Isle County, only 49% of respondents reported that affordability is an issue, but 49% also said that availability is a big problem in Grand Isle. This reveals a disconnect in understanding of how housing supply affects housing cost, which we see as a theme at later points in the survey.

Another paradox emerged when respondents were asked about what type of housing they would prefer to be built in their county. 46% of respondents in Franklin County strongly supported increased building of single family, detached houses on large lots of a half-acre or more, and 32% of respondents strongly supported single family, detached housing on small lots. Grand Isle responses showed similar numbers. When asked to rank municipal priorities earlier in the survey, preservation of open space and protection from development had an average ranking of 3.8, just edging out increasing the amount of housing that is affordable for most families. The conflict between these two preferences demonstrates tension between the need for increased housing supply and residents' preferences for open space. Further, while some respondents said that the pace of residential growth was too slow, there was only a narrow overlap between that response and the importance of building new housing.

People Who Say Pace Of Development Is Too Slow Only Narrowly Side With Proponents Of Building More Housing

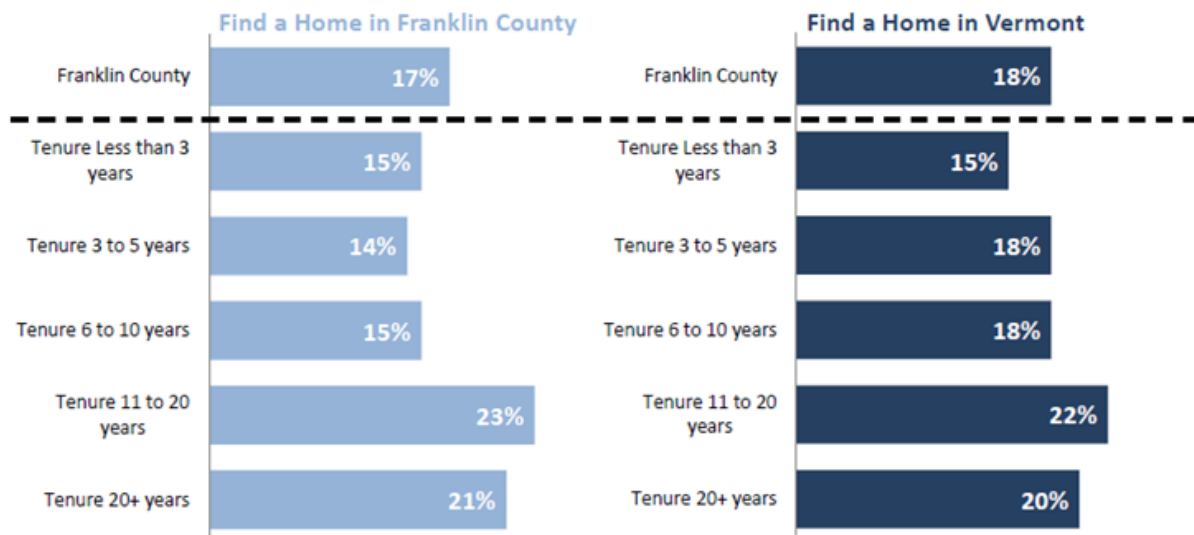
Many are still concerned about the character of their towns and villages.



Poll responses also revealed that renters, young voters, and families with children at home are most strained by the current cost of housing, and that respondents who had lived in the Franklin County for more than 11 years were more confident that they would be able to afford housing in Vermont if they needed to move than those who had been in the area for less than 10 years. This shows the importance of equity from home ownership, as most of the more tenured respondents owned their home. The tight market is raising the barrier for entry into homeownership for many, which results in less equity built over time and less stability in housing situations.

Those With Higher Tenure Are More Confident in Their Ability to Afford the Home They Need If They Move

Confidence of Being Able to Afford the Kind of Home the meets your needs
5 on a scale of 1 to 5



VOTERS ON ACT 250

As the premier piece of land use regulation in Vermont, Act 250 is often the center of conversations on housing supply issues. Though not the singular source of a tight housing market, certain provisions in Act 250 contribute to slow growth, and are the subject of reform discussions at the State Legislature. NVRA was interested in learning whether the general populace has an awareness of Act 250, particularly the 10-5-5 rule, and how their perceptions of Act 250 relate to housing preferences.

In Franklin County, a little over half of the respondents were somewhat familiar with Act 250. In Grand Isle County, that number rose to 68%. After the initial inquiry, the surveyor described the 10-5-5 rule of Act 250.

“As you may know, Act 250 is a land use law that limits development. Under Act 250, a single developer can only build nine new units of housing within a five-mile radius in a five-year timeframe without a permit to build more. Developers have to get an Act 250 permit with an extensive review and public comment process to build 10 units or more. This is known as the ten-five-five rule.”

When asked about changing the 10-5-5 rule to 25-5-5, respondents showed strong opposition, but when the 10-5-5 rule was put in context of housing costs and supply, opposition to changes softened slightly. This demonstrates that messaging and education about how Act 250 has influenced housing supply and costs would warm reception to proposed reforms, but there is clearly a long way to go in bringing the general public around to reforms.

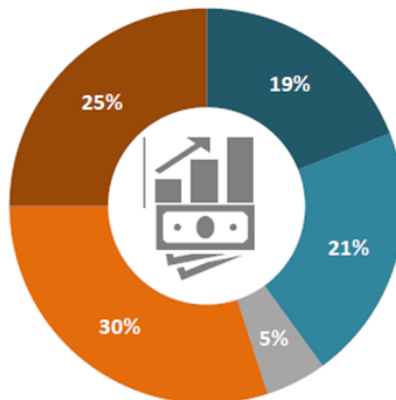
Majority Feel That the 10-5-5 Rule Is The Best Way to Protect the Environment and Our Communities

Messaging about housing costs and supply does soften opposition.

Paired Statements

Total Statement B: 55% | Total Statement A: 40%

(STATEMENT B)
SOME/OTHER people say that the 10-5-5 rule protects the unique character of our towns and villages, open lands, forests, and farms. Developers can build more housing if they get a permit. These permits ensure that we are protecting the environment and our communities, and not selling out to big developers.



(STATEMENT A) SOME/OTHER people say that the 10-5-5 rule contributes to the tight housing market and high costs. There's so much red tape that housing construction hasn't kept up with population growth for the last 50 years. We need to build more housing, quickly, to bring down costs and make sure people who were born and raised here can afford to stay.

Statement B -
much more

Statement B -
somewhat more

Don't
Know/ refused

Statement A -
somewhat more

Statement A -
much more

Implications for Reform

The Northwest Vermont REALTOR® Association is invested in finding solutions to increasing housing supply, and subsequently affordability, in Vermont. Poll results show that while these registered voters value green space and preserving Vermont as it has always been, they are also interested in commercial growth to increase commercial amenities available to residents. Commercial growth is uniquely tied to residential growth, as new businesses will need appropriate, affordable housing options for their workforce. Based on this polling data, we see an additional challenge of bringing current residents on board to change: voters don't think that building more housing will benefit them personally. Two-thirds of respondents have lived in their current home for more than five years, are very satisfied with their living situation, and do not feel financially strained from their rent or mortgage payment. They feel less confident that they would be able to find affordable housing in Northwest Vermont if they had to move, but this does not appear to be an immediate concern for most residents. The economic longevity and vitality of Vermont is strongly linked to the state of the housing market, and as such, stakeholders in this area must get creative with solutions to these issues, and provide additional education to current residents about why expanding housing stock is good for all Vermonters.

Our focus points for reform include:

a. Diverse Housing Options

Vermonters need choice when it comes to housing options available: apartment buildings, duplexes, quadplexes, cottage courts, condominiums, and single-family housing all serve different needs within neighborhoods. Diversity in housing stock provides a spectrum of affordability and lifestyle that traditional development of strictly single-family neighborhoods does not. In a study of 14 US metropolitan statistical areas, researchers from the Association of Collegiate Schools of Planning found that diverse housing stock is also associated with financially stable neighborhoods more resistant to foreclosure and stability of property values. By building more housing that maintains the character and charm of our community, we're not only creating local jobs and boosting our economy, but also meeting the demand for diverse housing options that cater to different needs, prices and preferences. With this approach, we not only unlock opportunities for first-time homebuyers, we safeguard the future of our senior neighbors. By giving them options for independent living, they have a unique opportunity to stay in the communities they know and love, while cashing out on equity they've built and moving to a more manageable living environment.

b. Local Economic Development

A vote for improved housing affordability is a vote for a prosperous local economy. When housing costs are manageable, our community can blossom. With increased disposable income, families can invest in local businesses, strengthening our bonds and driving overall economic growth. Diverse housing options ensure that our community has the workers it needs for a thriving economy with diverse local businesses.

IMPLICATIONS FOR REFORM (CONT.)

c. Act 250 and Local Zoning Reform

In 2021, approximately 23.8 percent of the final price of a new single-family home could be attributed to regulation at all levels of government (Emrath). While it is crucial to maintain wildlife habitats and recreational outdoors spaces, tenets of Act 250 have significantly limited development in Vermont. Act 250 must have significant reforms that make it easier and less expensive to build multiple housing types more quickly in more areas of Vermont. Local zoning authorities must reduce the regulatory barriers to housing development by allowing for greater density and diversity of housing stock within existing zoning codes.

d. Reduce Sprawl and Increase Density

Urban sprawl is uncontrolled expansion of development. A sprawling community is marked by low-density residential housing, more traffic, poor air and water quality, and worsened public health markers (Frumkin). By focusing on increasing housing supply and the density in existing towns and villages, we can actively combat sprawl and instead promote sustainable development. This approach minimizes the need for expanding into green spaces, protects the environment, and preserves the natural beauty of our forests, fields, and farms.

e. Plan for the Future: Engage in Lasting Investment

In envisioning a future where our communities thrive, recognizing the pivotal role strategic housing development plays is essential. By focusing on strategically bolstering housing supply within our towns that we need both immediately and will need in the future, we take a purposeful step towards providing housing that is affordable, supporting Vermonters and our communities, and maintaining our special Vermont character. Land use and development planning should consider growth as crucial to Vermont's economic longevity and vitality, and thus invest in bolstering housing stock for years to come.



Conclusion

The challenges Vermont is facing in regard to housing stock are not entirely unique to our state: housing affordability and availability are an issue nationwide, and many government entities are trying creative options to ease barriers to new housing. Vermonters must work together to bring more housing options online, through rehabilitation of vacant or blighted properties and development of new housing through the state. In thinking of next steps, NVRA invites interested stakeholders, both residents, elected officials, and municipal and planning authority staff to consider a holistic approach to reform through democratic discussion and innovation. Everyone loses when our housing market struggles, so we must compromise and work together to ensure housing is available and affordable across all income levels.

FOR MORE INFORMATION ON NVRA, VISIT [NWVTREALTOR.ORG](https://www.nwvtrealtor.org).
TO SIGN UP FOR ALERTS AND ADDITIONAL INFORMATION, VISIT
[VERMONTHOUSINGSOLUTIONS.COM](https://www.vermonthousingsolutions.com).

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[doi:10.1093/phr/117.3.201](https://doi.org/10.1093/phr/117.3.201)

AMERICAN STRATEGIES

VT - Northwest County Smart Growth (REVISED)

1. Interviewer initials. Hello, my name is (CALLER NAME). I'm calling from (PHONE BANK NAME) with a public opinion survey about [INSERT COUNTY NAME] County. I am NOT selling anything, and I will NOT ask you for a donation. May I speak with (NAME FROM FILE)?

(IF RESPONDENT, CONTINUE)

(IF NO) Is there another adult, age 18 or older, at the home I can speak with?

(IF YES, CONTINUE)

(IF NO, SCHEDULE CALLBACK WITH NAME FROM FILE)

ref: INTRO

- ☐ Dial
- ☐ Logoff

2. First of all, are you registered to vote in [INSERT COUNTY NAME] County?

(IF NO) I'm sorry. Is there a registered [INSERT COUNTY NAME] County voter available I can speak to?

ref: SCREEN

- ☐ Yes
- ☐ No (TERMINATE)

3. Sex of respondent

ref: GENDER

- ☐ Male
- ☐ Female

4. Overall, how would you describe the quality of life in [INSERT COUNTY NAME] County – (ROTATE FIRST TO LAST, LAST TO FIRST) excellent, good, just fair, or poor?

ref: QUAL

- | | |
|---------------------------------|--|
| <input type="radio"/> Excellent | <input type="radio"/> Poor |
| <input type="radio"/> Good | <input type="radio"/> (Don't know/refused) |
| <input type="radio"/> Just fair | |

5. Next I am going to read some issues that people say should be a priority for the local government and elected officials in [INSERT COUNTY NAME] County. Please rate each of the following using a scale of one to five, where one means that issue is not a priority for you at this time, and five means that issue is a top priority for you at this time. Of course, you can use any number between one and five, the higher the number, the higher the priority you place on that issue.

The first/next item is...(READ ITEM).

(PROMPT AS NEEDED) Please rate that on a scale of one to five, where one means that issue is not a priority for you and five means that issue is a top priority for you.

(CODE DON'T KNOW OR REFUSED 6)

(RANDOMIZE)

ref: PRIOR

- A. Attracting businesses and good paying jobs to the area
- B. Protecting open space like fields, forests, and farmland from development
- C. Increasing the amount of housing that is affordable for most families
- D. Encouraging the development of more walkable neighborhoods, where offices, stores, and entertainment are close to homes and apartments
- E. Maintaining streets and roads

6. Now thinking about growth and development in [INSERT COUNTY NAME] County.

(COMDEV AND RESDEV)

Would you say that the pace of RESIDENTIAL growth and development in [INSERT COUNTY NAME] County is happening (ROTATE TOO FAST AND TOO SLOW) too fast, too slow, - or is it happening at about the right pace?

ref: RESDEV

- ☐ Too fast
- ☐ Too slow
- ☐ About the right pace
- ☐ (Don't know/refused)

7. (ROTATE RESDEV AND COMDEV)

And would you say that the pace of COMMERCIAL growth and development in [INSERT COUNTY NAME] County is happening (ROTATE TOO FAST AND TOO SLOW) too fast, too slow, - or is it happening at about the right pace?

ref: COMDEV

- ☐ Too fast
- ☐ Too slow
- ☐ About the right pace
- ☐ (Don't know/refused)

8. And thinking about housing in [INSERT COUNTY NAME] County.

(ROTATE COST AND AVAIL)

How much of a problem is housing affordability in your community, that is to say, how much it costs to buy or rent a home?

Is housing affordability (ROTATE FIRST TO LAST AND LAST TO FIRST) a very big problem, a fairly big problem, a moderate problem, a slight problem, or not a problem at all?

ref: COST

- ☐ A very big problem
- ☐ A fairly big problem
- ☐ A moderate problem
- ☐ A slight problem
- ☐ Not a problem at all
- ☐ (Don't know/refused)

9. (ROTATE COST AND AVAIL)

How much of a problem is the availability of housing in your community, that is to say, the number of houses, condominiums, or apartments that are available to buy or rent?

Is housing availability (ROTATE FIRST TO LAST AND LAST TO FIRST) a very big problem, a fairly big problem, a moderate problem, a slight problem, or not a problem at all in your community?

ref: AVAIL

- ☐ Very big problem
- ☐ Fairly big problem
- ☐ Moderate problem
- ☐ Slight problem
- ☐ Not a problem at all
- ☐ (Don't know/refused)

10. Some people would like to see more housing built in [INSERT COUNTY NAME] County to increase supply, lower costs, and provide more options. Please tell me if you would support or oppose more of each kind of housing being built in your community.

(RANDOMIZE ORDER)

Do you (ROTATE FIRST TO LAST, LAST TO FIRST) strongly support, somewhat support, somewhat oppose, or strongly oppose building (READ ITEM) in your community?

ref: DENSITY

	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	(Don't know/refused)
A. Apartment buildings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Condominium buildings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Duplexes and triplexes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Single family, attached townhouses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Single family, detached houses on large lots of a half an acre or more	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. Single family, detached houses on small lots a quarter of an acre or less	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. Still thinking about land use and development in Vermont. Have you heard of a state law called Act 250?

(IF YES) How familiar are you with Act 250 - very familiar, somewhat familiar, or not too familiar?

ref: HEARD

- ☐ Very familiar
- ☐ Somewhat familiar
- ☐ Not too familiar
- ☐ Have not heard
- ☐ (Don't know/refused)

12. As you may know, Act 250 is a land use law that limits development. Under Act 250, a single developer can only build nine new units of housing within a five-mile radius in a five-year timeframe without a permit to build more. Developers have to get an Act 250 permit with an extensive review and public comment process to build ten units or more. This is known as the ten-five-five rule.

In general, do you favor or oppose the ten-five-five rule?

(FOLLOW UP) Is that strongly FAVOR/OPPOSE or somewhat FAVOR/OPPOSE?

ref: 1055FAVOPP

- | | |
|---------------------------------------|--|
| <input type="radio"/> Strongly favor | <input type="radio"/> Strongly oppose |
| <input type="radio"/> Somewhat favor | <input type="radio"/> (Don't know/refused) |
| <input type="radio"/> Somewhat oppose | |

13. Some people have proposed changing the ten-five-five rule so that a single developer can build as many as 24 housing units within a five-mile radius and a five-year timeframe without going through the Act 250 permitting process.

In general, do you favor or oppose allowing developers to build 24 housing units within 5-miles and 5-years without an Act 250 permit?

(FOLLOW UP) Is that strongly FAVOR/OPPOSE or somewhat FAVOR/OPPOSE?

ref: 2555FAVOPP

- | | |
|---------------------------------------|--|
| <input type="radio"/> Strongly favor | <input type="radio"/> Strongly oppose |
| <input type="radio"/> Somewhat favor | <input type="radio"/> (Don't know/refused) |
| <input type="radio"/> Somewhat oppose | |

14. Now I am going to read you a pair of statements, and I want you to tell me which statement comes closer to your own view, even if neither is exactly right. (ROTATE STATEMENTS)

(STATEMENT A) SOME/OTHER people say that the 10-5-5 rule contributes to the tight housing market and high costs. There's so much red tape that housing construction hasn't kept up with population growth for the last 50 years. We need to build more housing, quickly, to bring down costs and make sure people who were born and raised here can afford to stay.

(STATEMENT B) SOME/OTHER people say that the 10-5-5 rule protects the unique character of our towns and villages, open lands, forests, and farms. Developers can build more housing if they get a permit. These permits ensure that we are protecting the environment and our communities, and not selling out to big developers.

(AFTER STATEMENTS) Which statement, the first or second, comes closer to your own view.

(FOLLOW UP) Is that much more or somewhat more?

ref: 1055PAIR

- | | |
|---------------------------------------|--|
| <input type="radio"/> A much more | <input type="radio"/> B much more |
| <input type="radio"/> A somewhat more | <input type="radio"/> (Don't know/refused) |
| <input type="radio"/> B somewhat more | |

15. Next, I am going to read to you a list of things that some people say concern them about building more and different types of housing in [INSERT COUNTY NAME] County. Please tell me how concerned you are about each of the following (ROTATE FIRST TO LAST, LAST TO FIRST) very concerned, somewhat concerned, a little concerned, or not concerned at all.

(PROMPT). How concerned are you that more housing in [INSERT COUNTY NAME] County will result in (READ ITEM)?

(RANDOMIZE)

ref: DEVCONC

	Very concerned	Somewhat concerned	A little concerned	Not at all concerned	(Don't know/refused)
A. Less privacy from having more and closer neighbors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. An increase in traffic and congestion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Towns and villages losing their unique character to large and unattractive apartment buildings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Additional development pushing into open lands	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Negative environmental impacts from over-population	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. Lower property values for existing homes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

16. Now switching gears and thinking about the home, condominium, or apartment where you live. On a scale of 1 to 5, where 5 means very satisfied and 1 means not satisfied at all, how satisfied are you with your current housing situation? You can use any number from 1 to 5, the higher the number, the more satisfied you are with your housing situation.

ref: HSATS

- ☐ 1 - not satisfied at all
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5 - very satisfied

17. And how long have you lived in your current home? (READ OPTIONS)

ref: RESLENGTH

- ☐ Less than 3 years
- ☐ 3 to 5 years
- ☐ 6 to 10 years
- ☐ 11 to 20 years
- ☐ More than 20 years
- ☐ (Don't know/refused)

18. And do you currently own your home, rent your home, or are you living with friends or family?

ref: OWNRENTFAM

- ☐ Own
- ☐ Rent
- ☐ Living with friends or family
- ☐ (Don't know/refused)

19. (IF RENT OR OWN) When you made the decision to live where you are now, were you (ROTATE) satisfied or dissatisfied with the housing options that were in your price range?

(FOLLOW UP) And is that very SATISFIED/DISSATISFIED or somewhat SATISFIED/DISSATISFIED?

ref: HOUSESAT

- ☐ Very satisfied
- ☐ Somewhat satisfied
- ☐ Somewhat dissatisfied
- ☐ Very dissatisfied
- ☐ (Don't know/refused)

20. (IF RENT OR OWN) How much of a financial strain on your budget is paying your rent or mortgage each month? Is it (ROTATE FIRST TO LAST AND LAST TO FIRST) a significant strain, a slight strain, not much of a strain, or no strain at all?

ref: **STRAIN**

- ☐ A significant strain
- ☐ A slight strain
- ☐ Not much of a strain
- ☐ No strain at all
- ☐ (Don't know/refused)

21. On a scale of 1 to 5, where 5 means very confident and 1 means not at all confident, how confident are you that if you had to move from your current residence you would be able to afford to own or rent a home that meets your needs in [INSERT COUNTY NAME] County?

ref: **AFFORDNEW**

- ☐ 1 - not at all confident
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5 - very confident

22. On a scale of 1 to 5, where 5 means very confident and 1 means not at all confident, how confident are you that if you had to move from your current residence you would be able to afford to own or rent a home that meets your needs somewhere in VERMONT?

ref: **AFFORDSTATE**

- ☐ 1 - not at all confident
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5 - very confident

23. Finally, I would like to ask you a few questions for statistical purposes. In what year were you born? (DON'T KNOW/REFUSED = 0000)

ref: **AGE**

24. Do you have any children 18 years of age or younger currently living more than half-time in your household?

ref: KIDS

- ☐ Yes
- ☐ No
- ☐ (Don't know/refused)

25. What is your marital status? (READ LIST, RANDOMIZE)

ref: MARITAL

- ☐ Married
- ☐ Unmarried, living with partner
- ☐ Single
- ☐ Separated
- ☐ Widowed
- ☐ Divorced
- ☐ (Don't know/refused)

26. What is the last year of schooling that you have completed? (DO NOT READ LIST)

ref: EDUC

- ☐ 1st - 11th grade
- ☐ High school graduate
- ☐ Non-college post H.S. (including vocational, technical, or trade school, etc.)
- ☐ Some college (including community college, 2-year degree, some college coursework, etc.)
- ☐ 4-year college graduate
- ☐ Post-graduate school or degree (including law school, medical school, master's degree, or PhD/doctorate)
- ☐ (Don't know/refused)

27. What is your annual household income? Just stop me when I get to the right amount.
(READ OPTIONS TOP TO BOTTOM)

ref: INCOME

- | | |
|---|--|
| <input type="radio"/> Less than \$25,000 | <input type="radio"/> \$100,001 to \$125,000 |
| <input type="radio"/> \$25,000 to \$50,000 | <input type="radio"/> More than \$125,000 |
| <input type="radio"/> \$50,001 to \$75,000 | <input type="radio"/> (Refused) |
| <input type="radio"/> \$75,001 to \$100,000 | |

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National Association of REALTORS®

***VT – Northwest Counties
Smart Growth***

May 2023

VT – Northwest Counties Smart Growth Survey Methodology



Wireless (183)
Landline (105)
Online (112)



431 (weighted to 400)
Registered voters in
Northwest, Vermont

Franklin County: 352
(weighted to 340)
Grand Isle County: 79
(weighted to 60)



Interviews
conducted
May 1st – 9th

The sample was drawn from a third-party vendor file. 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.

Demographics

Gender



Women
51%



Men
49%

Current Residence

Less than 3 years: 23%
3 to 5 years: 17%
6 to 10 years: 17%
11 to 20 years: 15%
More than 20 years: 28%

Region by House District

Franklin County Districts:
1, 2, CHI FRA: 26%
3 and 8: 17%
4 and 6: 21%
5 and 7: 20%
Grand Isle: 15%

Owner/Renter

Homeowner: 79%
Renter: 13%
Lives with Friends/Family: 8%

Age

18-29: 13%
30-39: 16%
40-49: 15%
50-64: 26%
65+: 26%

Education

High School or Less: 24%
Post H.S: 31%
College Graduate: 44%

Income

\$75,000 or less: 38%
Over \$75,000: 56%

Executive Summary

Executive Summary

Voters in Grand Isle and Franklin Counties are overall satisfied with their quality of life. Voters recognize the challenges of affordable housing and inventory, but do not feel it affects them personally. There is a county split throughout the data, though the general sentiment is the same: Northwest Vermont voters don't desire changes to Act 250 that would allow developers to build more housing at a faster pace.

Residents rate quality of life highly in both counties, though Grand Isle voters have more intensity. Seventy-seven percent of Northwest Vermont voters consider the quality of life excellent (17 percent) or good (61 percent), while just 21 percent say it is just fair (18 percent) or poor (4 percent). Twenty-eight percent of Grand Isle County voters feel that quality of life is excellent compared to only 15 percent of Franklin County voters.

Maintaining streets and roads and economic development are top priorities for local government. Voters were asked to rate issues on a scale of one to five where one means that issue is not a priority for them at this time, and five means that issue is a top priority for them at this time. Seventy-four percent of voters rate maintaining streets and roads as either a 4 or 5. Attracting businesses and good paying jobs to the area was also seen as important to voters with 71 percent rating this as a 4 or 5.

Protecting open space and increasing the amount of affordable housing are equally high priorities in Franklin County; open space is more important than housing in Grand Isle County. In Franklin County, nearly identical numbers feel that protecting open space (62 percent rate 4 or 5 on 5-point scale) and increasing affordable housing (61 percent) are top priorities. In Grand Isle County, 70 percent say protecting open land is a high priority, while only 42 percent say that increasing the amount of affordable housing is a high priority.

Executive Summary

Encouraging the development of more walkable neighborhoods, where offices, stores, and entertainment are close to homes and apartments was rated as least important to voters. Only 28 percent rated this at a 4 or 5 whereas 71 percent rated it at a 1, 2 or 3.

Voters have mixed feelings about pace of residential development, would like to see more commercial development. Just under half of voters in both counties agree that the pace of residential growth is about right. However, Franklin County voters are more likely to say residential growth is too slow (36 percent) rather than too fast (18 percent), while Grand Isle County voters are more likely to say residential development is too fast (32 percent) rather than too slow (21 percent). When it comes to commercial growth and development, voters in both counties split between saying the pace is about right (47 percent) or too slow (41 percent). This is consistent with voters wanting local government officials to prioritize economic development.

- Older, non-college men lead resistance to residential development in Franklin County. Twenty-eight percent of men over 50 feel that residential growth is too fast. Twenty-eight percent of men who did not graduate from college and twenty-seven percent of men with children feel the same.
- Younger educated voters as well as non-homeowners would like to see more residential development. Thirty eight percent of younger voters who graduated from college feel that the pace of growth in residential areas is too slow. Renters and those that live with friends and family also feel that development is too slow (48 percent too slow).

Executive Summary

Housing costs are seen as a much bigger problem in Franklin County than in Grand Isle County. Two-thirds of Franklin County voters see housing affordability as either a very big (41 percent) or fairly big (26 percent) problem, while half of Grand Isle County voters feel that housing affordability is either a very big (28 percent) or a fairly big (21 percent) problem. Women with kids (83 percent), renters (70 percent), married women (78 percent), and women under 50 (77 percent) feel strongest that housing affordability is a very or fairly big problem

Voters in Franklin County don't necessarily link housing supply to housing costs. A smaller majority (53 percent) feel that housing availability is a very big (30 percent) or fairly big (23 percent) problem – a 15-point gap with those who say that housing affordability is a very or fairly big problem (68 percent). As with affordability, women with kids (65 percent), married women (64 percent), renters (62 percent), and female college graduates (62 percent) feel strongest that housing availability is a very or fairly big problem

Strong majorities support building more single-family detached houses on large lots. Seventy-seven percent of voters would like to see more single-family houses on large lots built in their county to increase supply, lower costs, and provide more options, with 43 percent strongly supportive. Seventy-four percent also support building more single family, attached townhouses (23 percent strongly support).

Voters in Franklin County are more supportive of building multi-family housing than voters in Grand Isle County. When asked if voters support or oppose building more apartment buildings in order to increase supply, lower costs, and provide more options, a majority (57 percent) of Franklin County voters are supportive, while a majority (61 percent) of Grand Isle County oppose this idea. Similar patterns emerge when voters of each county were asked if they support or oppose more condominiums, duplexes, and triplexes.

Executive Summary

A majority of voters have some familiarity with Act 250. Fifty-eight percent are either very (14 percent) or somewhat (44 percent) familiar with Act 250. Grand Isle County voters are much more familiar with 68 percent who say they are very (26 percent) or somewhat (42 percent) familiar, compared to 56 percent in Franklin County (11 percent very familiar, 44 percent somewhat familiar).

Majorities favor Act 250 after hearing a description of the 10-5-5 rule. Two-thirds of Grand Isle County voters and a 55 percent majority in Franklin County favor the 10-5-5 rule.

A strong majority opposes changing the 10-5-5 rule so that a single developer can build as many as 25 housing units instead of just 10. Sixty-two percent of voters oppose this change, including 39 percent who strongly oppose it. There is broad and strong opposition in both counties.

Balanced messaging softens opposition to the 25-5-5 change, but over half of Northwest Vermont voters still side with people who say that the 10-5-5 rule protects the unique character of our towns and villages. Fifty-six percent feel that the 10-5-5 rule protects the environment and communities, while 40 percent of Northwest Vermont feel that the 10-5-5 rule contributes to the tight housing market and high costs.

- Older men, college graduate men, and men without kids are most likely to agree that we need to build more housing, quickly, to bring down costs than think we need to protect the character and open lands.
- Women are most likely to say that we need to protect the character of our communities and open lands from big developers, especially older women (68 percent) and women without children at home (65 percent).

Challenges to Reforming Act 250

Voters don't think that building more housing will benefit them personally. Two-thirds of Northwest Vermont voters have lived in their current home for more than five years, are very satisfied with their living situation, and do not feel financially strained from their rent or mortgage payment. They feel less confident that they would be able to find affordable housing in Northwest Vermont if they had to move, but this does not appear to be an immediate concern for most residents.

Different demographic groups face different cross pressures on housing, development, and regulatory issues.

- Older non-college men are most likely to say that the pace of residential development is already too fast, but they are also among the most likely to side with reformers who want to change the 10-5-5 rule to 25-5-5. This may be because older, non-college men feel cross-pressured between wanting to live in a rural area and wanting to reduce government regulations so that the market can balance itself.
- Women are most concerned about housing costs and availability, but they also heavily side with supporters of the 10-5-5 rule that it protects the unique character of towns and villages and open lands from big developers. Our body of work shows that college educated women and older women are among those most likely to embrace government regulations as a check on big businesses.

Challenges to Reforming Act 250

Voters are just as concerned about maintaining the character of their towns as preserving open land.

- In Franklin County, two-third are concerned about towns and villages losing their unique character to large and unattractive apartment buildings (37 percent very concerned, 64 percent total concerned). Two-thirds are also concerned about additional development pushing into open lands (34 percent very concerned, 64 percent total concerned).
- In Grand Isle County, towns and villages losing their unique character to large and unattractive apartment buildings is the top concern (52 percent very concerned, 73 percent total concerned), above additional development pushing into open lands (42 percent very concerned, 72 percent total concerned).
- In both counties, there is far greater support for building single-family homes on large lots than apartments and condominiums in village centers.

The demographics of Franklin County provide more of a foothold for reforming zoning and development laws than in Grand Isle County.

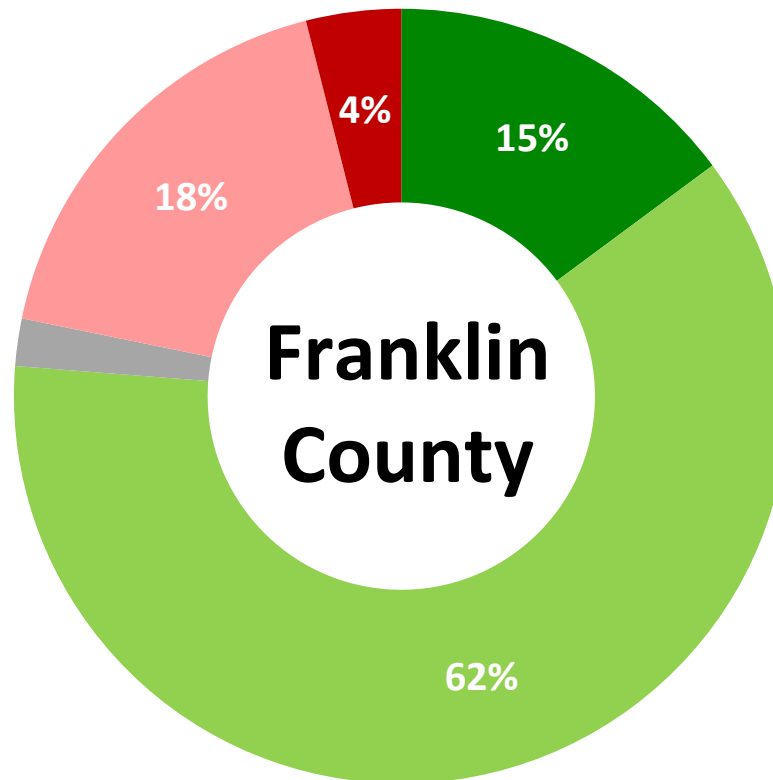
- Compared to voters in Grand Isle County, voters in Franklin County are a little bit younger, less likely to have a college degree, and lower income. There are far more renters in Franklin County (15 percent) than in Grand Isle County (3 percent).
- Voters in Franklin County are more likely to have moved recently and experienced the tight housing market. They are also more likely to feel financial strain from their rent or mortgage payment.

Life in Franklin County

Franklin County Voters Are Happy With the Quality of Life

Quality of life in Franklin County

Just fair/Poor 22% | Excellent/Good 77%

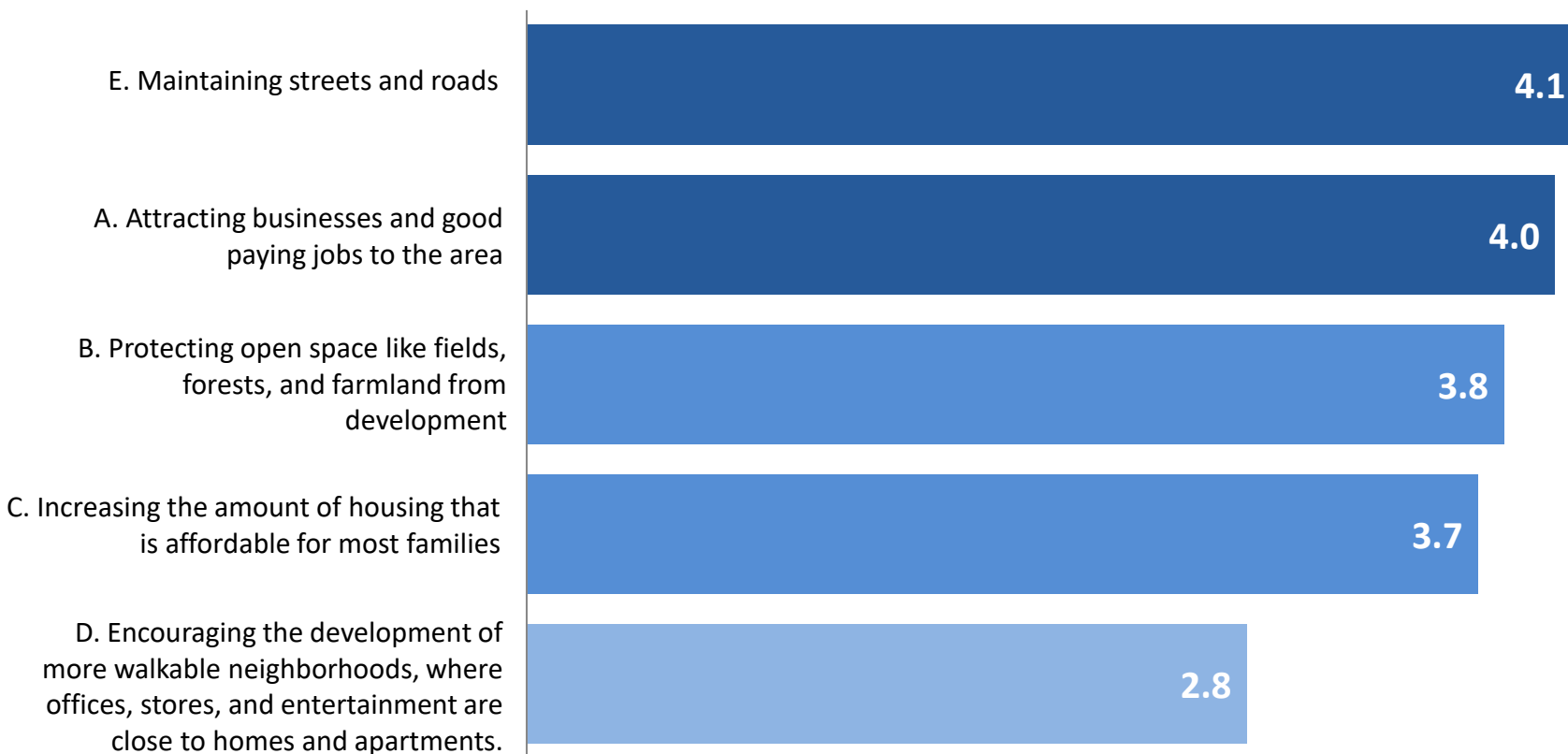


Q.4 Overall, how would you describe the quality of life in [INSERT COUNTY NAME] County – (ROTATE FIRST TO LAST, LAST TO FIRST) excellent, good, just fair, or poor?

Maintaining Streets and Roads and Economic Development Are Top Priorities for Local Government to Focus On

Protecting open space and housing affordability are tied for third

Biggest Priorities For Government To Focus On – Franklin County

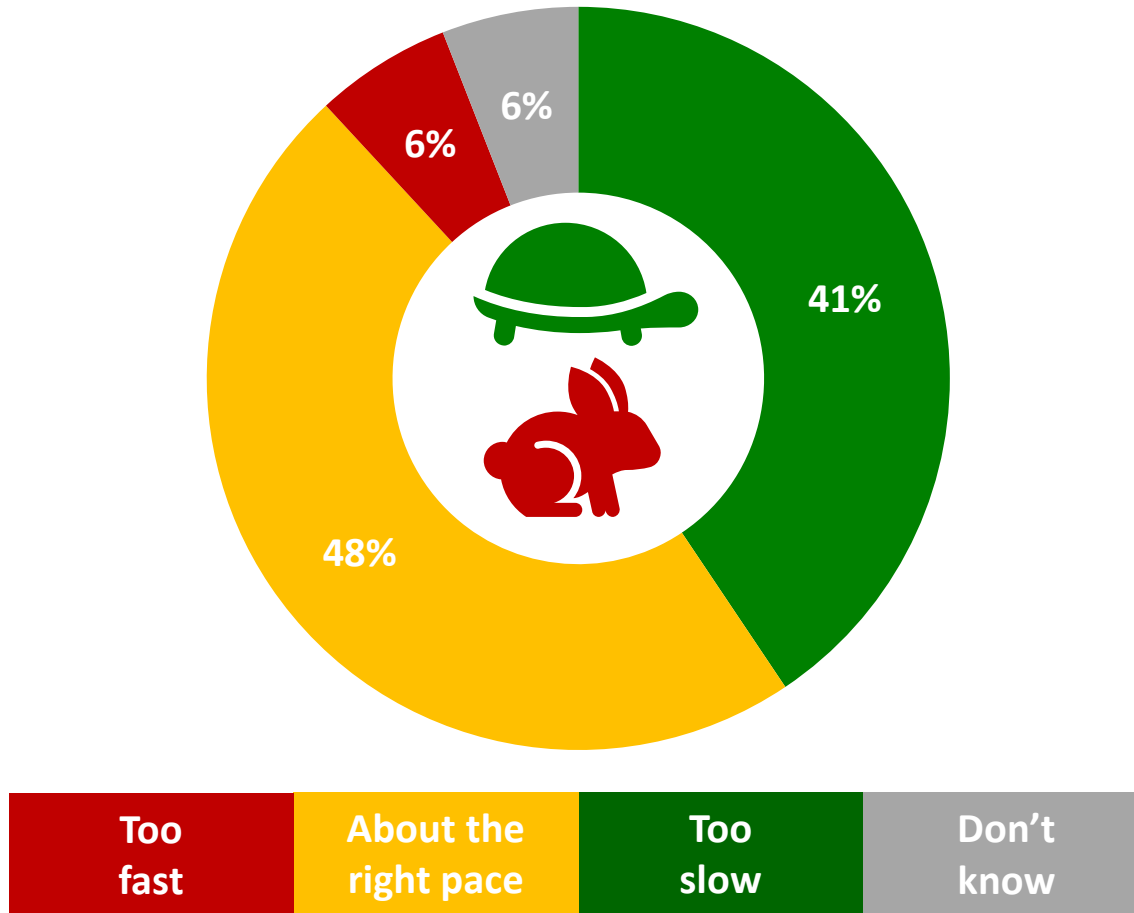


Q.5 Next I am going to read some issues that people say should be a priority for the local government and elected officials in [INSERT COUNTY NAME] County. Please rate each of the following using a scale of one to five, where one means that issue is not a priority for you at this time, and five means that issue is a top priority for you at this time. Of course, you can use any number between one and five, the higher the number, the higher the priority you place on that issue.

Voters Split Between Saying the Pace of Commercial Growth and Development Is Too Slow or About Right

Consistent with voters prioritizing economic development.

Pace of Commercial Growth and Development in Vermont – Franklin County

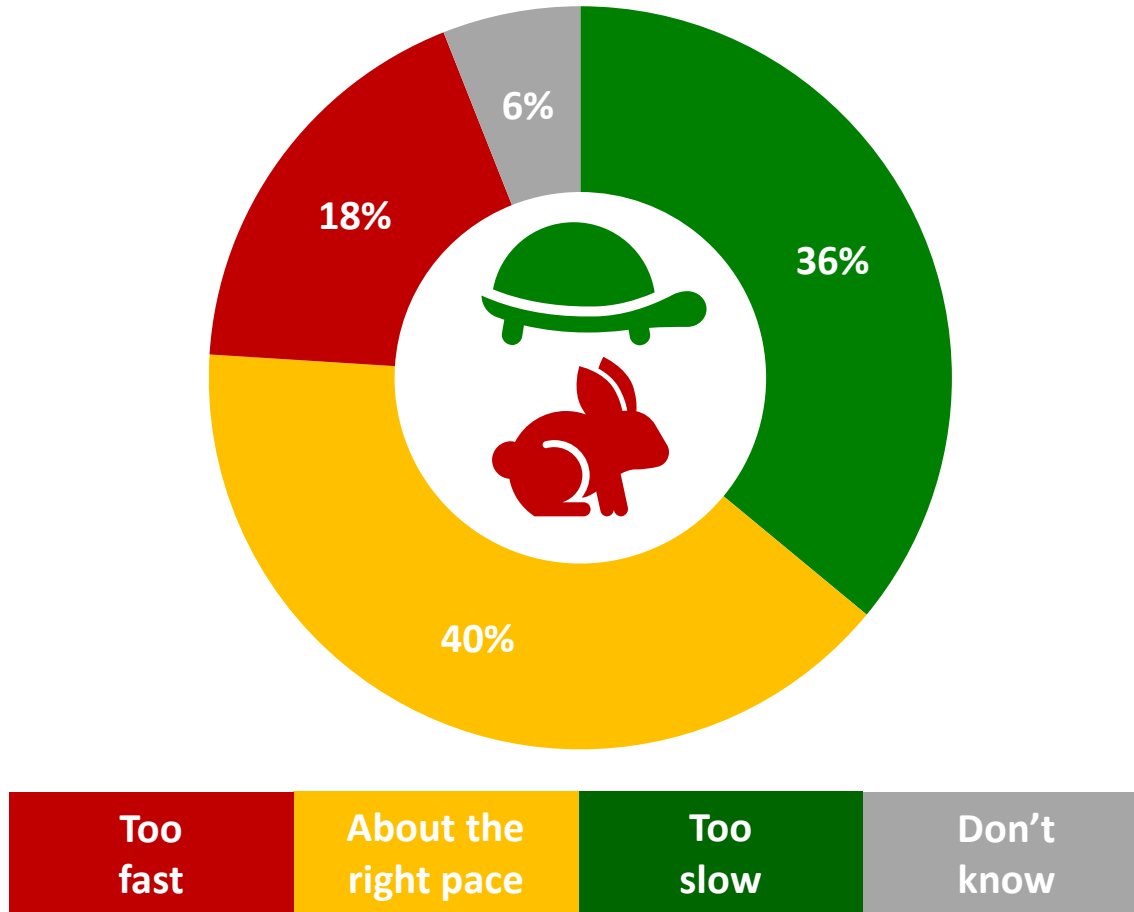


Q.7 And would you say that the pace of COMMERCIAL growth and development in [INSERT COUNTY NAME] County is happening (ROTATE TOO FAST AND TOO SLOW) too fast, too slow, - or is it happening at about the right pace?

Voters Split Between Saying the Pace of Residential Growth and Development is Too Slow or About Right

Greater sense that residential development is happening too fast, compared to commercial dev.

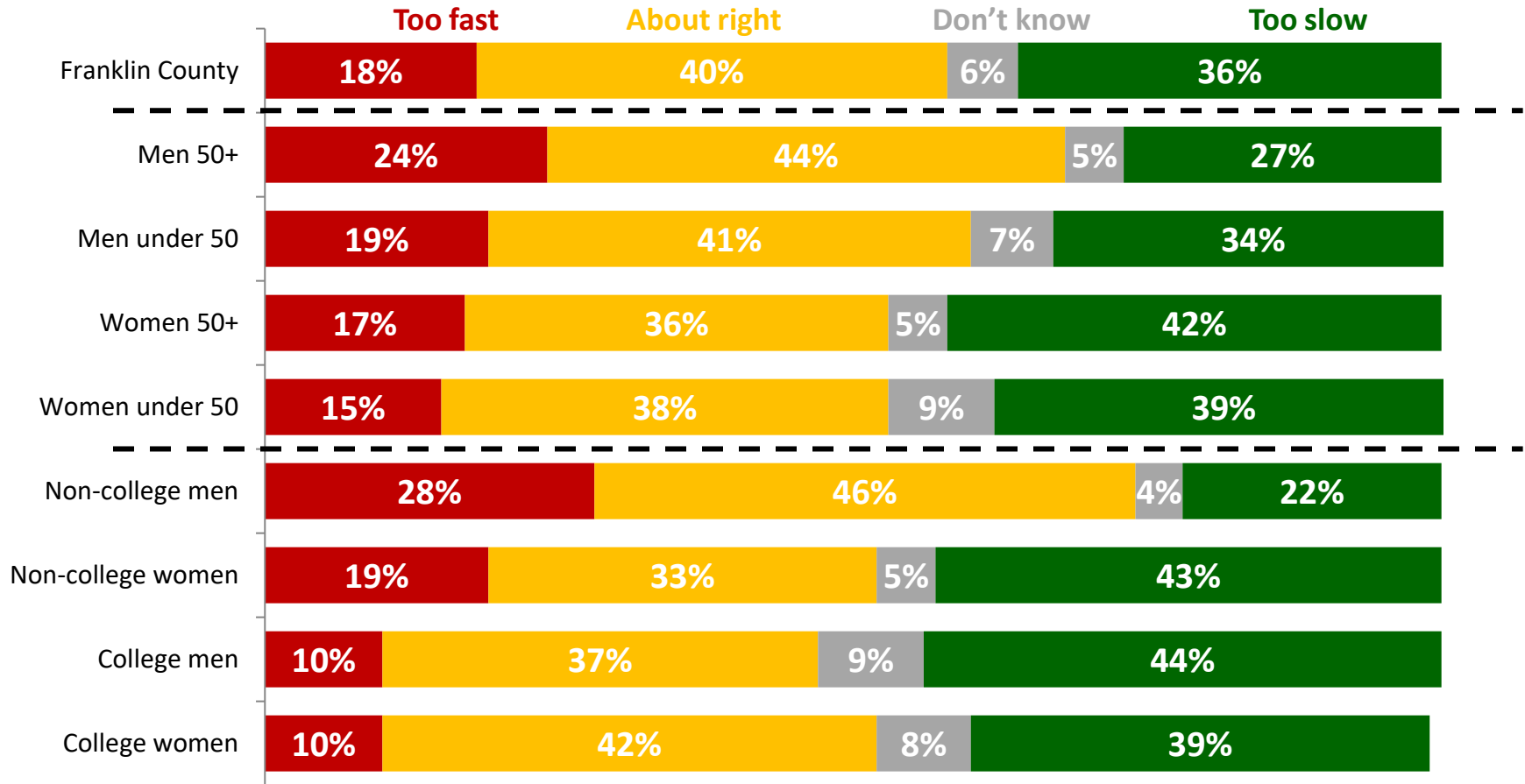
Pace of Residential Growth and Development in Franklin County



Q.6 Would you say that the pace of RESIDENTIAL growth and development in [INSERT COUNTY NAME] County is happening (ROTATE TOO FAST AND TOO SLOW) too fast, too slow, - or is it happening at about the right pace?

Older and Non-College Men Are Most Likely to Say that Pace of Residential Development is Too Fast

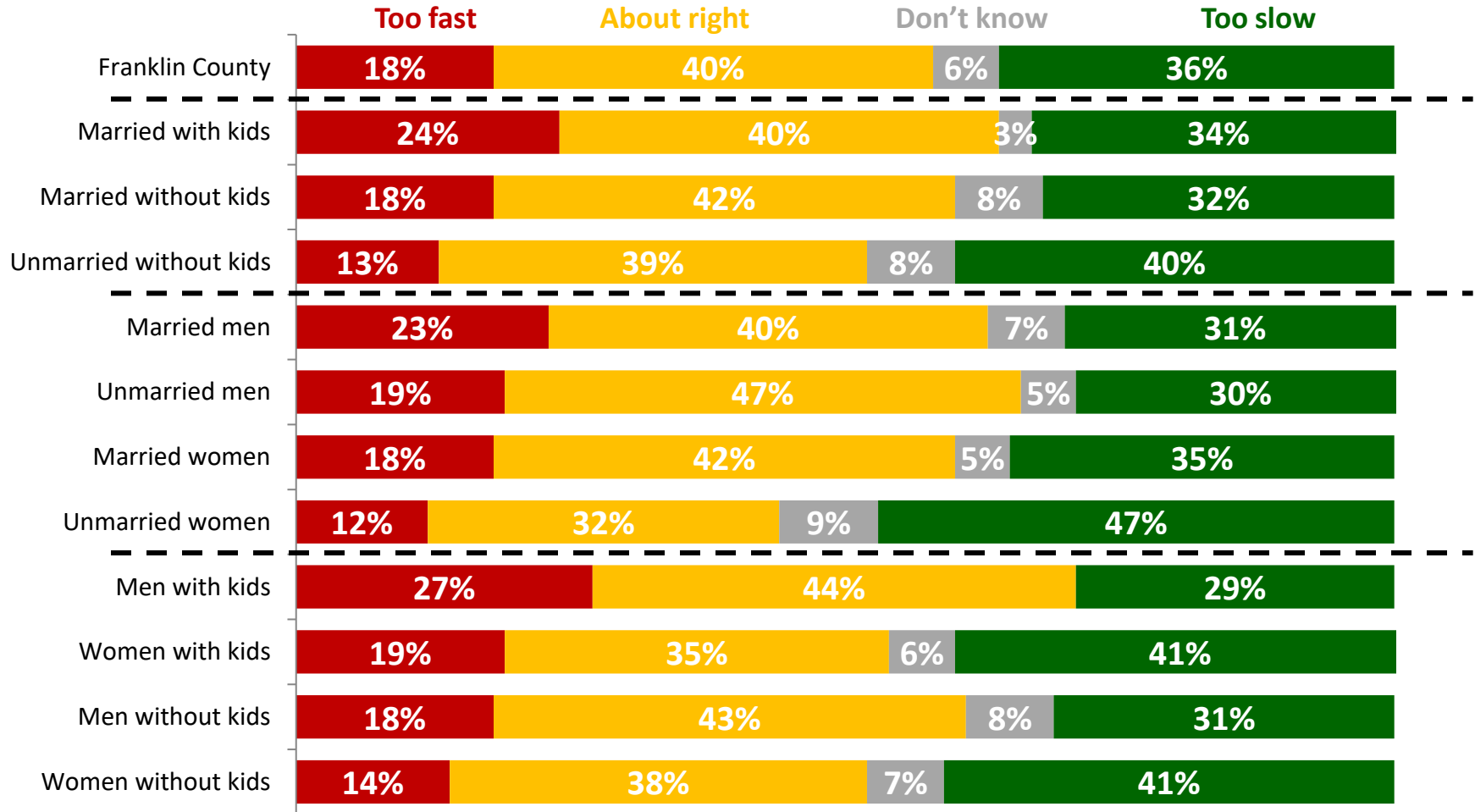
Pace of Residential Growth and Development in Vermont
By Gender/Age and Gender/Education



Q.6 Would you say that the pace of RESIDENTIAL growth and development in [INSERT COUNTY NAME] County is happening (ROTATE TOO FAST AND TOO SLOW) too fast, too slow, - or is it happening at about the right pace?

Married Men with Kids Are More Likely to Say The Pace of Residential Growth is Too Fast

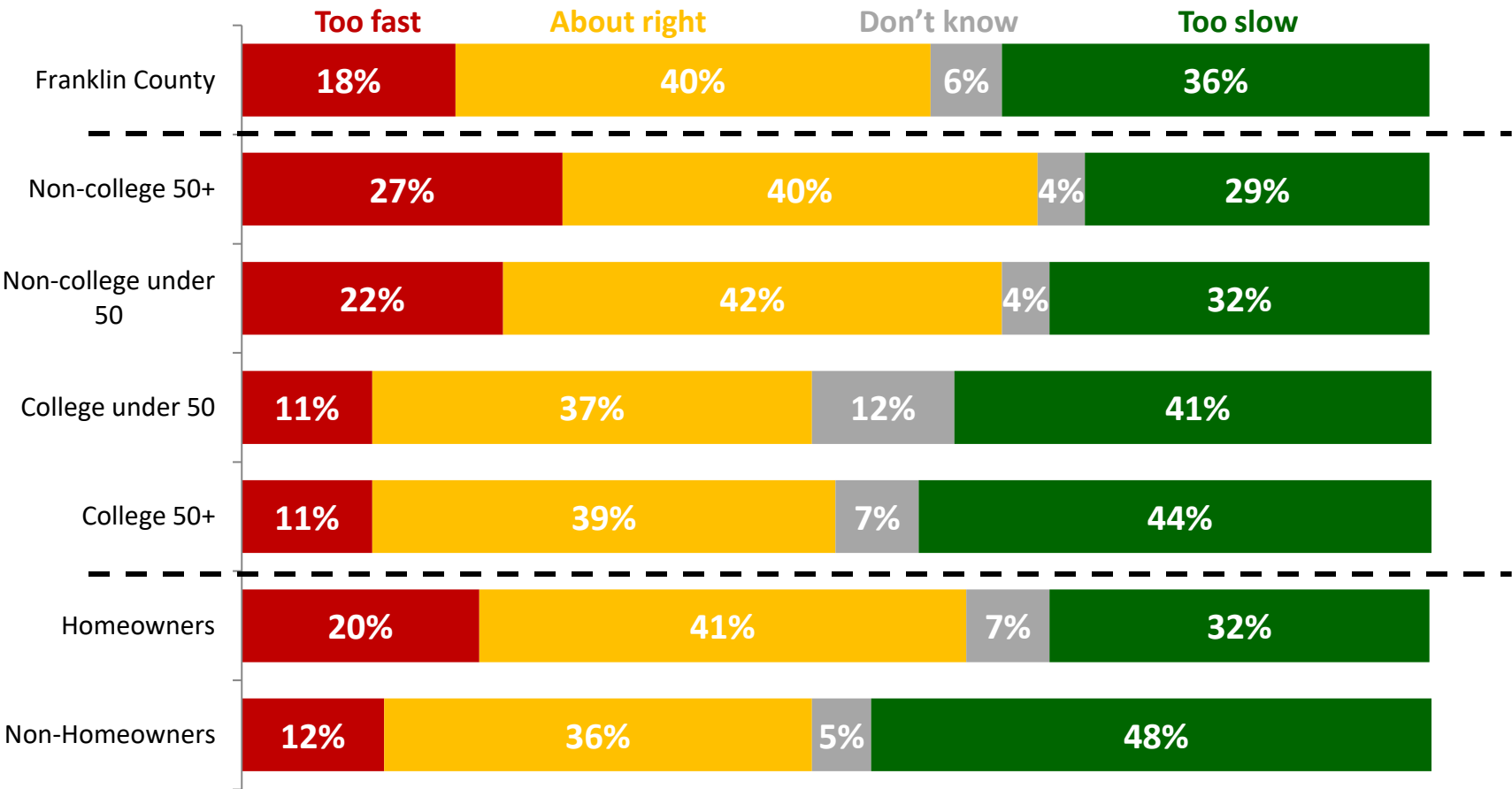
Pace of Residential Growth and Development in Vermont
By Marital Status and Presence of Children



Q.6 Would you say that the pace of RESIDENTIAL growth and development in [INSERT COUNTY NAME] County is happening (ROTATE TOO FAST AND TOO SLOW) too fast, too slow, - or is it happening at about the right pace?

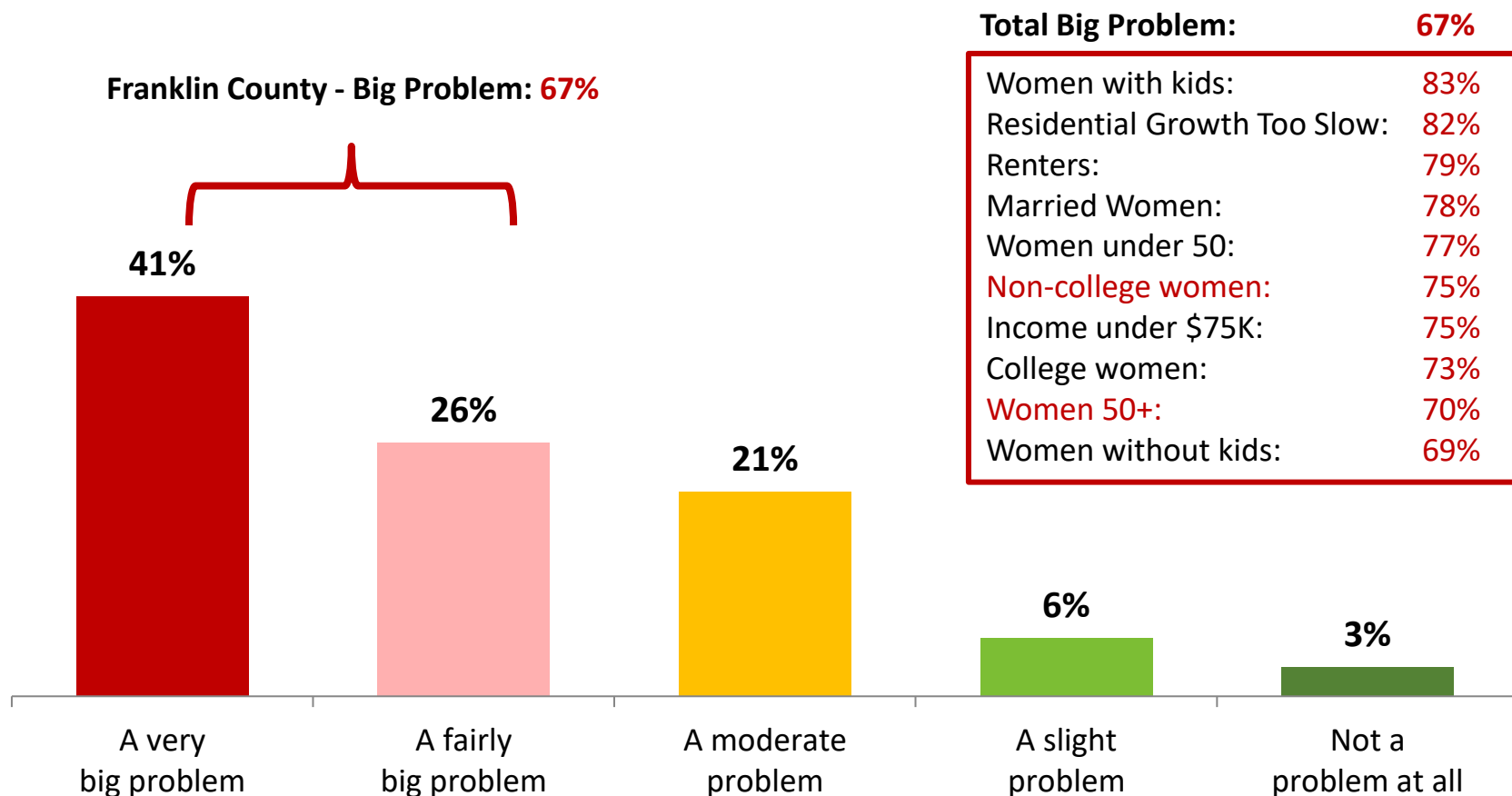
College Graduates and Non-Homeowners Are Most Likely To Say That Pace of Development is Too Slow

Pace of Residential Growth and Development in Vermont
By Age/Education and Homeownership



Two-Thirds Believe Housing Affordability is a Big Problem

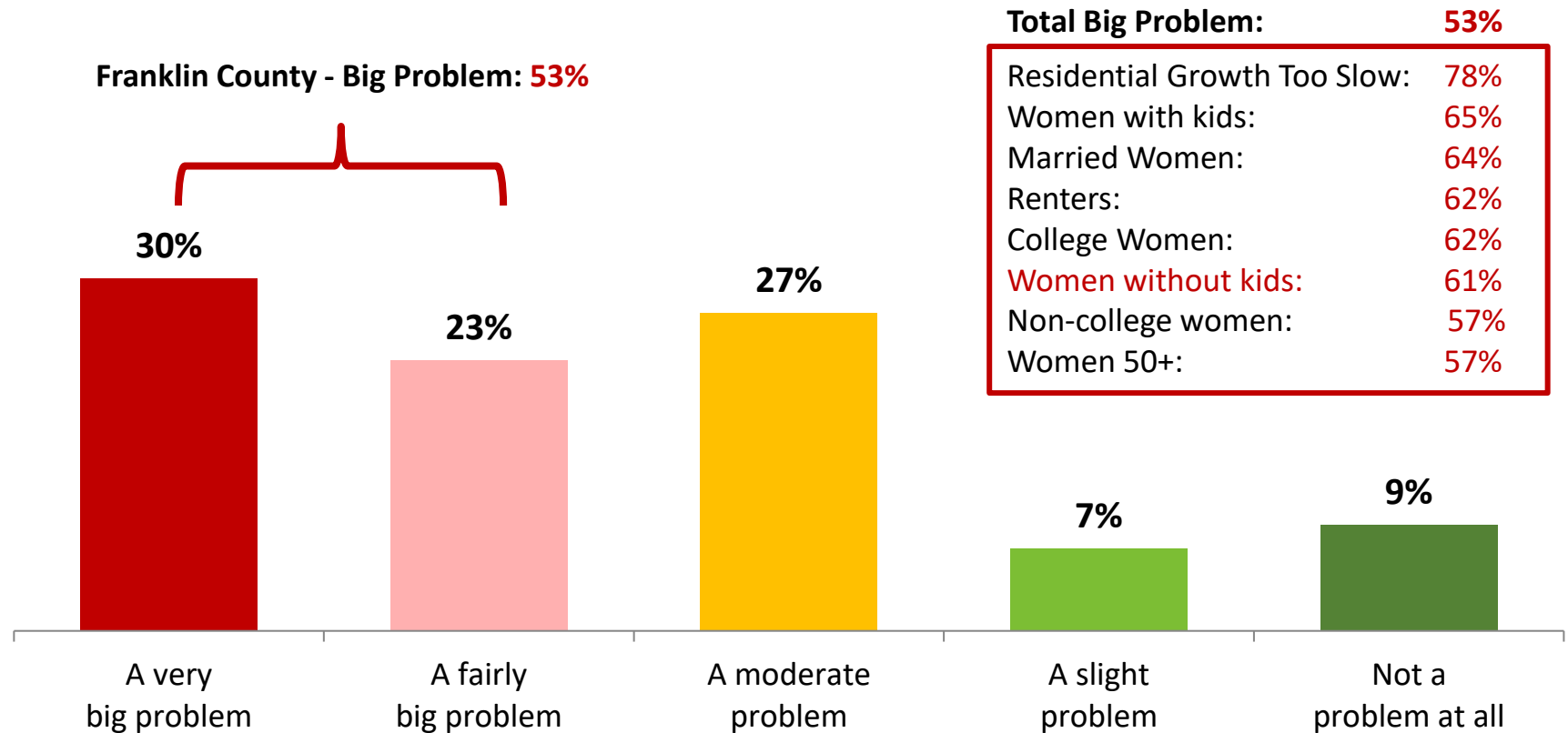
Housing Affordability Problem in Franklin County



Q.8 How much of a problem is housing affordability in your community, that is to say, how much it costs to buy or rent a home? Is housing affordability (ROTATE FIRST TO LAST AND LAST TO FIRST) a very big problem, a fairly big problem, a moderate problem, a slight problem, or not a problem at all?

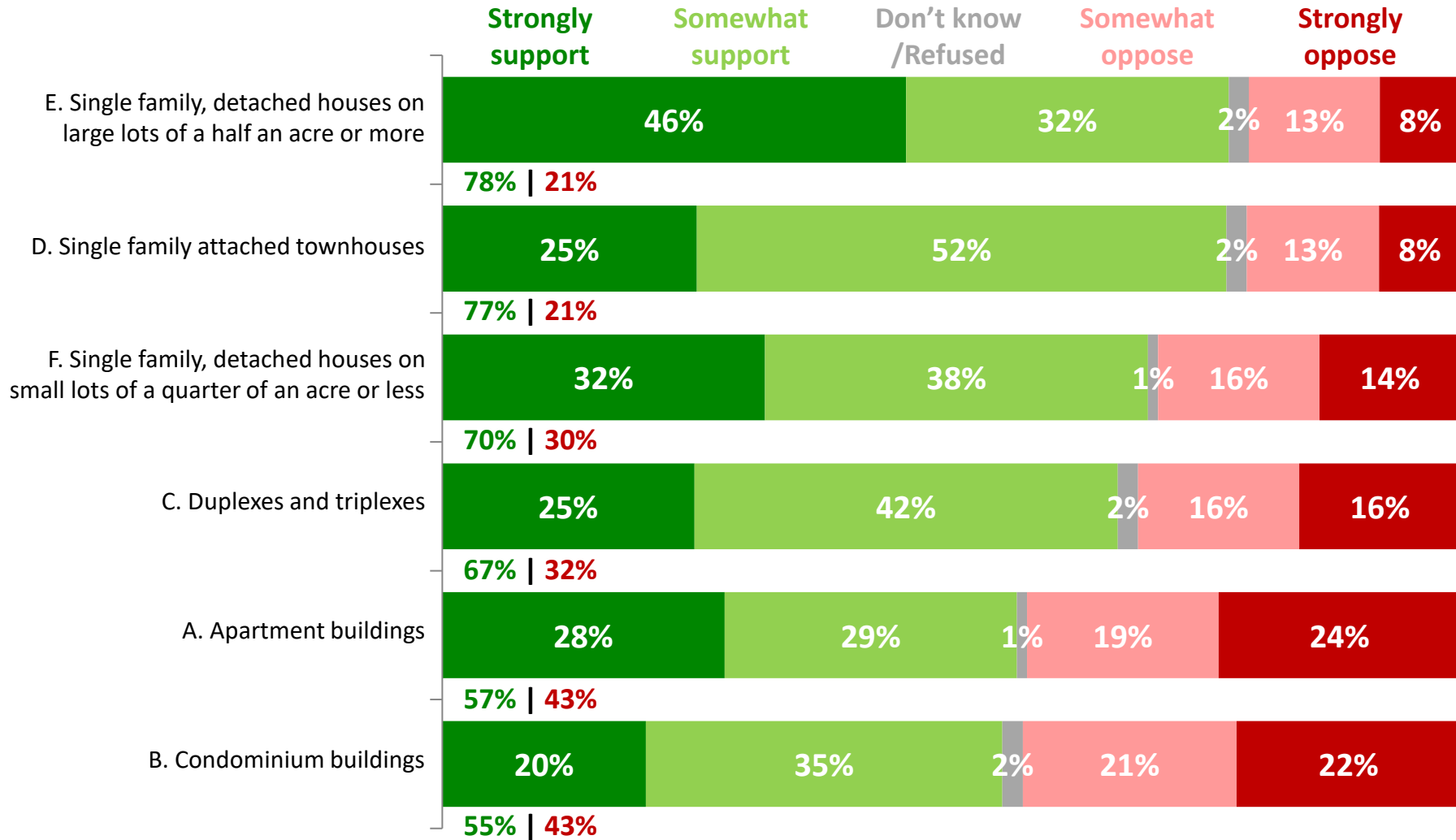
Housing Availability Seen as Big or Moderate Problem in Franklin County

Housing Availability Problem in Franklin County



Q.9 How much of a problem is the availability of housing in your community, that is to say, the number of houses, condominiums, or apartments that are available to buy or rent? Is housing availability (ROTATE FIRST TO LAST AND LAST TO FIRST) a very big problem, a fairly big problem, a moderate problem, a slight problem, or not a problem at all in your community?

Franklin Co. Voters Are Open to Building Single Family Homes, Duplexes, and Triplexes; Only Soft Support for Apartments/Condos

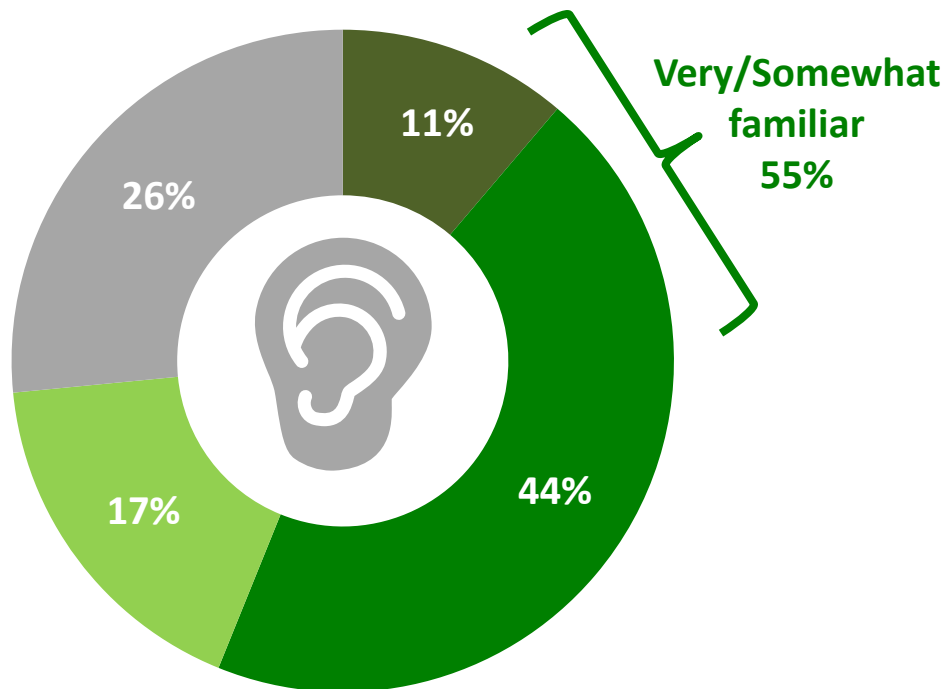


Q.10 Some people would like to see more housing built in [INSERT COUNTY NAME] County to increase supply, lower costs, and provide more options. Please tell me if you would support or oppose more of each kind of housing being built in your community.

Franklin County Voters on Act 250

Seven-in-Ten Have Heard of Act 250; One Fourth Are Unfamiliar in Franklin County

ACT 250 Familiarity in Franklin County



No – Have
not heard

Yes – Not too
familiar

Yes – Somewhat
familiar

Yes – Very
familiar

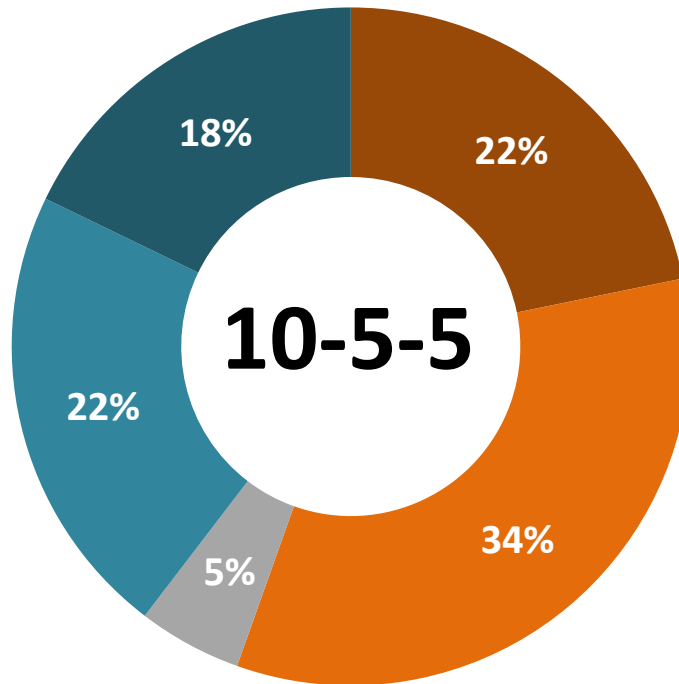
Very/Somewhat Familiar		55%
Age		
Age 18 to 34		31%
Age 35 to 49		54%
Age 50 to 64		68%
Age 65+		47%
Gender/Age		
Men under 50		49%
Men 50+		74%
Women under 50		37%
Women 50+		68%
Tenure in Vermont		
Less than 3 years		45%
3 to 5		29%
5 to 10		54%
11 to 20 years		68%
20+ years		77%

Voters Lean in Favor of the 10-5-5 Rule of Act 250

10-5-5 Rule Favorability in Franklin County

Total Oppose 40% | Total Favor 56%

Q.12 As you may know, Act 250 is a land use law that limits development. Under Act 250, a single developer can only build nine new units of housing within a five-mile radius in a five-year timeframe without a permit to build more. Developers have to get an Act 250 permit with an extensive review and public comment process to build ten units or more. This is known as the ten-five-five rule.

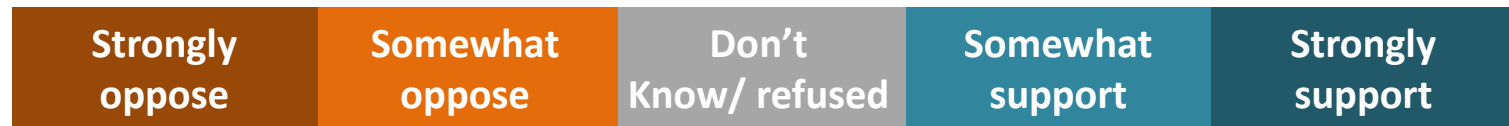
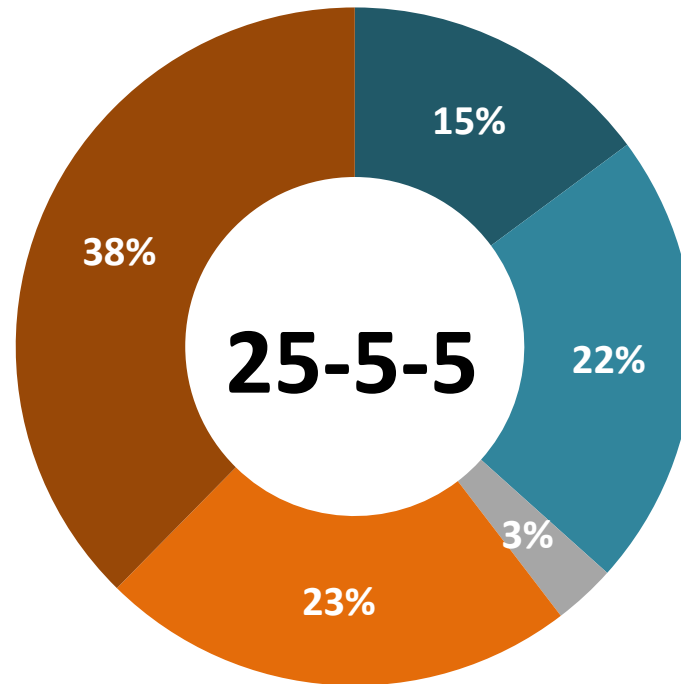


Strong Opposition to Changing the 10-5-5 Rule to 25-5-5

25-5-5 Rule Change Favorability In Franklin County

Total Oppose 61% | Total Favor 37%

Q.13 Some people have proposed changing the ten-five-five rule so that a single developer can build as many as 24 housing units within a five-mile radius and a five-year timeframe without going through the Act 250 permitting process.



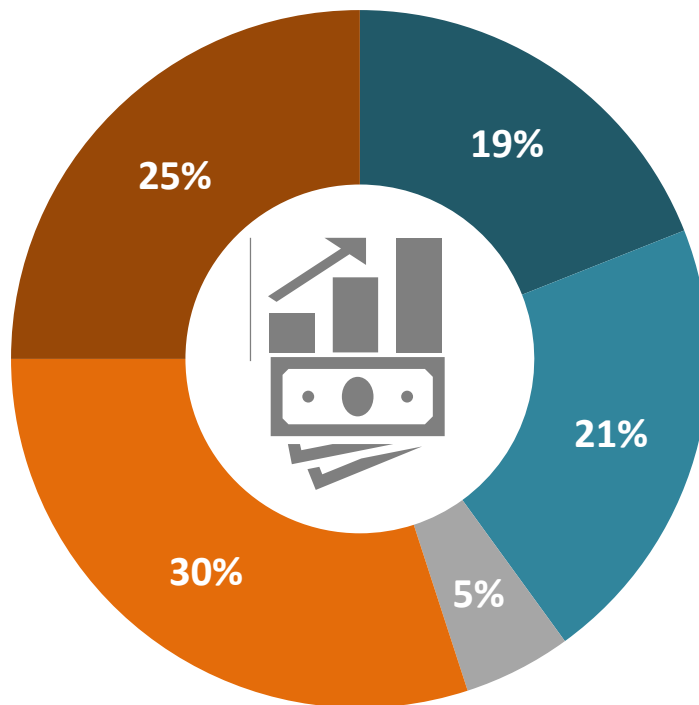
Majority Feel That the 10-5-5 Rule Is The Best Way to Protect the Environment and Our Communities

Messaging about housing costs and supply does soften opposition.

Paired Statements

Total Statement B: 55% | Total Statement A: 40%

(STATEMENT B)
SOME/OTHER people say that the 10-5-5 rule protects the unique character of our towns and villages, open lands, forests, and farms. Developers can build more housing if they get a permit. These permits ensure that we are protecting the environment and our communities, and not selling out to big developers.



(STATEMENT A) SOME/OTHER people say that the 10-5-5 rule contributes to the tight housing market and high costs. There's so much red tape that housing construction hasn't kept up with population growth for the last 50 years. We need to build more housing, quickly, to bring down costs and make sure people who were born and raised here can afford to stay.

**Statement B -
much more**

**Statement B -
somewhat more**

**Don't
Know/ refused**

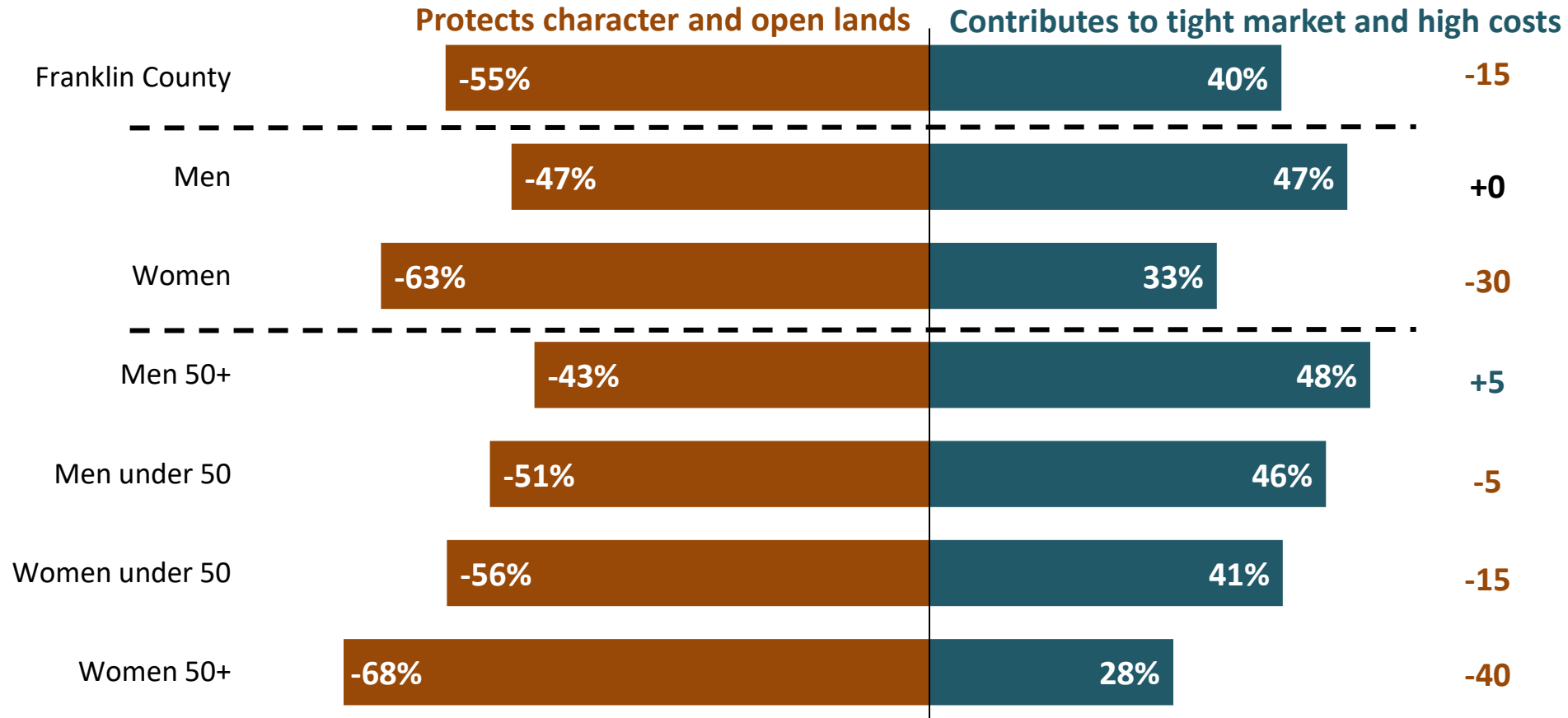
**Statement A -
somewhat more**

**Statement A -
much more**

Q.14 Now I am going to read you a pair of statements, and I want you to tell me which statement comes closer to your own view, even if neither is exactly right

Men, Especially Older Men Agree That We need to Build More Housing, Quickly, To Bring Down Costs

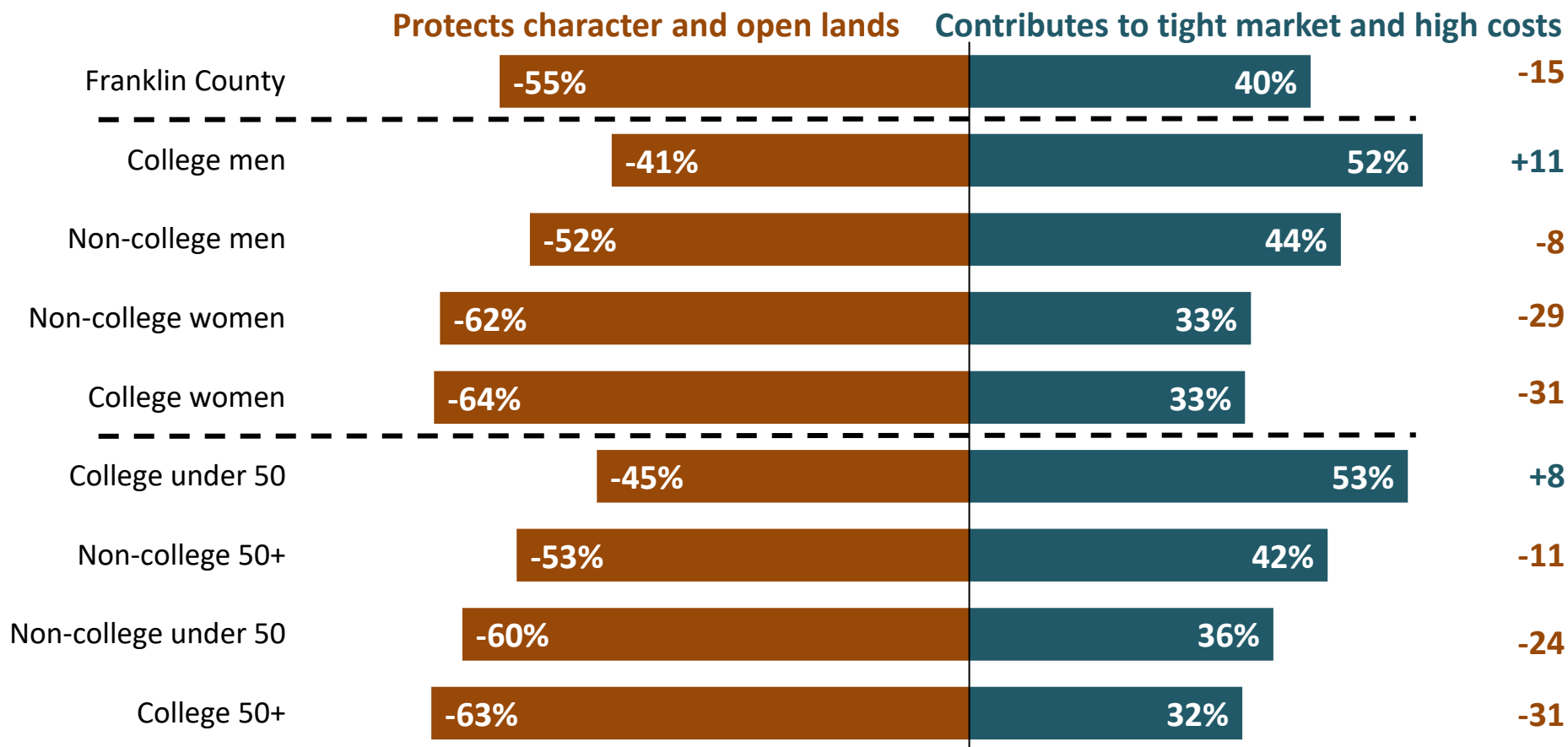
Paired Statements by Key Demographics in Franklin County



Q.14 Now I am going to read you a pair of statements, and I want you to tell me which statement comes closer to your own view, even if neither is exactly right

Younger Educated Voters as well as Educated Men Agree That We need to Build More Housing, Quickly, To Bring Down Costs

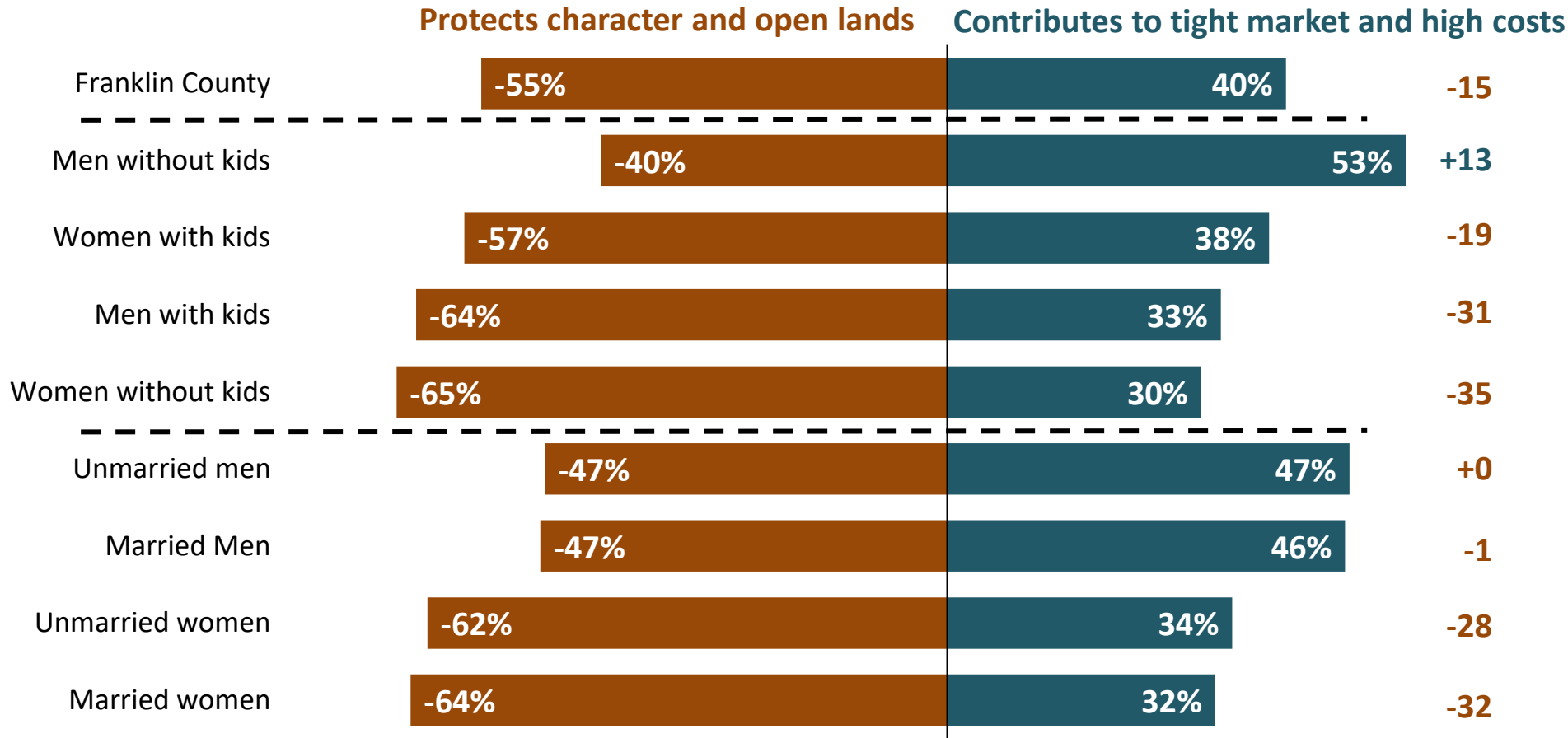
Paired Statements by Key Demographics in Franklin County



Q.14 Now I am going to read you a pair of statements, and I want you to tell me which statement comes closer to your own view, even if neither is exactly right

Men Without Kids And Unmarried Men Agree That We need to Build More Housing, Quickly, To Bring Down Costs

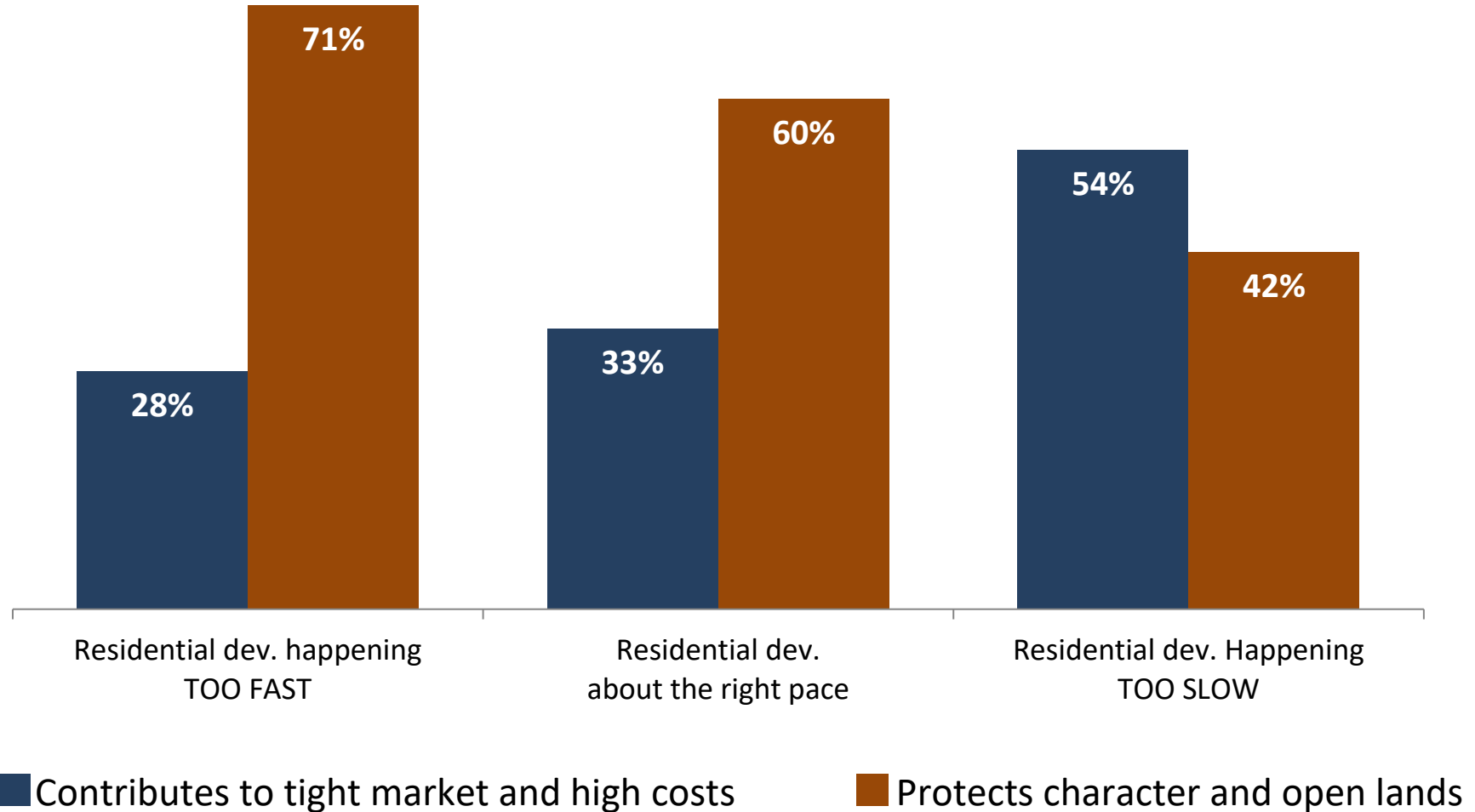
Paired Statements by Key Demographics in Franklin County



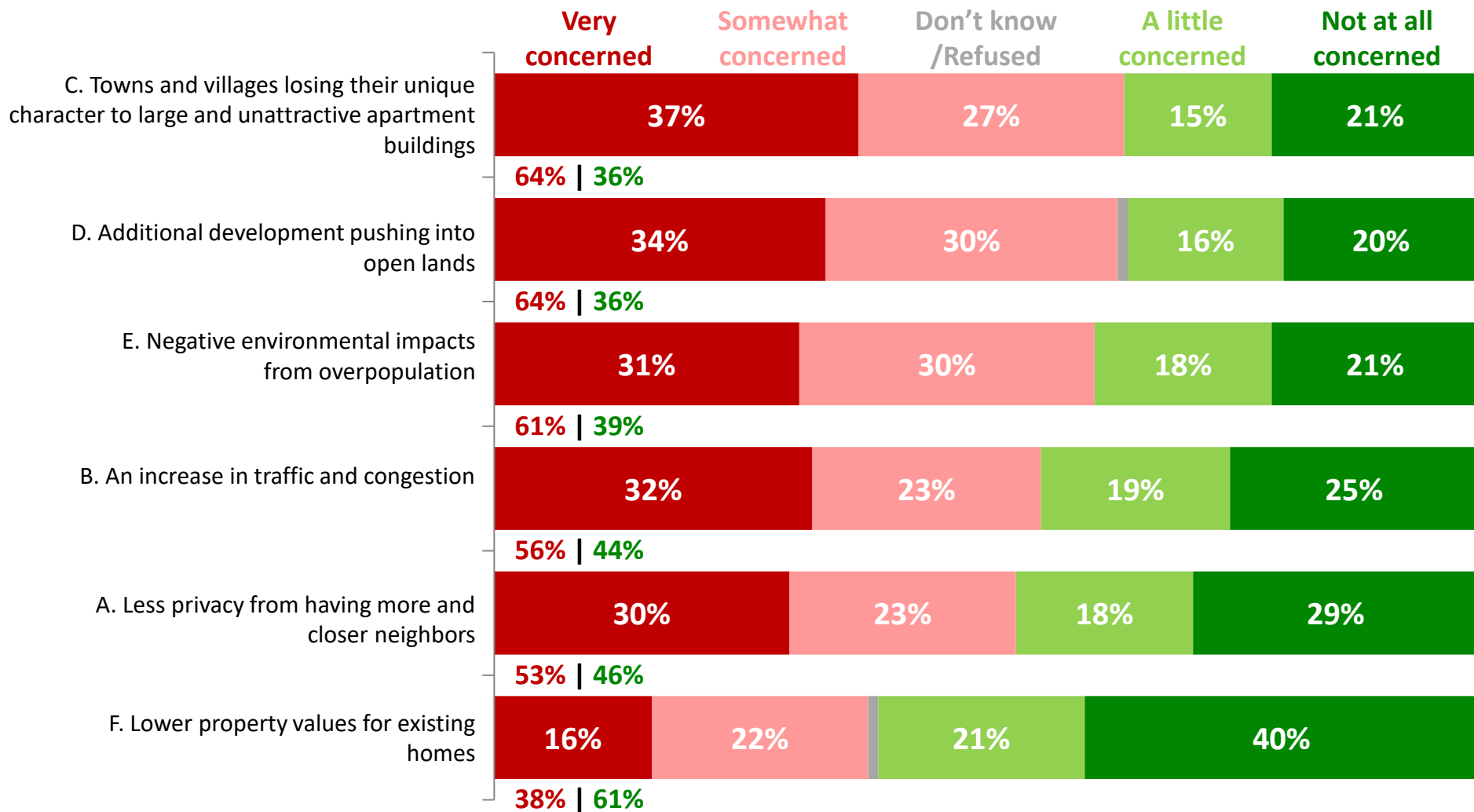
Q.14 Now I am going to read you a pair of statements, and I want you to tell me which statement comes closer to your own view, even if neither is exactly right

People Who Say Pace Of Development Is Too Slow Only Narrowly Side With Proponents Of Building More Housing

Many are still concerned about the character of their towns and villages.



Franklin Co. Voters Concerned With Loss of Unique Character of Towns and Development Pushing into Open Lands



Q.15 Next, I am going to read to you a list of things that some people say concern them about building more and different types of housing in [INSERT COUNTY NAME] County. Please tell me how concerned you are about each of the following. Are you (ROTATE FIRST TO LAST, LAST TO FIRST) very concerned, somewhat concerned, a little concerned, or not concerned at all.

Personal Living Situation in Franklin County

2-in-3 Residents of Franklin County are Very Satisfied with Their Current Housing Situation

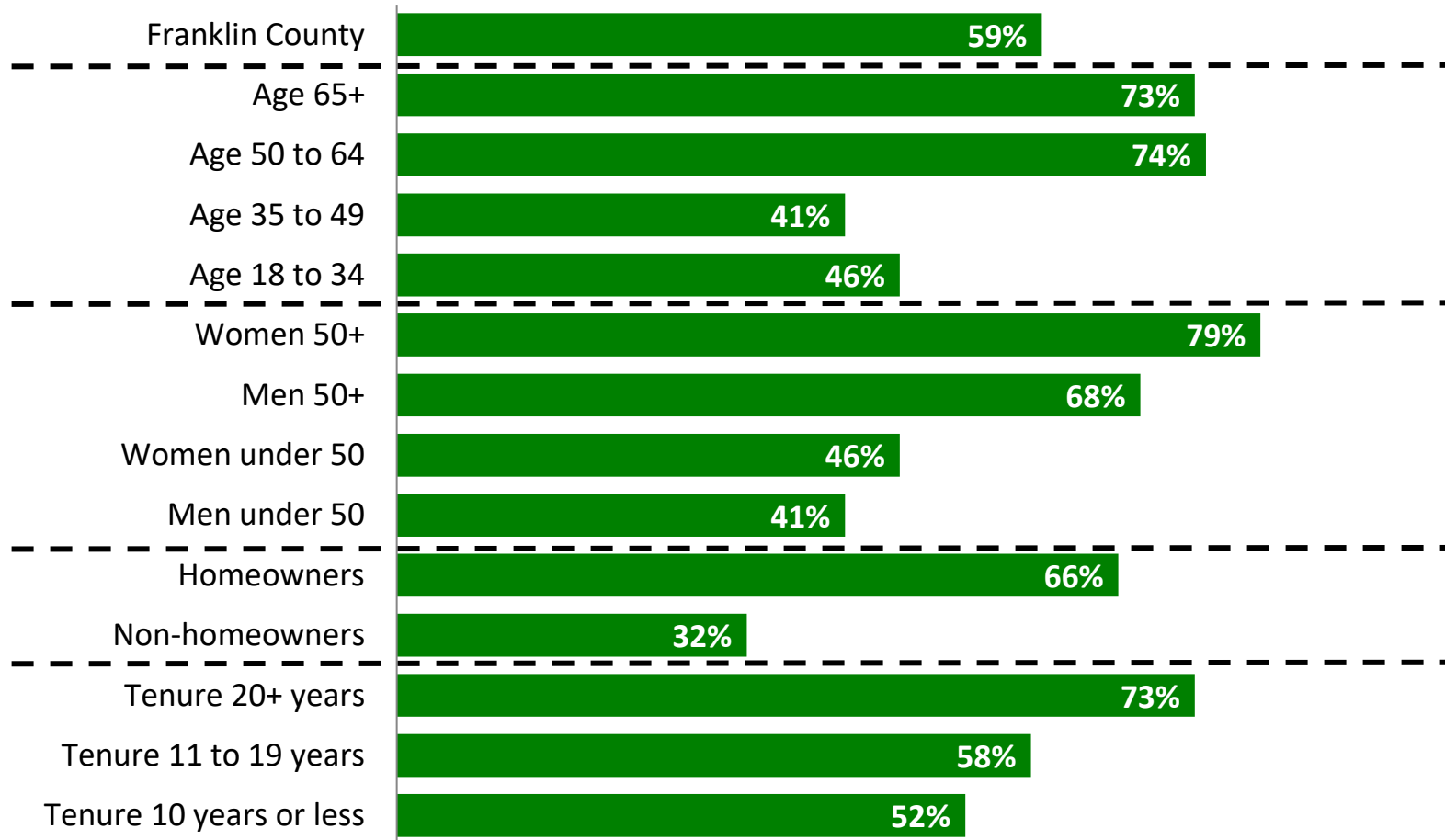
Satisfaction with Your Current Housing Situation
on a 5-Point Scale



Q.16 Now switching gears and thinking about the home, condominium, or apartment where you live. On a scale of 1 to 5, where 5 means very satisfied and 1 means not satisfied at all, how satisfied are you with your current housing situation? You can use any number from 1 to 5, the higher the number, the more satisfied you are with your housing situation.

Younger Franklin Co. Voters, Non-homeowners, and Those Who Have Been Here Less Time are Less Likely to Be Satisfied

Satisfaction with Your Current Housing Situation on a 5-Point Scale
Demographics who said 5

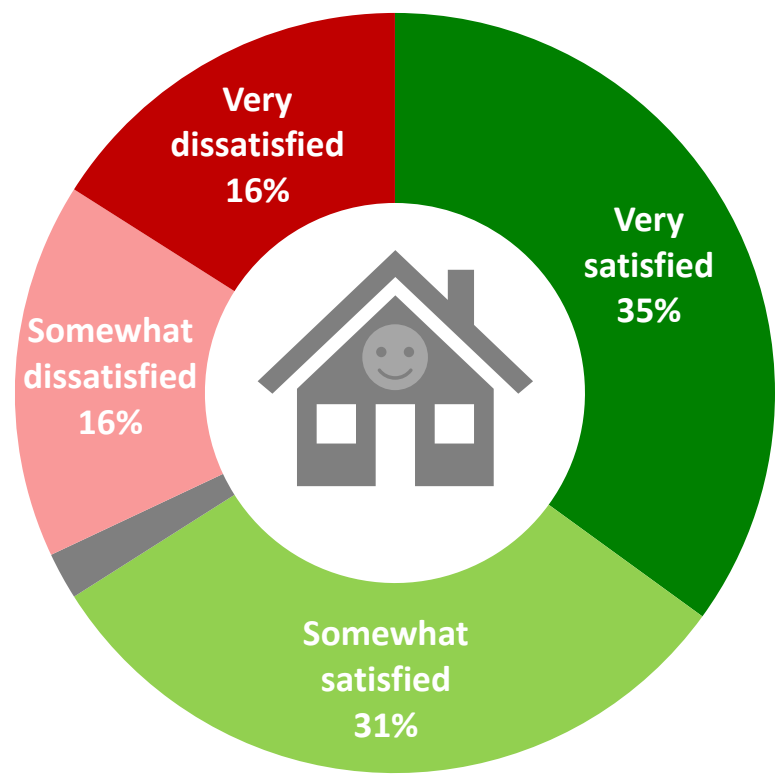


Q.16 Now switching gears and thinking about the home, condominium, or apartment where you live. On a scale of 1 to 5, where 5 means very satisfied and 1 means not satisfied at all, how satisfied are you with your current housing situation? You can use any number from 1 to 5, the higher the number, the more satisfied you are with your housing situation.

Majority Say They Were Satisfied with the Options They Had Available When They Were Looking for Housing Last

Housing Satisfaction in Franklin County IF RENT OR OWN THEIR HOME

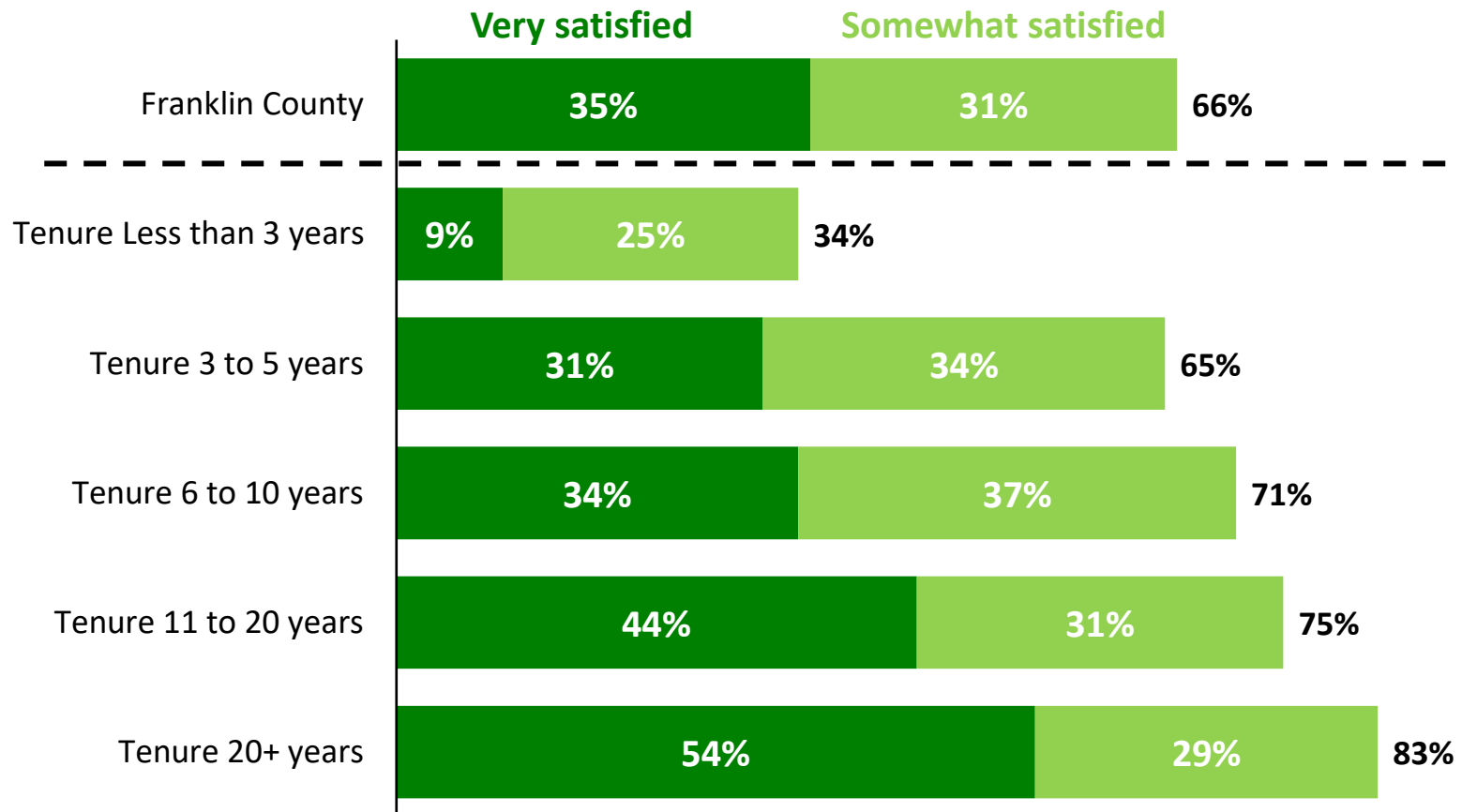
Total Dissatisfied 32% | Total Satisfied 66%



Q.19 (IF RENT OR OWN in OWNRENTFAM) When you made the decision to live where you are now, were you (ROTATE) satisfied or dissatisfied with the housing options that were in your price range?

Franklin Co. Voters Who Have Moved Recently Are Less Satisfied with the Options They Had

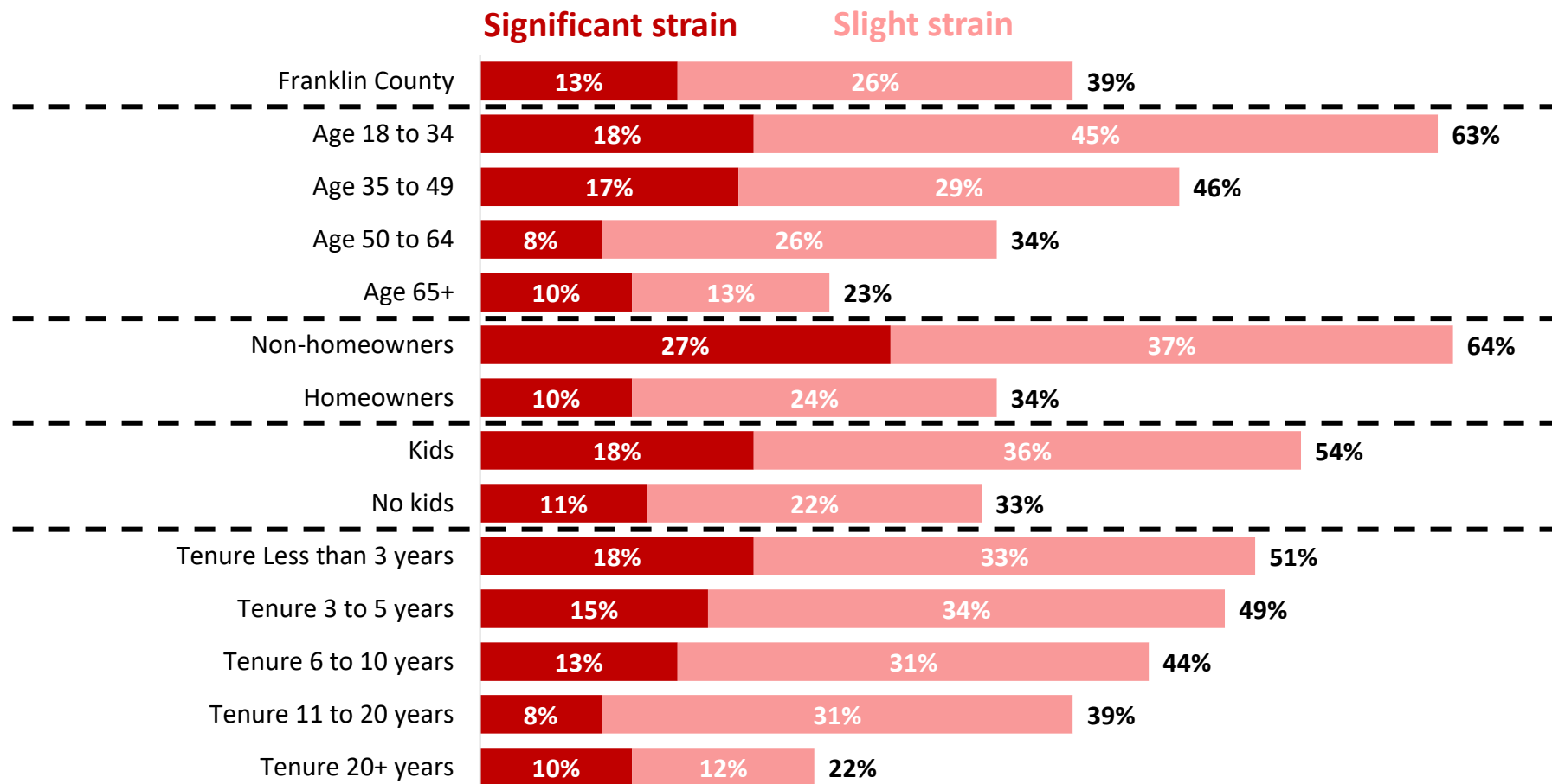
Level of Satisfaction with the Housing Options
In Your Price Range When You Made Decision to Live There
by Tenure



Q.19 (IF RENT OR OWN in OWNRENTFAM) When you made the decision to live where you are now, were you (ROTATE) satisfied or dissatisfied with the housing options that were in your price range?

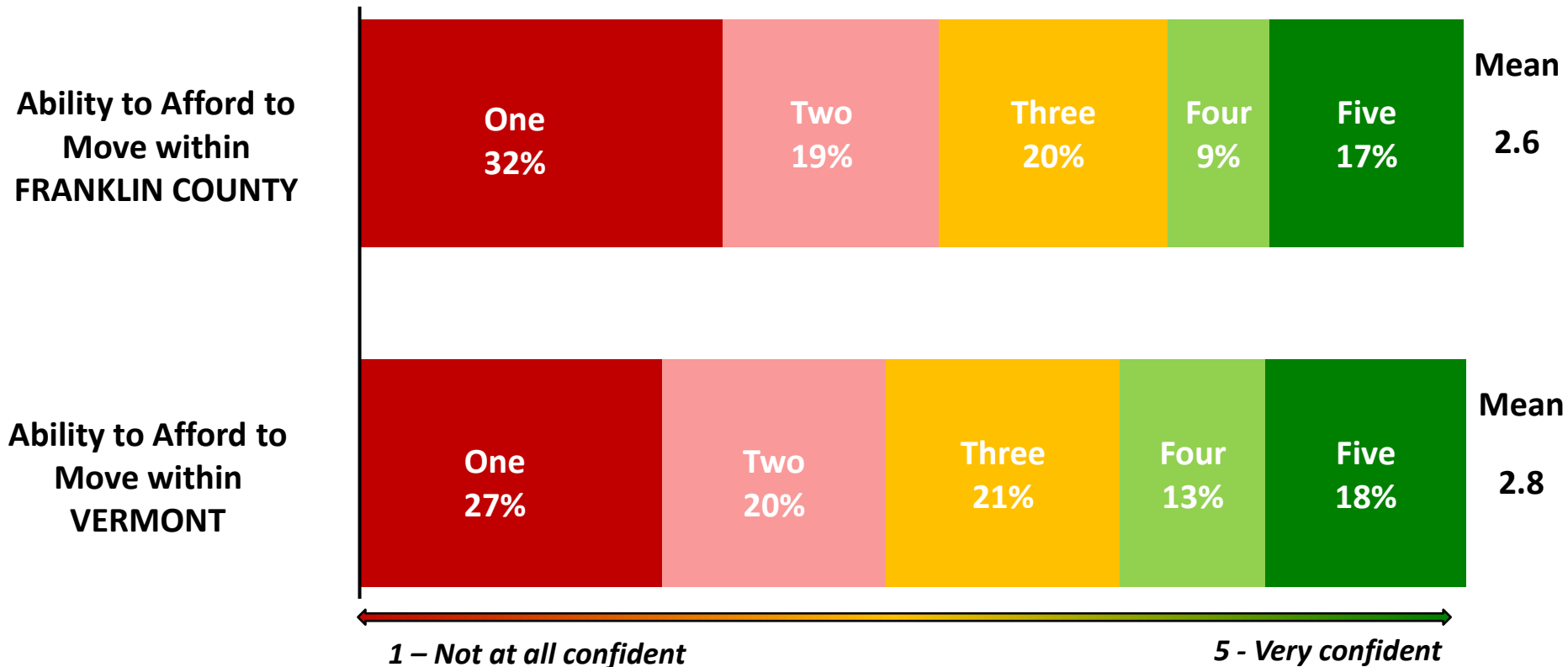
Renters, Young Voters, Those with Kids at Home, and Recent Movers More Likely to Personally Feel Strain of Housing Costs

Financial Strain of Your Rent/Mortgage
by Age, Homeownership, Kids, Length of Residency



Q.20 (IF RENT OR OWN in OWNRENTFAM) How much of a financial strain on your budget is paying your rent or mortgage each month? Is it (ROTATE FIRST TO LAST AND LAST TO FIRST) a significant strain, a slight strain, not much of a strain, or no strain at all?

Voters in Franklin County Are So Confident They Will be Able to Find Home That Meets Their Needs if They Have to Move

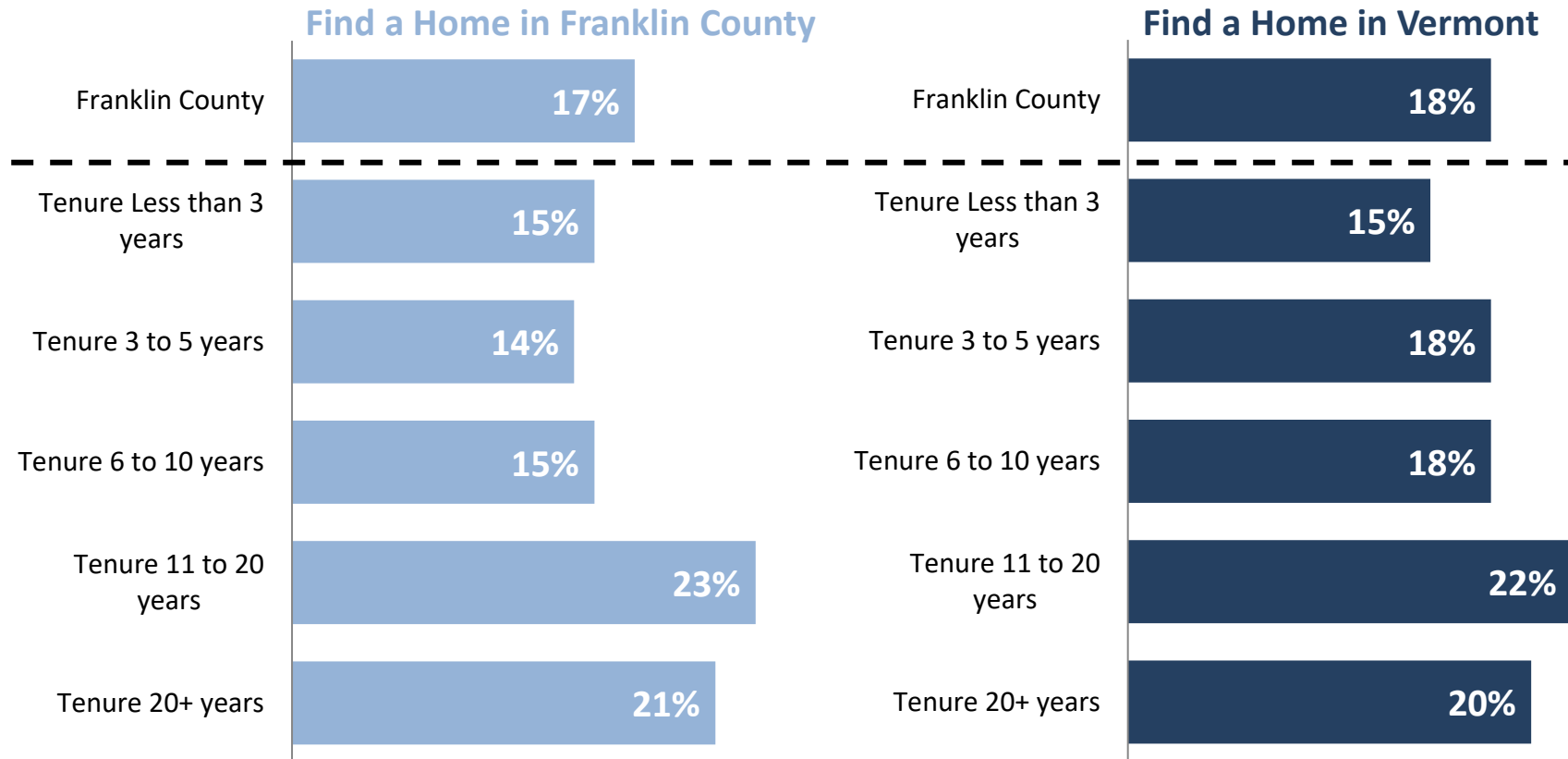


Q.21 On a scale of 1 to 5, where 5 means very confident and 1 means not at all confident, how confident are you that if you had to move from your current residence you would be able to afford to own or rent a home that meets your needs in [INSERT COUNTY NAME] County?

Q.22 On a scale of 1 to 5, where 5 means very confident and 1 means not at all confident, how confident are you that if you had to move from your current residence you would be able to afford to own or rent a home that meets your needs somewhere in VERMONT?

Those With Higher Tenure Are More Confident in Their Ability to Afford the Home They Need If They Move

Confidence of Being Able to Afford the Kind of Home the meets your needs
5 on a scale of 1 to 5



Q.21 On a scale of 1 to 5, where 5 means very confident and 1 means not at all confident, how confident are you that if you had to move from your current residence you would be able to afford to own or rent a home that meets your needs in [INSERT COUNTY NAME] County?

Q.22 On a scale of 1 to 5, where 5 means very confident and 1 means not at all confident, how confident are you that if you had to move from your current residence you would be able to afford to own or rent a home that meets your needs somewhere in VERMONT?

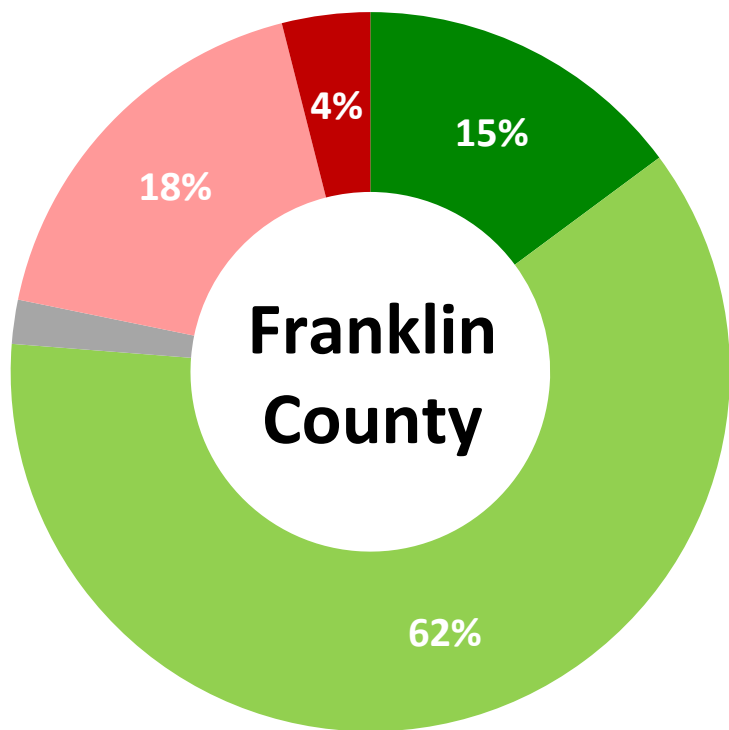
Life in Grand Isle County

Voters from Both Counties are Happy With Quality Of Life

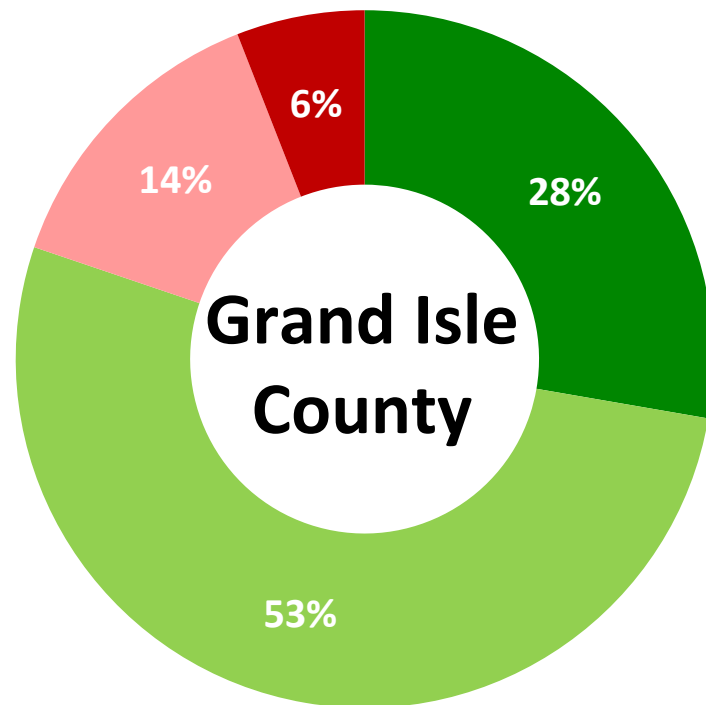
Stronger intensity from Grand Isle

Quality of life

Just fair/Poor 22% | Excellent/Good 77%

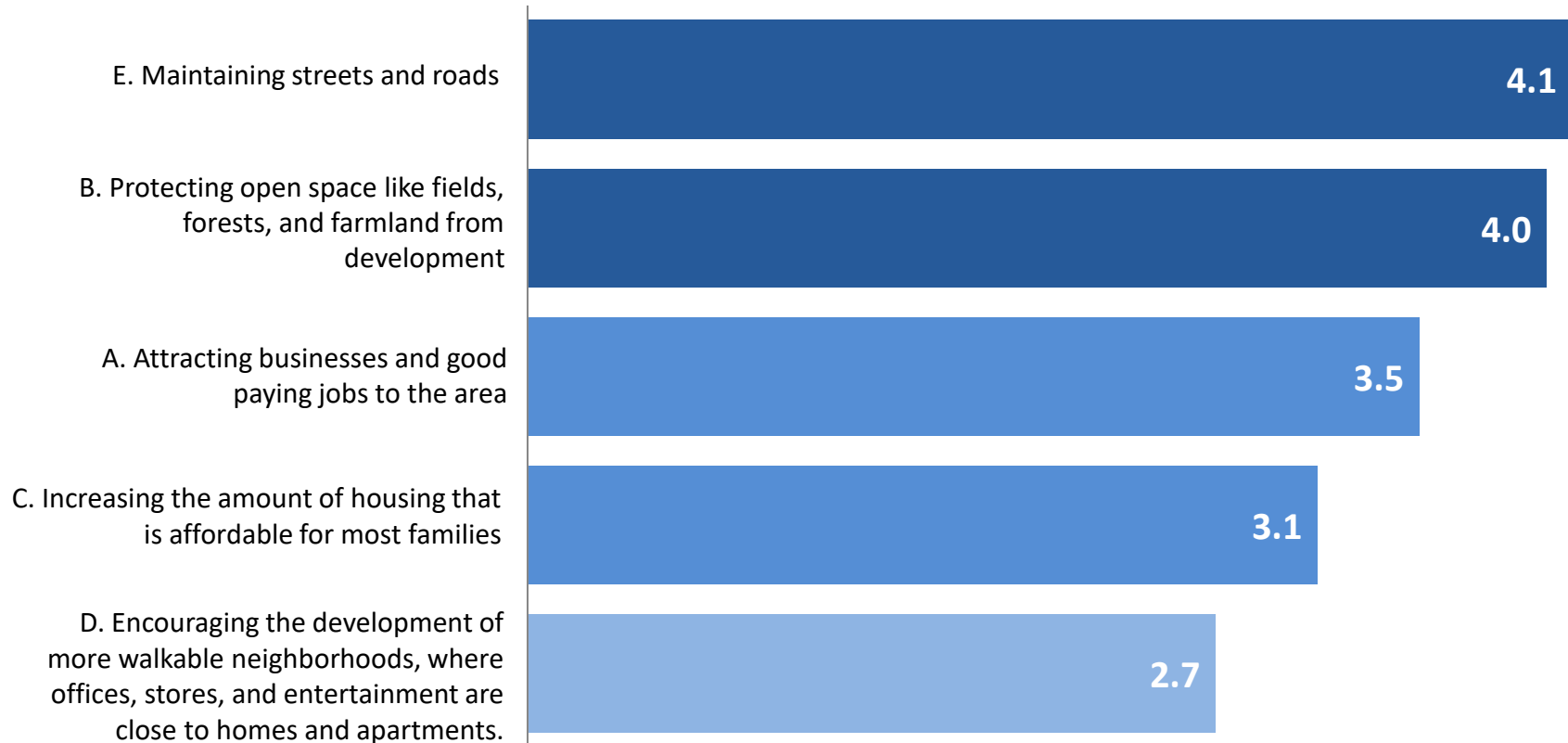


Just fair/Poor 20% | Excellent/Good 81%



For Grand Isle Voters, Preserving Open Space is a Higher Priority than Building More Housing that is Affordable

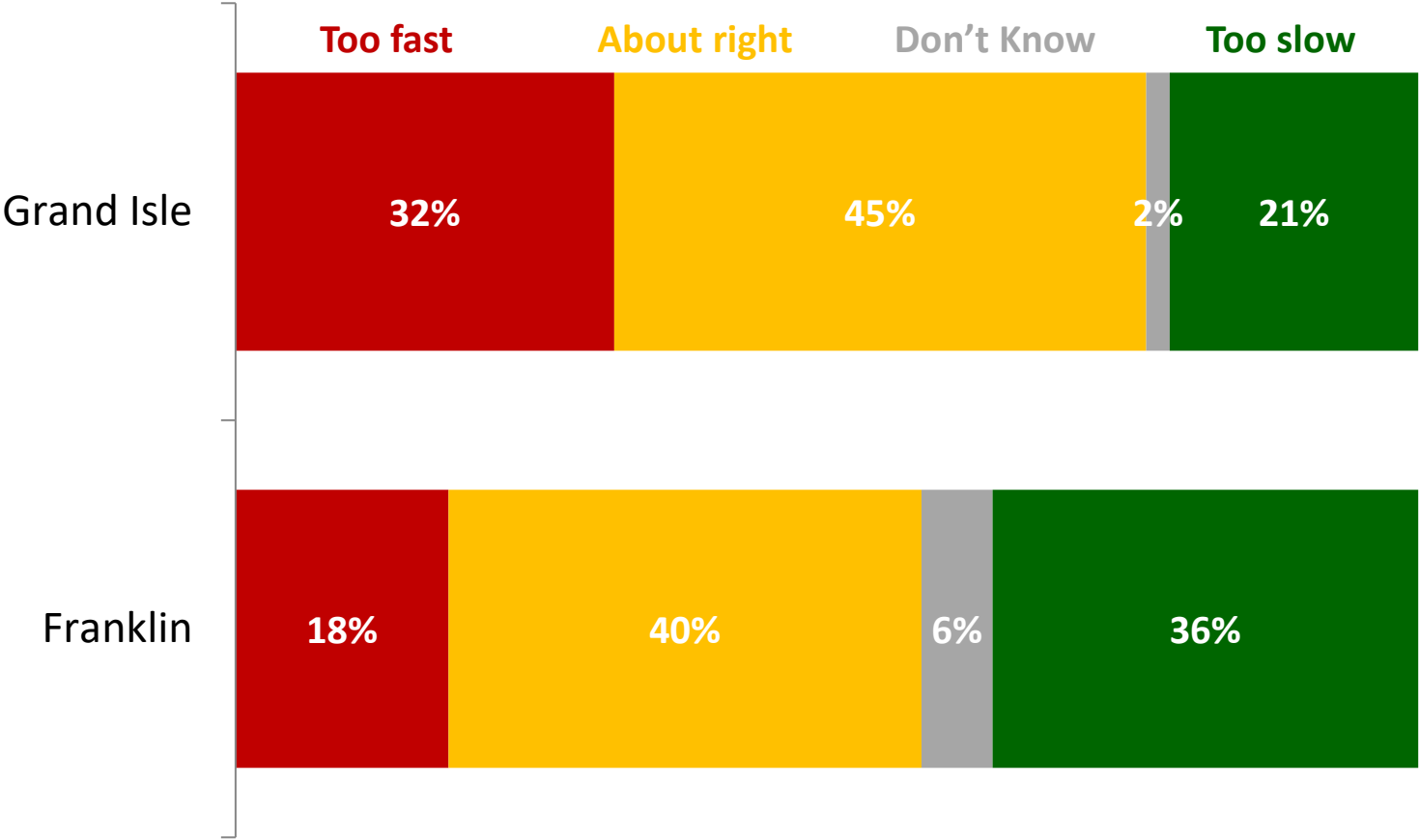
Biggest Priorities For Government To Focus On



Q.5 Next I am going to read some issues that people say should be a priority for the local government and elected officials in [INSERT COUNTY NAME] County. Please rate each of the following using a scale of one to five, where one means that issue is not a priority for you at this time, and five means that issue is a top priority for you at this time. Of course, you can use any number between one and five, the higher the number, the higher the priority you place on that issue.

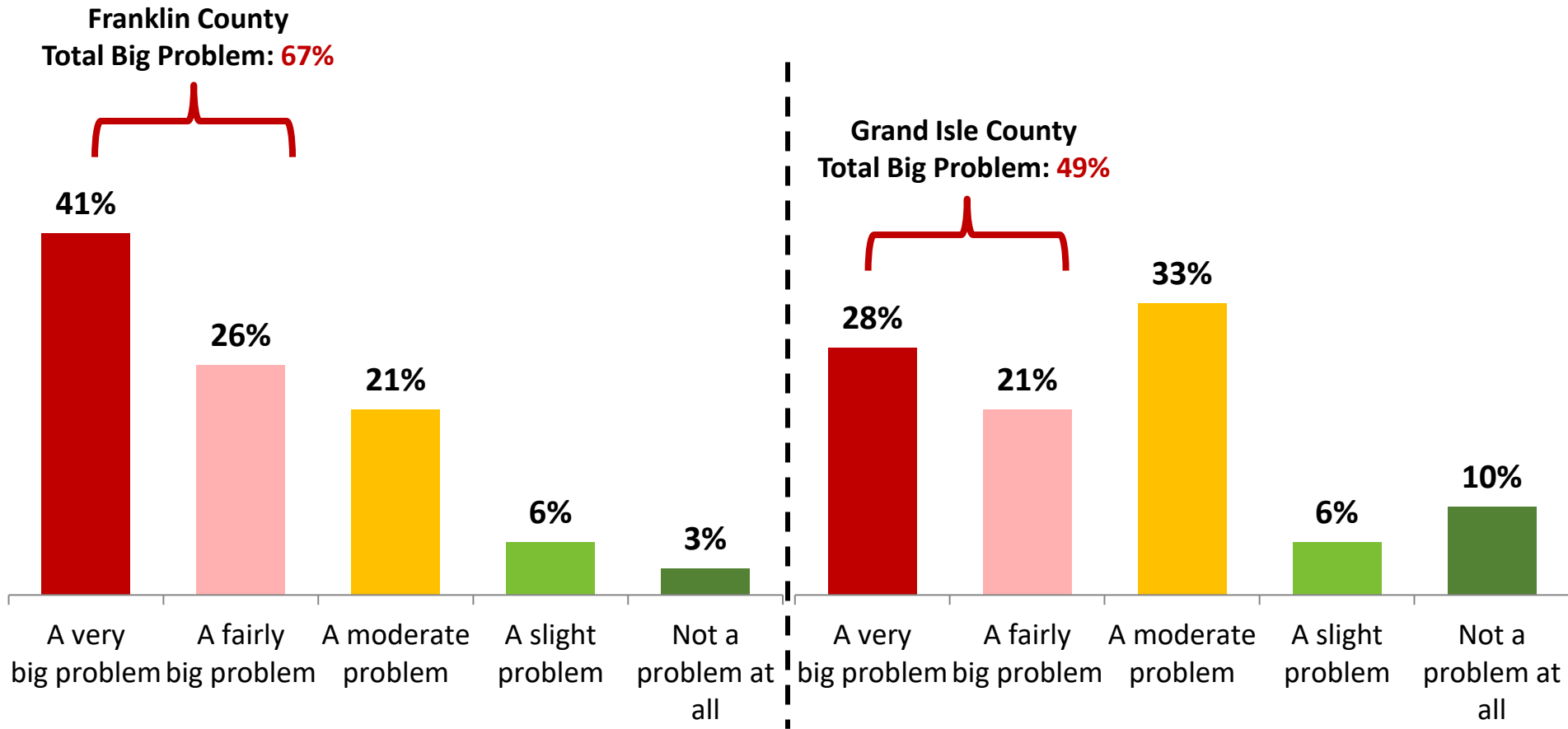
Franklin County Voters Say Residential Growth Is Too Slow, Grand Isle County Voters Say Too Fast

Pace of Residential Growth and Development in Vermont By County



Grand Isle County Voters See Housing Affordability as Less of a Problem than Franklin County Voters

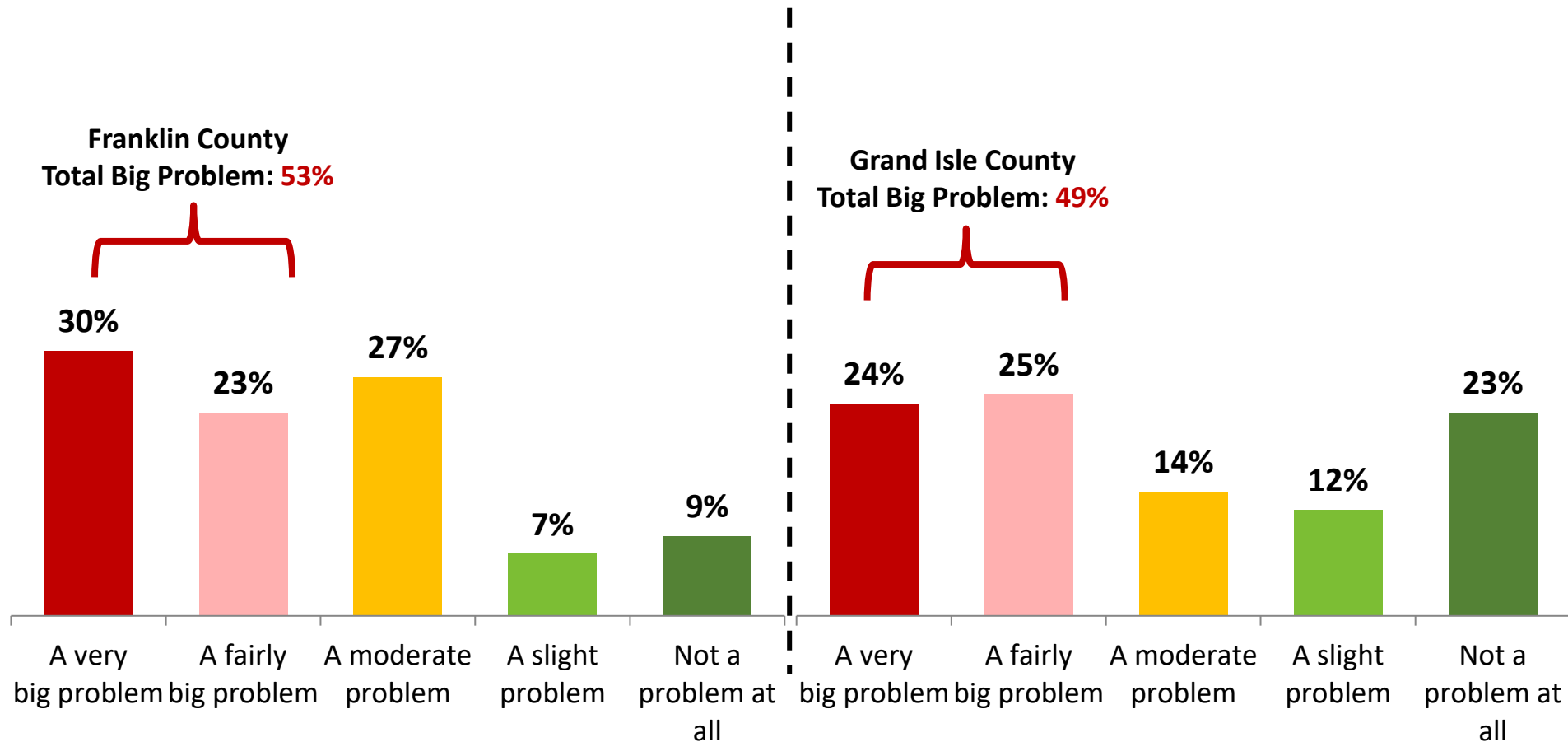
Housing Affordability Problem in Both Counties



Q.8 How much of a problem is housing affordability in your community, that is to say, how much it costs to buy or rent a home? Is housing affordability (ROTATE FIRST TO LAST AND LAST TO FIRST) a very big problem, a fairly big problem, a moderate problem, a slight problem, or not a problem at all?

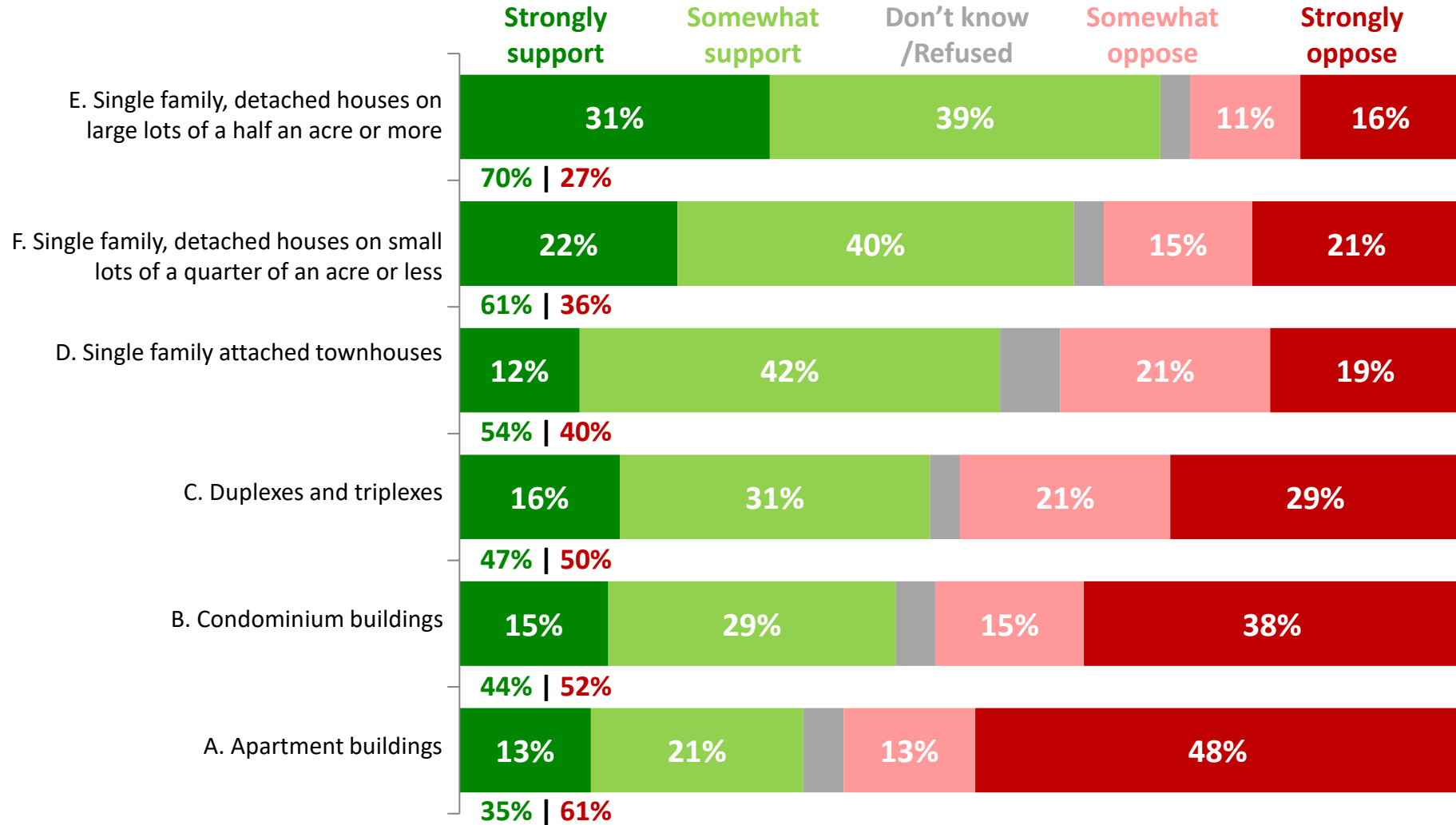
Housing Availability Seen as Big or Moderate Problem in Franklin County; Similar Numbers in Grand Isle County

Housing Availability Problem in Both Counties



Q.9 How much of a problem is the availability of housing in your community, that is to say, the number of houses, condominiums, or apartments that are available to buy or rent? Is housing availability (ROTATE FIRST TO LAST AND LAST TO FIRST) a very big problem, a fairly big problem, a moderate problem, a slight problem, or not a problem at all in your community?

Grand Isle County Voters Are Hesitant To Add Any Multi-family Housing, Including Duplexes and Triplexes

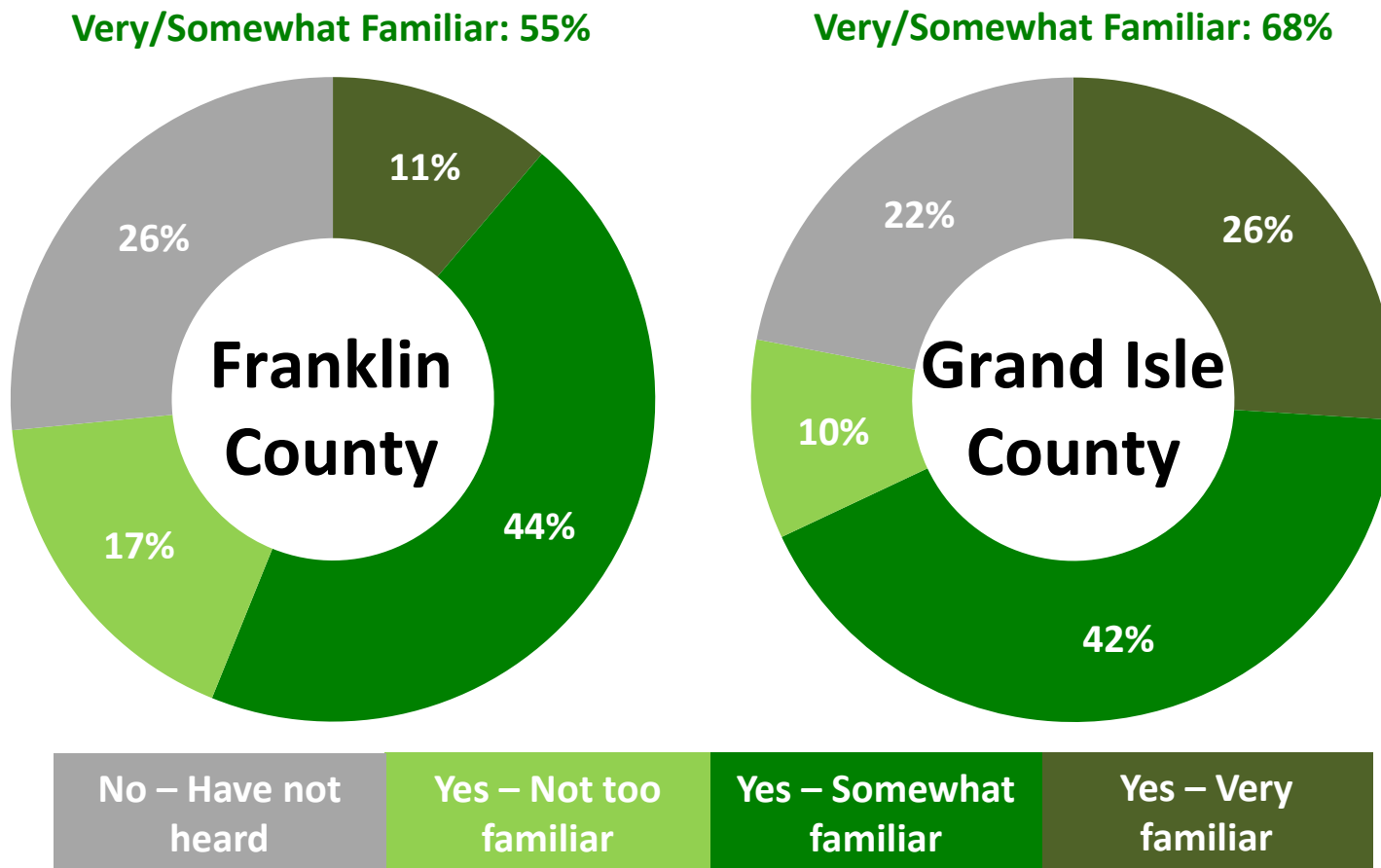


Q.10 Some people would like to see more housing built in [INSERT COUNTY NAME] County to increase supply, lower costs, and provide more options. Please tell me if you would support or oppose more of each kind of housing being built in your community.

Grand Isle County Voters on Act 250

Grand Isle County Voters Are Much More Familiar with Act 250 Than Those in Franklin County

ACT 250 Familiarity

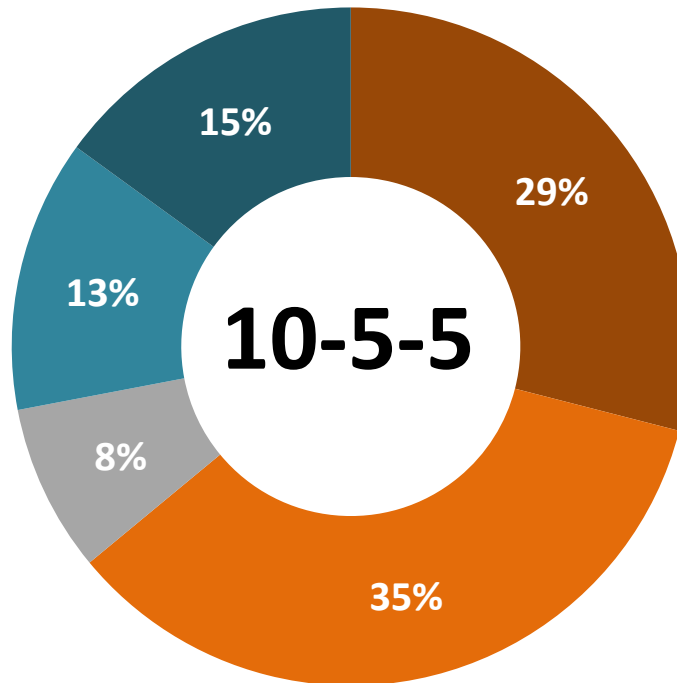


Two Thirds of Grand Isle Voters Favor the 10-5-5 Rule

10-5-5 Rule Favorability in Grand Isle County

Q.12 As you may know, Act 250 is a land use law that limits development. Under Act 250, a single developer can only build nine new units of housing within a five-mile radius in a five-year timeframe without a permit to build more. Developers have to get an Act 250 permit with an extensive review and public comment process to build ten units or more. This is known as the ten-five-five rule.

Total Oppose 28% | Total Favor 64%



Strongly
oppose

Somewhat
oppose

Don't
Know/ refused

Somewhat
support

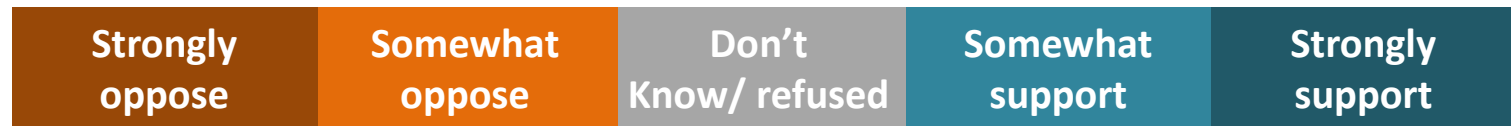
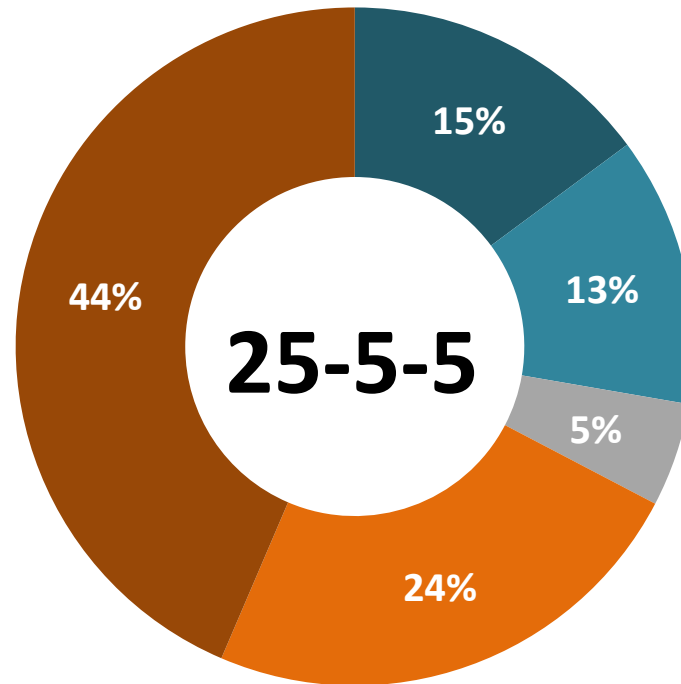
Strongly
support

Strong Opposition to Changing the 10-5-5 Rule to 25-5-5 in Grand Isle County

25-5-5 Rule Change Favorability In Grand Isle County

Total Oppose 68% | Total Favor 28%

Q.13 Some people have proposed changing the ten-five-five rule so that a single developer can build as many as 24 housing units within a five-mile radius and a five-year timeframe without going through the Act 250 permitting process.



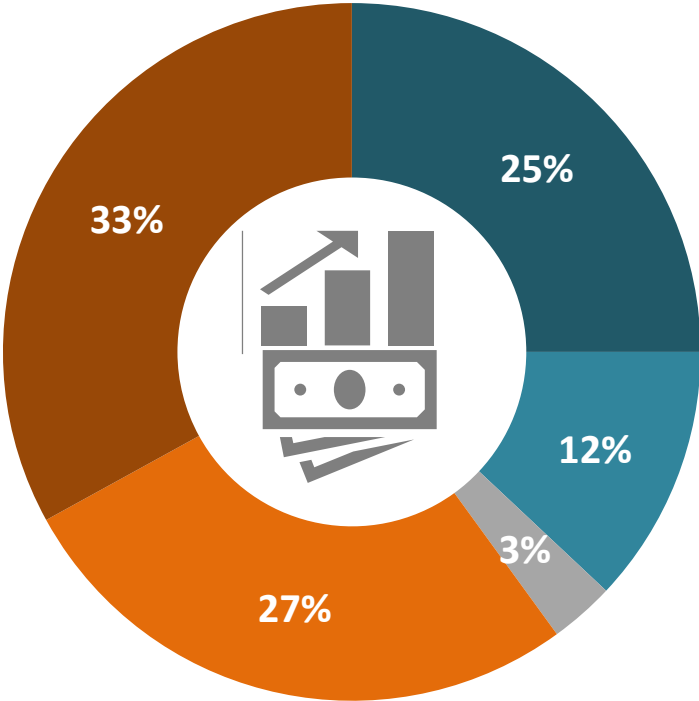
Messaging Softens Opposition to 25-5-5 Rule Change, but There's Still Greater Opposition in Grand Isle Co. than Franklin Co.

Majority feel that the 10-5-5 rule is the best way to protect the environment and communities.

Paired Statements

Total Statement B: 60% | Total Statement A: 37%

(STATEMENT B)
SOME/OTHER people say that the 10-5-5 rule protects the unique character of our towns and villages, open lands, forests, and farms. Developers can build more housing if they get a permit. These permits ensure that we are protecting the environment and our communities, and not selling out to big developers.

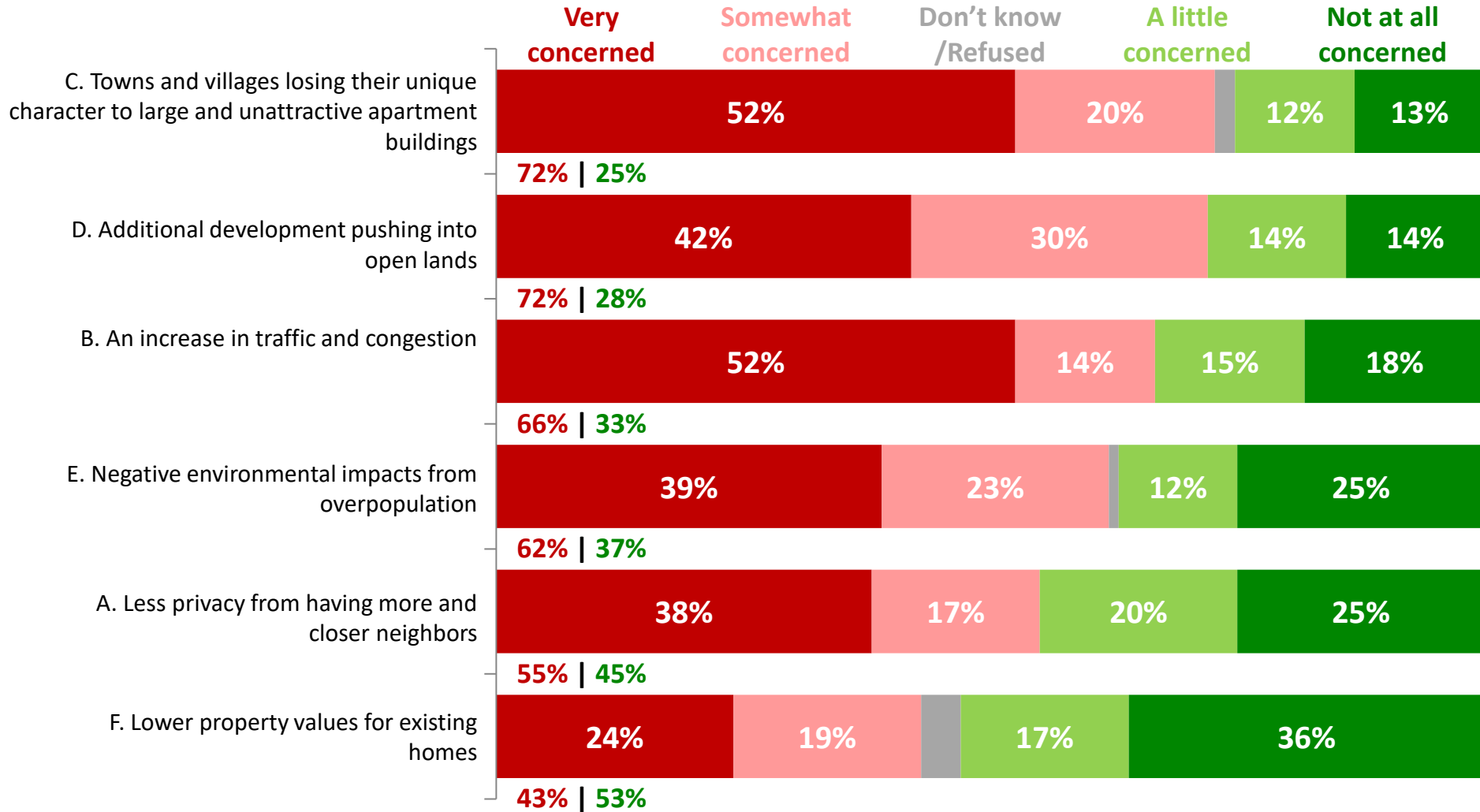


(STATEMENT A) SOME/OTHER people say that the 10-5-5 rule contributes to the tight housing market and high costs. There's so much red tape that housing construction hasn't kept up with population growth for the last 50 years. We need to build more housing, quickly, to bring down costs and make sure people who were born and raised here can afford to stay.

Statement B - much more	Statement B – somewhat more	Don't Know/ refused	Statement A – somewhat more	Statement A – much more
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Q.14 Now I am going to read you a pair of statements, and I want you to tell me which statement comes closer to your own view, even if neither is exactly right

Grand Isle Voters Concerned With More Traffic, In addition to Loss of Unique Character, Open Lands

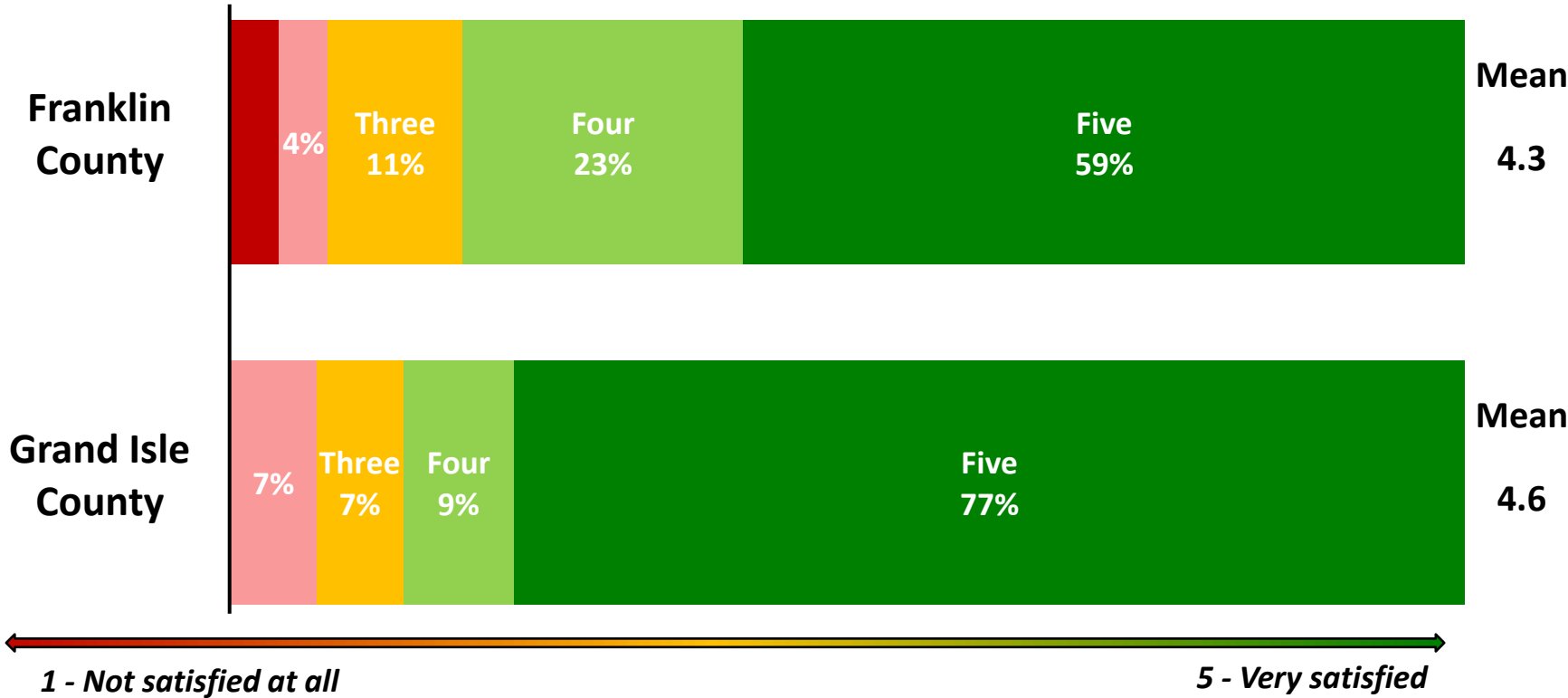


Q.15 Next, I am going to read to you a list of things that some people say concern them about building more and different types of housing in [INSERT COUNTY NAME] County. Please tell me how concerned you are about each of the following. Are you (ROTATE FIRST TO LAST, LAST TO FIRST) very concerned, somewhat concerned, a little concerned, or not concerned at all.

Personal Living Situation in Grand Isle County

Residents of Grand Isle Are More Satisfied with Their Current Housing Situation Than Those in Franklin County

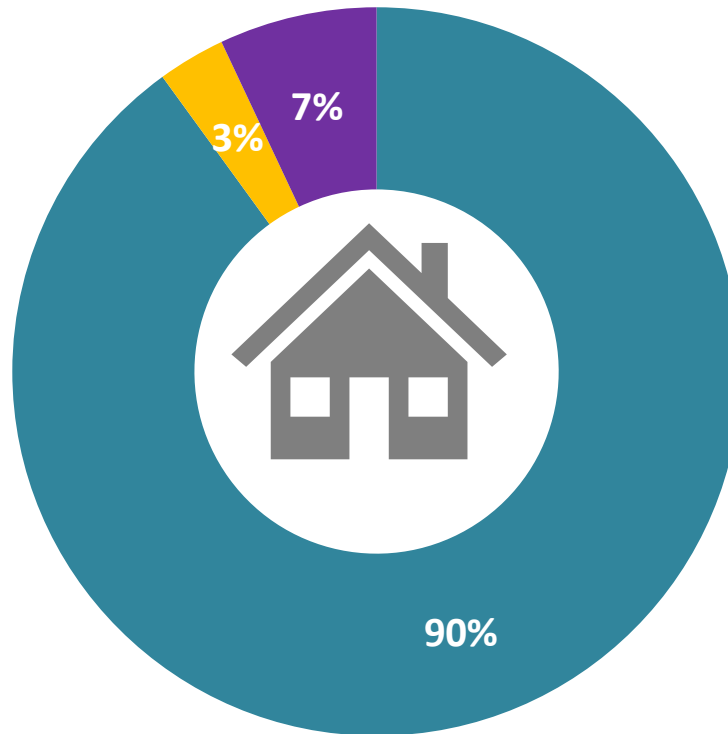
Satisfaction with Your Current Housing Situation
on a 5-Point Scale



Q.16 Now switching gears and thinking about the home, condominium, or apartment where you live. On a scale of 1 to 5, where 5 means very satisfied and 1 means not satisfied at all, how satisfied are you with your current housing situation? You can use any number from 1 to 5, the higher the number, the more satisfied you are with your housing situation.

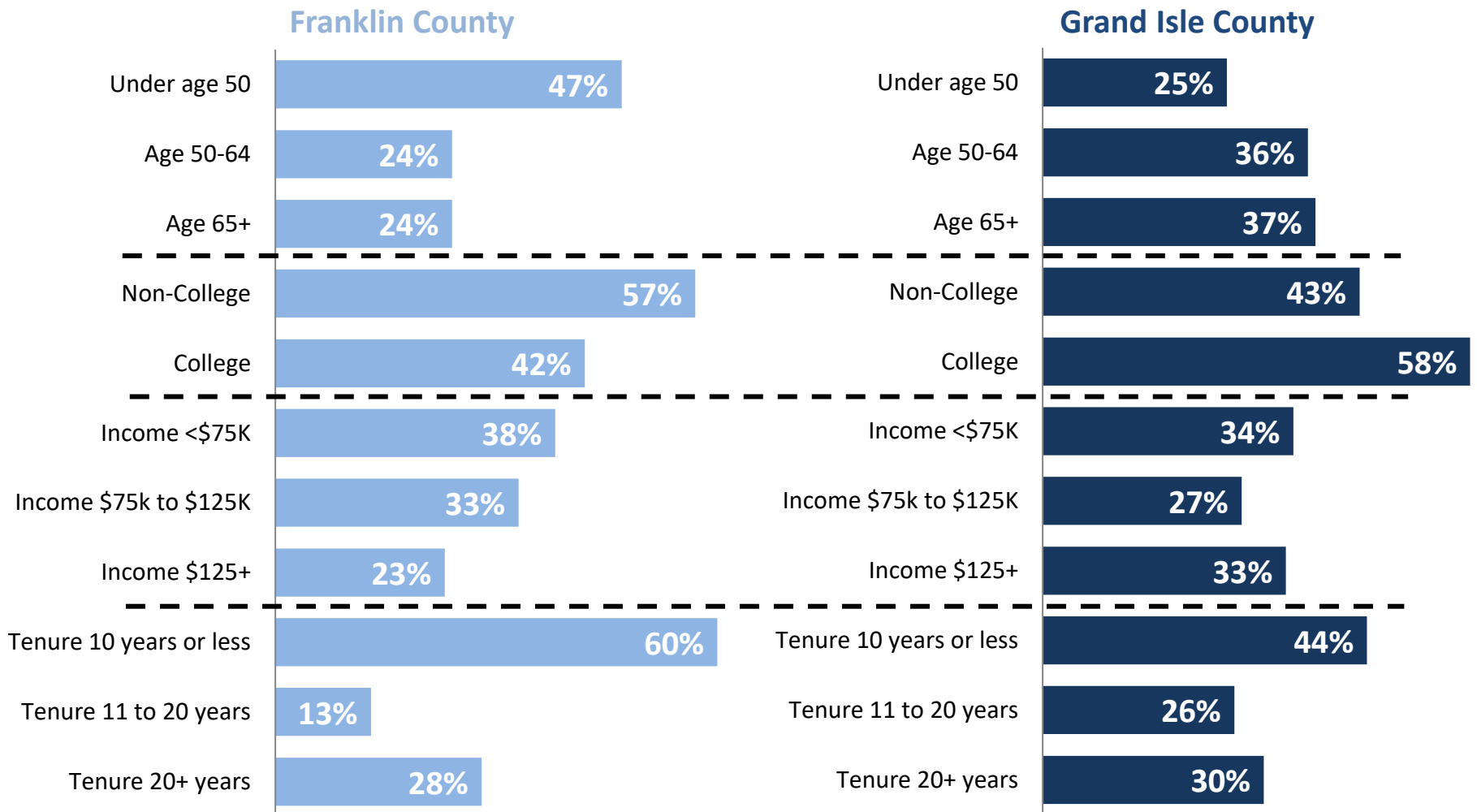
Almost All Voters in Grand Isle County Are Homeowners

Ten percent rent their homes or are living with friends and family.



Grand Isle Voters Are Older, More Educated, and Make More Money Than Franklin County Voters

Demographic Breakdown Per County



National Association of REALTORS®

VT – Northwest Counties Smart Growth

May 2023

American Strategies designed and administered this multi-modal survey conducted by professional interviewers and via Qualtrics. The survey reached 431 adults (400 weighted) adults, age 18 or older, who indicated they were registered to vote in Grand Isle County or Franklin County, Vermont. The survey was conducted May 1-9, 2023.

Forty-six percent of respondents were reached on wireless phones and twenty-six percent on VOIP/landlines. Twenty-eight percent of respondents were reached online. Quotas were assigned to reflect the demographic distribution of registered voters in Grand Isle and Franklin Counties, and the data were weighted to ensure an accurate reflection of the population. The sample was drawn from a third-party vendor file. 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.