

National Association of REALTORS® Fredericksburg, VA Area Smart Growth Survey

March 2020

American Strategies designed and administered this telephone survey conducted by professional interviewers. The survey reached 425 adults (400 weighted), age 18 or older, who indicated they live in the City of Fredericksburg, Spotsylvania County, or Stafford County. The survey was conducted from March 5-8, 2020.

Fifty-nine percent of respondents were reached on wireless phones, twenty-one percent on VOIP phones, and twenty percent on landlines. Quotas were assigned to reflect the demographic distribution of registered voters in the City of Fredericksburg, Spotsylvania County, and Stafford County, and the data were weighted to ensure an accurate reflection of the population. The sample was drawn from a third-party vendor voter 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.

Executive Summary

Voters are overwhelmingly satisfied with quality of life. Ninety-three percent of voters are satisfied with the quality of life in their communities, with well over half (62 percent) saying they are very satisfied. Only 6 percent of voters report they are dissatisfied with life in their county. Voters in Stafford County are more intensely positive than voters in Fredericksburg and Spotsylvania County. Satisfaction with quality of life increases with age, while whites and homeowners are more likely to rate their quality of life as excellent than their non-white and renter counterparts.

Voters are most pleased with the availability of hospitals and doctors' offices, availability of places of worship, the safety of the community and level of crime, and the number of shops and restaurants convenient to their homes. When asked to rate their satisfaction with amenities in their community on a 5-point scale, where 5 is the most satisfied, the availability of hospitals and doctors' offices (4.2 mean score), availability of places of worship (4.1 mean score), the safety of the community and level of crime (4.1 mean score), and the number of shops and restaurants convenient to your home (4.0 mean score) receive the highest marks. Those who live in suburbs are most satisfied with the availability of hospitals and doctors' offices (4.4 mean score), while those in small towns and rural areas are most satisfied with the privacy they have from their neighbors (4.2 mean score).

Executive Summary

Levels of satisfaction are lowest for the availability and condition of sidewalks, the level of property taxes and other local taxes, and housing affordability. The availability and condition of sidewalks (2.8 mean score), the level of property taxes and other local taxes (2.9 mean score), and the affordability of housing, including apartments, town homes, and houses (3.1 mean score) receive the most critical marks.

Voters would weigh community safety, housing affordability, and availability of doctors and hospitals as most important factors if they were deciding where to live. When asked about the importance of these same community attributes (above) if they were deciding where to live today on a 5-point importance scale, the safety of the community and level of crime (4.6 mean score) is by far the most important factor to voters. The affordability of housing, including apartments, town homes, and houses (4.3 mean score) and the availability of hospitals and doctors' offices (4.3 mean score) are tied for the second most important factor.

The biggest mismatches between satisfaction and importance arise among voter opinions on local tax levels, commute lengths, and housing affordability.

Executive Summary

Voters put more weight on neighborhoods than home qualities when deciding where to live. While a third of voters view home qualities as more important than neighborhood qualities, nearly twice as many (64 percent) say neighborhood qualities are more important. Voters also prioritize staying within budget over stretching their budgets to live in their preferred neighborhood (65 percent and 34 percent, respectively).

A plurality of voters believe there are too many new houses and apartments being built, but most voters are comfortable with the pace of commercial growth. There is some discomfort with the pace of growth in the area, as 47 percent of voters say there are too many new houses and apartments being built, while 43 percent say there is the right amount of new residential development. Voters are more comfortable with the amount of new stores and offices being built (31 percent too much, 50 percent right amount).

Most voters prefer to live in detached single-family homes. Six-in-ten voters say they prefer to live in a detached single-family home with a large yard, and another 27 percent say they prefer to live in a detached single-family home with a small yard. One-in-ten voters prefer a single-family attached home (6 percent) or a building with multiple apartments or condos (4 percent). Renters, city dwellers, and non-white voters are most likely to have a mismatch between their current living situation and their preferred living situation.

Executive Summary

A majority of voters believe there is too little housing for low-income residents and young people starting their careers. Just over half of voters believe there is a shortage of housing for people with low incomes (55 percent too little), and half say there is too little housing for younger people and those who are just getting started in their careers. Just about four-in-ten voters say there is too little housing for older people with special needs or who are looking to downsize (43 percent) and people with moderate incomes (42 percent). Across the board, women are more sensitive to housing shortages than their male counterparts.

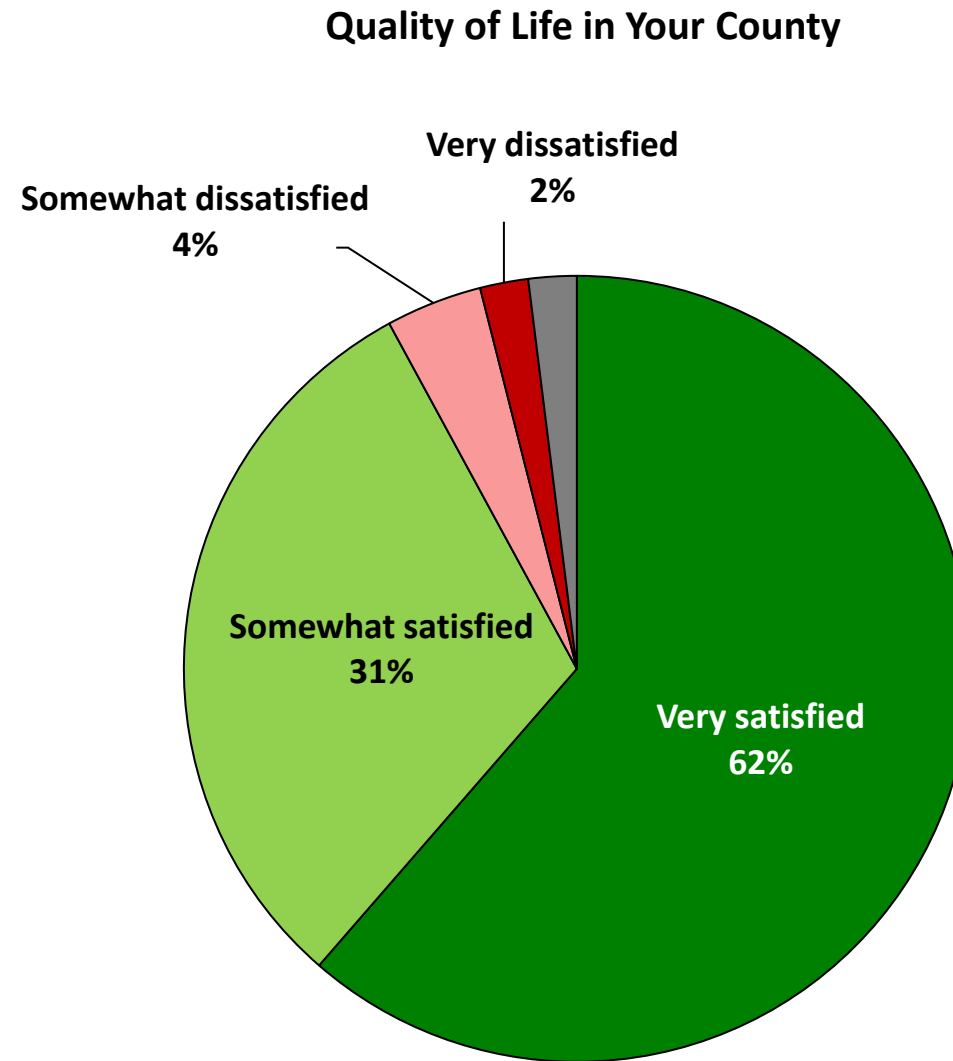
Low wages, consumer and credit card debt, and down payment and closing costs are the largest barriers to home purchases. Four-in-ten (41 percent) voters say having a full-time job but still not making enough to afford a home is huge obstacle that makes buying a home too difficult or expensive, and another 35 percent of voters see it as a medium obstacle. Similar numbers see having too much consumer or credit card debt as a huge (39 percent) or medium (36 percent) obstacle. Having enough money for a down payment and closing costs is seen as huge obstacle for over a third of voters (36 percent), and a medium obstacle for just over another third (39 percent). Voters in Fredericksburg are most sensitive to affordability concerns.

Executive Summary

Goals for development show some underlying conflicts in attitudes towards how to grow. When asked to rate six priorities for local government when making decisions about their county's growth on a 7-point scale, voters rate making it easier to live and work in the same area to reduce commute lengths and traffic (5.4 mean score) as most important. Shorter commutes are particularly important to those who have lived in their home less than five years, Gen Xers, and voters with children at home. Despite their appetite for shorter commutes, voters rate developing more mixed-use buildings in their areas with stores, offices, and housing (3.9 mean score) as their lowest priority. Attracting a wider variety of shops and restaurants is a second-tier priority (4.5 mean score), but younger voters, minority voters, those with children at home, and new arrivals are more focused on increasing these amenities.

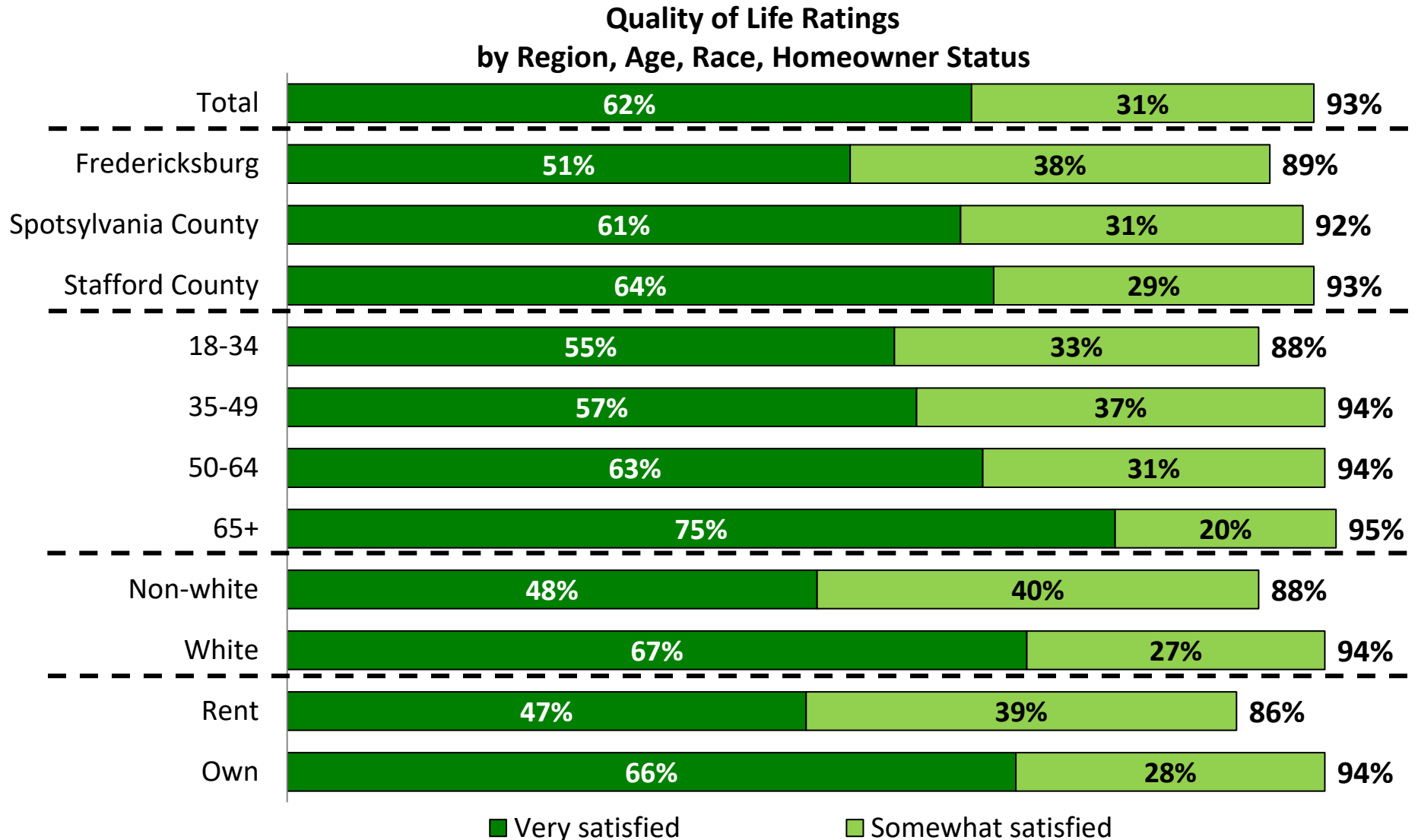
Quality of Life

Six-in-Ten Are Very Satisfied With the Quality of Life in Their Community



Q.3 My first question is about the quality of life in your community. Would you say that you are (ROTATE VERY SATISFIED TO VERY DISSATISFIED) very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the quality of life in your community?

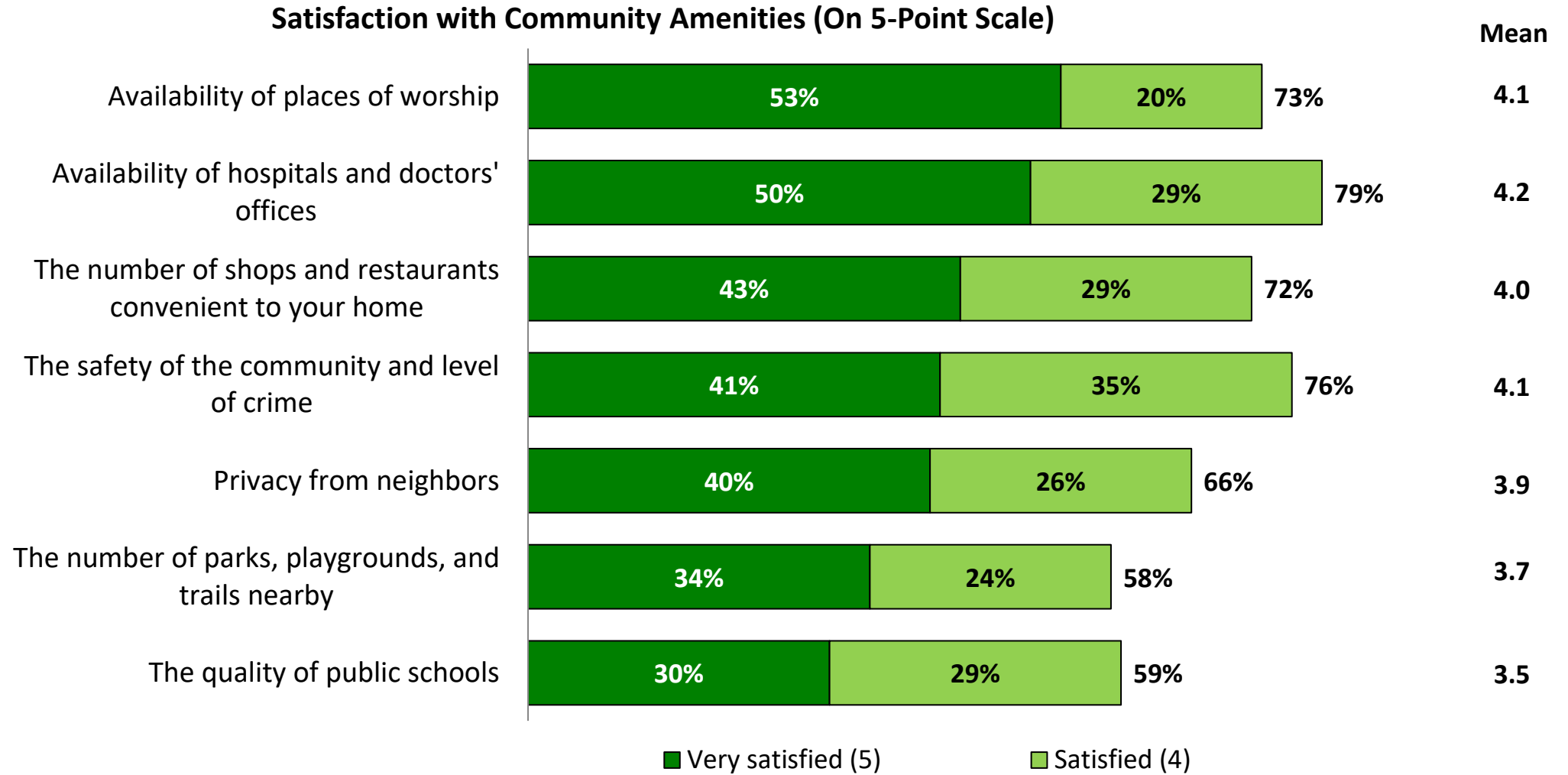
While Overall Satisfaction is Universally High, Intensity Varies with Age, Region, Race, and Homeowner Status



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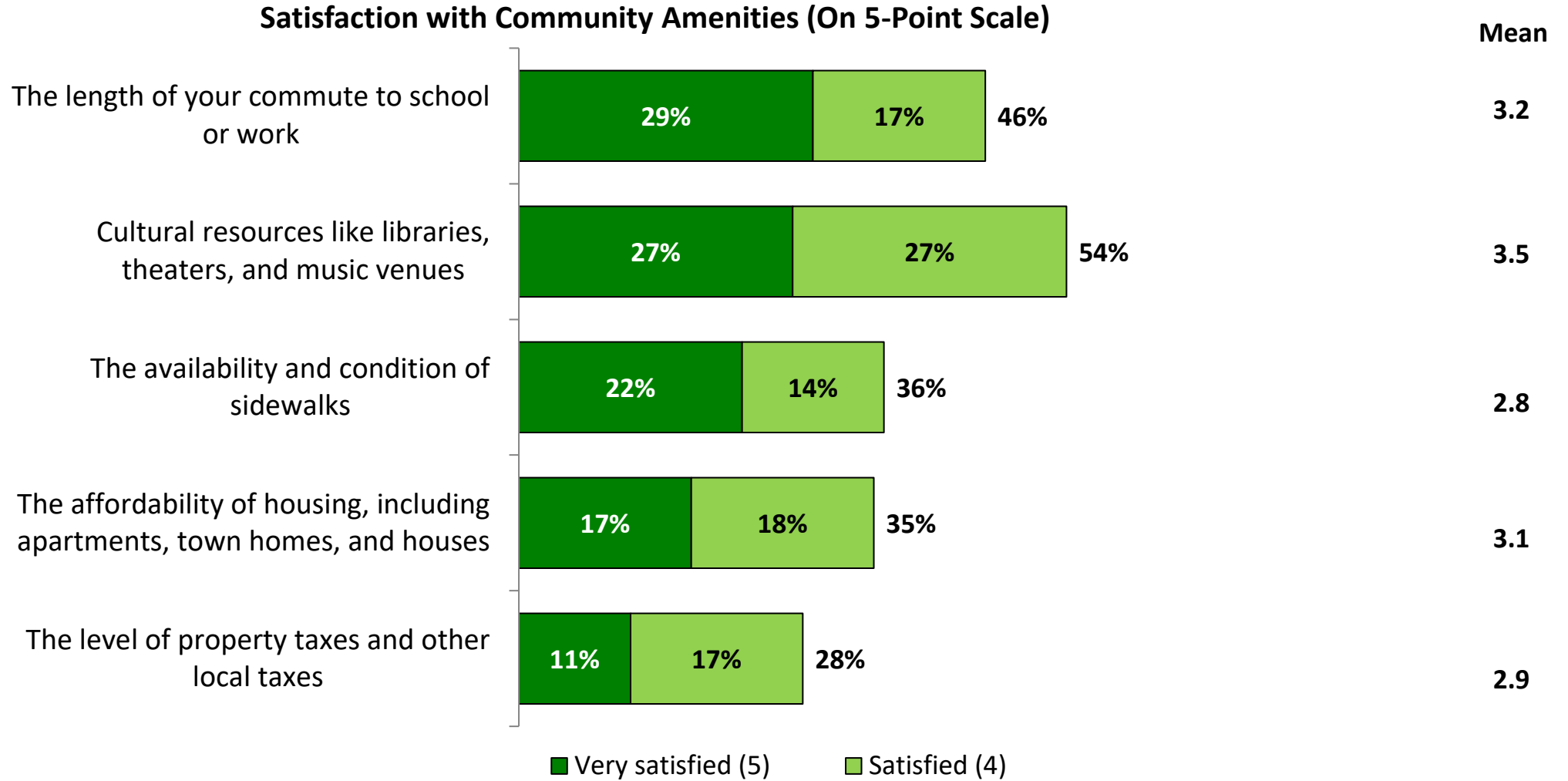
Community Amenities

Locals Generally Satisfied with Places of Worship, Access to Medical Care, Number of Shops and Restaurants, and Community Safety



Q.6 Now I have a few questions about your neighborhood and community. I'd like to read you a list of amenities, features, and activities some people have said are important in deciding where to live. For each, please rate your satisfaction with that feature or amenity in your community on a scale of 1 to 5, with 1 being very dissatisfied, 3 being neutral, and 5 being very satisfied. Remember you can use any number from 1 to 5.

Voters Less Satisfied with Level of Local Taxes, Cost of Housing, and Sidewalks



Q.6 Now I have a few questions about your neighborhood and community. I'd like to read you a list of amenities, features, and activities some people have said are important in deciding where to live. For each, please rate your satisfaction with that feature or amenity in your community on a scale of 1 to 5, with 1 being very dissatisfied, 3 being neutral, and 5 being very satisfied. Remember you can use any number from 1 to 5.

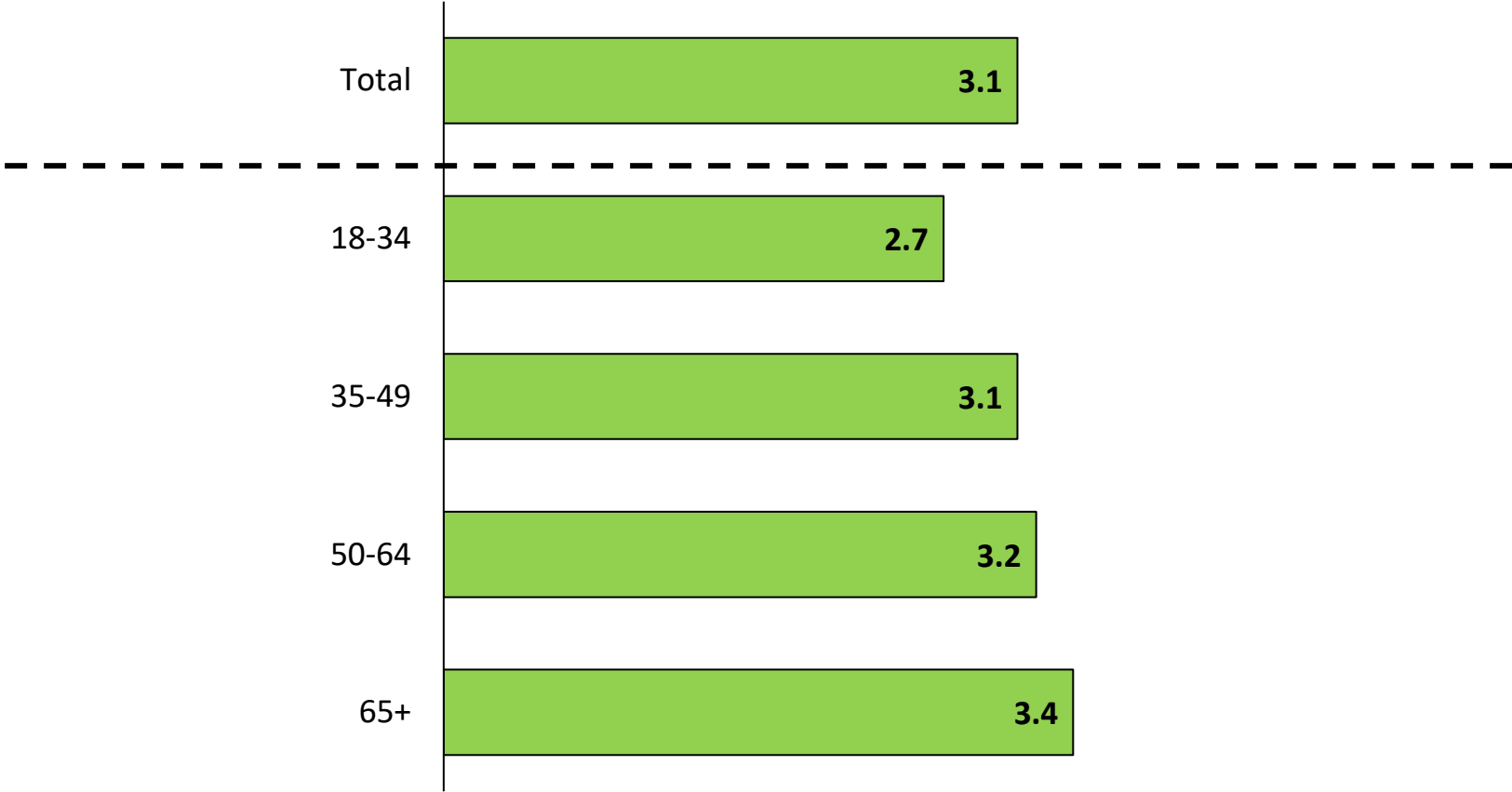
Suburbanites Most Pleased with Access to Doctors, While Those in Small Towns and Rural Areas Like Privacy

Satisfaction with Housing Affordability (Means)	Total	City	Suburb	Small town/Rural
Availability of hospitals and doctors' offices	4.2	4.1	4.4	3.9
The safety of the community and level of crime	4.1	3.9	4.1	4.1
Availability of places of worship	4.1	4.2	4.1	4.0
The number of shops and restaurants convenient to your home	4.0	4.2	4.0	3.7
Privacy from neighbors	3.9	3.7	3.8	4.2
The number of parks, playgrounds, trails nearby	3.7	3.8	3.7	3.5
The quality of public schools	3.5	3.4	3.6	3.5
Cultural resources like libraries, theaters, and music venues	3.5	3.7	3.6	3.3
The length of your commute to school or work	3.2	3.4	3.1	3.0
The affordability of housing, including apartments, town homes, and houses	3.1	3.2	3.1	3.0
The level of property taxes and other local taxes	2.9	3.0	2.9	2.7
The availability and condition of sidewalks	2.8	3.2	2.8	2.4

Q.6 Now I have a few questions about your neighborhood and community. I'd like to read you a list of amenities, features, and activities some people have said are important in deciding where to live. For each, please rate your satisfaction with that feature or amenity in your community on a scale of 1 to 5, with 1 being very dissatisfied, 3 being neutral, and 5 being very satisfied. Remember you can use any number from 1 to 5.

Satisfaction with Housing Affordability Increases with Age

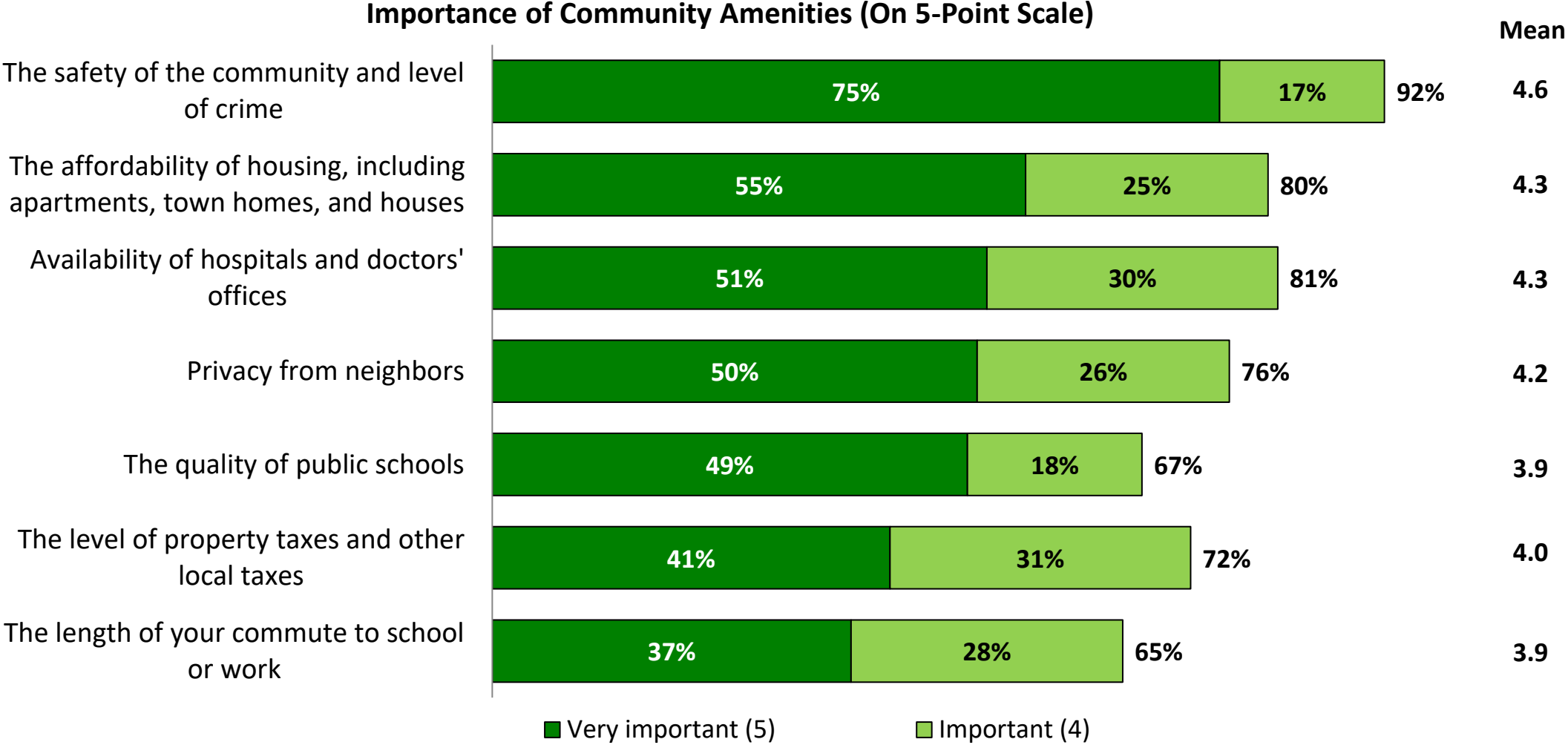
Satisfaction with Housing Affordability (Means)
By Age



Q.6 Now I have a few questions about your neighborhood and community. I'd like to read you a list of amenities, features, and activities some people have said are important in deciding where to live. For each, please rate your satisfaction with that feature or amenity in your community on a scale of 1 to 5, with 1 being very dissatisfied, 3 being neutral, and 5 being very satisfied. Remember you can use any number from 1 to 5.

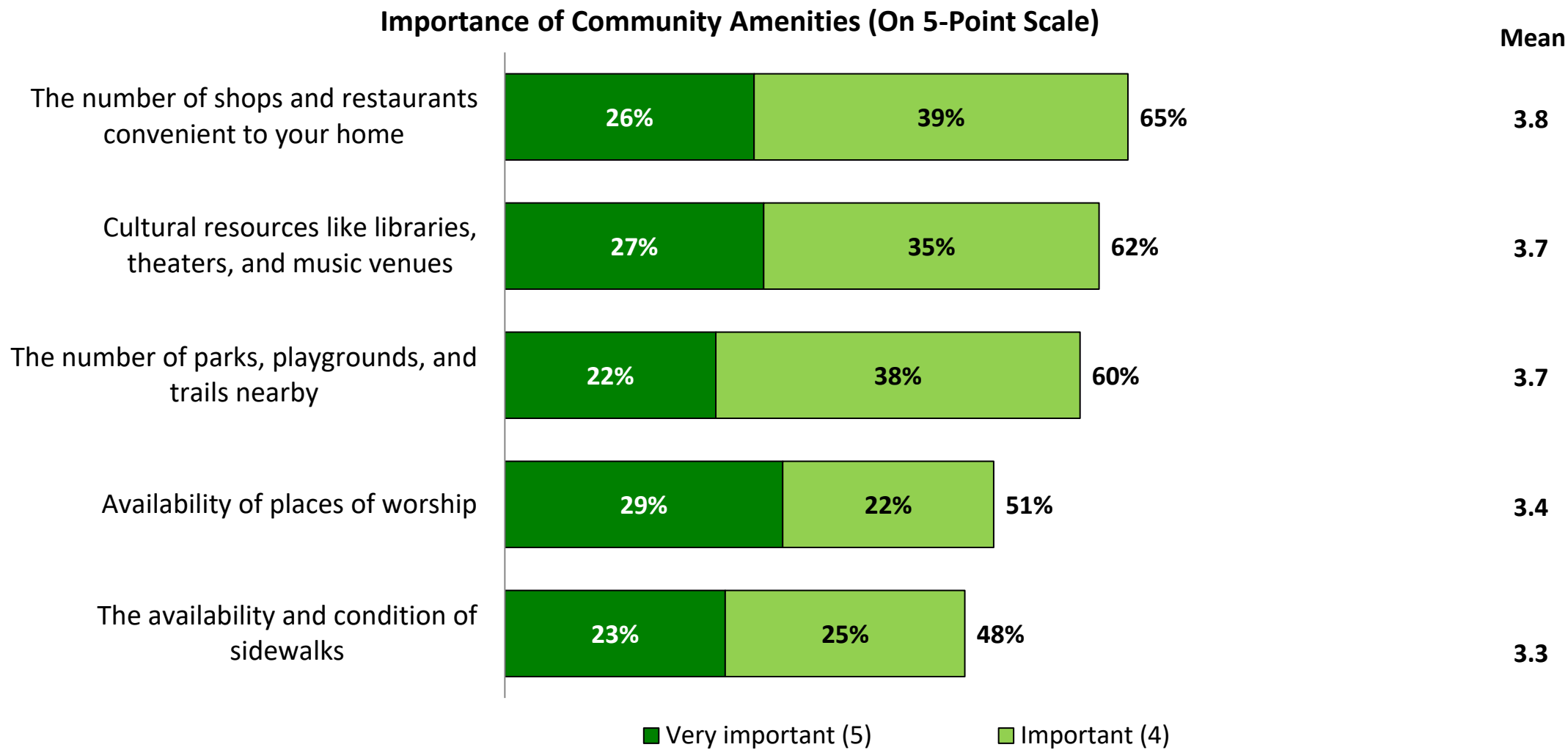
What's Important in Deciding Where to Live

Safety is By Far Most Important Factor in Deciding Where to Live



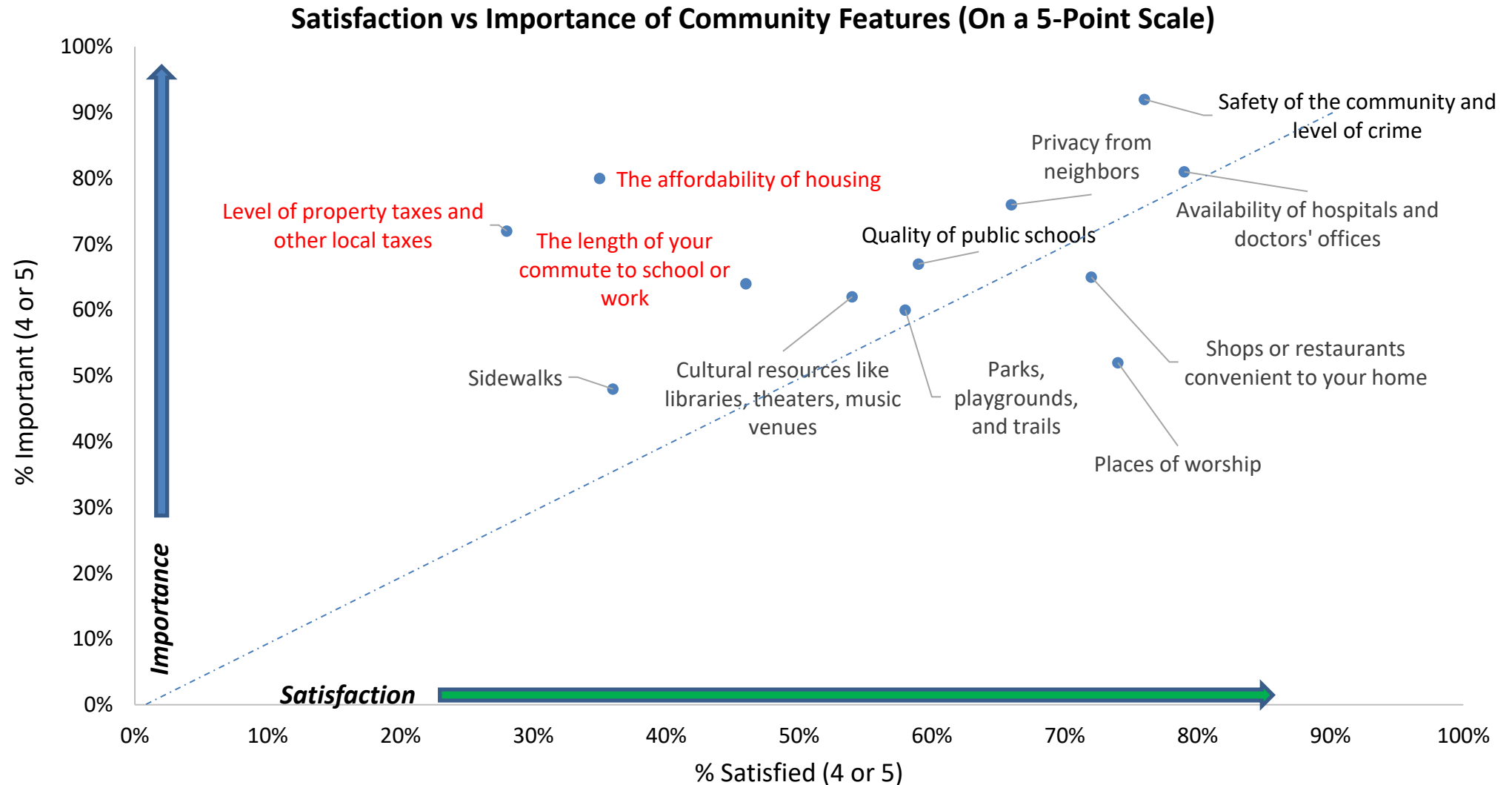
Q.7 Now think for a moment about where you would like to live. It may be your current home, or it may be somewhere new. I am going to read you that same list again. If you were deciding today where you wanted to live, please tell me how important each of the following would be to you on a scale of 1 to 5, with 1 being not important at all and 5 being very important.

Availability of Sidewalks and Places of Worship are Less Important to Residents in Deciding Where to Live



Q.7 Now think for a moment about where you would like to live. It may be your current home, or it may be somewhere new. I am going to read you that same list again. 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.

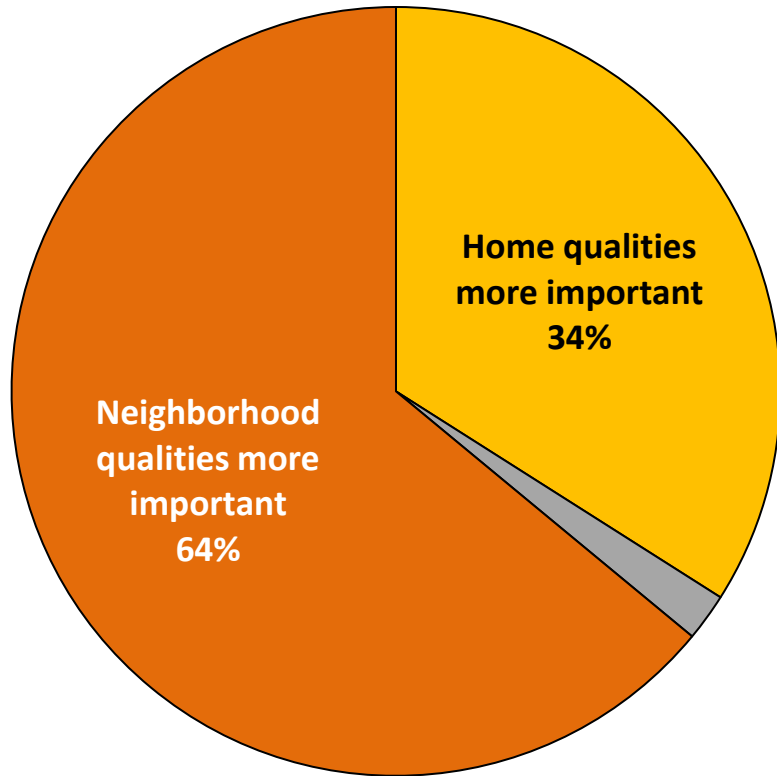
Biggest Mismatches between Satisfaction and Importance Center around Level of Taxes, Housing Affordability, and Commute Time



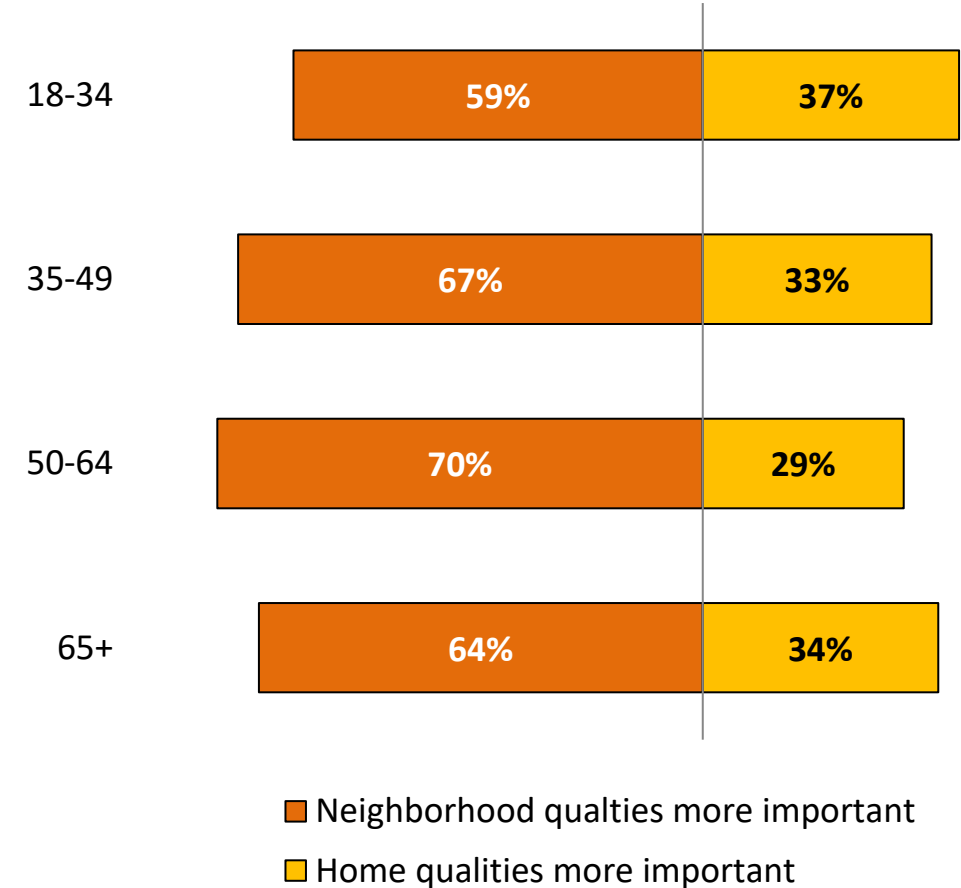
When Forced to Choose, Just Under Two-Thirds Put Neighborhood Qualities Before Home Qualities When Deciding Where to Live

Neighborhood qualities become more important with age

Home Qualities vs Neighborhood Qualities



Home Qualities vs Neighborhood Qualities By Age

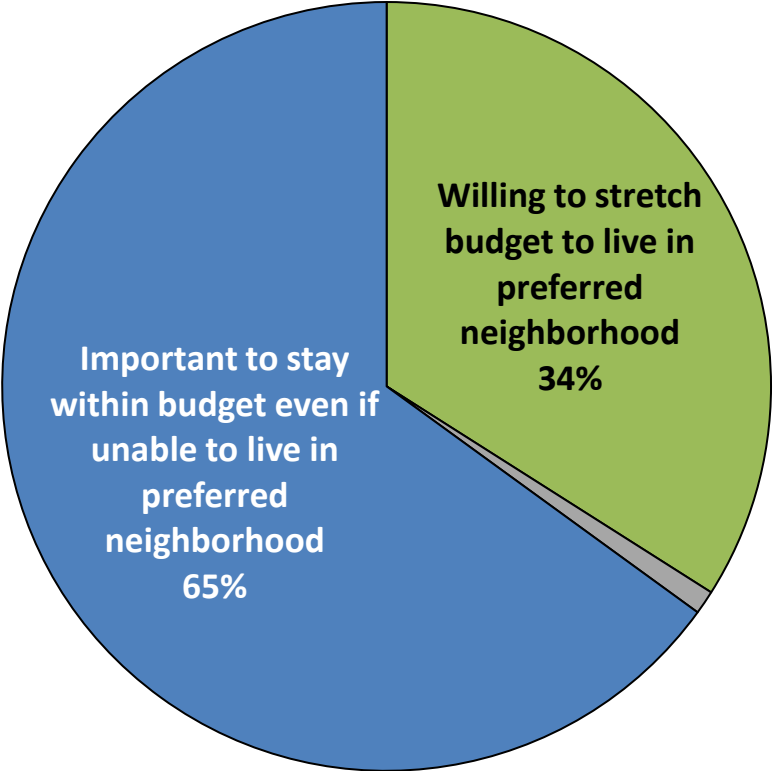


Q.9 If you were to purchase or rent a home in [COUNTY] today, which would be more important to you in deciding where to live: (ROTATE) the qualities of the home itself, like size and features, OR the neighborhood the home is in?

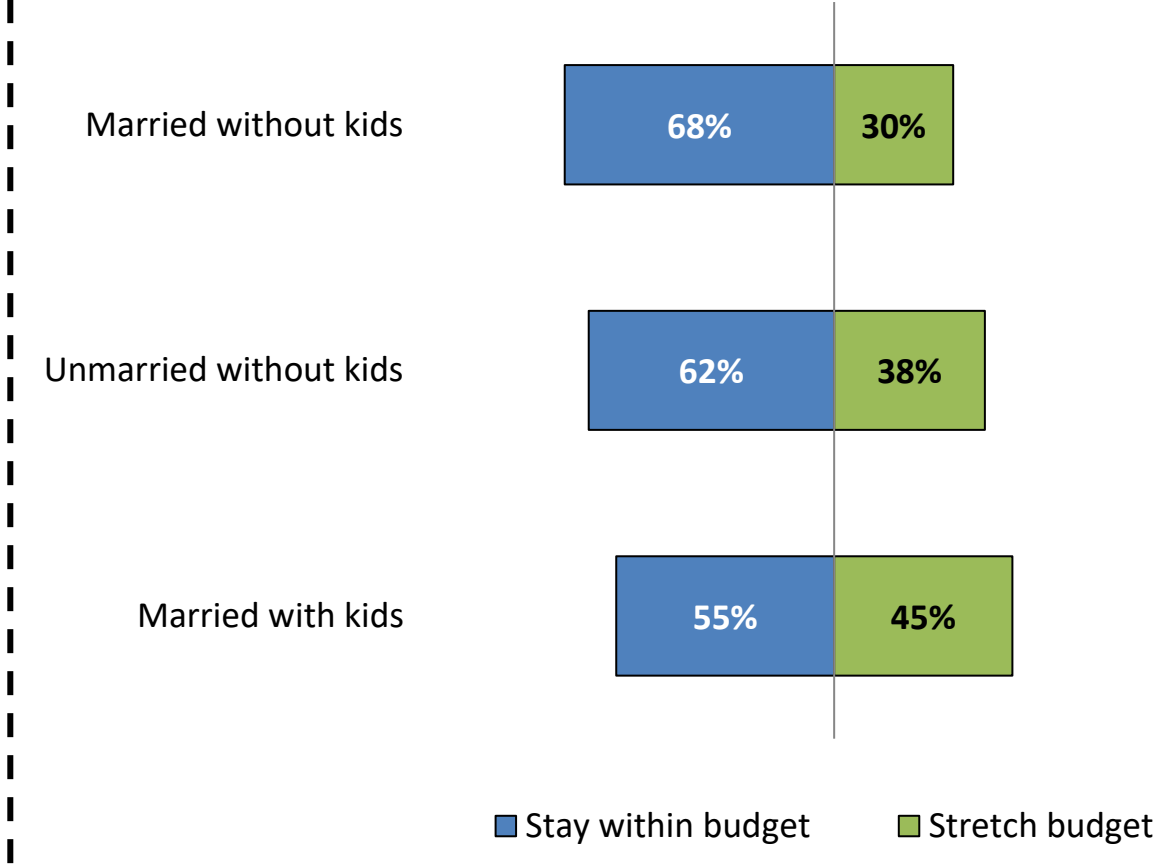
Just Under Two-Thirds Say it is More Important to Stay Within Budget Even if it Means They Would Be Unable to Live in Preferred Neighborhood

Married residents with kids at home more likely to be willing to stretch budget

Stretch vs Stay Within Budget



Stretch vs Stay Within Budget By Marital Status/Kids



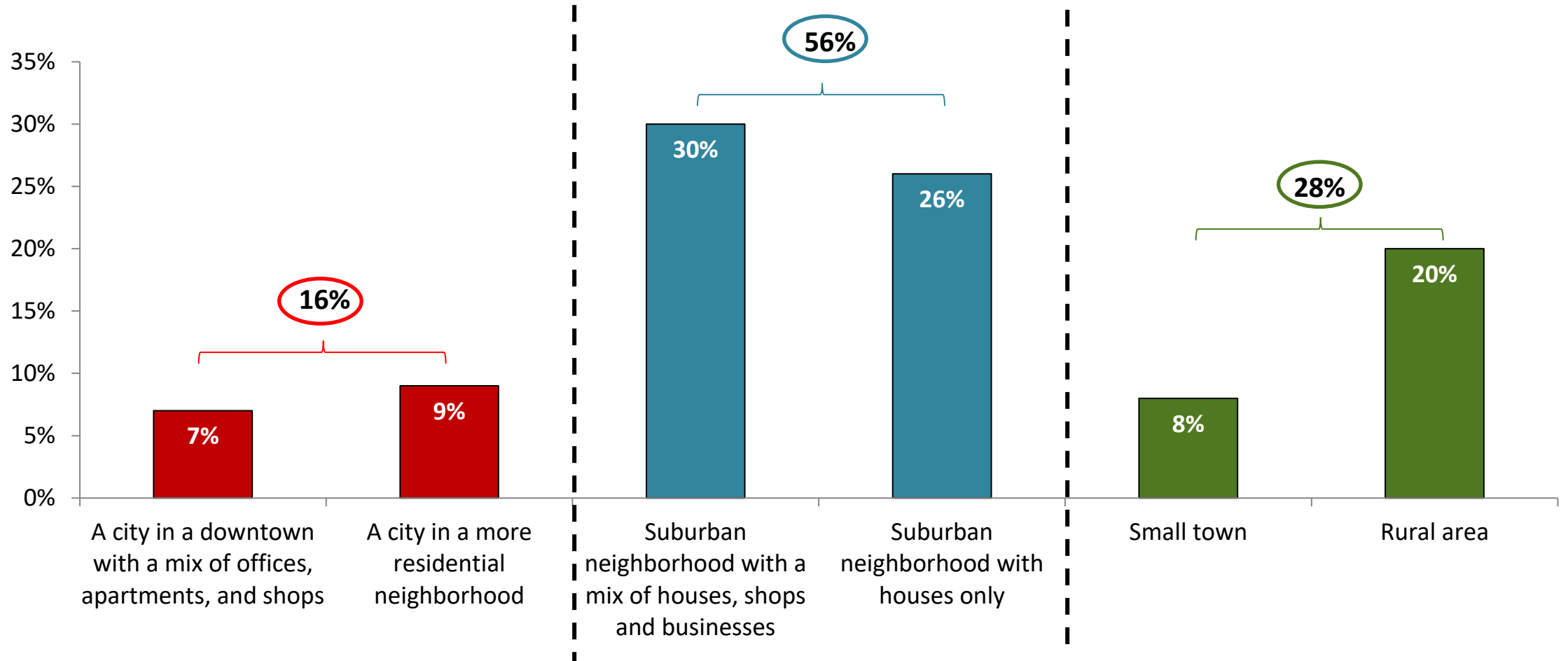
Q.10 Which of the following comes closest to your preferences when deciding where to live? (ROTATE) I would be willing to stretch my budget to spend more on housing so I could live in my preferred neighborhood. OR It is important for me to stay within my budget even if it means I would be unable to live in my preferred neighborhood.

Living Preferences

Most Residents Describe Their Area as Suburban

One-in-five live in a rural area

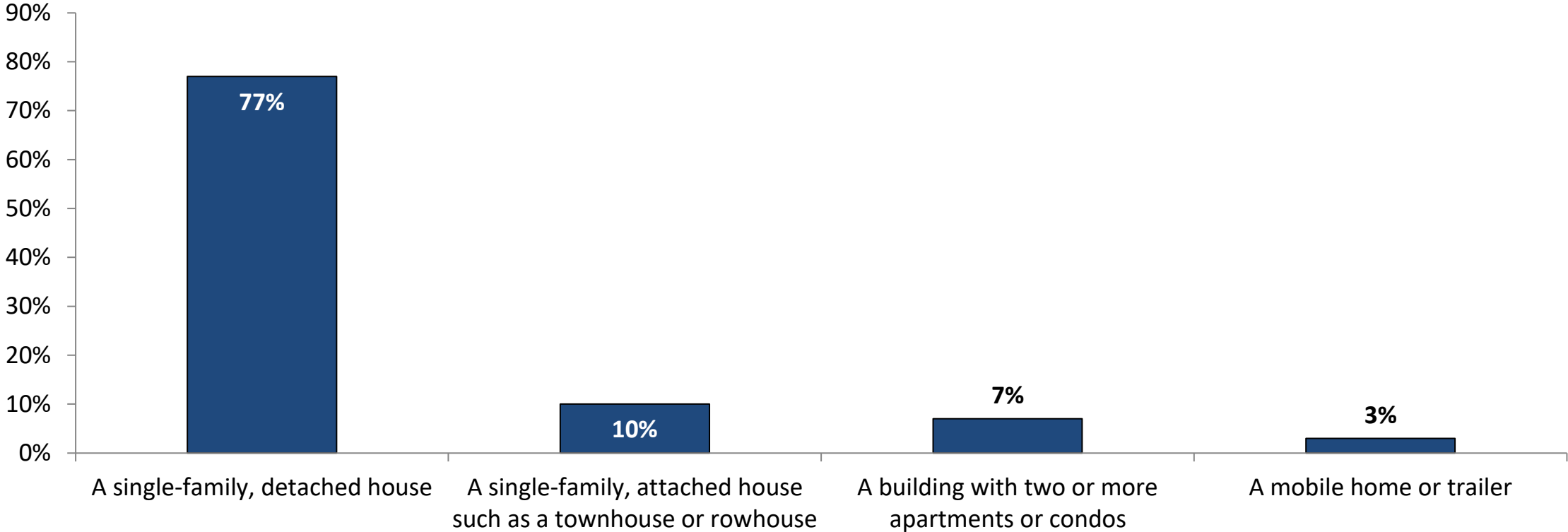
Area Where You Currently Live



Q.4 Which of the following best describes the place where you live:

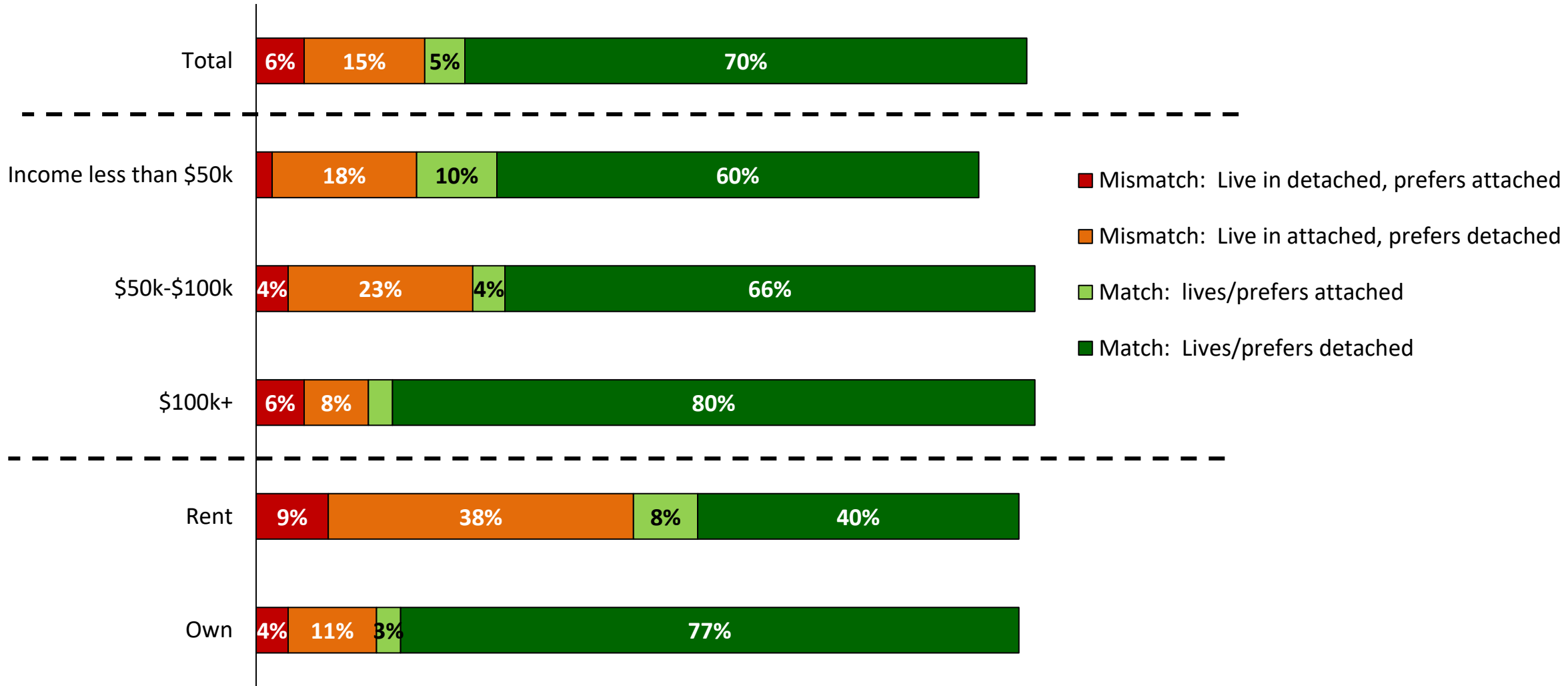
Broad Majority of Residents Live in Single Family, Detached Homes

Type of Home



Higher Income Voters and Homeowners Most Likely to Live in Their Preferred Home Type

Current Home Type/Home Type Preference by Group



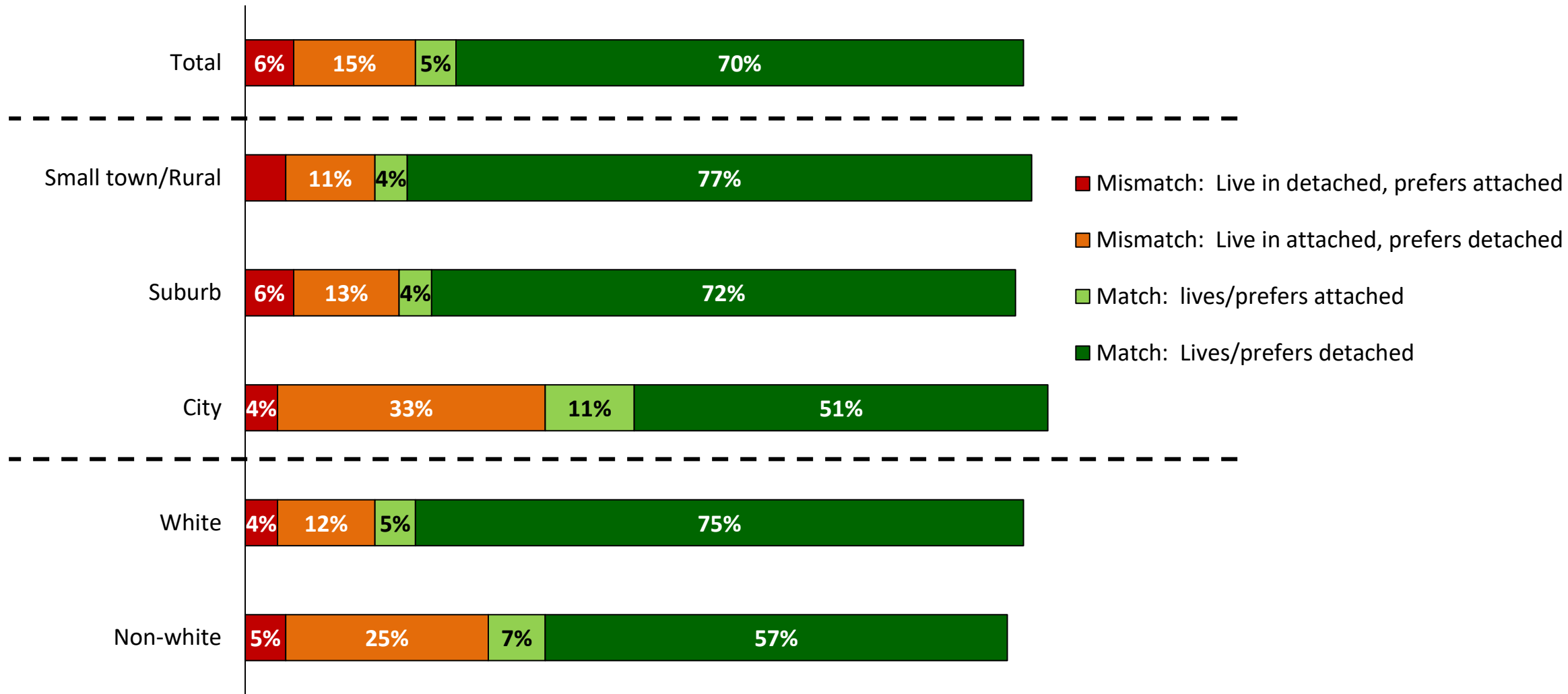
Q.5 Do you live in:

Q.12 If you could live in any style residence you wanted, which of the following would you prefer to live in?

Majority of Residents Live in and Prefer Detached Homes

City dwellers and non-white voters more

Current Home Type/Home Type Preference by Group



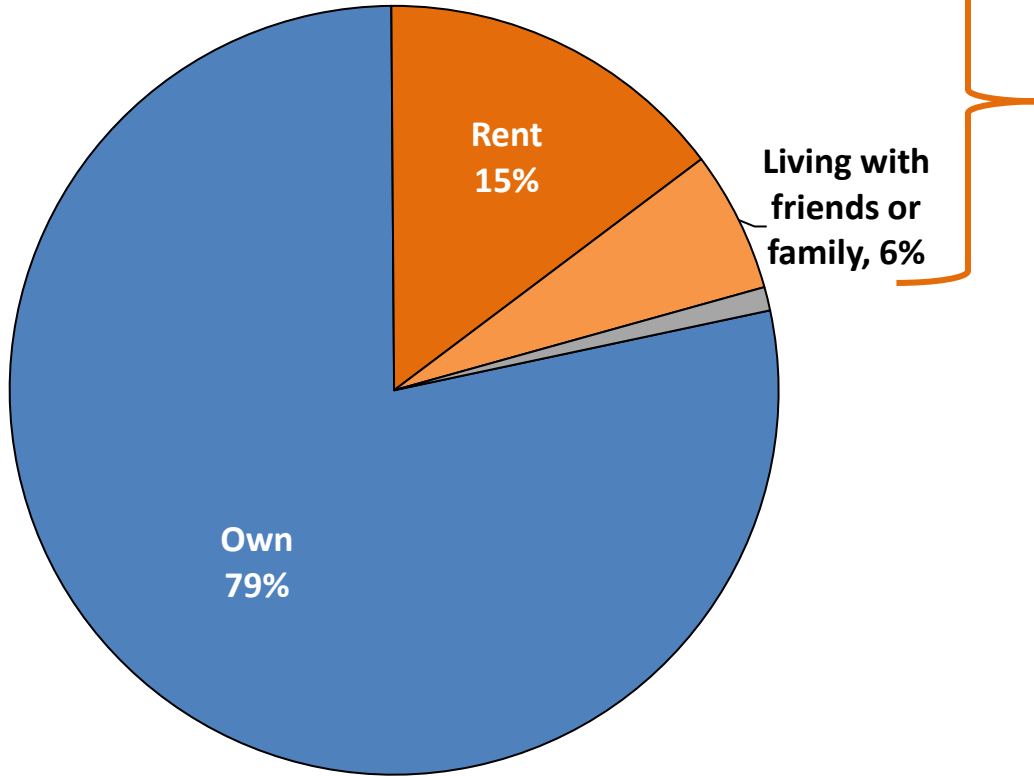
Q.5 Do you live in:

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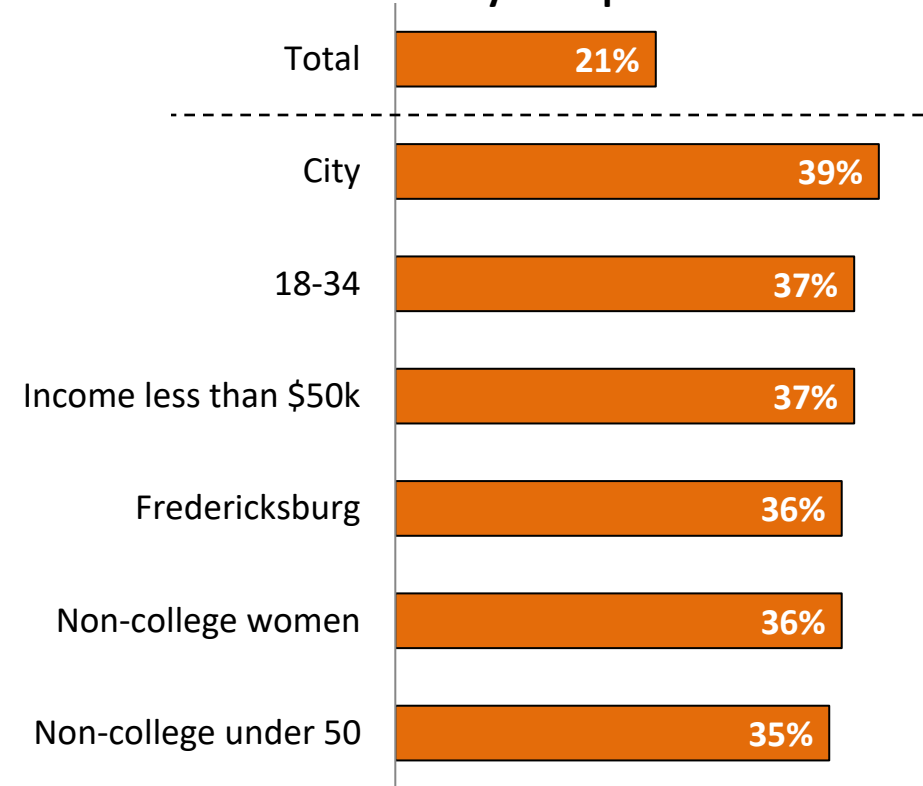
Broad Majority of Residents Own Their Homes

City residents, young people, and lower income more likely to rent or live with friends and family

Homeownership Status



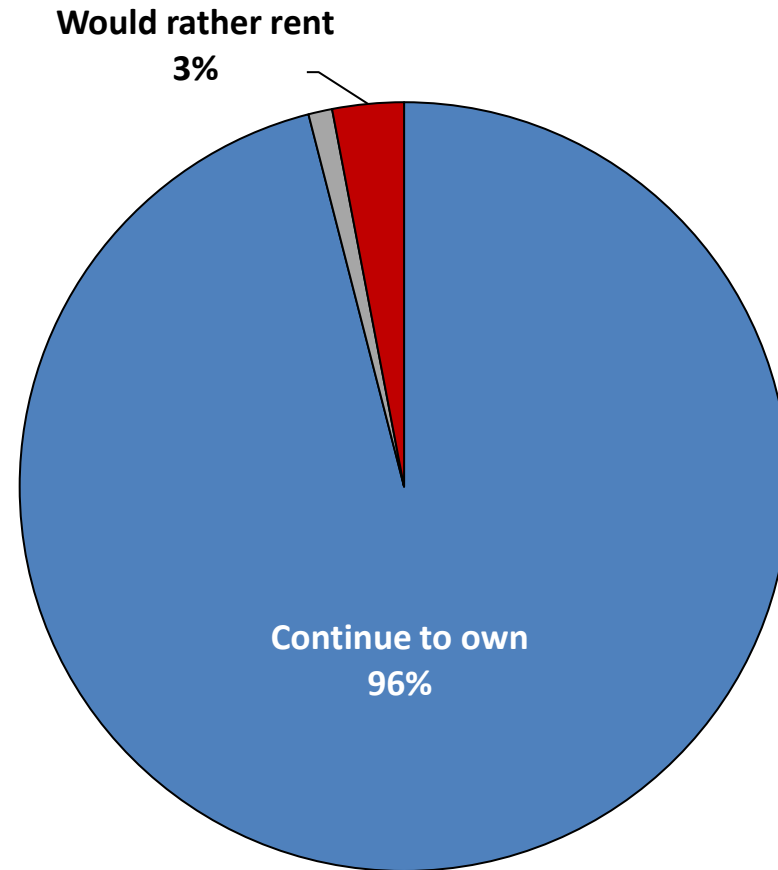
Combined Rent or Live with Friends or Family by Group



Majority of Both Homeowners and Renters Would Prefer to Own Their Home in the Future

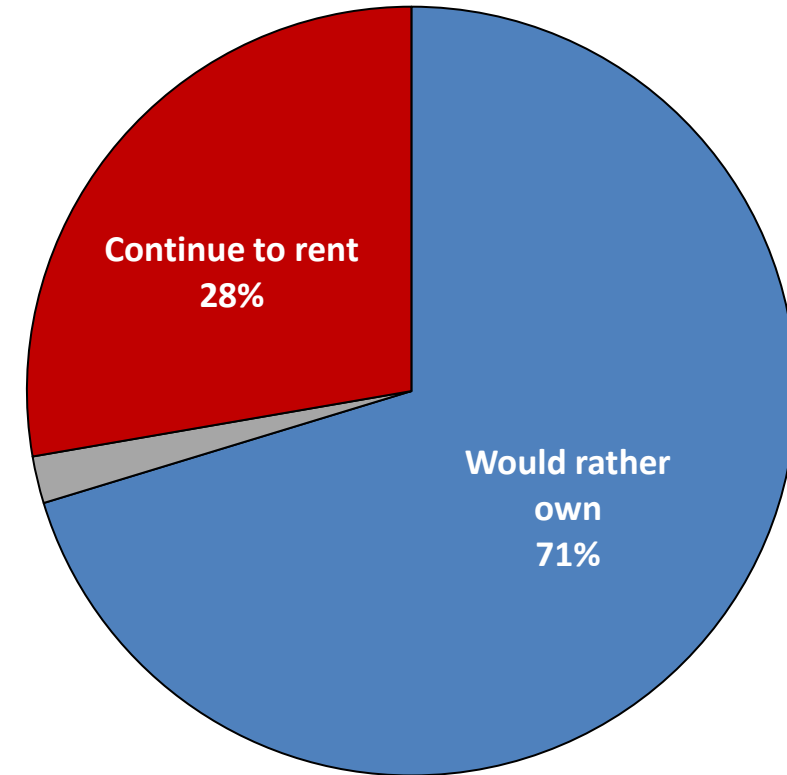
Future Preference, Among Homeowners

N=314 respondents



Future Preference, Among Renters

N=61 respondents



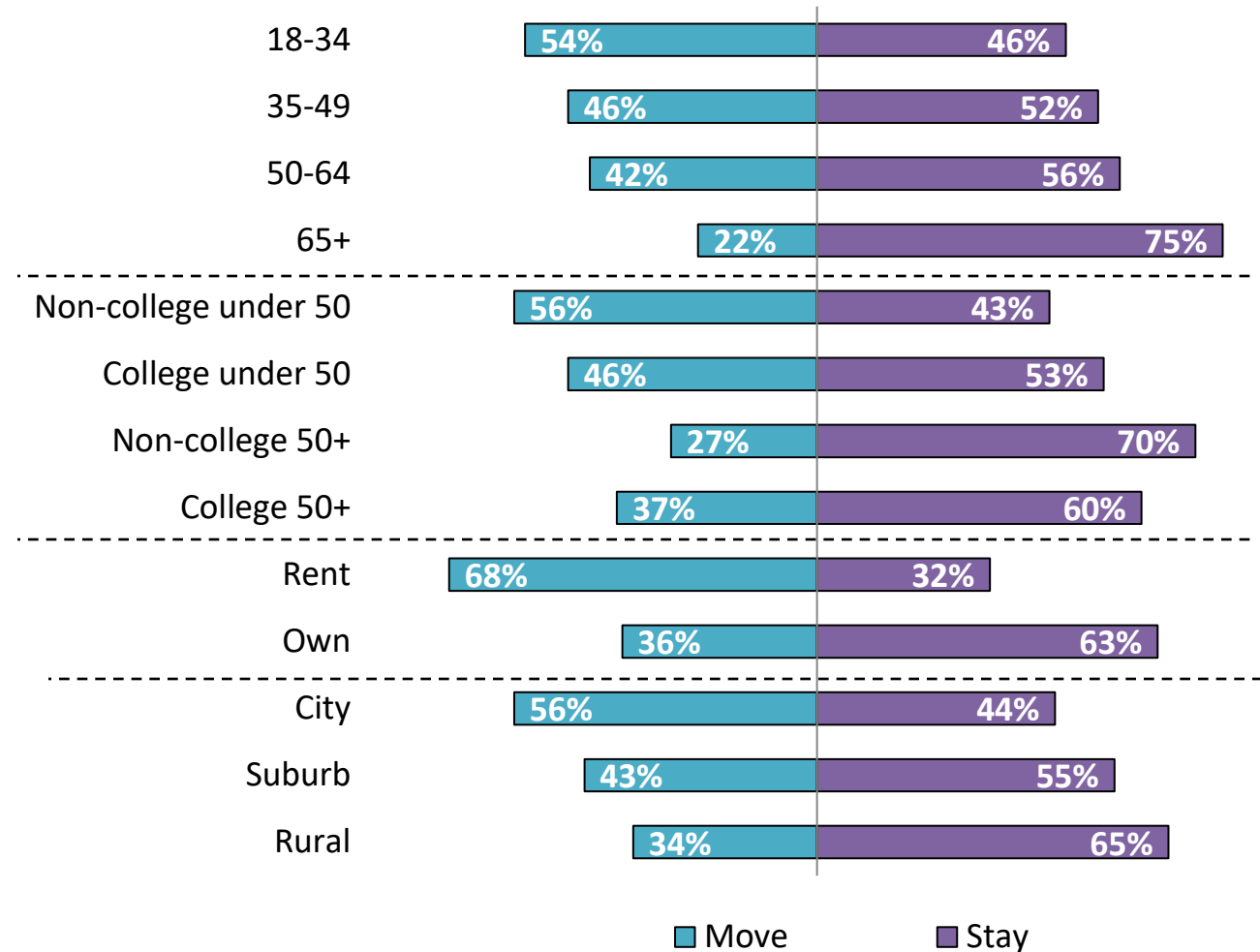
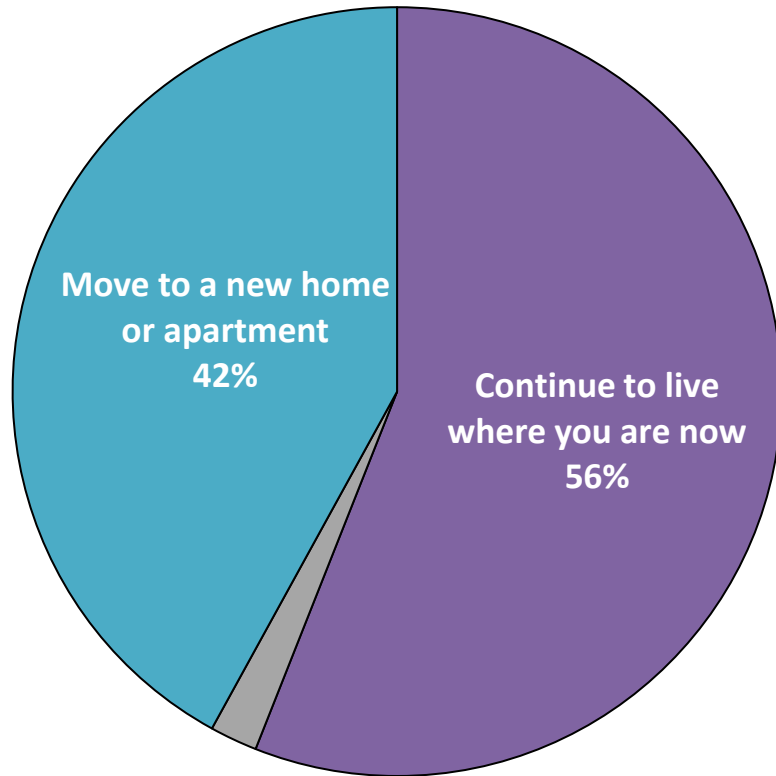
Q.14 (IF RENT IN Q.13) Do you prefer to continue to rent your home, or would you rather own?

Q.15 (IF OWN IN Q.13) Do you prefer to continue to own a home, or would you rather rent?

Just Over Half of Residents Prefer to Stay in Their Current Homes

Young people, renters, and city residents more likely to want to move in the next few years

Future Living Preference



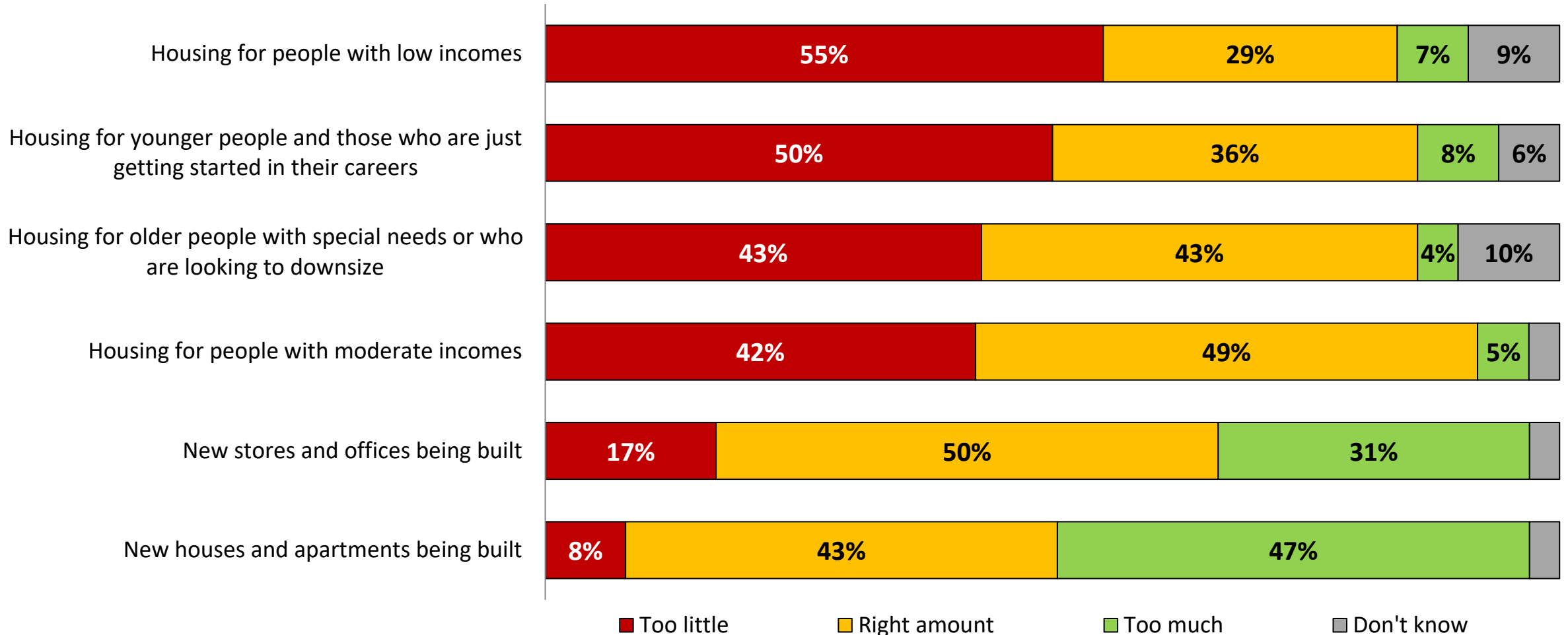
Q.16 As you think ahead a few years, would you like to (ROTATE) continue to live where you are now OR move to a new home or apartment?

Affording a New Home

Most Residents See a Shortage of Housing For Those with Low Incomes and Young People

Just under half say there are too many new houses and apartments being built

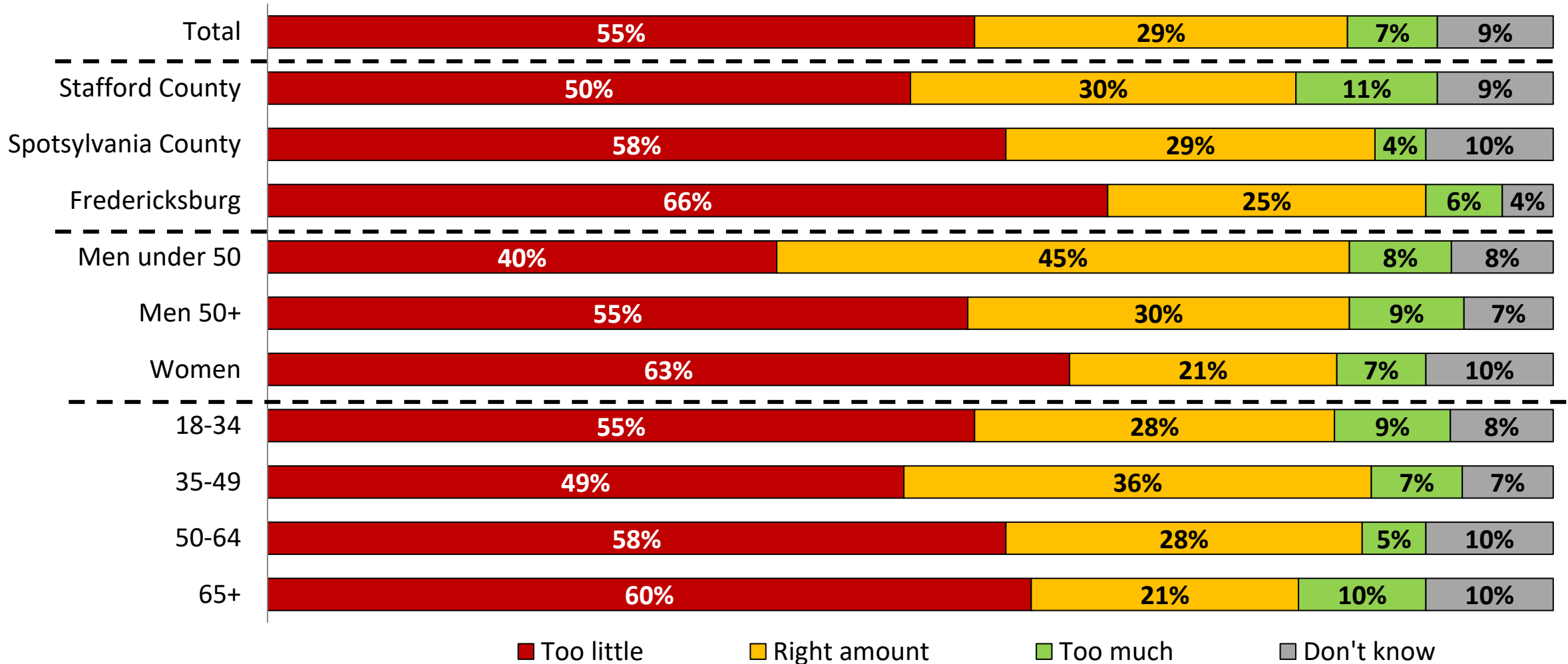
Amount of Housing Available



Q.8 And do you think there is (ROTATE TOO MUCH/TOO LITTLE) too much, too little, or the right amount of each of the following in [COUNTY]?

Fredericksburg Residents, Women Most Likely to Cite Shortage in Low-Income Housing

Amount of Housing for People with Low Incomes by Group



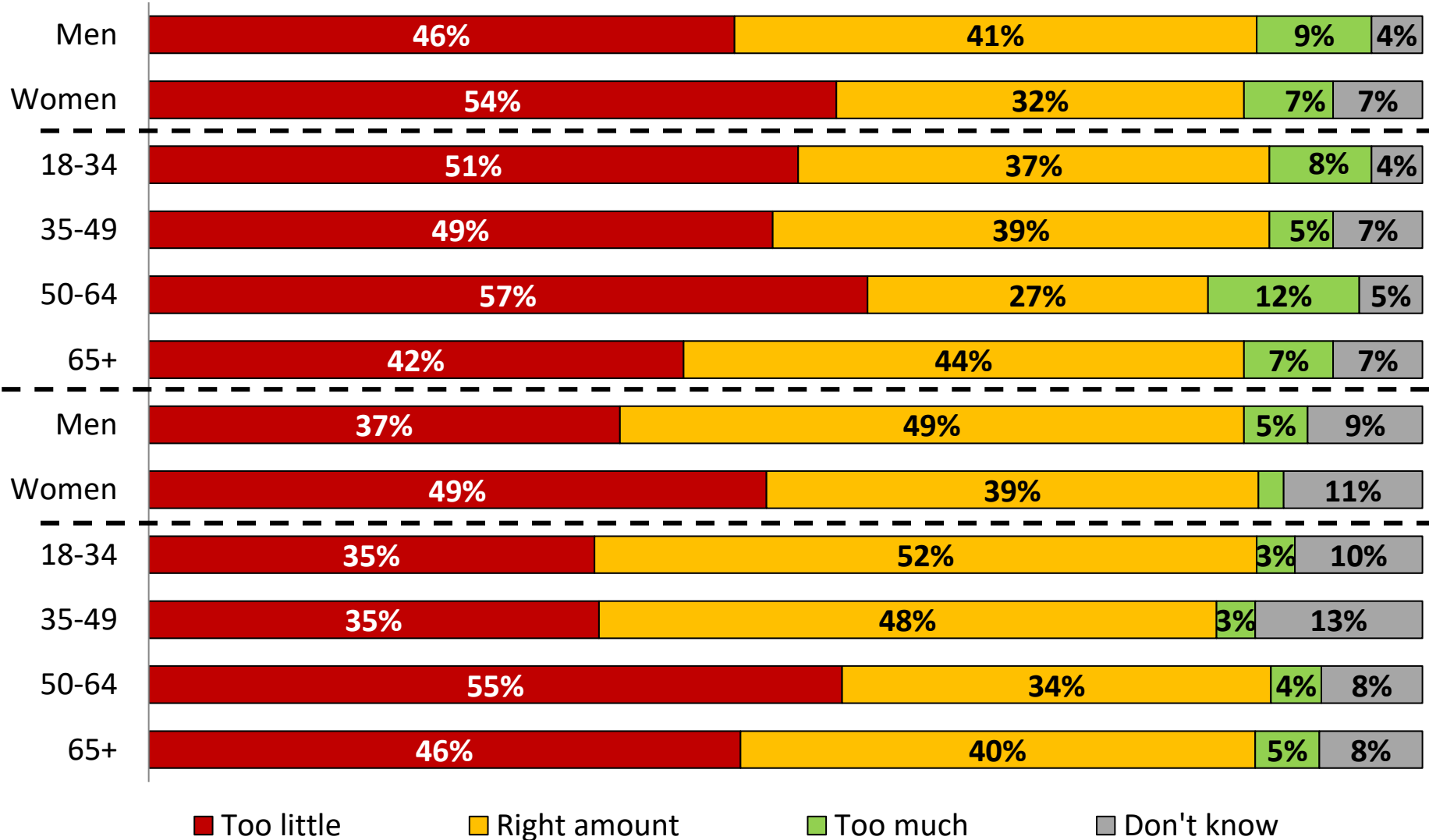
Q.8 And do you think there is (ROTATE TOO MUCH/TOO LITTLE) too much, too little, or the right amount of each of the following in [COUNTY]?

Women and Residents Age 50-64 More Likely to See Lack of Housing for Young People and Seniors

Amount of Housing for Age Groups by Group

Housing for younger people and those who are just getting started in their careers

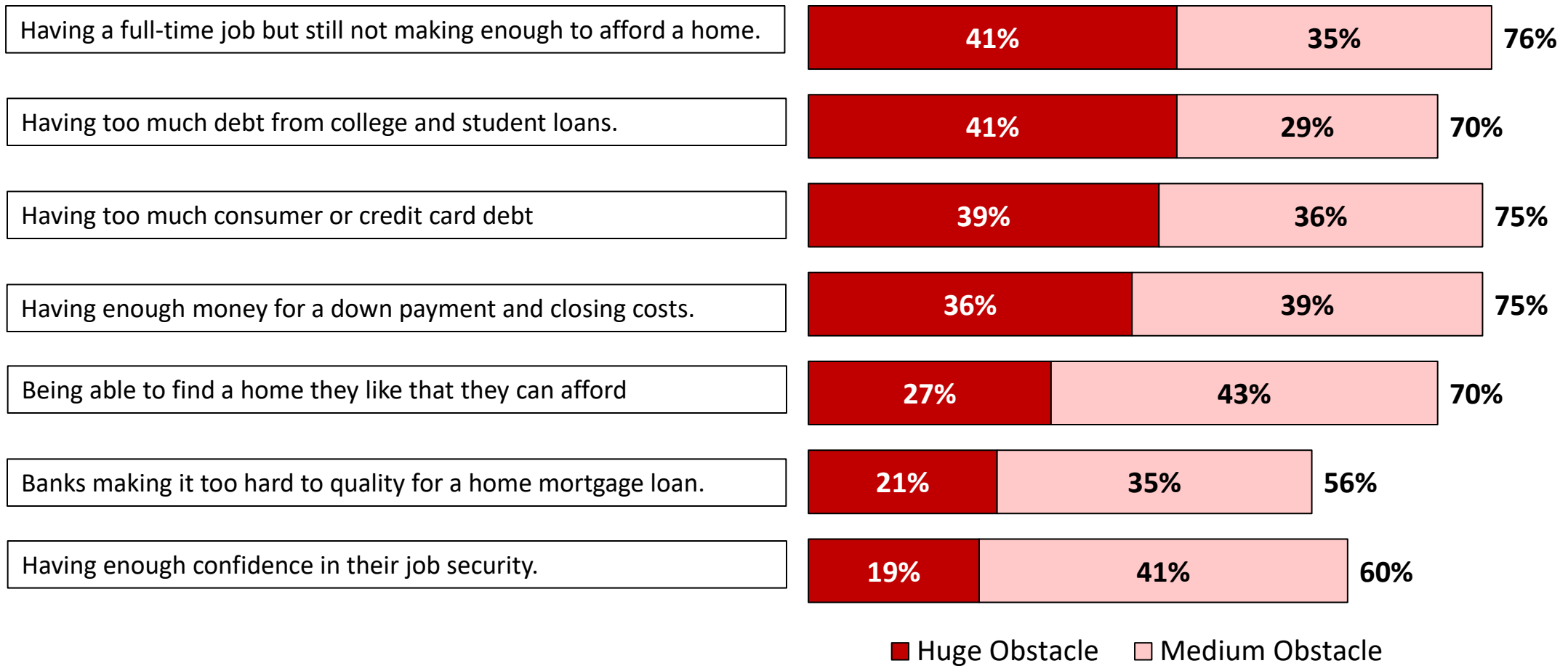
Housing for older people with special needs or who are looking to downsize



Obstacles to Home Purchases

Low Wages, Student and Credit Card Debt, and Down Payment Costs are Top Obstacles to Buying a Home

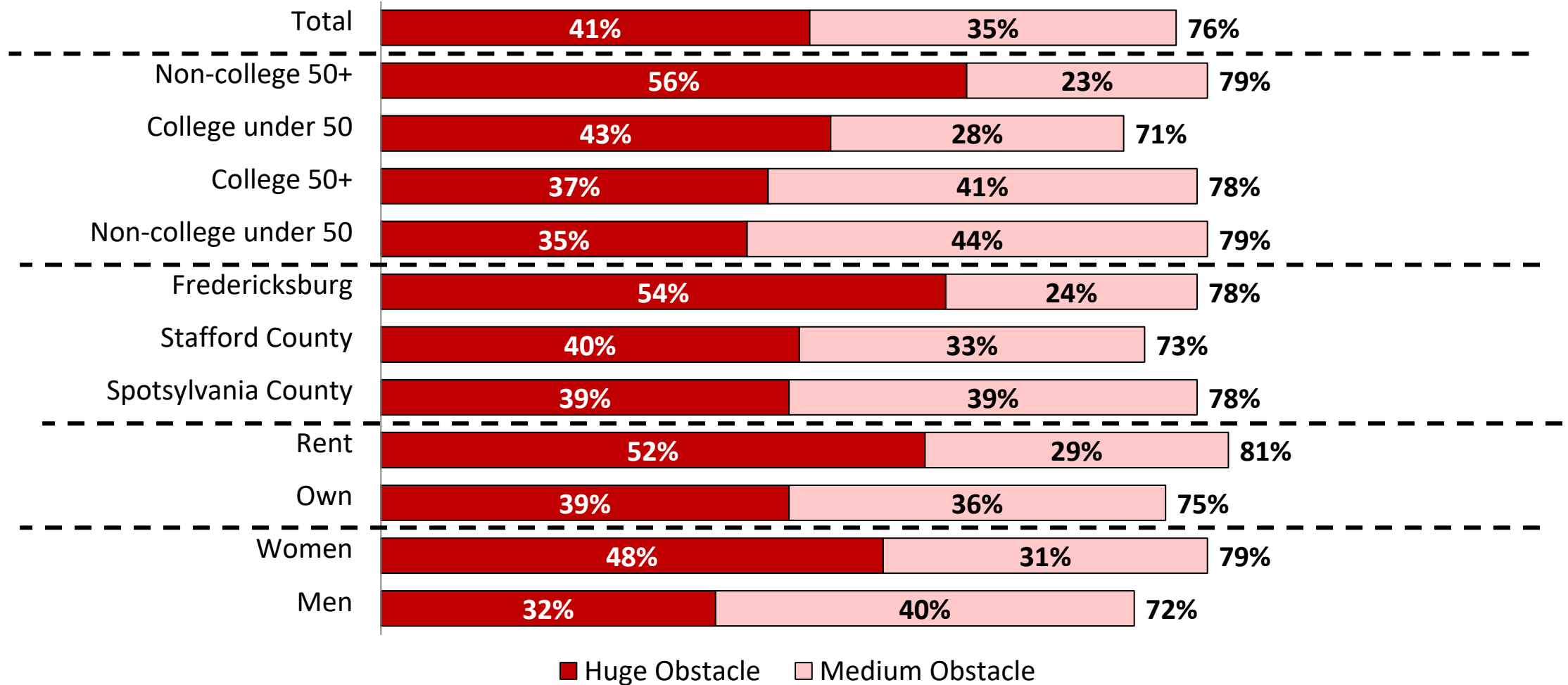
Potential Obstacles to Buying a Home



Q.17 Now I am going to read several things some people have said makes buying a home too difficult or expensive. After I read each one please tell me whether you think that is a (ROTATE FIRST TO LAST AND LAST TO FIRST) huge obstacle for people in [COUNTY], a medium-size obstacle, a small obstacle, or not an obstacle at all that makes buying a home too difficult or expensive for people in [COUNTY]. Thinking about people buying a home in your area, the first/next statement is...

Fredericksburg Residents, Renters, and Older Non-College Educated Residents More Likely to See Low Wages as a Huge Obstacle to Buying a Home

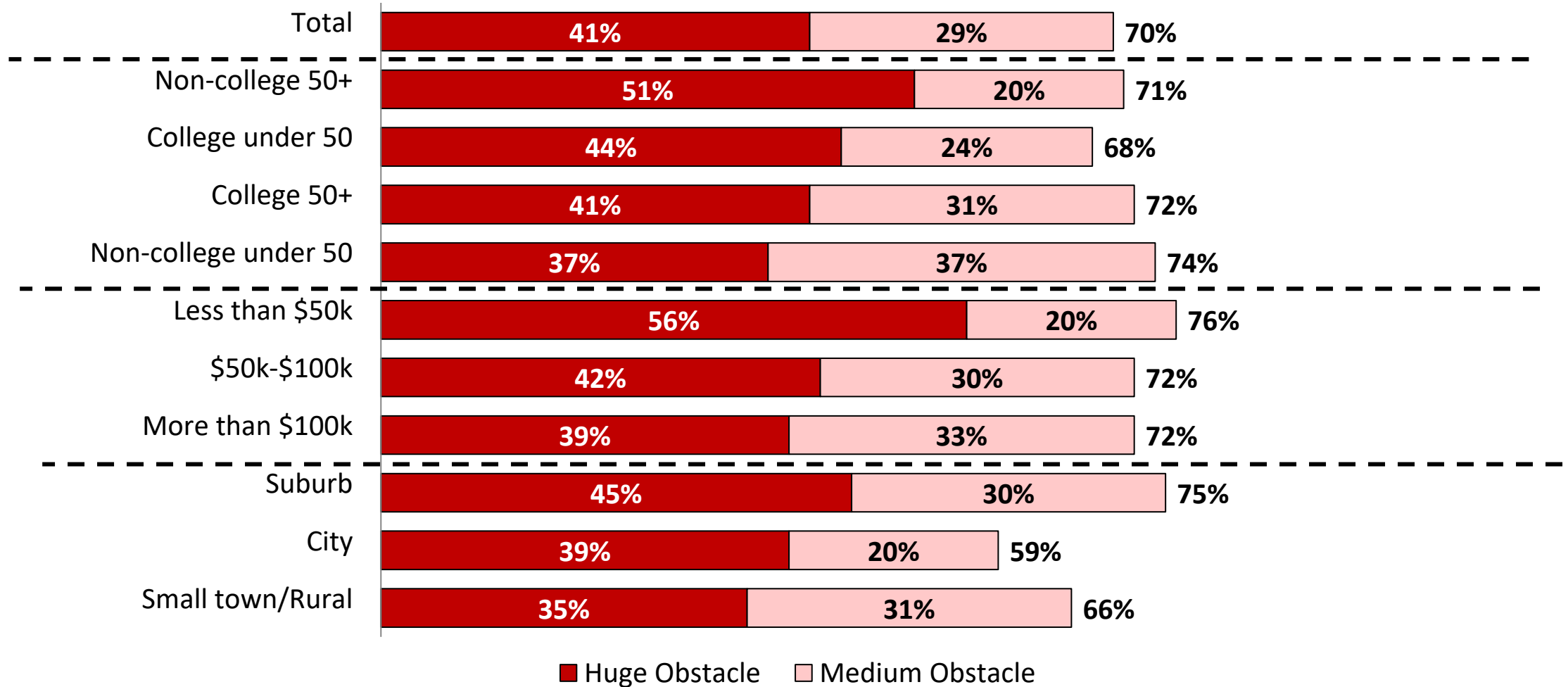
Having a Full Time Job But Still Not Making Enough to Afford a Home by Group



Q.17 Now I am going to read several things some people have said makes buying a home too difficult or expensive. After I read each one please tell me whether you think that is a (ROTATE FIRST TO LAST AND LAST TO FIRST) huge obstacle for people in [COUNTY], a medium-size obstacle, a small obstacle, or not an obstacle at all that makes buying a home too difficult or expensive for people in [COUNTY]. Thinking about people buying a home in your area, the first/next statement is...

Older Non-College Residents, Those with Lower Incomes, and Suburban Residents More Likely to See Student Debt as a Huge Obstacle to Buying a Home

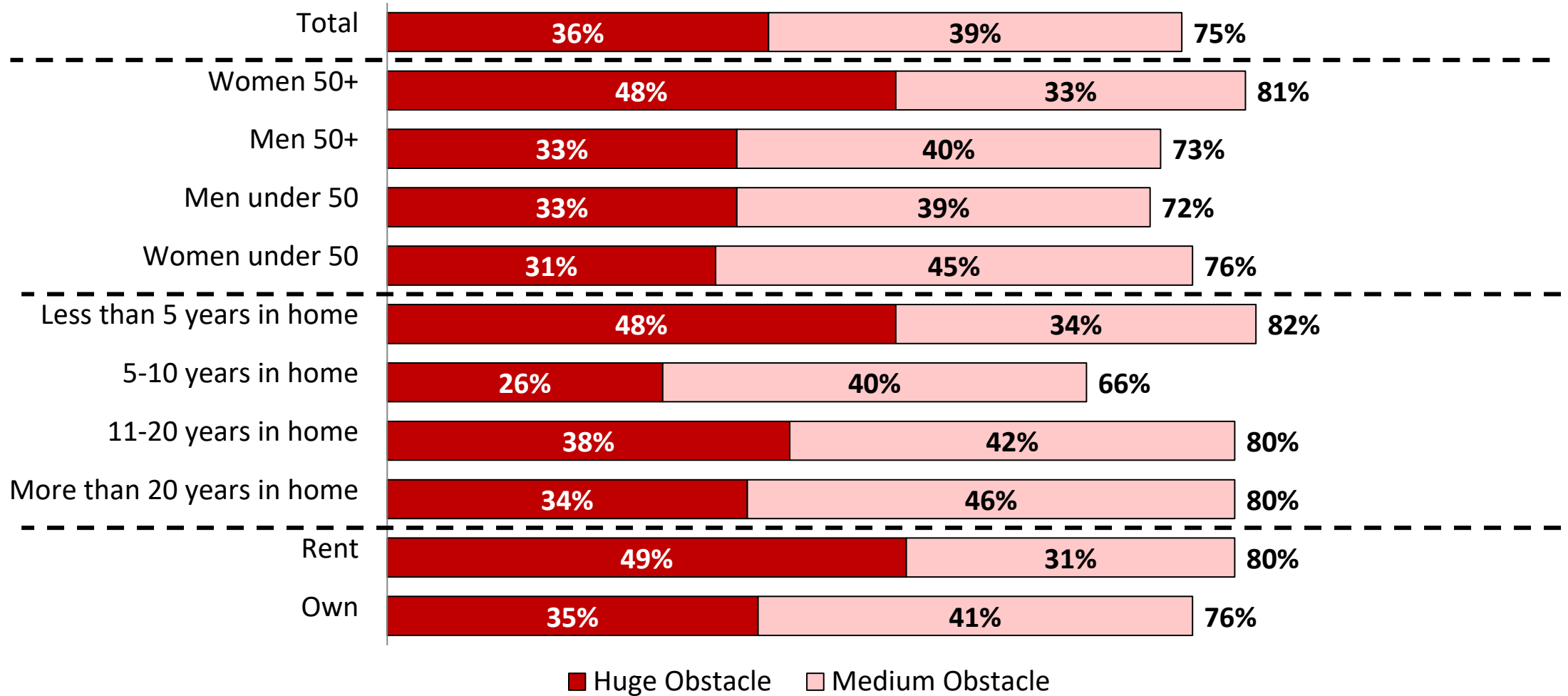
Having Too Much Debt From College and Student Loans by Group



Q.17 Now I am going to read several things some people have said makes buying a home too difficult or expensive. After I read each one please tell me whether you think that is a (ROTATE FIRST TO LAST AND LAST TO FIRST) huge obstacle for people in [COUNTY], a medium-size obstacle, a small obstacle, or not an obstacle at all that makes buying a home too difficult or expensive for people in [COUNTY]. Thinking about people buying a home in your area, the first/next statement is...

Older Women, Newer Residents, and Renters More Likely to See Down Payment and Closing Costs as a Huge Obstacle to Buying a Home

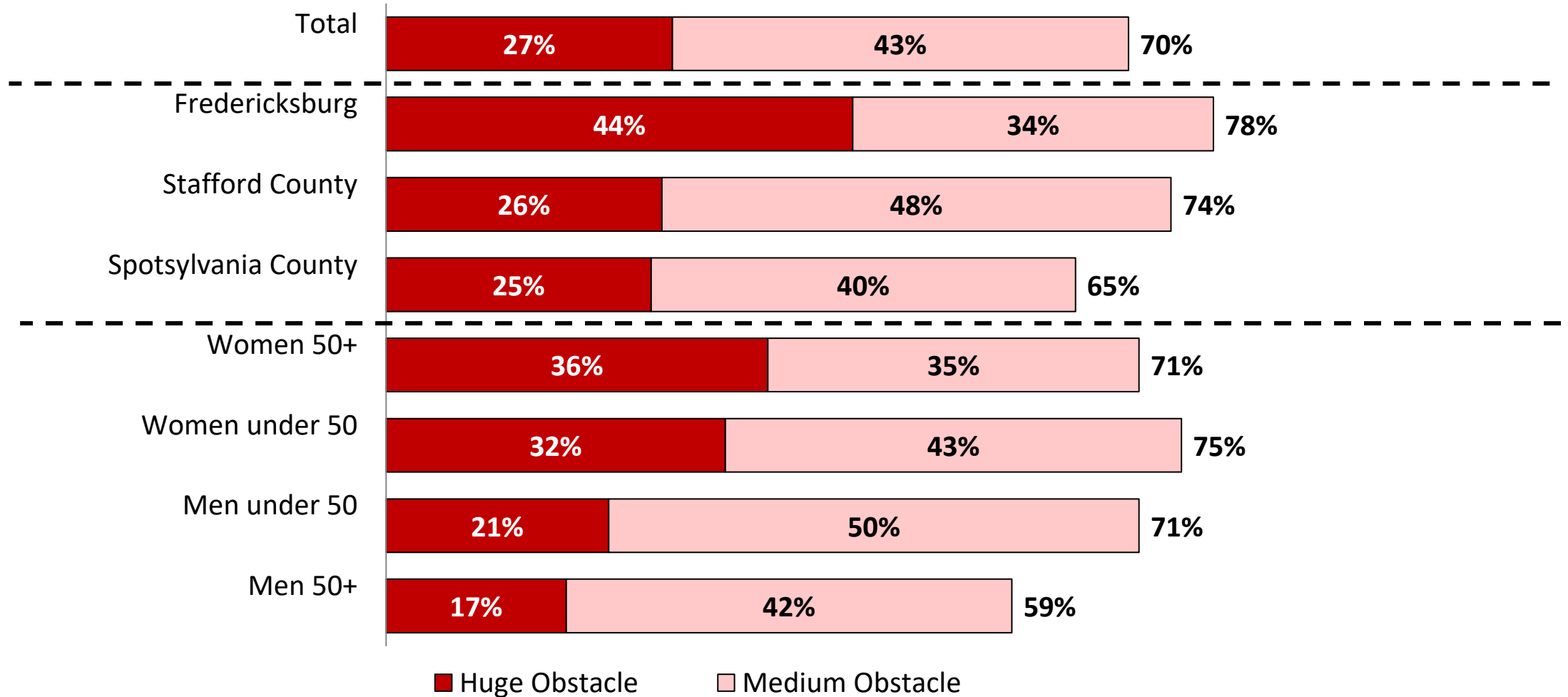
Having Enough Money for Down Payment and Closing Costs by Group



Q.17 Now I am going to read several things some people have said makes buying a home too difficult or expensive. After I read each one please tell me whether you think that is a (ROTATE FIRST TO LAST AND LAST TO FIRST) huge obstacle for people in [COUNTY], a medium-size obstacle, a small obstacle, or not an obstacle at all that makes buying a home too difficult or expensive for people in [COUNTY]. Thinking about people buying a home in your area, the first/next statement is...

Fredericksburg Residents and Women More Likely to See Finding an Affordable Home as a Huge Obstacle

Being Able to Find a Home They Like That They Can Afford by Group



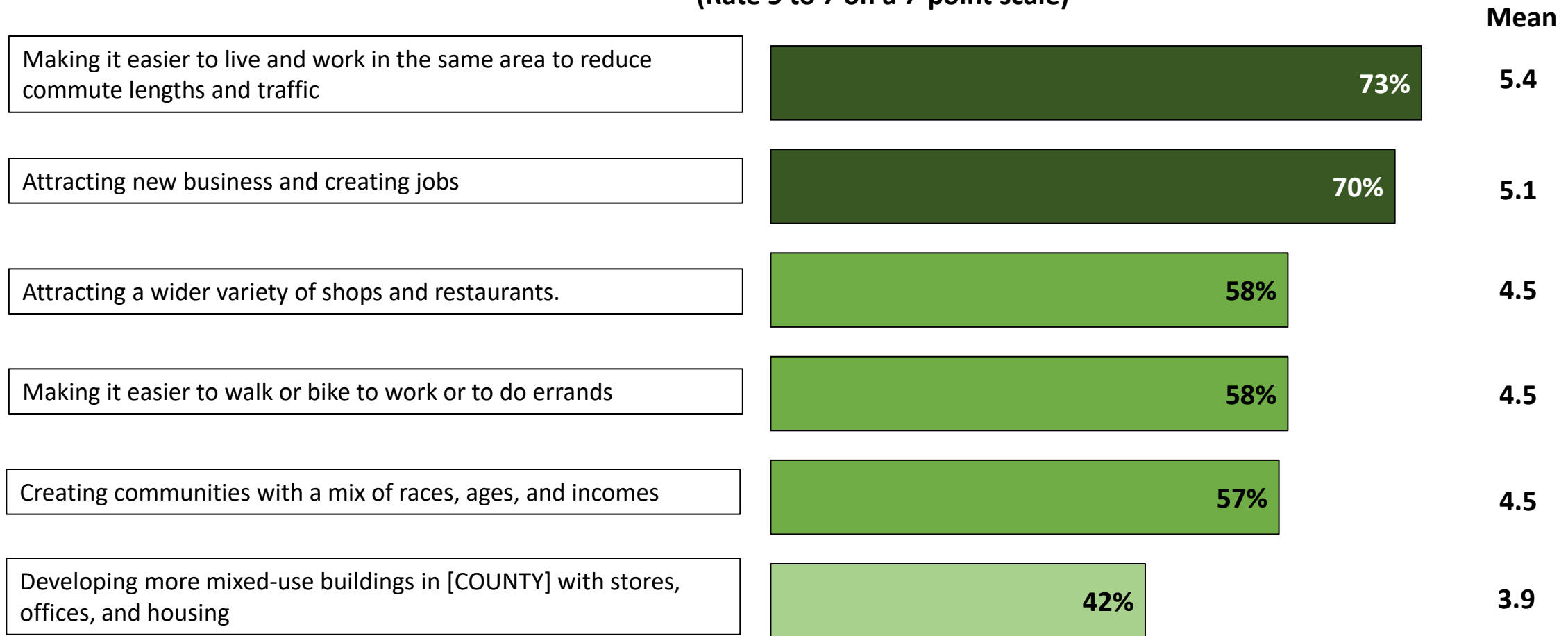
■ Huge Obstacle □ Medium Obstacle

Q.17 Now I am going to read several things some people have said makes buying a home too difficult or expensive. After I read each one please tell me whether you think that is a (ROTATE FIRST TO LAST AND LAST TO FIRST) huge obstacle for people in [COUNTY], a medium-size obstacle, a small obstacle, or not an obstacle at all that makes buying a home too difficult or expensive for people in [COUNTY]. Thinking about people buying a home in your area, the first/next statement is...

Development Goals

Creating Communities Where One Can Live and Work and Attracting New Businesses and Creating Jobs are Top Growth Priorities

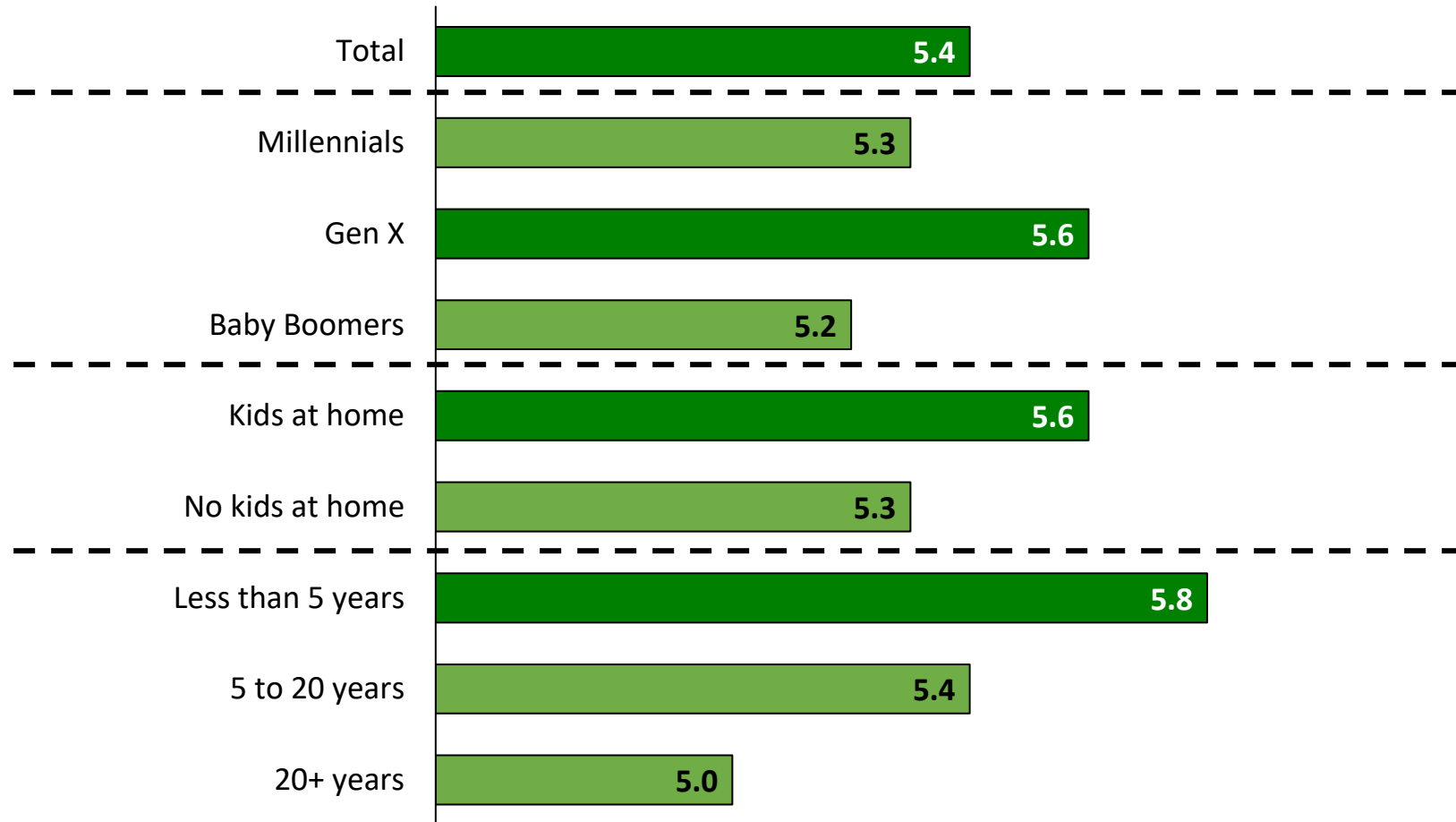
Importance of Growth and Development Goals
(Rate 5 to 7 on a 7-point scale)



Q.18 Thinking now about growth and development in [COUNTY], I am going to read to you a list of things that people say are important to them as their local government makes decisions about [COUNTY]'s growth. Please rate each of the following using a scale of one to seven, where one means that goal or outcome is not important for you, and seven means that goal our outcome is very important for you. Of course, you can use any number between one and seven. The higher the number, the more important that goal or outcome is for you.

Gen X, Those with Kids at Home, and Newer Residents Place Higher Priority on Communities Where it is Easier to Live and Work

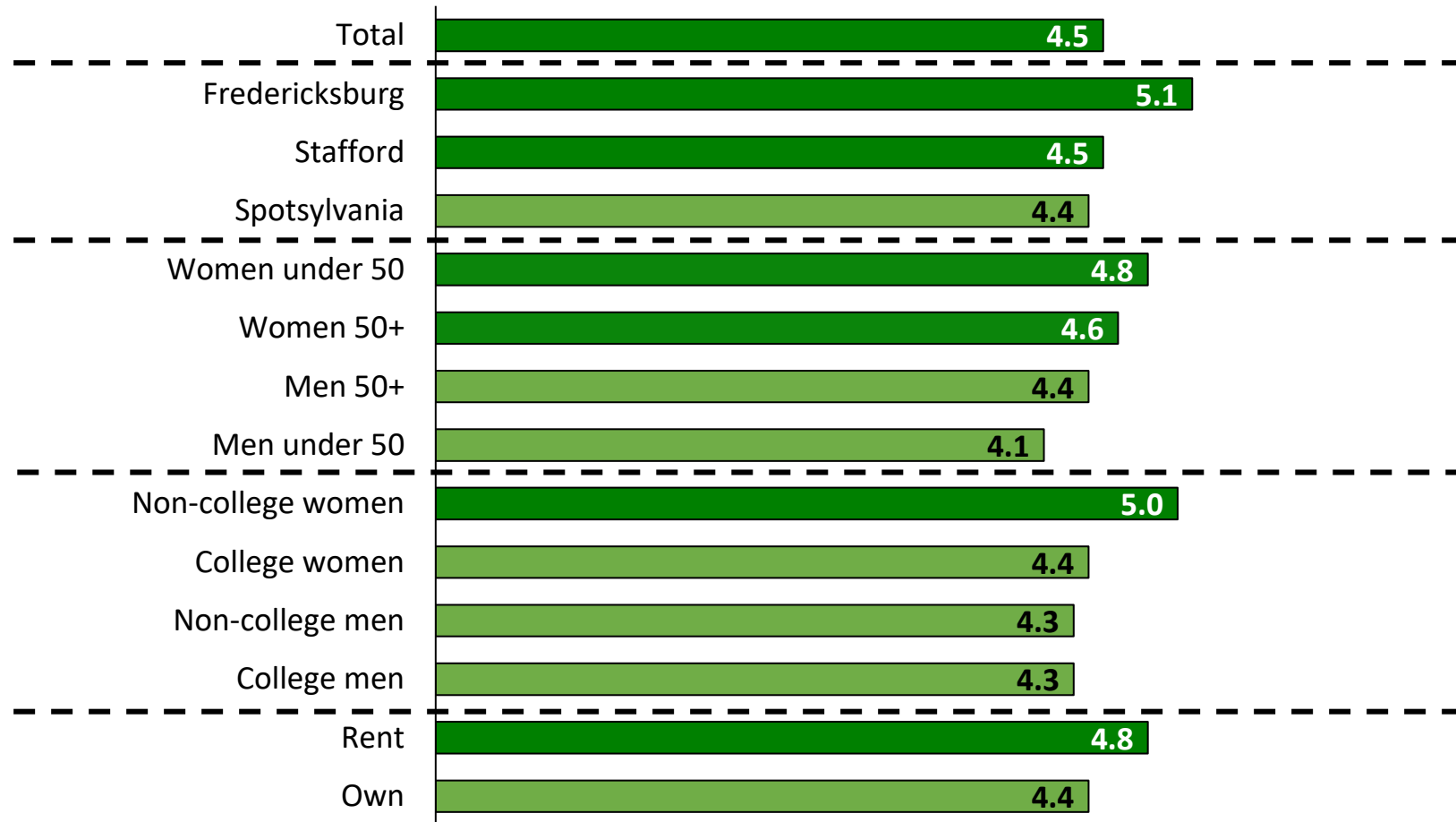
Making It Easier to Live and Work in the Same Area (Means)
By Group



Q.18 Thinking now about growth and development in [COUNTY], I am going to read to you a list of things that people say are important to them as their local government makes decisions about [COUNTY]'s growth. Please rate each of the following using a scale of one to seven, where one means that goal or outcome is not important for you, and seven means that goal our outcome is very important for you. Of course, you can use any number between one and seven. The higher the number, the more important that goal or outcome is for you.

Fredericksburg Residents, Women, and Renters More Likely to See Importance of Making it Easier to Walk or Bike in Their Communities

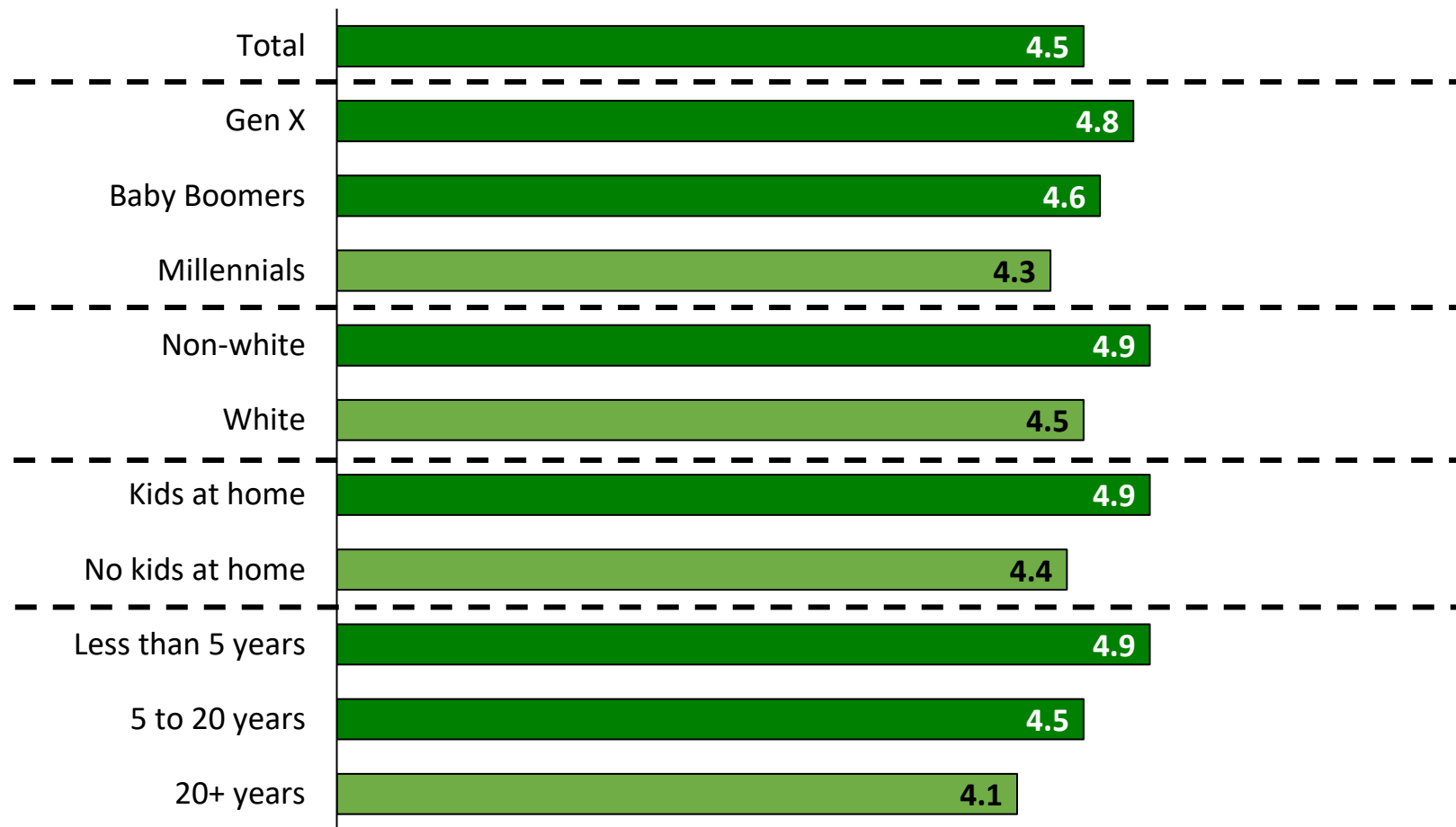
Making It Easier to Walk or Bike to Work or To Do Errands (Means)
By Group



Q.18 Thinking now about growth and development in [COUNTY], I am going to read to you a list of things that people say are important to them as their local government makes decisions about [COUNTY]'s growth. Please rate each of the following using a scale of one to seven, where one means that goal or outcome is not important for you, and seven means that goal our outcome is very important for you. Of course, you can use any number between one and seven. The higher the number, the more important that goal or outcome is for you.

Gen X, Those with Kids at Home, Non-White, and Newer Residents Place Higher Priority on Attracting a Variety of Shops and Restaurants

Attracting a Wider Variety of Shops and Restaurants (Means)
By Group



Q.18 Thinking now about growth and development in [COUNTY], I am going to read to you a list of things that people say are important to them as their local government makes decisions about [COUNTY]'s growth. Please rate each of the following using a scale of one to seven, where one means that goal or outcome is not important for you, and seven means that goal our outcome is very important for you. Of course, you can use any number between one and seven. The higher the number, the more important that goal or outcome is for you.

National Association of REALTORS® Fredericksburg, VA Area Smart Growth Survey

March 2020

American Strategies designed and administered this telephone survey conducted by professional interviewers. The survey reached 425 adults (400 weighted), age 18 or older, who indicated they live in the City of Fredericksburg, Spotsylvania County, or Stafford County. The survey was conducted from March 5-8, 2020.

Fifty-nine percent of respondents were reached on wireless phones, twenty-one percent on VOIP phones, and twenty percent on landlines. Quotas were assigned to reflect the demographic distribution of registered voters in the City of Fredericksburg, Spotsylvania County, and Stafford County, and the data were weighted to ensure an accurate reflection of the population. The sample was drawn from a third-party vendor voter 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.