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Summary of the Outreach Process and Qualitative Data

The Rockingham Planning Commission conducted public outreach to learn about the 27 communities we serve as part of the Regional Housing Needs Assessment process. The insights gained from this research helped to better understand the perspectives and concerns of the region. More specifically, this work informed the narrative and further research needed for the final assessment.

New Hampshire RSA 36:47(II) requires that "For the purpose of assisting municipalities in complying with RSA 674:2, III(*l*), each regional planning commission shall compile a regional housing needs assessment, which shall include an assessment of the regional need for housing for persons and families of all levels of income."

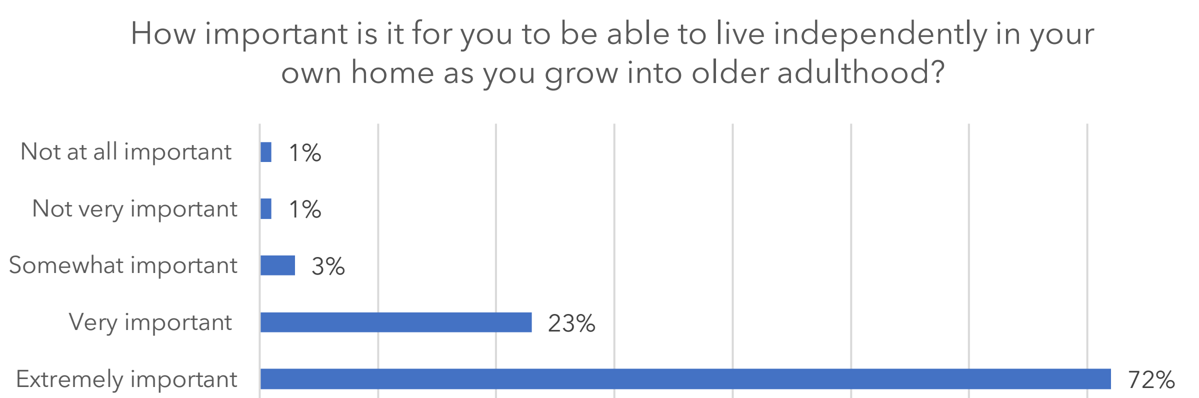
Age Friendly Survey

In 2021, the Rockingham Nutrition Meals on Wheels Program (RNMOW) and Rockingham Planning Commission (RPC) were awarded a two-year grant from Tufts Health Plan Foundation to work with an array of partners to assist communities in the Rockingham region in becoming Age-Friendly. Age Friendly communities enable residents to thrive at every age and every stage of life, as policies and initiatives that help older residents tend to make communities more livable for all ages. The project draws on a national framework developed by AARP that has been used widely in New Hampshire in recent years. AARP New Hampshire is also a collaborating sponsor of the project.

Rockingham Planning Commission worked with the following six communities in 2021-2022 to conduct Age Friendly Community Assessments—Exeter, Fremont, Hampstead, Hampton, Portsmouth, and Stratham.

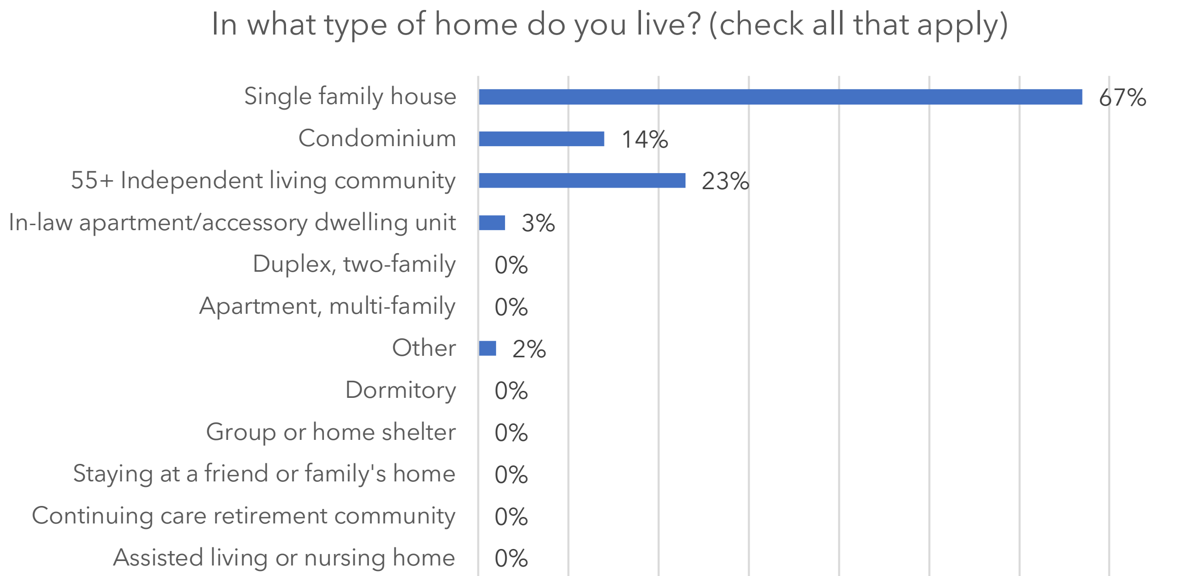
Exeter

Survey Question 12. How important is it for you to live independently in your own home as you grow older?



55.3% of respondents said it is "Extremely Important" to live independently in their own home as they grow older and 31.8% reported that it is "Very Important."

Survey Question 9. What type of house do you live in? (check all that apply)



Survey respondents lived in a variety of housing types. Only 40% lived in single family homes. This is reflective of the fact that Exeter has a broader range of housing options than other assessment communities.

Survey Question 10. My current home meets or fits my needs regarding:

	Very well	**OK**	**Not very well**	**Not at all**
Design (e.g. single floor living, width of doors, few or no steps to get in)	56%	34%	9%	1%
Type of home (ex. Single family, apartment, condominium, other)	69%	25%	5%	1%
Location near places I want to go	61%	30%	8%	1%
Amount of routine maintenance (ex. Raking, snow shoveling)	42%	35%	20%	4%
Affordability within my budget	40%	45%	13%	2%
Sense of acceptance (if in an assisted living or other retirement community)	44%	44%	6%	6%

69% of respondents said that the type of home they lived in fit their needs and more than half of respondents were happy with their current home's design and location. On the other hand, only 40% said that their current home was very affordable and 24% of respondents said that the amount of routine maintenance required on their home did not meet their needs very well or at all.

Survey Question 6. Thinking about the future, which of the following reasons would likely keep you in Exeter as you reach your 70s, 80s, and beyond (check all that apply)?

Only 26% of respondents said that options for a place to live would be a reason to remain in Exeter.

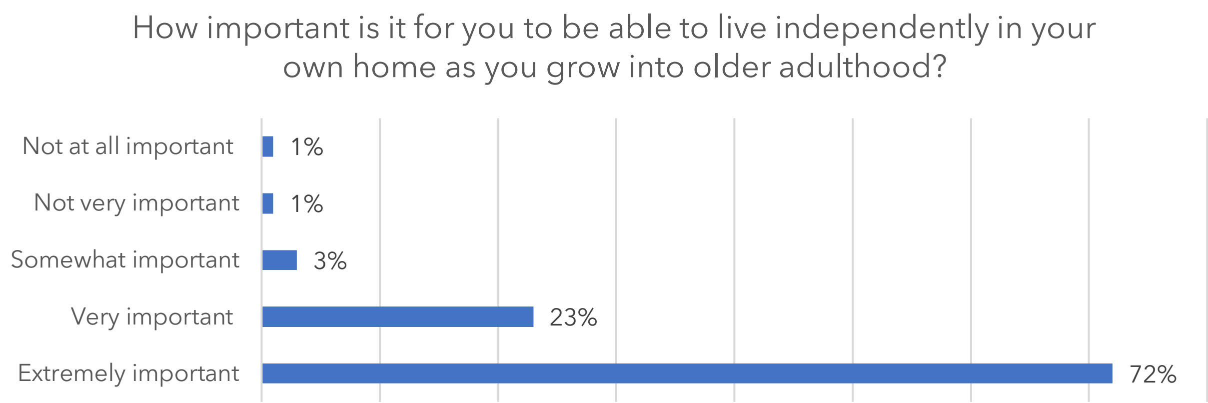
Survey Question 11. If you have looked for a place to live in the past five years, or are considering finding another place to live in your community in the future, how would you rate the options available for you related to:

	Many Available	**Some Available**	**Few Available**	**None Available**	**Not Applicable**	**Don't Know**
Desired type of home (e.g. single family, apartment, condo, other)	6%	21%	43%	10%	14%	7%
Design (e.g. single floor living, width of doors, few or no steps to get in)	11%	22%	35%	6%	15%	10%
Location near places I want to go	10%	23%	36%	8%	15%	8%
Maintenance I'm willing to take on (e.g. lawn, raking, snow clearance)	8%	23%	33%	8%	19%	9%
Affordability within my budget	8%	22%	34%	16%	13%	8%
Sense of acceptance (if looking for an assisted living or other retirement community or neighborhood)	8%	25%	22%	5%	23%	16%

Likewise, 43% of survey respondents indicated that there were few houses available that met their needs with regard to type. More than 30% indicated there were few available that met their needs with regard to design, location, level of required maintenance, and affordability.

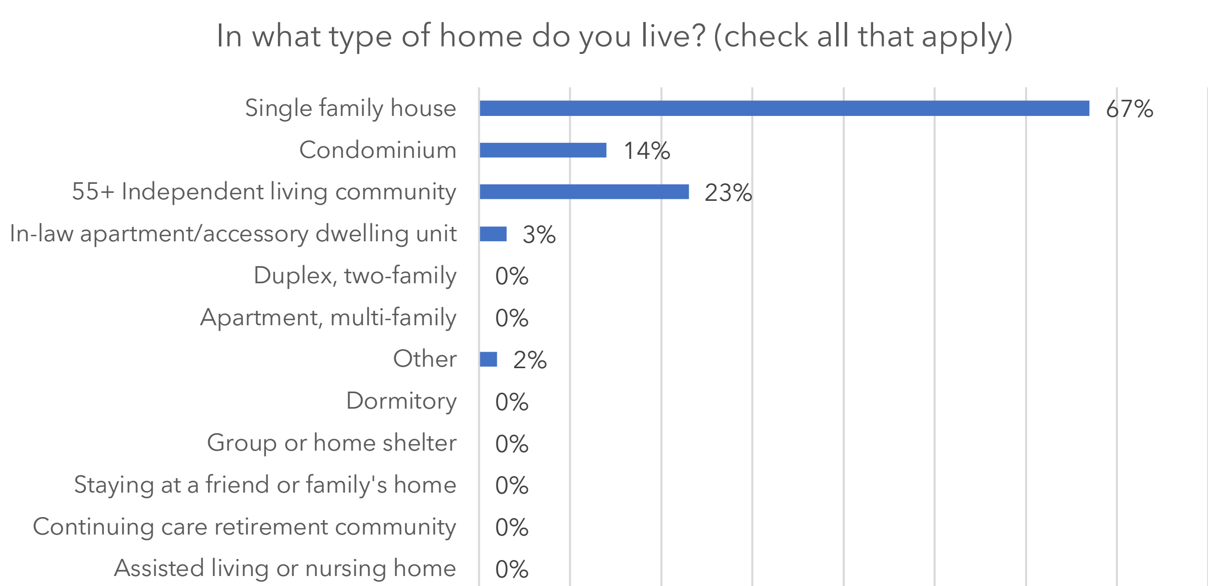
Portsmouth

Survey Question 12. How important is it for you to live independently in your own home as you grow older?



64.1% of respondents said it is "Extremely Important" to live independently in their own home as they grow older and 28.2% reported that it is "Very Important."

Survey Question 9. What type of house do you live in? (check all that apply)



The majority of survey respondents lived in single family homes, followed by condominiums and apartments.

Survey Question 10. My current home meets or fits my needs regarding:

	Very well	**OK**	**Not very well**	**Not at all**
Design (e.g. single floor living, width of doors, few or no steps to get in)	57%	28%	13%	2%
Type of home (ex. Single family, apartment, condominium, other)	71%	24%	3%	2%
Location near places I want to go	66%	28%	4%	4%
Amount of routine maintenance (ex. Raking, snow shoveling)	35%	39%	21%	5%
Affordability within my budget	34%	50%	14%	2%
Sense of acceptance (if in an assisted living or other retirement community)	45%	36%	6%	13%

71% of respondents said that the type of home they lived in fit their needs very well and more than half of respondents were happy with their current home's design and location. On the other hand, only 34% said that their current home was very affordable and 35% of respondents said that the amount of routine maintenance required on their home met their needs very well.

Survey Question 6. Thinking about the future, which of the following reasons would likely keep you in Portsmouth as you reach your 70s, 80s, and beyond (check all that apply)?

Only 27% of respondents said that options for a place to live would be a reason to remain in Portsmouth.

Survey Question 11. If you have looked for a place to live in the past five years, or are considering finding another place to live in your community in the future, how would you rate the options available for you related to:

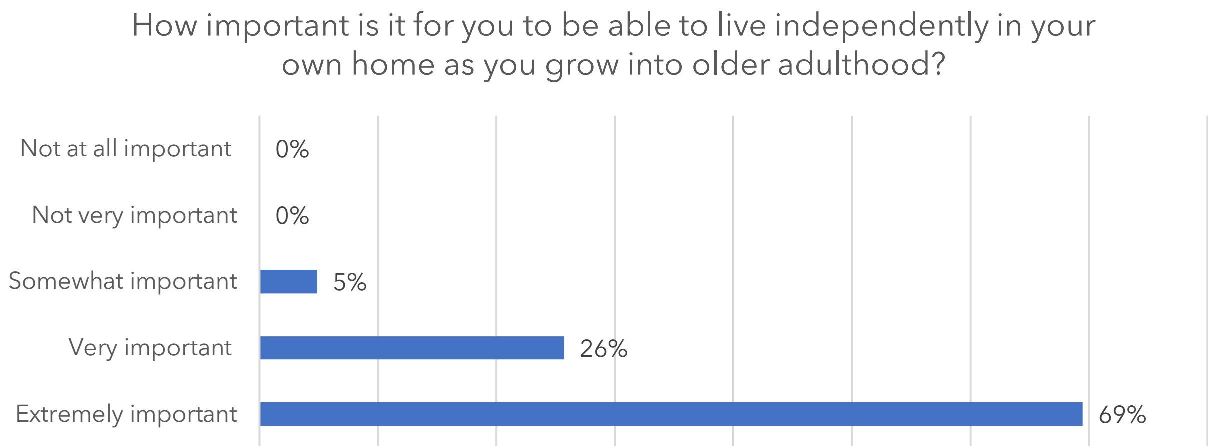
	Many Available	**Some Available**	**Few Available**	**None Available**	**Not Applicable**	**Don't Know**
Desired type of home (e.g. single family, apartment, condo, other)	1%	17%	46%	10%	18%	7%
Design (e.g. single floor living, width of doors, few or no steps to get in)	1%	16%	45%	8%	17%	12%
Location near places I want to go	6%	21%	39%	6%	18%	10%
Maintenance I'm willing to take on (e.g. lawn, raking, snow clearance)	3%	17%	37%	7%	23%	13%
Affordability within my budget	2%	17%	36%	19%	16%	10%
Sense of acceptance (if looking for an assisted living or other retirement community or neighborhood)	2%	17%	27%	4%	26%	24%

Likewise, 46% of survey respondents indicated that there were few houses available that met their needs with regard to type. More than 30% indicated there were few available that met their needs with regard to design, location, level of required maintenance, and affordability.

Fremont

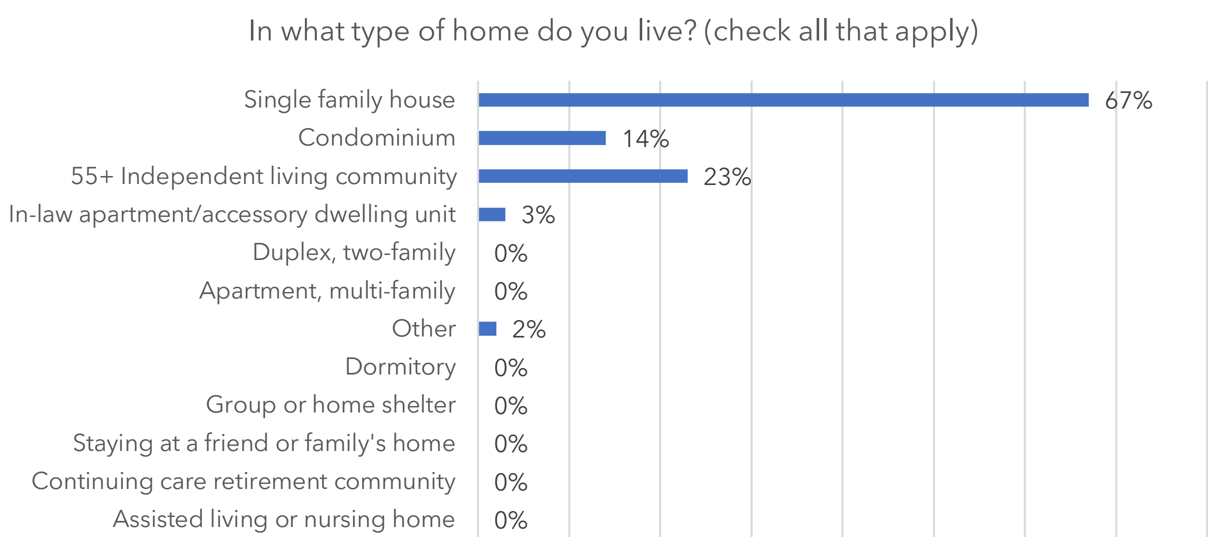
Question 12: How important is it for you to be able to live independently in your own home as you grow into older adulthood?

The overwhelming majority of survey respondents indicated that it is extremely important for them to be able to live independently in their own homes as they age (69%).



Question 9: In what type of home do you live? (check all that apply)

The vast majority of survey respondents indicated that they live in a single-family house (65%).



Question 10: My current home meets or fits my needs regarding:

	Very well	**OK**	**Not very well**	**Not at all**
Design (e.g. single floor living, width of doors, few or no steps to get in)	62%	31%	6%	1%
Type of home (ex. Single family, apartment, condominium, other)	71%	25%	4%	1%
Location near places I want to go	49%	38%	12%	1%
Amount of routine maintenance (ex. Raking, snow shoveling)	34%	43%	18%	5%
Affordability within my budget	34%	54%	10%	2%
Sense of acceptance (if in an assisted living or other retirement community)	39%	47%	6%	9%

Question 6: Thinking about the future, which of the following reasons would likely keep you in your current town as you reach your 70s, 80s and beyond? (check all that apply)

Only 20% of respondents indicated that options for places to live would be the topmost reason for staying in Fremont as they age.

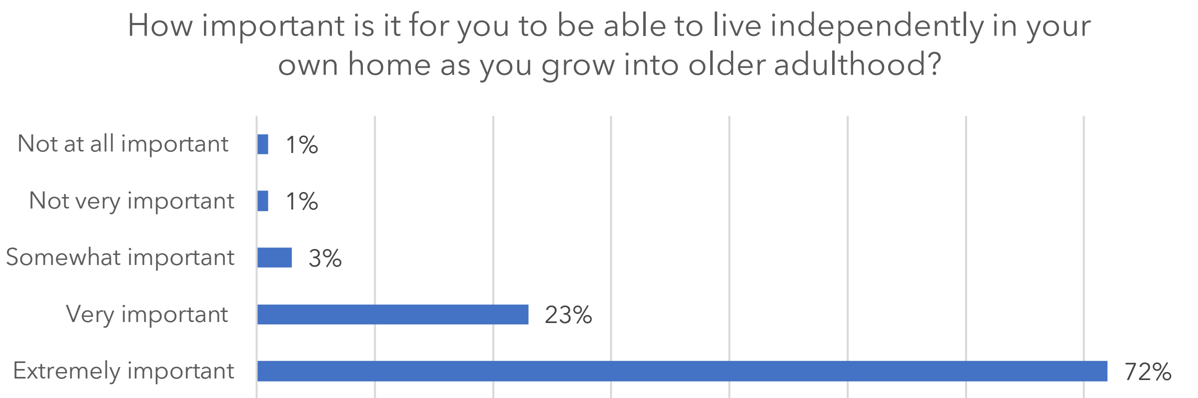
Question 11: If you have looked for a place to live in the past five years, or are considering finding another place to live in your community in the future, how would you rate the options available for you related to:

	Many Available	Some Available	Few Available	None Available	Not Applicable	Don't Know
Desired type of home (e.g. single family, apartment, condo, other)	2%	21%	37%	13%	18%	10%
Design (e.g. single floor living, width of doors, few or no steps to get in)	2%	22%	37%	7%	19%	14%
Location near places I want to go	6%	23%	32%	9%	13%	10%
Maintenance I'm willing to take on (e.g. lawn, raking, snow clearance)	2%	22%	30%	10%	22%	14%
Affordability within my budget	1%	13%	40%	15%	19%	11%
Sense of acceptance (if looking for an assisted living or other retirement community or neighborhood)	2%	20%	21%	7%	25%	25%

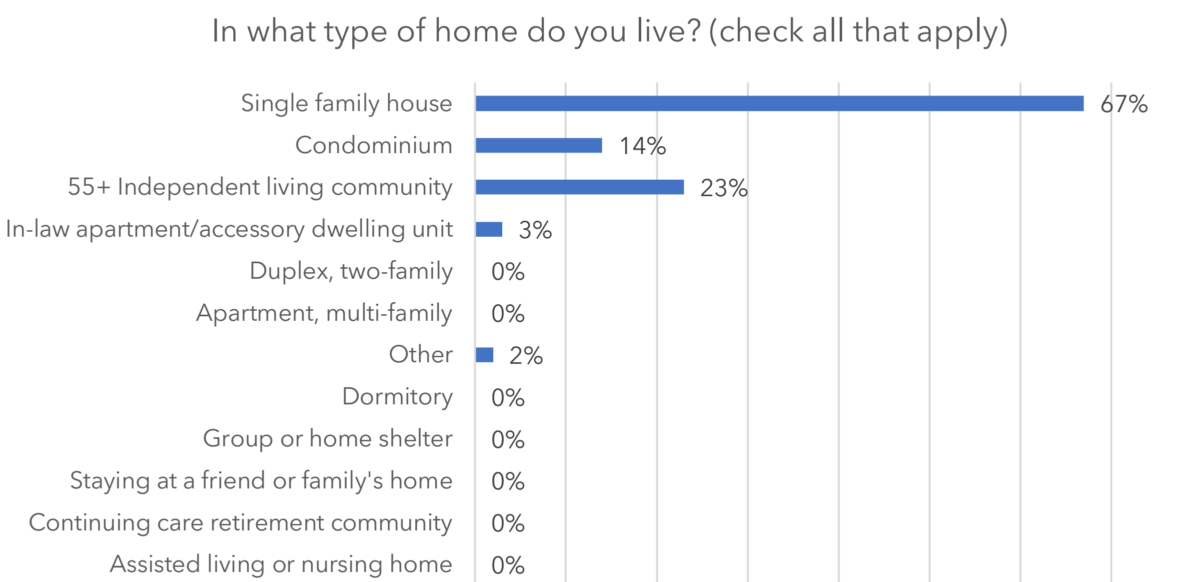
Stratham

Question 12: How important is it for you to be able to live independently in your own home as you grow into older adulthood?

The vast majority of survey respondents indicated that it's extremely or very important for them to remain in their own homes as they grow into older adulthood.



Question 9: In what type of home do you live? (Check all that apply)



Question 10: My current home meets or fits my needs regarding:

	Very well	**OK**	**Not very well**	**Not at all**
Design (e.g. single floor living, width of doors, few or no steps to get in)	57%	27%	12%	4%
Type of home (ex. Single family, apartment, condominium, other)	71%	28%	1%	0%
Location near places I want to go	58%	33%	8%	1%
Amount of routine maintenance (ex. Raking, snow shoveling)	34%	36%	26%	4%
Affordability within my budget	36%	50%	12%	2%
Sense of acceptance (if in an assisted living or other retirement community)	39%	43%	6%	12%

Most residents indicated that their current home fits their needs either very well, or ok.

Question 6: Thinking about your future, which of the following reasons would likely keep you in your community as you reach your 70s, 80s, and beyond? (Check all that apply)

Only 22% of survey respondents indicated that options for places to live is the biggest reason they would remain in Stratham.

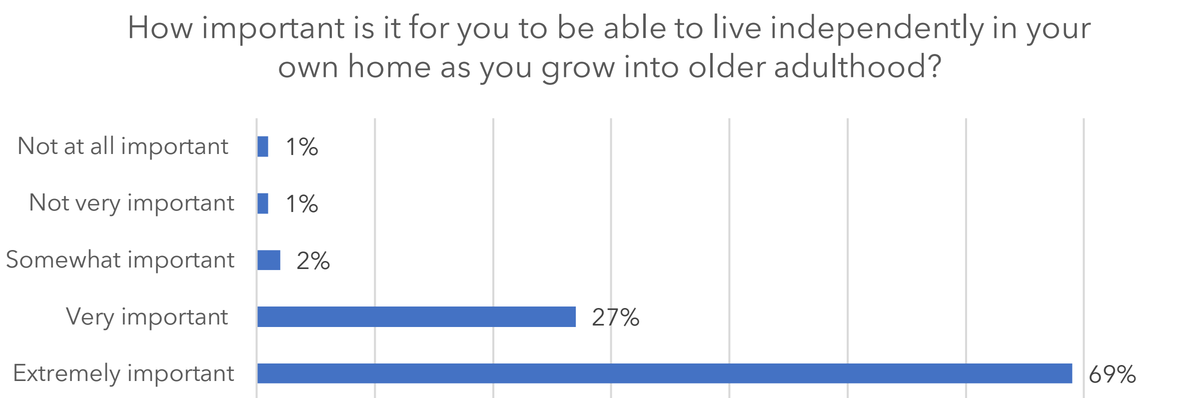
Question 11: If you have looked for a place to live in the past five years, or are considering another place to live in your community in the future, how would you rate the options available for you related to:

	Many Available	**Some Available**	**Few Available**	**None Available**	**Not Applicable**	**Don't Know**
Desired type of home (e.g. single family, apartment, condo, other)	2%	17%	40%	15%	16%	9%
Design (e.g. single floor living, width of doors, few or no steps to get in)	1%	18%	39%	13%	16%	13%
Location near places I want to go	5%	19%	38%	11%	15%	10%
Maintenance I'm willing to take on (e.g. lawn, raking, snow clearance)	5%	21%	38%	9%	17%	10%
Affordability within my budget	3%	15%	36%	23%	15%	7%
Sense of acceptance (if looking for an assisted living or other retirement community or neighborhood)	3%	19%	28%	8%	25%	18%

While responses varied across the board, most respondents indicated that there were few housing options available to them in each of the above categories.

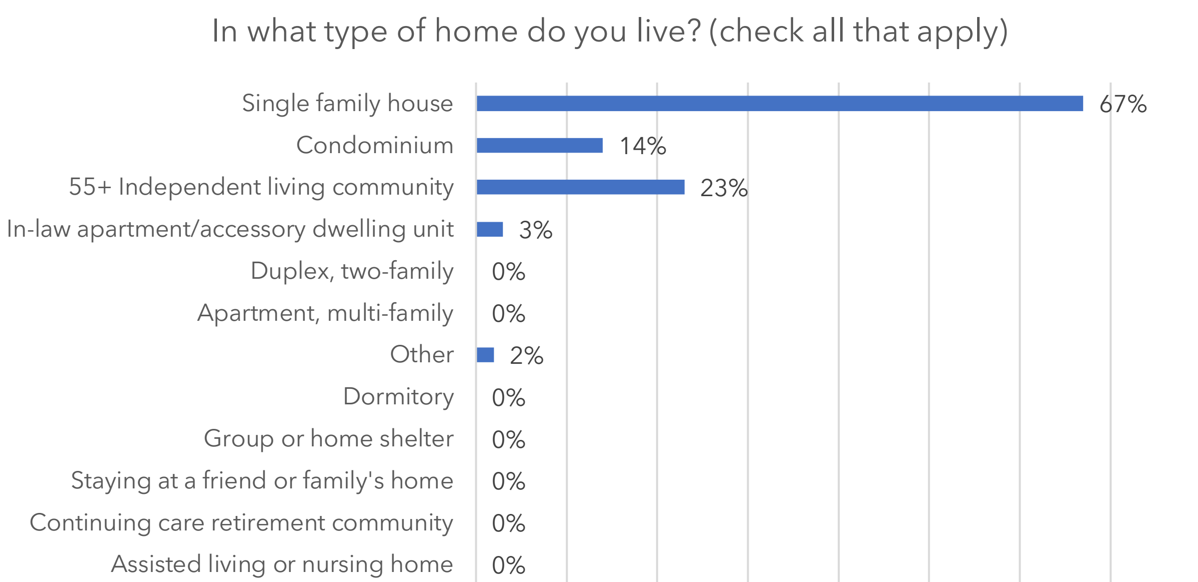
Hampstead

Question 12: How important is it for you to be able to live independently in your own home as you grow into older adulthood?



72% of respondents said it is "Extremely Important" to live independently in their own home as they grow older and 22.7% reported that it is "Very Important."

Question 9: In what type of home do you live? (Check all that apply)



Survey respondents lived in a variety of housing types, but the majority are in single family homes.

Question 10: My current home meets or fits my needs regarding:

	Very well	**OK**	**Not very well**	**Not at all**
Design (e.g. single floor living, width of doors, few or no steps to get in)	54%	36%	9%	2%
Type of home (ex. Single family, apartment, condominium, other)	68%	29%	3%	-
Location near places I want to go	43%	47%	7%	3%
Amount of routine maintenance (ex. Raking, snow shoveling)	28%	41%	23%	8%
Affordability within my budget	30%	53%	16%	1%
Sense of acceptance (if in an assisted living or other retirement community)	34%	49%	6%	11%

68% of respondents said that the type of home they lived in fit their needs very well and more than half of respondents were happy with their current home's design. On the other hand, only 30% said that their current home was very affordable and 31% of respondents said that the amount of routine maintenance required on their home did not meet their needs very well or at all.

Question 6: Thinking about your future, which of the following reasons would likely keep you in your community as you reach your 70s, 80s, and beyond? (Check all that apply)

Only 18% of survey respondents indicated that options for places to live is the biggest reason they would remain in Hampstead.

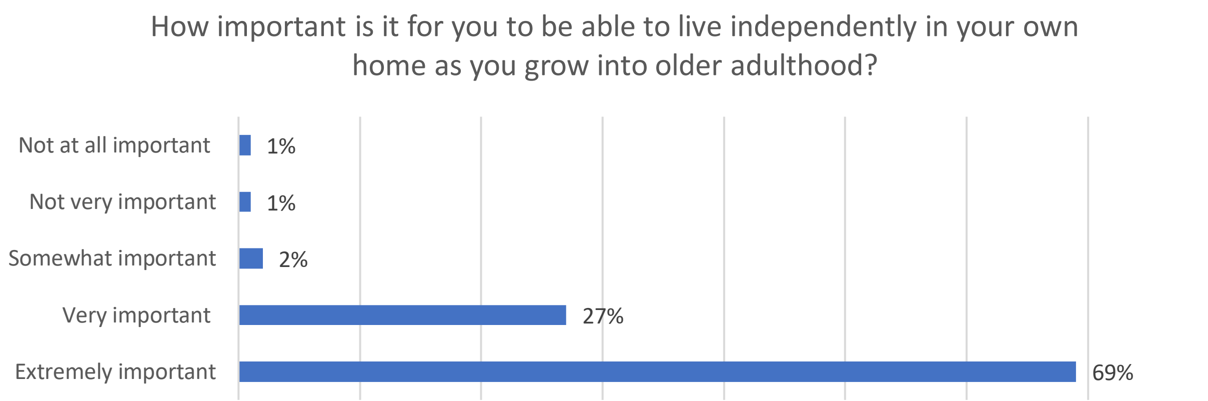
Question 11: If you have looked for a place to live in the past five years, or are considering another place to live in your community in the future, how would you rate the options available for you related to:

	Many Available	**Some Available**	**Few Available**	**None Available**	**Not Applicable**	**Don't Know**
Desired type of home (e.g. single family, apartment, condo, other)	5%	11%	42%	5%	23%	14%
Design (e.g. single floor living, width of doors, few or no steps to get in)	3%	21%	33%	5%	19%	19%
Location near places I want to go	6%	23%	31%	6%	21%	14%
Maintenance I'm willing to take on (e.g. lawn, raking, snow clearance)	5%	18%	33%	6%	21%	17%
Affordability within my budget	2%	19%	36%	13%	16%	13%
Sense of acceptance (if looking for an assisted living or other retirement community or neighborhood)	1%	16%	24%	7%	29%	23%

Likewise, 42% of survey respondents indicated that there were few houses available that met their needs with regard to type. More than 30% indicated there were few available that met their needs with regard to design, location, level of required maintenance, and affordability.

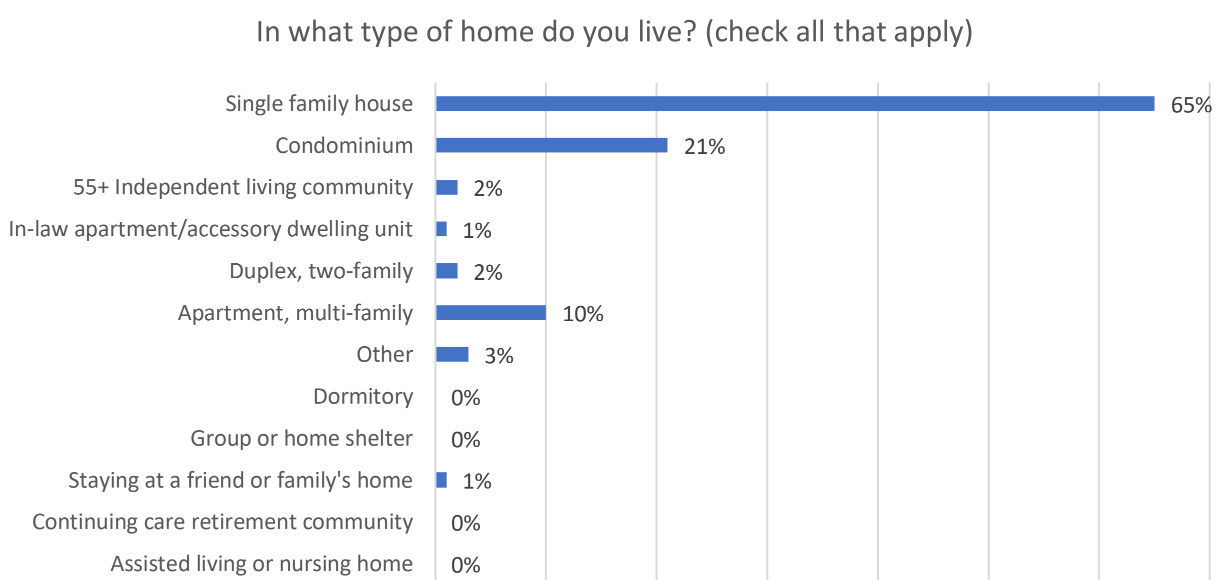
Hampton

Question 12: How important is it for you to be able to live independently in your own home as you grow into older adulthood?



68.5% of respondents said it is "Extremely Important" to live independently in their own home as they grow older and 27.4% reported that it is "Very Important."

Question 9: In what type of home do you live? (Check all that apply)



Survey respondents lived in a variety of housing types, however, the majority live in single-family homes.

Question 10: My current home meets or fits my needs regarding:

	Very well	**OK**	**Not very well**	**Not at all**
Design (e.g. single floor living, width of doors, few or no steps to get in)	48%	36%	14%	2%
Type of home (ex. Single family, apartment, condominium, other)	70%	27%	1%	2%
Location near places I want to go	73%	23%	2%	1%
Amount of routine maintenance (ex. Raking, snow shoveling)	27%	56%	13%	3%
Affordability within my budget	40%	49%	9%	3%
Sense of acceptance (if in an assisted living or other retirement community)	32%	47%	8%	14%

70% of respondents said that the type of home they lived in fit their needs very well and the majority of respondents were happy with their current home's design and location. On the other hand, only 40% said that their current home was very affordable.

Question 6: Thinking about your future, which of the following reasons would likely keep you in your community as you reach your 70s, 80s, and beyond? (Check all that apply)

Only 19% of survey respondents indicated that options for places to live is the biggest reason they would remain in Hampton.

Question 11: If you have looked for a place to live in the past five years, or are considering another place to live in your community in the future, how would you rate the options available for you related to:

	Many Available	**Some Available**	**Few Available**	**None Available**	**Not Applicable**	**Don't Know**
Desired type of home (e.g. single family, apartment, condo, other)	3%	13%	46%	11%	19%	9%
Design (e.g. single floor living, width of doors, few or no steps to get in)	4%	18%	39%	8%	18%	13%
Location near places I want to go	10%	23%	34%	8%	18%	13%
Maintenance I'm willing to take on (e.g. lawn, raking, snow clearance)	5%	22%	32%	5%	23%	13%
Affordability within my budget	2%	16%	35%	18%	17%	11%
Sense of acceptance (if looking for an assisted living or other retirement community or neighborhood)	1%	16%	24%	5%	30%	25%

Likewise, 46% of survey respondents indicated that there were few houses available that met their needs with regard to type. More than 30% indicated there were few available that met their needs with regard to design, location, level of required maintenance, and affordability.

Community Survey

Between February 14, 2022, and May 12, 2022, a total of 329 individuals took the Community Survey and provided 19,927 responses or comments to the survey questions. The survey was predominantly an online survey hosted on the RPC's webpage and distributed via municipalities' unofficial social media accounts, various town webpages and newsletters, announcements at multiple municipal board meetings, RPC commissioner meetings, and other stakeholder events. Paper surveys were made available upon request. This survey has representation from all 27 RPC communities though some may be more represented than others.

This survey was intended primarily for residents of the RPC region, however, individuals who are interested in living in the region or work in the region were also invited to provide their thoughts. The primary objective of this survey was to further understand the region's housing needs and perceptions.

Each of the 27 RPC communities were represented in the Community Survey. Exeter, Hampton, Portsmouth, and Raymond as the largest three communities in the RPC region, also had the largest amount of participation.

When analyzing community representation, we compared the proportion of survey responses from an individual community to the total proportion of regional population of that community. For example, Portsmouth responses represented 11% of the total survey responses, which is equivalent to the total proportion of regional population Portsmouth represents (11%). Similarly, Hampton responses made up 7% of total survey responses, while their population is equivalent to 8% of the region. Exeter had slightly higher representation with 12% of total survey responses, while their population makes up 8% of the region's population.

The two communities that had a large discrepancy of the number of survey responses received compared to the proportion of the region's population included Raymond, which made up 15% of the total survey responses, while their population only consists of 5% of the total region. Conversely, Salem accounted for 1% of the total survey responses, while their population comprises 15% of the total region.

Age, Employment, and Disability Status

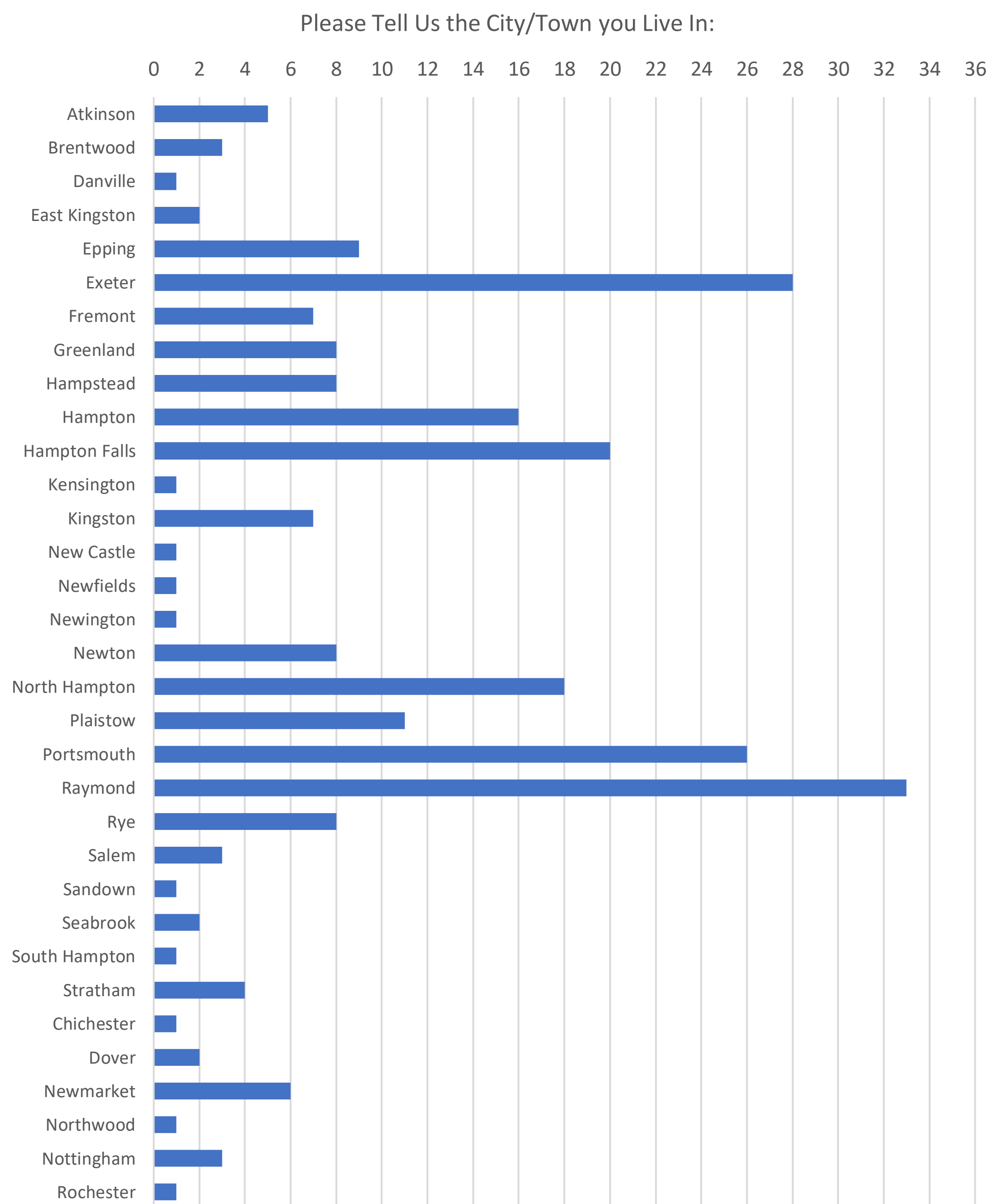
Survey participation breakdown by age group was dispersed evenly apart from the largest respondent group being between 55 and 64 (27%). Approximately 57% of respondents stated they are employed full time, with 22% being retired.

While 90% of respondents answered that they do not have a disability, 10% of respondents selected they have difficulty with either cognitive, ambulatory, independent living, hearing, vision, self-care and/or other, which is important to note as we begin to analyze the types of housing needed in our community.

Respondents' Age:	
25-34	13%
35-44	17%
45-54	18%
55-64	27%
65-74	19%
75 or older	4%
Other	2%

Housing Status

The Regional Housing Needs Assessment will provide information on current and future housing trends and needs. It is important to identify the type of housing situations survey respondents are currently living in or would like to be living in.



Current Housing Status:	
Own my home with a mortgage	47% (150 responses)
Own my home without a mortgage	26% (83 responses)
Rent my home	16% (50 responses)
Live with family or roommates who share cost	6% (18 responses)
Am a dependent (live with parents or other caretakers who pay for my housing)	3% (10 responses)
Other	3% (8 responses)
I do not currently have permanent housing	1% (4 responses)
Live in senior housing or assisted living (for seniors or disables persons)	<1% (1 response)
Live in a shelter, halfway house, or other temporary housing	0% (0 responses)

Majority of the respondents (73%) own their own home with or without a mortgage. Approximately 27% of respondents live in a different housing situation including renting, living with family or roommates or do not currently have permanent housing (1% or 4 respondents). Approximately 75% of survey respondents live in a single-family home. 77% of respondents are not looking for a new place to live, while 23% are actively looking for a new place to live.

Key Findings

The following outlines key survey findings. The survey was designed to assist the RPC and Regional Planning Commissions in understanding current housing supply, demand, and affordability and begin to identify what types of housing may be needed in the future.

Several key themes emerged from survey responses:

Demand:

- Approximately 23% of respondents are actively seeking a new place to live.
- Majority of respondents (76%) agree that their current housing meets their needs today, but 39% stated they disagree that their current housing will meet their needs for the next 10 years.

Affordability:

- A sizeable number of participants are paying more than 30% of their household income towards their housing costs, with 10% stating that their housing cost is more than 50% of their household income.
- Cost of available housing has a significant impact on 58% of respondents' ability to stay in the community.

Supply & Future Need:

- The majority of participants (83%) stated that there is a need for additional moderate-income housing units in their community. Approximately 63% of participants "disagreed" or "strongly disagreed" that there is a need for additional high-end housing (luxury housing).

- Whether actively seeking new housing or not, the majority of respondents stated their preferred housing type as a single-family house.

Housing Preference

Types of Housing

Of those who are not actively seeking a new place to live, 14% moved within the last year, 27% within the last 1-5 years, and 38% have not moved in over 10 years. This is an important note, as majority of respondents (77%), are not currently seeking a new place to live and a significant portion of those who are not seeking a new place to live, have not moved in recent years.

When asked about ideal housing preference, those not seeking a new place to live, overwhelmingly selected that their preference is to live in a single-family home (85%). About 3% would prefer to be living in an Accessory Dwelling Unit, in-law apartment, or backyard cottage, and 3% would prefer to live in a multi-family. Approximately 5% selected that would prefer to be living in a townhouse or row house.

The following is the breakdown of the type of housing those who are actively seeking a new place to live (23% of respondents), would ideally live in today:

Respondents Actively Seeking New Housing	
Preferred Housing Type	**% of Respondents**
Single Family	65%
Multi Family (2-4 units)	5%
Multi Family (50-20 units)	2%
Multi Family (20+)	3%
Manufactured or Mobile	6%
Townhouse or Row House	5%
Supportive Services	6%
No Response	3%
ADU, In-law Apartment, backyard cottage	3%
Age Restricted Housing	3%

Housing Characteristics

Whether or not actively seeking housing, we asked all participants to identify the most important characteristics when choosing a neighborhood to live in. The two most important characteristics were predominantly safety and being within an affordable price range. Characteristics that were ranked as being a lower priority included proximity to public transportation and being located near where the respondent grew up.

	Very High	**High**	**Neutral**	**Low**	**Very Low**	**N/A**	**I don't know**
Close to Friends and Family	21%	36%	28%	8%	4%	2%	-
Close to Work	16%	38%	25%	4%	2%	15%	-
Close to Amenities (such as shopping, health care, downtown center, recreational activities, etc.)	18%	45%	29%	5%	2%	-	-
Close to Public Transportation	3%	9%	28%	15%	34%	10%	1%
In my affordability price range	46%	38%	10%	4%	1%	2%	-
Schools Systems	12%	20%	20%	7%	12%	28%	1%
Size of Unit	11%	50%	28%	6%	2%	3%	1%
Infrastructure and Utilities are available (sidewalks, water, sewer, internet, etc.)	22%	36%	24%	9%	8%	1%	-
Land Suitability (flood risk, soil type, etc.)	22%	42%	22%	7%	3%	2%	2%
Land Amenities (size, view, landscaping, etc.)	19%	45%	26%	6%	2%	1%	1%
Located near where I grew up	3%	8%	20%	14%	37%	16%	2%
Safety	40%	46%	10%	3%	1%	-	-
Presence of established village, downtown centers, and events	16%	39%	28%	7%	10%	1%	-
Proximity to outdoor recreation	16%	37%	32%	7%	23%	1%	-

Housing Need

Housing Costs & Challenges

According to HUD, for a household's housing cost to be considered "Affordable" the household must pay less than 30% of their total household income on housing cost (including mortgage/rent, utilities, insurance, and property taxes). While 50% of the participants of this survey responded that they pay less than 30% of their household's income towards housing costs, 42% of respondents stated that their housing costs where over 30% of their household's income, and therefore not considered "Affordable" by HUD standards.

When asked to rank the greatest housing-related challenges facing their community, 91% ranked "Cost of housing or rent" as the number one challenge. This was followed by the "availability of housing options (different types)" as the second greatest housing-related challenge.

Participants were asked to indicate the level of impact certain factors have on their ability to stay in the community. The most significant factor that impacts respondents' ability to stay in the community is "Cost of available housing" with 58% stating that this has a significant impact.

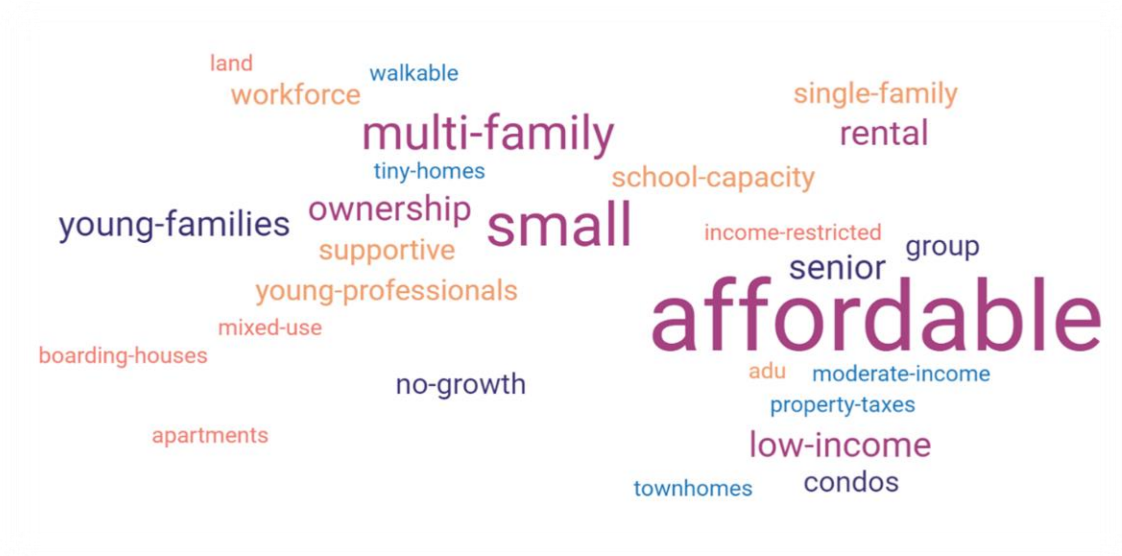
Types of Houses Needed

When asked about housing in their community and the need for additional units by unit type, 83% responded they either "strongly agree" or "agree" that moderate-income housing is needed. Approximately 67% answered that they "strongly agree" or "agree" that rental housing is needed. 63% "strongly agree" or "agree" that senior housing is needed and 62%""strongly agree" or "agree" that housing for people with physical disabilities is needed.

When asked about their current housing needs, 76% responded they "strongly agree" or "agree" that their current housing meets their needs today. When asked if their housing meets their anticipated needs for the next 10 years, 48% "strongly agree" or "agree", whereas 39% "strongly disagree" or "disagree".

Future Housing Goals and Desires

What types of housing are missing in you community?



Employer Survey

Between March 7, 2022 and April 15, 2022 a total of 197 businesses and employers took the Employer Survey and provided 5,196 responses or comments to the survey questions. The survey was predominantly an online survey hosted on the RPC's webpage and distributed directly via email to the businesses registered and in good standing with the New Hampshire Secretary of State. The survey had participation from businesses located in 22 of the 27 Rockingham Planning Commission municipalities plus a handful of communities outside RPC's region. This survey was intended primarily for employers located in Rockingham Planning Commission region; however, it has been noted that employers and businesses often operate in multiple municipalities which may extend beyond regional boundaries. The primary objective of this survey was to understand how housing challenges are impacting regional employers and businesses.

This survey is one of multiple public input sources used in the RPC Regional Housing Needs Assessment Update. Other sources include the following community and stakeholder surveys and in-person engagement.

- Community Survey
- Social Service Provider Survey
- NH Housing Rental Survey
- Developers Summary of Key Findings of statewide outreach
- Municipal Representative Questionnaire

This survey was intended primarily for employers located in RPC region; however, it has been noted that employers and businesses often operate in multiple municipalities which may extend beyond regional boundaries. The survey's primary objective was to understand how housing challenges are impacting regional employers and businesses. The survey asked questions to help the RPC understand the following questions:

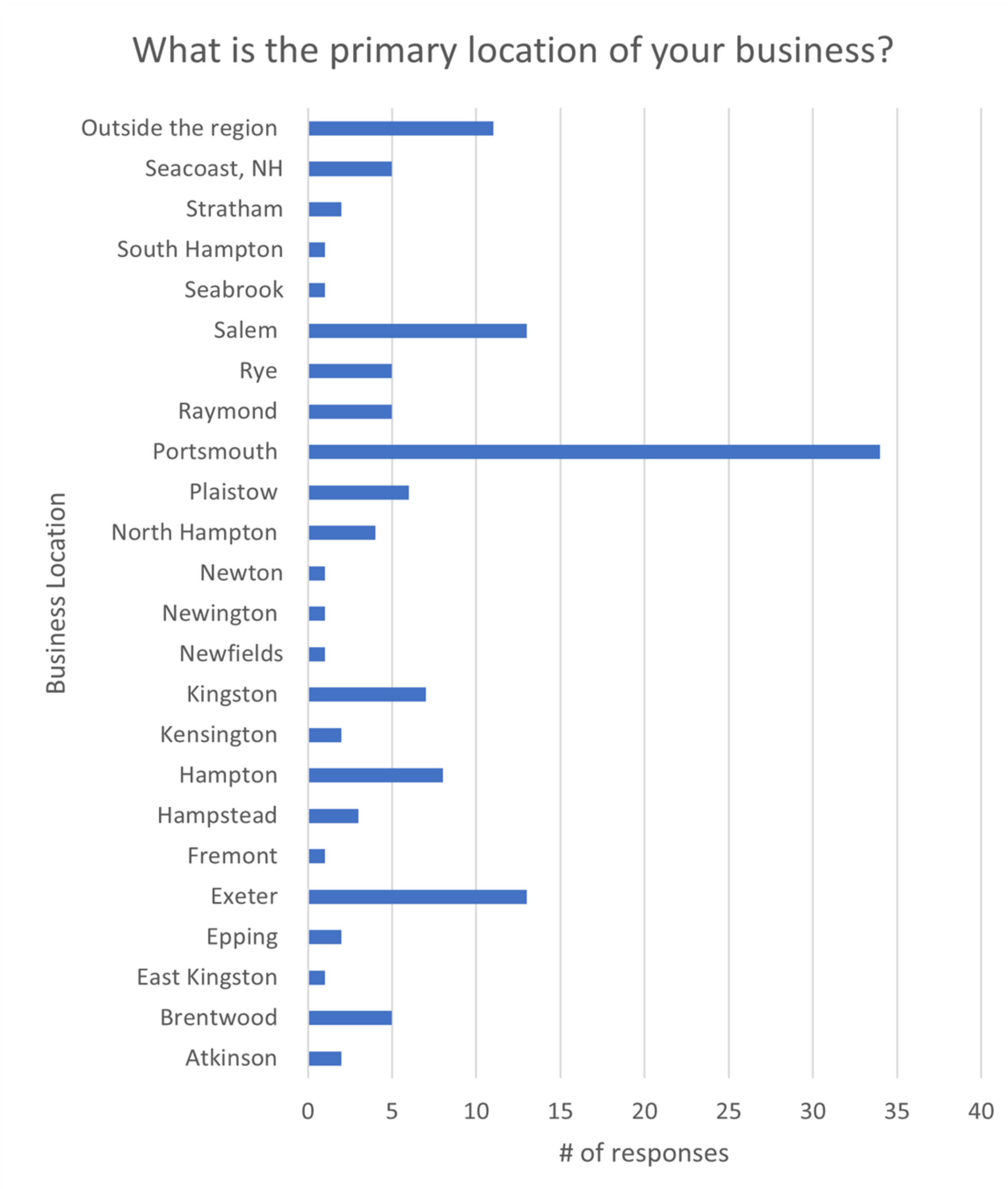
- How and if housing conditions stand in the way of employer attraction and retention?
- What types of housing solutions are most appealing to employers and employees?
- What housing solutions businesses would consider supporting in order to alleviate the current housing pressures on employees?

New Hampshire RSA 36:47(II) requires that "For the purpose of assisting municipalities in complying with RSA 674:2, III(*l*), each regional planning commission shall compile a regional housing needs assessment, which shall include an assessment of the regional need for housing for persons and families of all levels of income." The RPC is developing the Regional Housing Needs Assessment in coordination with the nine New Hampshire Regional Planning Commissions through a statewide effort.

Participants

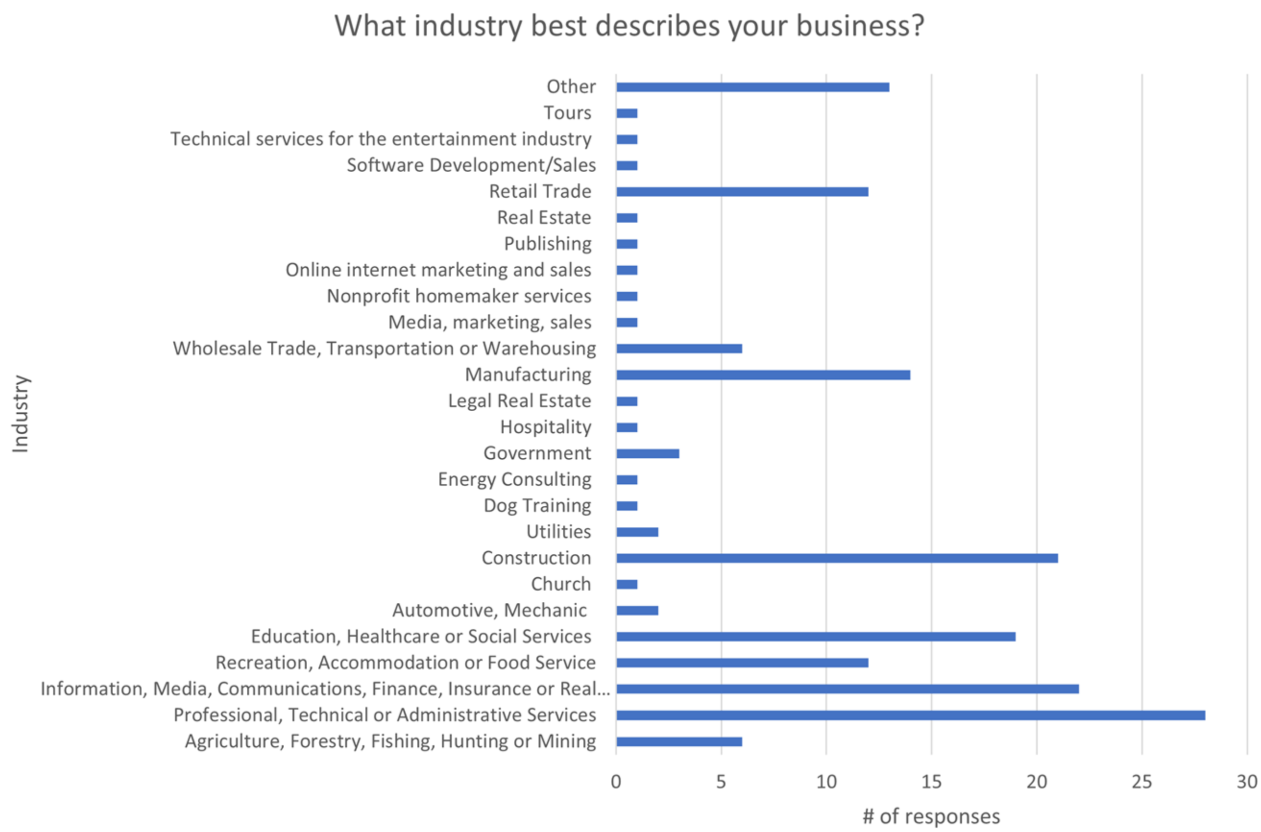
Business Location

Survey participation by location and by industry was dispersed among the region and various industry types. Portsmouth-based businesses had the largest representation in the region, likely due to the high concentration of employers and population. It is also noted that many businesses that participated stated they service multiple municipalities.



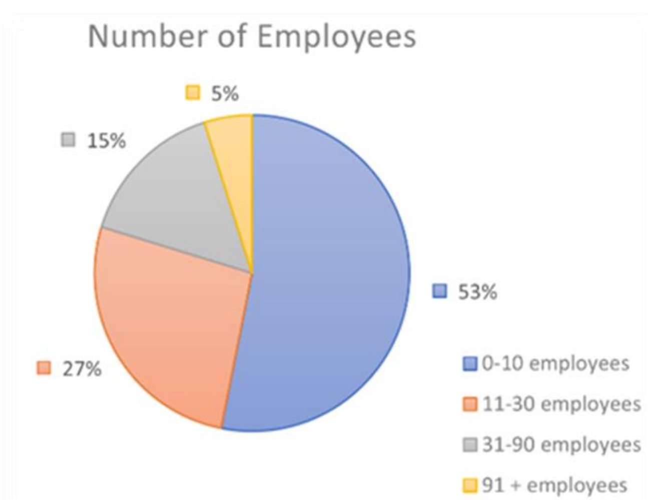
Industry

Of the businesses and employers that participated in the survey, "professional, technical or administrative services", "information, media, communications, insurance or real estate", "construction", and "education, healthcare or social services" were the industries with the highest representation in this survey.



Business Size

Over 50% of the businesses that participated in the survey have less than 10 employees. About 20% of participants have over 30 employees and 5% have 91 or more employees.



Earnings

Below includes a breakdown of the approximate earnings level of employees as reported by employers who participated in the survey. As show below, approximately 52% of respondents identified that 0%-25% of their employees earned between $0 - $24,999; 36% of respondents identified that 0%-25% of their employees earned between $25,000 - $49,999, and so on.

The largest income brackets employers identified for their employees were between $25,000 and $74,999.

In 2021, approximately what proportion of your full-time employees earned:

	0% - 25%	**26% - 50%**	**51% - 75%**	**76% - 100%**	**N/A**
$0 - $24,999	52%	4%	4%	17%	22%
$25,000 - $49,999	36%	28%	10%	13%	13%
$50,000 – $74,999	39%	28%	12%	7%	14%
$75,000 – $114,999	43%	17%	9%	12%	19%
$115,000 or higher	53%	12%	1%	15%	19%

Key Findings

The following outlines key survey findings. The survey was designed to assist the RPC and Regional Planning Commissions in understanding current housing supply, demand, and affordability and begin to identify what types of housing may be needed in the future.

Several key themes emerged from survey responses:

- While remote work has become more prevalent in recent years, of the employers who participated in this survey, 79% stated that less than 25% of employees work from home periodically and 75% of employers stated that less than 25% of employees work from home regularly.
- Over 50% (56%) of participants stated that a housing supply shortage impacts their ability to attract or keep workers though only 26% agreed that their company has a role in helping to address New Hampshire's housing issue.
- Employers are increasingly seeking unique and innovative solutions to address housing challenges (i.e., Housing assistance, addressing other challenges such as childcare, advocating for energy efficient building etc.).
- Many employers sited local zoning as a major hurdle for building and developing affordable housing that would meet the needs of their employees. Further, there was discussion in the open comments of the survey about an increased need for diverse types of housing such as smaller homes and lots, multi-family and condos that would suit the needs of younger or smaller families.
- Housing challenges are impacting both employees of low and moderate income.

Housing and Employees

Where do your employees live?

When asked where employees live in relation to their place of employment, 83% of employers stated that less than 50% of their employees live in the same neighborhood as their organization. 91% stated that less than 50% live in the same Town/City but not the same neighborhood as their organization.

Approximately 58% of employers stated that less than 50% live in a non-adjacent Town/City and approximately 41% stated that more than 50% live in a non-adjacent Town/City.

"As a childcare provider, we would like to work with others who offer workforce housing and develop plans to co-locate childcare and housing together to create more options for both issues."

- Employer Survey Respondent

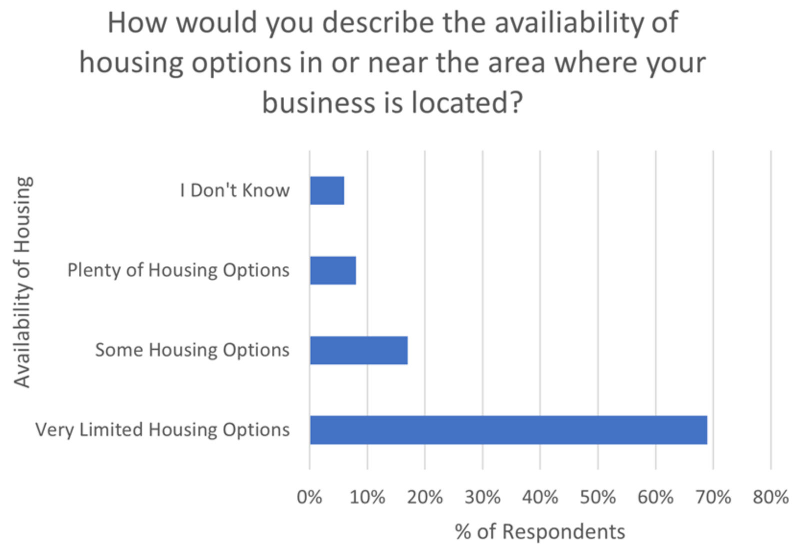
In recent years, remote work as become more popular and accessible due to the Covid19 Pandemic. Interestingly, of the employers who took this survey, 79% stated that less than 25% of employees work from home periodically and 75% of employers stated that less than 25% of employees work from home regularly.

Approximately what percentage of you employees live:

	0% - 25%	26% - 50%	51% - 75%	76% - 100%
In same neighborhood	76%	7%	2%	15%
In the same Town/City but not the same neighborhood	75%	16%	4%	4%
In an adjacent Town/City	51%	30%	12%	7%
In a non-adjacent Town/City	37%	21%	21%	20%
Employees work from home periodically	79%	6%	4%	11%
Employees work from home regularly	75%	5%	3%	17%

Housing Availability

When asked about the availability of housing options in or near the area where their business is located, 69% of employers responded they would describe the availability as having "very limited housing options". Approximately 8% stated that they would describe the availability as having "plenty of housing options".



Attracting and Retaining Workers

When asked of employers believe that a housing supply shortage impacts their ability to attract or keep workers, 56% stated yes and 41% stated no. When asked further on which factors impact employers' ability to attract or keep qualified workers, 54% of respondents selected the "Cost of housing (rental or purchase)" as a High Impact. "Proximity of housing to public transportation" and "Proximity of housing to amenities (e.g., parks, open space, schools)" where selected as mostly Low Impact on the ability to attract or keep qualified workers. Employers were almost evenly split on the impact of "Availability of housing (rental or purchase)" on the ability to attract or keep qualifies workers with 31% stating Low Impact, 34% stating Moderate Impact, and 35% stating High Impact.

> "It's no exaggeration to say that the availability of affordable housing is THE biggest constraint to maintaining viable small farming businesses and the rural character of NH towns."
>
> - Employer Survey Respondent

To what extents do you think the following factors impact your ability to attract or keep qualifies workers?

	Low Impact	Moderate Impact	High Impact
Availability of housing (rental or purchase)	31%	34%	35%
Cost of housing (rental or purchase)	24%	22%	54%
Quality of housing	49%	35%	15%
Proximity to the workplace	44%	33%	24%
Proximity of housing to public transportation	69%	20%	11%
Proximity of housing to amenities (e.g. parks, open space, schools)	73%	21%	6%

When asked how employers hear about housing challenges, 56% stated they hear from employees, 26% from job candidate(s), and 18% stated they have not heard about housing problems.

Housing Assistance

Employers were asked if they participate in any strategies specific to helping employees secure housing. The strategies provided in the question included:

- Down payment and/or closing cost assistance
- Rent Subsidy
- Secondary (Gap) Financing
- Homebuyer Education
- Moving Cost Assistance
- Cash Contributions
- Land Donation
- Construction Financing
- Low-income Housing Tax Credit Investments
- Employer Operated Housing

Of the strategies listed, 98-99% of respondents stated that they did not provide any employer assistance, except the following strategies were utilized by 4-7% of respondents:

- Homebuyer Education (7%)
- Moving Cost Assistance (6%)
- Cash Contributions (4%)

Though majority of employers do not currently provide assistance for employees seeking to secure housing, there was some interest in learning about details or providing certain strategies, most notable, Low-income Housing Tax Credit Investments and Employer Operated Housing.

When respondents were asked if they saw their company having a role in helping to address New Hampshire's housing issue as it related to employee attraction and retention 74% responded no, while 26% responded yes.

Municipal Officials Survey

Rockingham Planning Commission staff created a municipal survey to help inform the Regional Housing Needs Assessment. It was distributed electronically on April 7, 2022 to municipal planners, town administrators, town managers, administrative assistants, Planning Board members, and Select Board members. The survey remained opened for 4 months.

There were 24 participants representing the following entities:

- RPC Commissioner
- Planning or Zoning Staff
- Planning Board or Zoning Board Member
- Town Administrator
- Committee or Commission Member
- Council, Selectmen, Alderman
- Other

What is the state of housing in your community?

Survey respondents were asked "What has been your municipality's experience with housing development proposals? Have you had recent housing development proposals submitted to the planning board? Has the public been supportive of housing proposals?" Of the 13 respondents who answered this question, 11 had recent housing development proposals submitted to the planning board. 5 reported mixed levels of support from the public for housing proposals, 1 was unclear about the level of public support, and 5 reported that the public was generally supportive of housing proposals.

Respondents were also asked to identify the highest priority issues for their municipality to address. 67% of respondents said that natural resource preservation and preservation of rural character was their highest priority. Only 39% identified affordable and/or workforce housing as their highest priority.

	High Priority	Medium Priority	Low Priority	Not a Priority	Unsure
Economic Development	42%	42%	11%	5%	-
Workforce Development	16%	37%	26%	11%	11%
Natural Resource Preservation/Preservation of Rural Character	67%	33%	-	-	-
Affordable and/or Workforce Housing	39%	33%	22%	-	6%
Transportation/Infrastructure Improvements	24%	41%	35%	-	-

That said, not a single respondent strongly agreed with the statement "your municipality provides affordable home purchase choices." In fact, 41% of respondents disagreed with that statement and 18% strongly disagreed with it.

	Strongly Agree	**Agree**	**Neutral**	**Disagree**	**Strongly Disagree**	**N/A**	**I do not know**
Your municipality provides affordable home purchase choices	-	12%	29%	41%	18%	-	-
Your municipality provides adequate rental options	-	25%	12%	38%	19%	-	6%
Your municipality provides housing choices that attract work of all ages	-	28%	6%	50%	17%	-	-
Your municipality provides adequate housing options for aging seniors	-	41%	18%	29%	12%	-	-
Your municipality provides adequate housing choices near jobs and transit access	6%	28%	22%	17%	22%	6%	-

Respondents were slightly more optimistic about the state of affordable housing at the regional level, however, 50% still disagreed with the statement "your region provides affordable home purchase choices."

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	N/A	I do not know
Your region provides affordable home purchase choices	6%	12%	25%	50%	-	-	6%
Your region provides adequate rental options	6%	19%	31%	25%	-	-	19%
Your region provides housing choices that attract work of all ages	6%	38%	12%	25%	6%	-	12%
Your region provides adequate housing options for aging seniors	-	38%	31%	12%	6%	-	12%
Your region provides adequate housing choices near jobs and transit access	6%	29%	35%	24%	-	-	6%

What factors are influencing housing affordability and availability in your community?

When asked "what do you see as the primary factors impacting housing availability and affordability in your municipality?" the most common response was increased property values, followed by limited available land, and growing desirability of the community. Other responses included lack of infrastructure (such as water and sewer), limited housing options, and a desire to maintain community character. Likewise, when respondents were asked "what are the greatest constraints to your municipality achieving their housing goals?" the most common answers were lack of available buildable land, community willingness, increased property values, and lack of infrastructure.

Survey respondents were also asked whether there are land use or zoning constraints on affordable or workforce housing developments in their community. 5 out of the 15 respondents said there are not land use or zoning constraints on affordable or workforce housing development and 1 respondent was unsure. 9 respondents said there are land use or zoning constraints on affordable or workforce housing development. Of those 9 who responded yes, 3 reported constraints related to 2-acre minimum lot sizes and 3 reported constraints related to lack of sewer/water infrastructure. Other barriers that were identified later in the survey include concerns about traffic and reduced quality of life, cost of land and availability of buildable land, lack of support from elected officials and the public, lack of staff capacity, and workforce housing and age restricted zoning.

What impact is housing affordability and availability having on your community?

Survey respondents were asked "how has housing availability and affordability impacted your municipality?" The most common response was that it has impacted workforce availability. Open ended comments included:

- "I think there is a VERY limited number of workers available to service the communities that need their service. Not unusual to hear about folks driving 30-50 minutes to work at some fairly basic jobs."
- "Many employers are not able to meet their workforce needs. Many interested would-be residents are not able to afford housing in the community. Many households include older parents, or children in their 20s or 30s not by choice but because there are no alternative housing options for them at an affordable cost."
- "little opportunity for workforce or moderate income housing to support job opportunities"
- "I can't see how town workers- teachers, safety, other- can afford to live in this town. Also, I imagine that part of our employment issues (which existed prior to COVID) are due to a lack of housing that's affordable for a broad range of people. Home values are going up, and the shifting to remote work is bringing in people of means 'from away' (as old timers around here would say) driving low inventory prices up even more. I think climate migration is going to drive things up even more over time."
- "If you asked a current resident, they would probably say that it hasn't. However, young people that grew up in Newington can rarely afford to stay here because of the high cost and low inventory of housing. Because Newington has many service businesses, finding employees to fill these jobs is increasingly difficult."
- "There is a major issue with work force for our businesses due to the lack of housing for employees within a reasonable commute."
- "Another way housing availability and affordability has impacted Exeter is that those who work in Town or close by cannot afford to live near their work, so they are forced to move away, leaving their jobs at area businesses. Local businesses have had to cut their hours of business and/or close their doors due to workforce shortage."

Other responses included increased property values and a lack of housing inventory.

What programs have been successful?

Respondents were asked "what types of programs, policies, or strategies has your municipality implemented to address housing needs and has it been successful?" Two respondents reported their communities have tried density bonuses with limited success. One of these respondents noted that their community provides density bonuses for either workforce housing or community space; every applicant has offered community space but no applicant has offered workforce housing. They are now trying to remove or lessen the incentives for community space in order to increase the attractiveness of the workforce housing option. Other respondents mentioned permitting accessory dwelling units and working through their Master Plan to address housing needs. It is unclear how successful these measures have been.

New Hampshire Landlord and Property Manager Survey

Respondents were asked "what types of programs, policies, or strategies has your municipality implemented to address housing needs and has it been successful?" Two respondents reported their communities have tried density bonuses with limited success. One of these respondents noted that their community provides density bonuses for either workforce housing or community space; every applicant has offered community space but no applicant has offered workforce housing. They are now trying to remove or lessen the incentives for community space in order to increase the attractiveness of the workforce housing option. Other respondents mentioned permitting accessory dwelling units and working through their Master Plan to address housing needs. It is unclear how successful these measures have been.

Introduction

Planners worked with Nick Norman, Government Affairs for the Apartment Association of NH, to distribute a survey to the Association's membership in mid-October. An attempt was made after Thanksgiving to increase participation and the survey closed during the first week in December.

A total of 46 individuals responded to the survey. 43 respondents represented for-profit businesses and 3 represented non-profits. Respondents rented and/or leased an average of 122 housing units. 33% of respondents rented studio apartments, 70% rented 1-bedroom apartments, 87% rented 2-bedroom apartments, 65% rented 3-bedroom apartments, 20% rented 4 or more bedroom apartments, 30% rented single family homes, and 28% rented duplex units. Respondents were also asked to list the NH municipalities in which they currently rent or manage housing units. Municipalities represented from the RPC region included: Portsmouth (3 respondents), Salem (3), Epping (2), Stratham (1), Exeter (1), and Plaistow (1). 93% of respondents said that 76% to 100% of the units that they own or manage are available for long-term lease (6 months or more).

The following data comes from survey respondents.

Subsidies and Rental Assistance

74% of respondents reported that they do not own or manage any income-restricted housing units and 20% said yes. 61% of respondents said that they accept some type of rental housing subsidy for any of their housing units. 13% reported that they used to but no longer do, 15% said no, and 11% said no but they would be willing to look into doing so. Of those who have accepted subsidies, their tenants participated in the following programs: HUD housing choice vouchers (83%), NH Fuel Assistance (73%), Covid relief (67%), rent or eviction relief programs unrelated to Covid relief programs (27%), HUD project based vouchers (13%), and low income housing tax credits (13%). Most respondents who have not participated in subsidies stated that their reason for not doing so was that they were too complicated or restrictive. Other reasons given included concerns about problematic tenants, being unfamiliar with the programs, and impact on profits.

Opportunities for Expansion

Respondents were asked to indicate the current wait times for their properties, if they are currently keeping a waiting list. Of the 16 participants who answered this question, 12 had no waiting list, 1 had a 0-6 month waiting list, 1 had a 6-12 month waiting list, and 2 had waiting lists greater than 2 years. When asked if they plan to acquire, build, or manage any new rental units in the next 5 years, 24% of respondents said yes and 54% said no. Overwhelmingly, respondents listed profitability, cost, and financing as key factors driving their decisions to grow their businesses.

35% of respondents said that finding adequately skilled labor to manage their property represented a major hardship, followed by utility costs (30%), restrictions on evictions (30%), and repair and maintenance costs (28%).

Realtor Survey

Planners worked with Dave Cummings, Communications Director for the NH Association of Realtors, to distribute a survey to the Association's membership during the last week of May 2022. A follow-up email was sent in mid-July to increase participation and the survey closed at the end of the month.

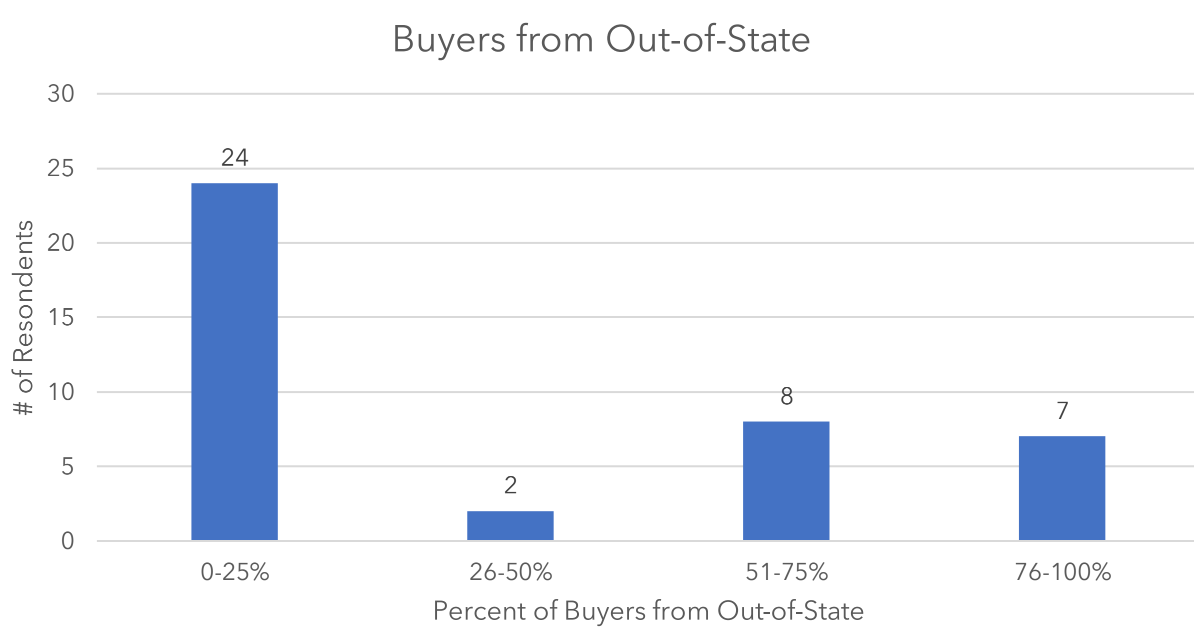
The following Real Estate Boards were represented in the survey:

- Capital Region Board
- Commercial Investment Board
- Contoocook Valley Board
- Granite State South Board
- Greater Claremont Board
- Greater Manchester Board
- Lakes Region Board
- Monadnock Region Board
- North Country Board
- Seacoast Board
- Strafford County Board
- Sunapee Region Board
- Upper Valley Board
- White Mountain Board

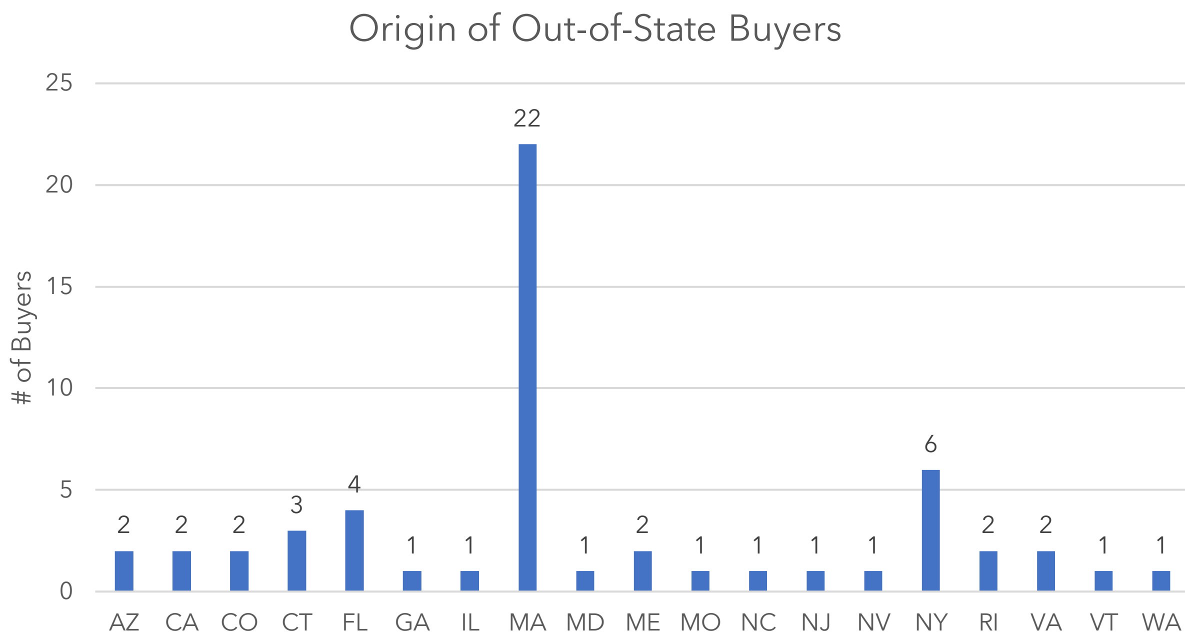
A total of 209 Realtors responded to the survey, including 41 representing the Seacoast Board. The Seacoast Board of Realtors serves Brentwood, East Kingston, Epping, Exeter, Greenland, Hampton, Hampton Falls, Kensington, Newcastle, Newfields, Newington, Newmarket, North Hampton, Nottingham, Portsmouth, Rye, Seabrook, South Hampton, and Stratham. The following data comes from survey respondents representing the Seacoast Board.

Out-of-State Buyers

Of the 41 respondents representing the Seacoast Board, 24 reported that 0-25% of their clients or sales came from out-of-state. 2 reported that 26-50% of buyers came from out-of-state, 8 reported that 51-75% of buyers came from out-of-state, and 7 reported that 76-100% of buyers came from out-of-state.

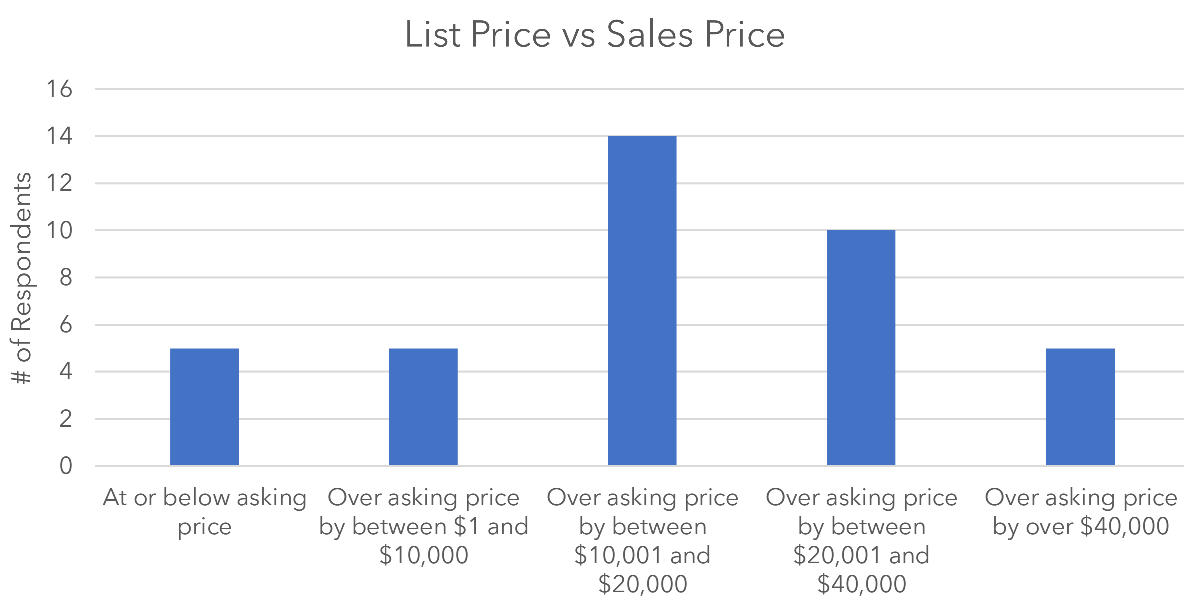


The majority of out-of-state buyers in the Seacoast Region came from Massachusetts, followed by New York and Florida.

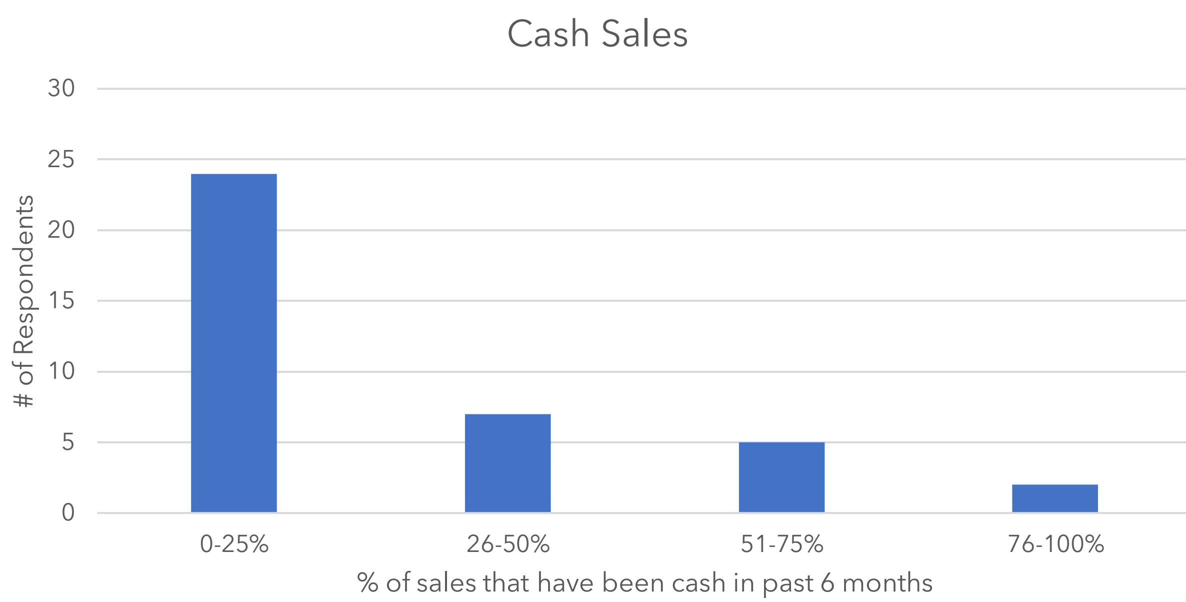


List Price vs Sale Price

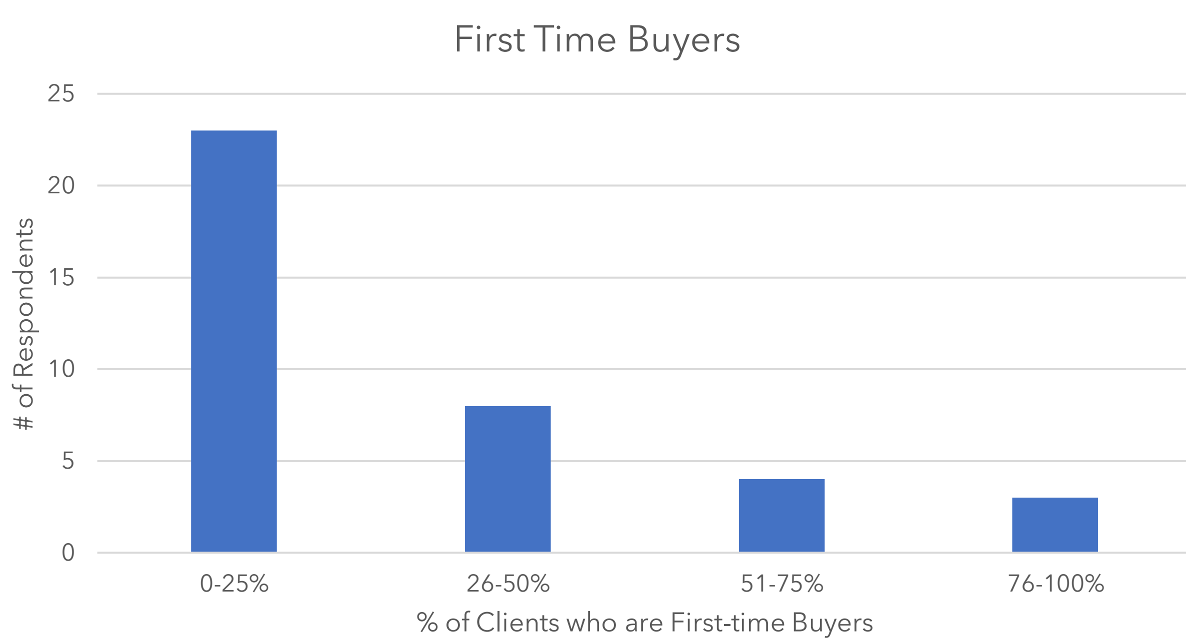
14 respondents said that in the past 6 months, on average sales prices have been $10,001 to $20,000 over list prices. Another 10 respondents stated that on average sales prices have been $20,001 to $40,000 over list prices.



Cash Sales
24 respondents reported that in the past 6 months 0-25% of their sales had been cash. 7 reported 26-50% of their sales were cash, 5 reported 51-75% of their sales were cash, and 2 reported that 76-100% of their sales were cash in the past 6 months.

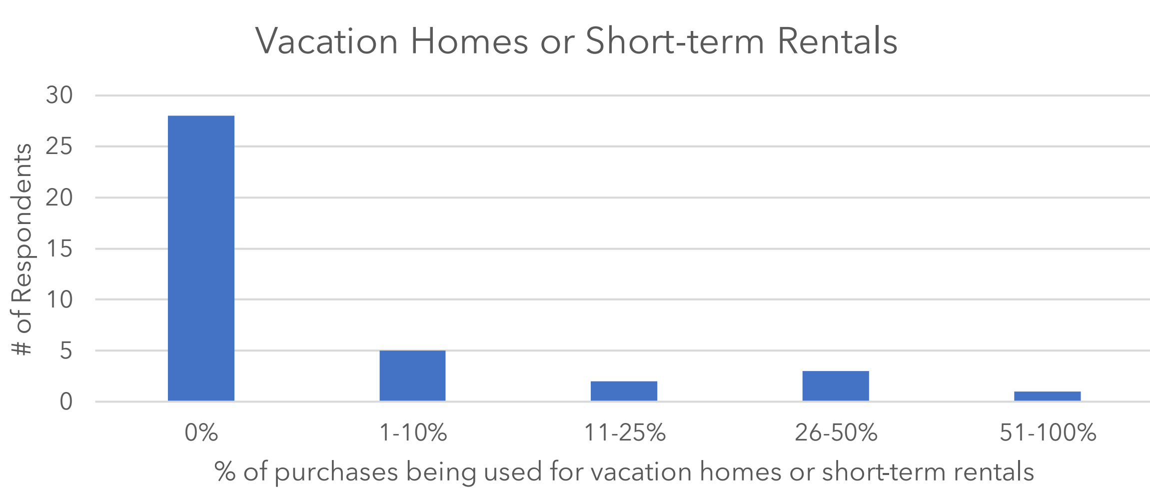


First Time Homebuyers
23 respondents reported that in the past 6 months 0-25% of their clients have been first-time buyers. 8 reported 26-50% of their clients were first-time buyers, 4 reported 51-75% of their clients were first-time buyers, and 3 reported that 76-100% of their clients were first-time buyers in the past 6 months.



Number of Offers Made
19 respondents reported that on average 0 to 5 offers were made on properties they represented in the past 6 months. 14 respondents reported 6 to 10 offers were made on average, 3 respondents reported 11 to 15 offers were made, and no respondents reported more than 15 offers had been made on properties they represented in the past 6 months.

Vacation and Short-Term Rentals
28 respondents said that in the past 6 months, no homes they were involved in buying or selling were being used as vacation homes or short-term rentals. 5 respondents said that 1-10% of purchases were being used as vacation homes or short-term rentals, 2 respondents said that 11-25% of purchases were being used as vacation homes or short-term rentals, 3 respondents said that 26-50% of purchases were being used as vacation homes or short-term rentals, and 1 respondent said that 51-100% of purchases were being used as vacation homes or short-term rentals.



Social Service Survey

This survey was distributed statewide during the Spring of 2022 to social service providers as defined in the purpose of this report. The effort was coordinated with the New Hampshire Council on Housing Stability Housing and Homelessness Systems work group, New Hampshire Coalition to End Homelessness, nine Regional Planning Commissions, Department of Health and Human Services, and Community Development Finance Authority. The survey was shared with the three New Hampshire Continuums of Care membership lists via email. The survey was also shared by Regional Planning Commissions on social media and via direct request.

The survey garnered 72 respondents of an estimated 140 providers with sufficient data to consider as part of this analysis.

For the complete summary of this survey please visit: **https://tinyurl.com/4775unuc**