

National Association of REALTORS®

*New Hampshire
Statewide Housing Preferences Survey*

December 2024

New Hampshire Housing Preferences Survey Methodology



400 (400 weighted)
Registered Voters
In New Hampshire



Wireless (154)
Non-wireless (45)
Online (202)



Interviews
Conducted
December 3-9, 2024

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
52%



Men
48%

Owner/Renter

Homeowner: 74%
Renter: 18%
Lives w/Friends/Family: 8%

Education

Non-College Graduates: 51%
4 Yr. College Degree: 26%
Post-Graduate Degree: 23%

Employment

Employed: 43%
Self-employed: 16%
Retired: 33%
Unemployed/Other: 9%

Party Registration

Democrat: 30%
Independent: 38%
Republican: 33%

Region

Central: 24%
North: 18%
Rockingham: 24%
South: 33%

Age

18-29: 4%
30-39: 12%
40-49: 16%
50-64: 31%
65+: 35%

Income

Under \$75K: 32%
\$75K to \$150K: 38%
More than \$150K: 23%

Executive Summary

New Hampshire voters are split on the direction of the state. Half say that the state is off on the wrong track (50 percent), while under half feel things are going in the right direction (46 percent). Prior to the pandemic, 62 percent of New Hampshire voters said the state was headed in the right direction.

Large majorities see a lack of housing in their communities. Sixty percent say that housing availability is a very (38 percent) or fairly (22 percent) big problem. Fifty-eight percent say there are not enough different types of housing like apartment buildings, townhomes, and duplexes. Forty-one percent say that there are enough.

Housing costs are a big problem. Seventy-seven percent say that housing affordability is either a very (56 percent) or a fairly (21 percent) big problem.

Residential development is a more divisive issue now than in 2019. In 2019, a 56 percent plurality of voters said that the pace of residential development in their area was “about right.” Now, voters are divided between saying that residential development is too fast (35 percent) or about right (40 percent). One quarter of voters continue to say that the pace of residential development has been too slow (25 percent now, up from 18 percent in 2019).

Housing is a slightly higher priority than preserving open land and the rural character of the state. On a scale of 1 to 5 where one means it should not be a priority at all and five means it should be a top priority; half of voters say affordable housing should be a top priority (5-out-of-5). Just under half say that creating more housing options for working families should be a top priority (45 percent). Housing is a higher priority than preserving forests, fields, and open lands (37 percent 5-out-of-5) and preserving New Hampshire’s rural character is the lowest priority of those tested (32 percent 5-out-of-5).

Executive Summary

Voters lean towards building more housing to bring down costs, rather than limiting housing to preserve the rural character of the state. Fifty-four percent feel that building more housing to bring down costs is more important to them. Forty-three percent feel that limiting housing construction to preserve the rural character of New Hampshire is more important to them.

Voters lean towards saying that building more housing closer together on smaller lots is a better way to preserve the rural character of New Hampshire than building fewer homes further apart on larger lots. Fifty-four percent feel that they can best preserve New Hampshire's rural character by building more housing closer together on smaller lots. Forty-two percent feel that they can best preserve the rural character of the state by building single-family homes further apart on larger lots.

There is strong and broad support for allowing attached ADUs, detached ADUs, and homes on lots smaller than one acre.

- The New Hampshire state legislature recently passed a law that gives all property owners the right to build an attached accessory dwelling unit, or ADU, on their property. This means that they can add a basement apartment, attic apartment, garage apartment, or an in-law suite to their main residence. (62 percent strongly favor, 90 percent total favor)
- The New Hampshire state legislature is considering a law that would give all property owners the right to build a detached accessory dwelling unit, or ADU, on their property. This means that property owners could add a separate structure, such as a guest house, that shares a lot with their main residence. (47 percent strongly favor, 81 percent total favor)
- The state legislature is considering a law that would allow homes on lots that are smaller than one acre. This would increase the amount of build-able land and help ease the housing shortage. (38 percent strongly favor, 66 percent total favor)

Executive Summary

Most voters are satisfied with their housing situation. Seventy-one percent rate their housing situation at either a 4 (18 percent) or a 5 (53 percent) on a 5-point scale where 5 means very satisfied). However, voters are less satisfied with their housing now than before the pandemic (70 percent satisfied, compared to 83 percent in 2019).

Many feel that paying their rent or mortgage is a financial strain. Almost half feel that paying their rent or mortgage is either a slight (23 percent) or significant strain (24 percent). Voters feel more of a financial strain from their rent or mortgage payment now (47 percent significant/slight strain) than in 2019 (38 percent significant/slight strain).

Over half of voters have not moved within the last ten years nor plan to move again within the next ten years. Fifty-five percent have been in their current home for more than 10 years. Forty-seven plan to stay for at least 10 more years while 49 percent plan to move within the next 10 years.

Half of New Hampshire voters are not confident that if they have to move, they would be able to afford to own or rent a home that meets their needs in their community. On a scale of 1 to 5 where 1 means they are not at all confident, and 5 means they are very confident, forty-nine percent give either a 1 (36 percent) or 2 (13 percent) – meaning they are not confident they would be able to find alternative housing. In 2019, one-quarter of voters gave either a 1 (14 percent) or 2 (13 percent).

Executive Summary

Most voters would like to stay in New Hampshire. Slightly less than half would like to stay in the community they live in now (45 percent). Twenty-four percent would like to move to another part of New Hampshire. One-fifth would like to move to another state (21 percent).

A sizeable minority would prefer an alternative to a single-family house. Almost half would prefer to live in a townhome or twin home (10 percent), a condo or apartment in a multi-family building (10 percent), an ADU (11 percent), or some other type of arrangement (14 percent) for their next home. Thirty-eight percent of New Hampshire voters say they would like their next home to be smaller than their current home.

A majority would still rather live in a single-family detached home (53 percent). Those who prefer a single-family detached home would also prefer a house on a large lot in a rural area (73 percent) over a house on a small lot in a town or city.

Having access to high-speed internet is very important to voters. Eighty-two percent of voters rate access to high-speed internet at either a 4 (20 percent) or a 5 (62 percent) on a 5-point scale where 5 means very important, and 1 means not important at all.

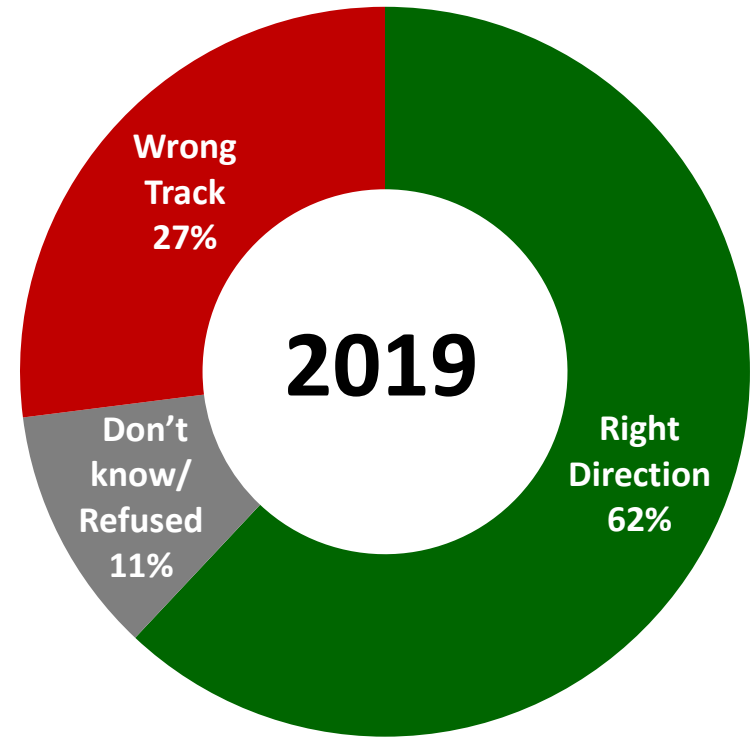
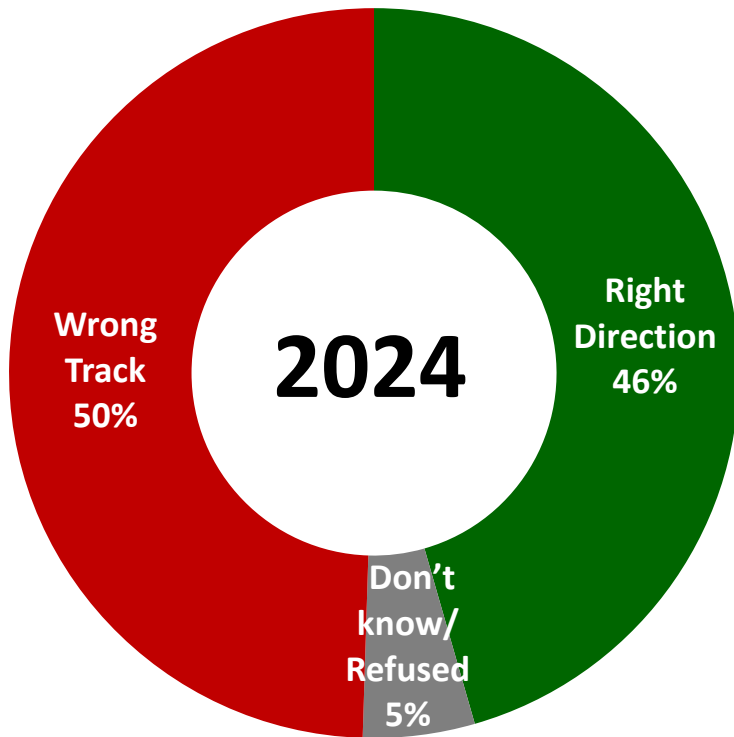
Voters also place high importance on having green space and trees around their home and privacy from neighbors. Seventy-eight percent of voters give having green space and trees around their home either a 4 (21 percent) or a 5 (57 percent). Voters also say that privacy from neighbors is an important factor (66 percent 4 or 5).

Most voters plan to use a REALTOR® the next time they buy or sell a house. Seventy-two percent plan to use a REALTOR® the next time they are selling or buying a house. Few have heard about the NAR® lawsuit (29 percent), and only one-quarter of them (7 percent of all voters) say that it makes them less likely to work with a REALTOR® in the future.

Policy

Voters Are Split on the Direction of the State; Significantly Less Happy Than Pre-Pandemic

Direction of New Hampshire 2024 vs. 2019

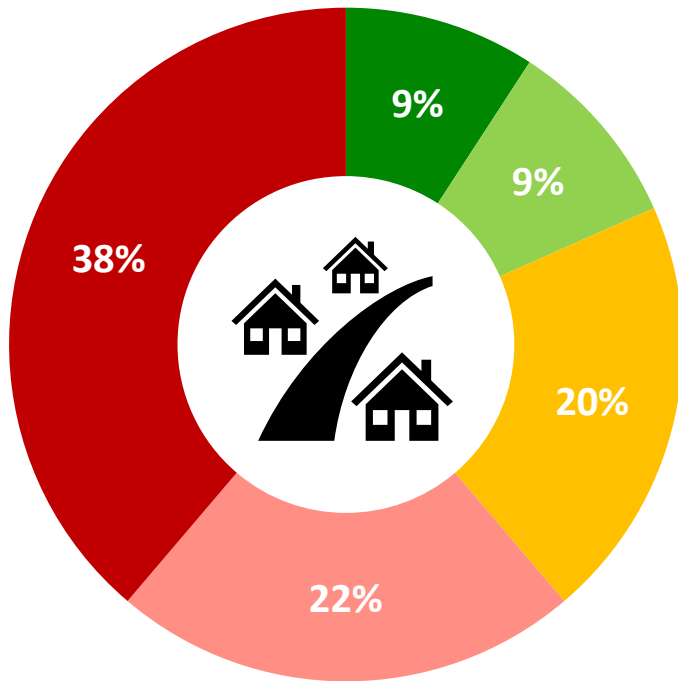


Q.4 Generally speaking, do you think that things in New Hampshire are going in the right direction, or do you feel things have gotten off on the wrong track?

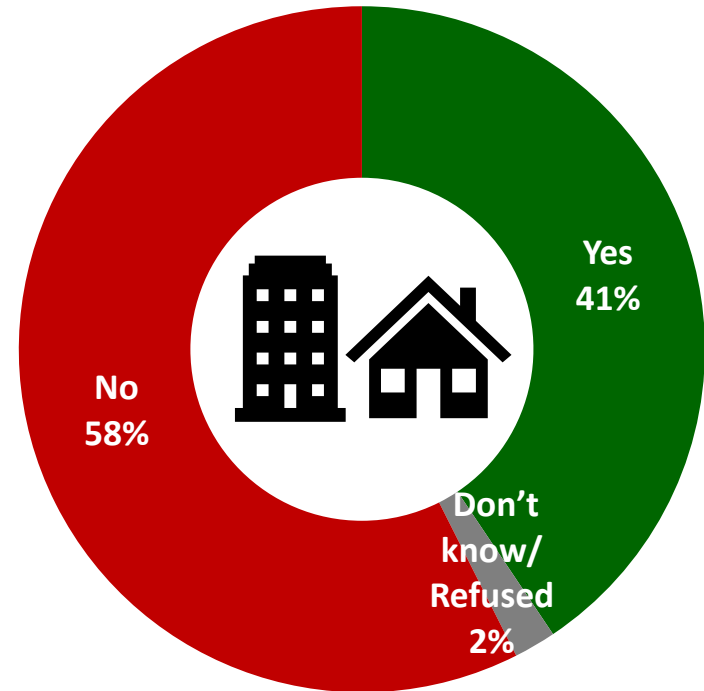
Large Majorities See A Lack of Housing

Availability of Housing

Big Problem: 60% | **Not a problem: 18%**



Enough Different Housing Types



Not a problem at all

A slight problem

A moderate problem

A fairly big problem

A very big problem

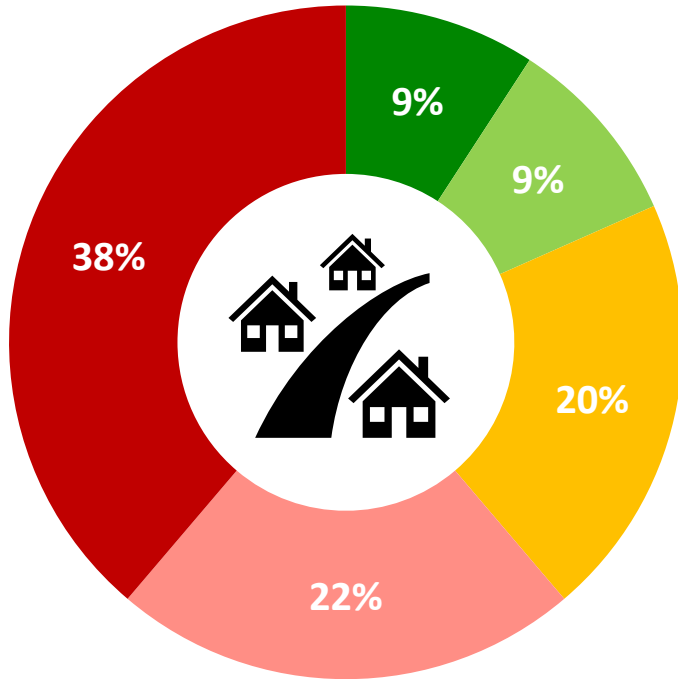
Q.11 (ROTATE Q.11 AND Q.12) How much of a problem is the availability of housing in your community, that is to say, the number of houses, condominiums, or apartments that are available to buy or rent?

Q.13 And when it comes to different types of housing - from single-family homes, to apartment buildings, to townhouses and duplexes - would you say there is enough variety of housing types in your community for the people who want to live there?

Even More People Say That Housing Affordability is a Problem

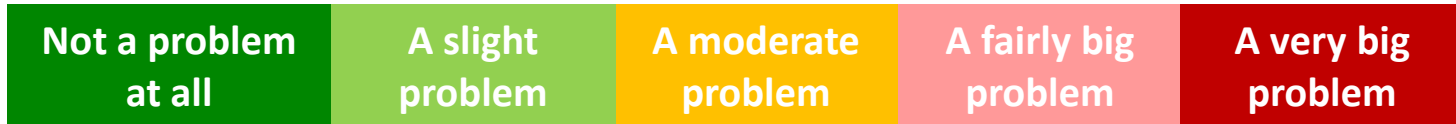
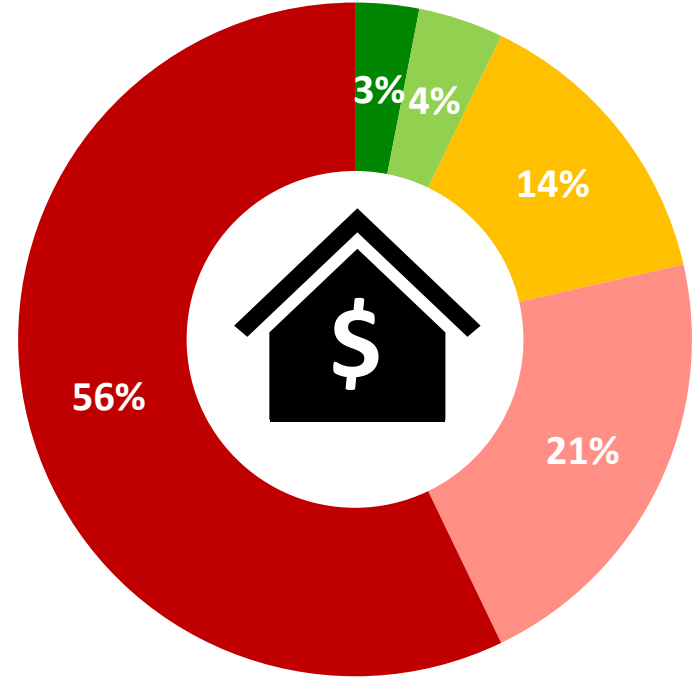
Availability of Housing

Big Problem: 60% | **Not a problem: 18%**



Housing Affordability

Big Problem: 77% | **Not a problem: 7%**

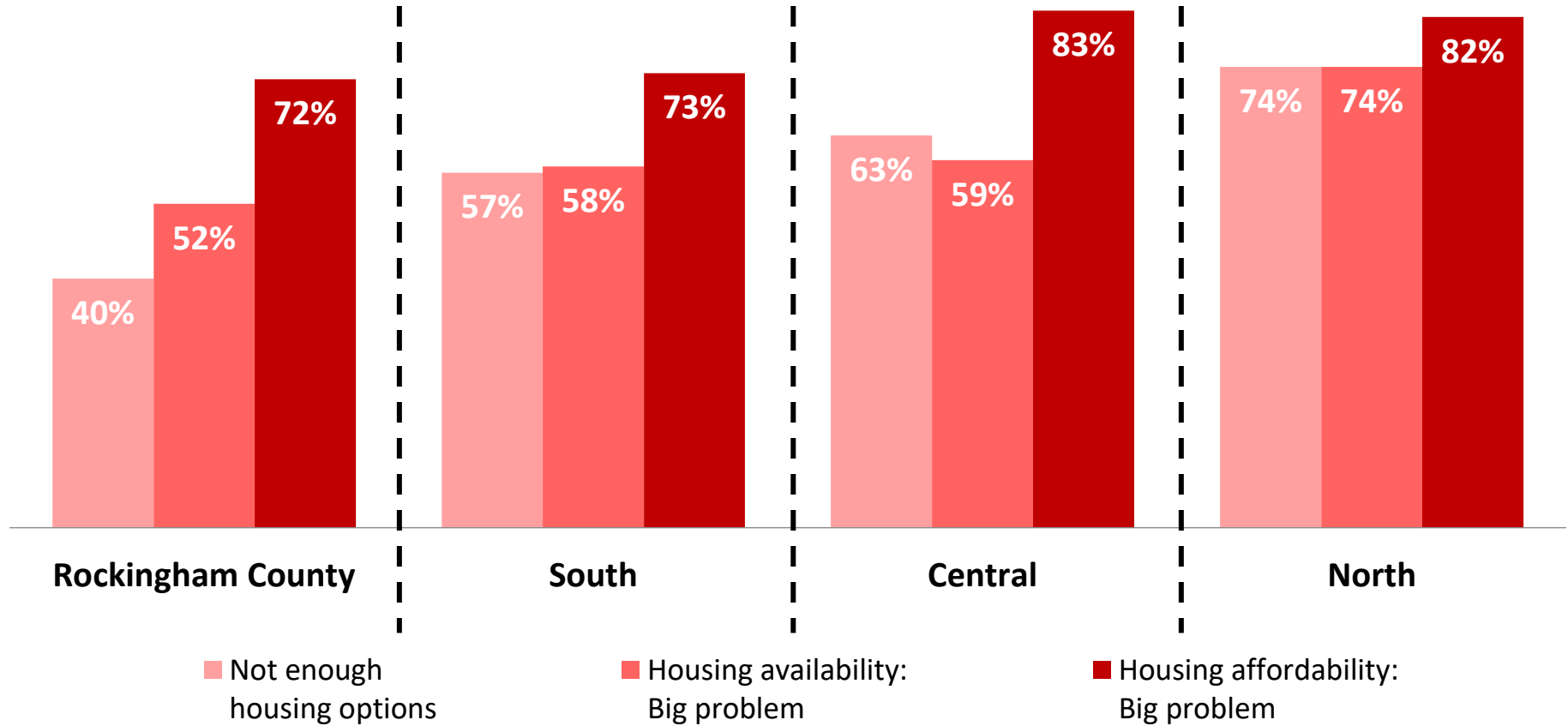


Q.11 (ROTATE Q.11 AND Q.12) How much of a problem is the availability of housing in your community, that is to say, the number of houses, condominiums, or apartments that are available to buy or rent?

Q.12 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?

Housing Crisis Is Everywhere, But Most Acute In Northern New Hampshire

Not Enough Housing Options, Housing Availability is a Big Problem, and Housing Costs Are a Big Problem
by Region

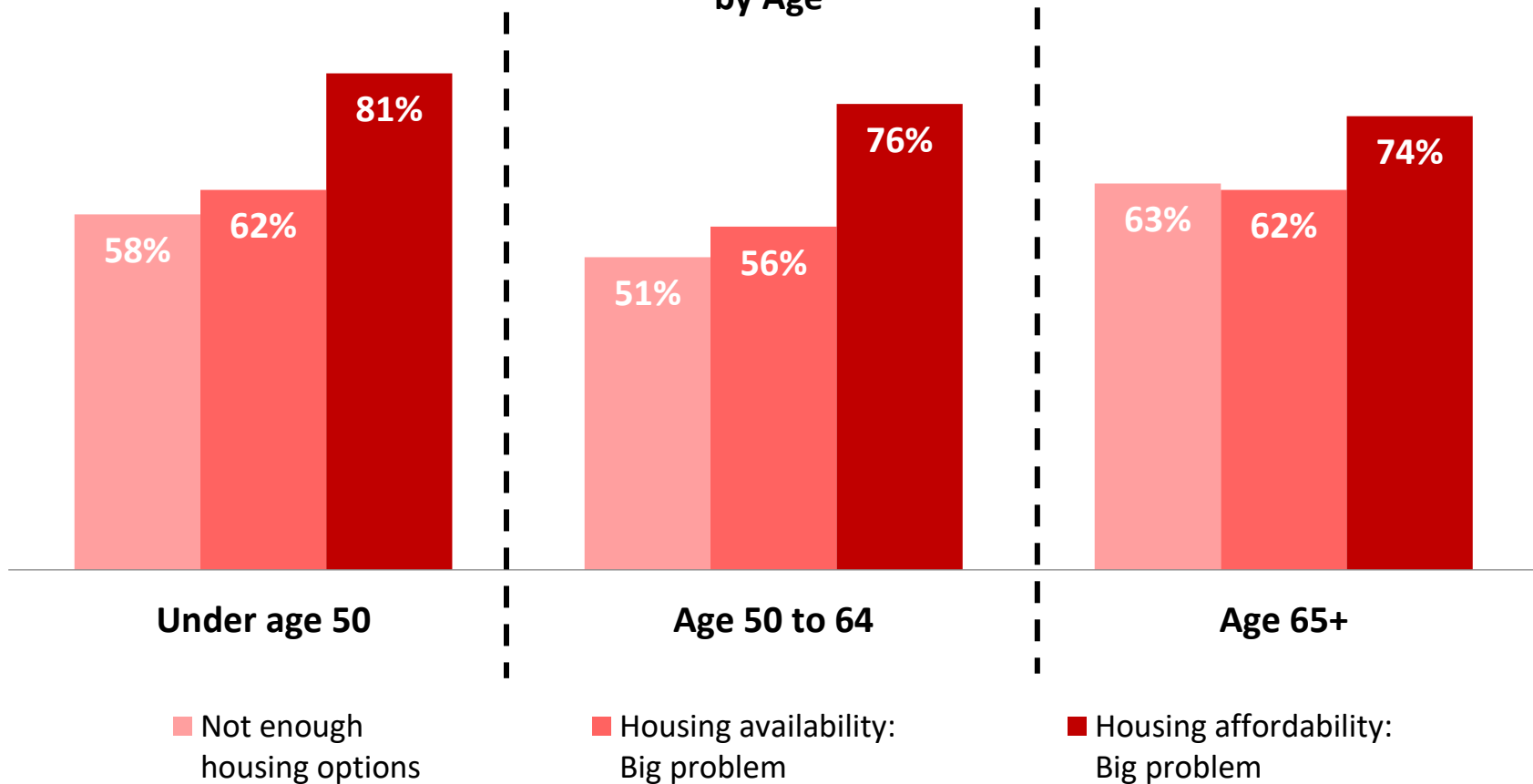


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Voters Across Age Groups See Housing Availability and Housing Costs as a Big Problem

Not Enough Housing Options, Housing Availability is a Big Problem, and Housing Costs Are a Big Problem

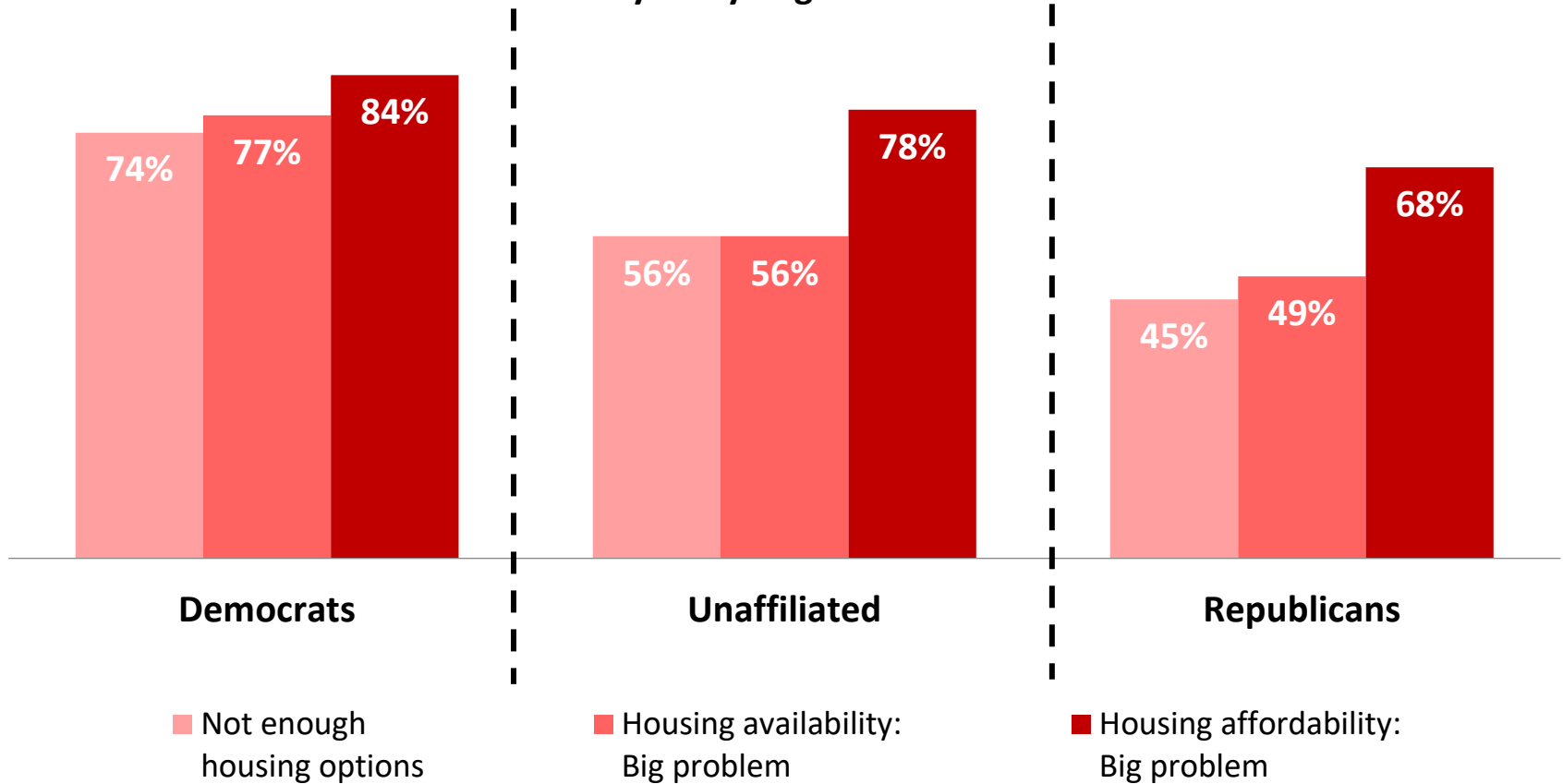
by Age



Q.11 (ROTATE Q.11 AND Q.12) 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? Q.12 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? Q.13 And when it comes to different types of housing - from single-family homes, to apartment buildings, to townhouses and duplexes - would you say there is enough variety of housing types in your community for the people who want to live there?

Partisan Gap, Especially on Housing Supply and Options

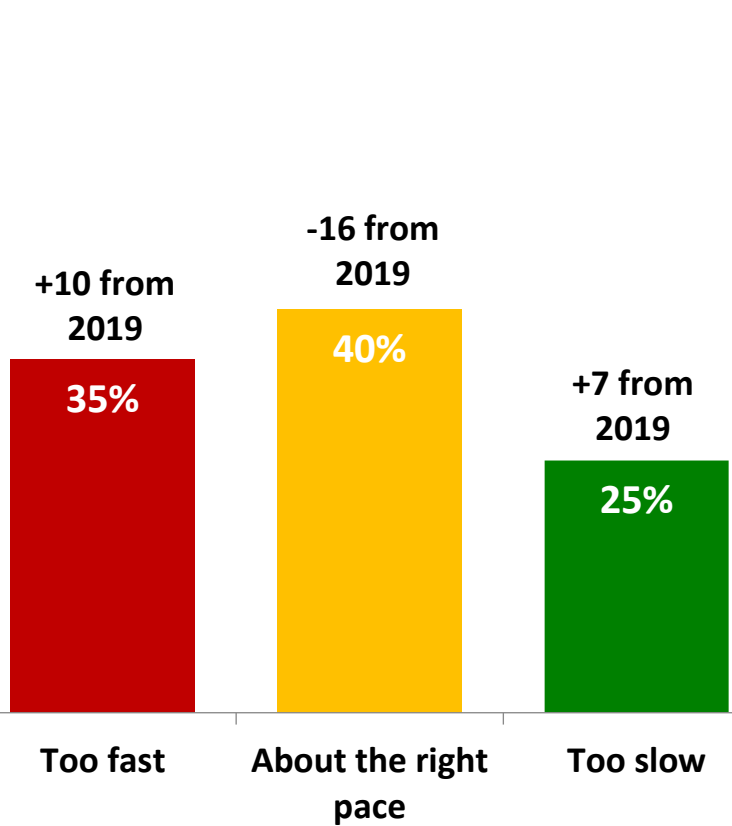
Not Enough Housing Options, Housing Availability is a Big Problem, and Housing Costs Are a Big Problem
by Party Registration



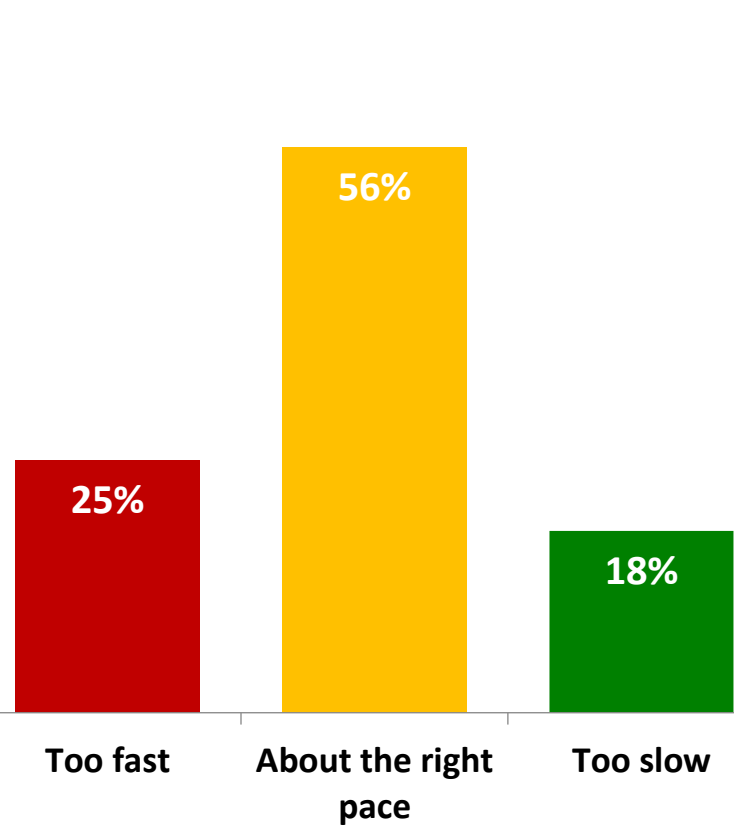
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Residential Development is a More Divisive Issue Now Than in 2019

Pace of Residential Development 2020



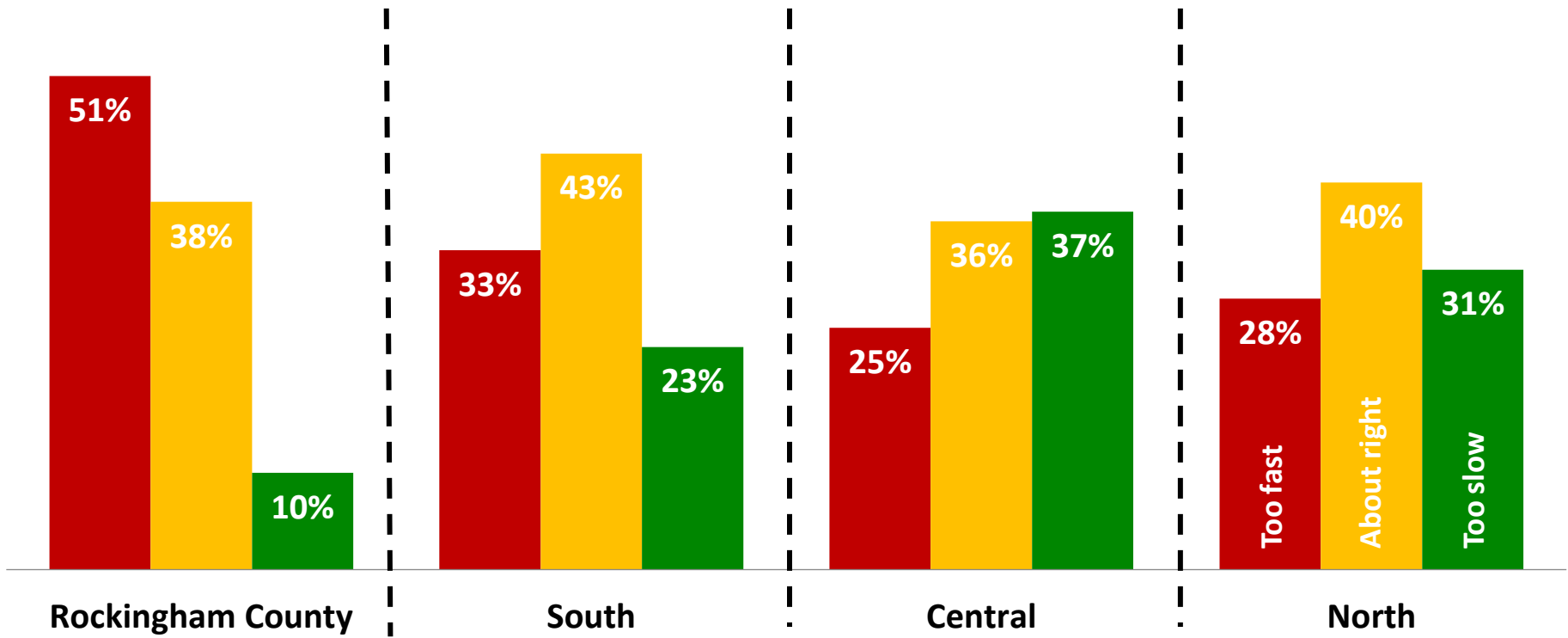
Pace of Residential Development 2019



Q.10 Would you say that the pace of RESIDENTIAL growth and development in your area is happening: (PHONE ONLY, CONTINUE) too fast, too slow, - or is it happening at about the right pace?

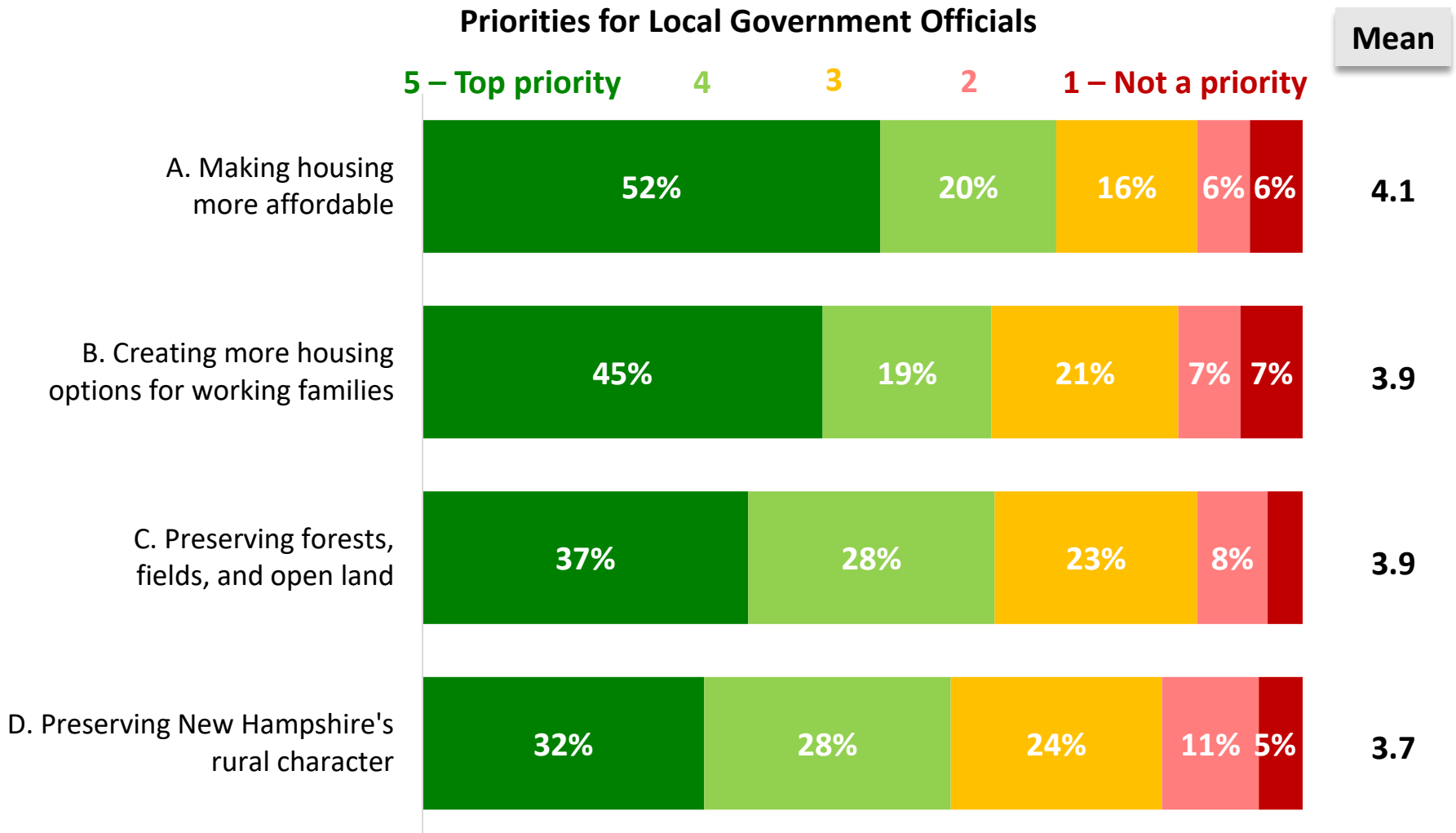
Rockingham County Voters More Likely To Say Residential Development is Too Fast; Central Voters Split Between Too Slow and About the Right Pace

Pace of Residential Development by Region



Q.10 Would you say that the pace of RESIDENTIAL growth and development in your area is happening: (PHONE ONLY, CONTINUE) too fast, too slow, - or is it happening at about the right pace?

Housing is a Slightly Higher Priority Than Preserving Open Land and New Hampshire's Rural Character

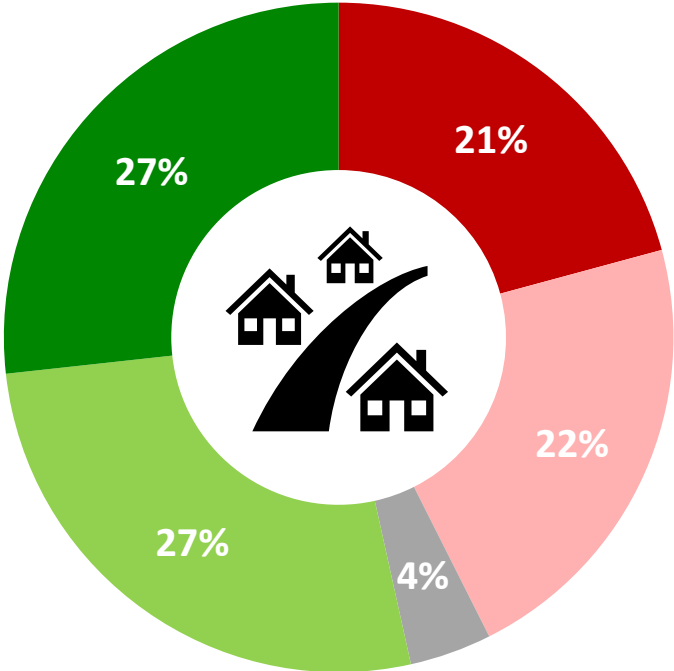


Q.5 Next, I am going to read some issues that people say should be a priority for local government officials. Please rate each of the following using a scale of one to five, where one means that issue is not a priority for you at this time, and five means that issue is a top priority for you at this 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.

In a Forced Choice, Voters Lean Towards Saying that Building Housing to Bring Down Costs is More Important Than Preserving the Rural Character of New Hampshire

Building More vs. Limiting Housing

Building More: 54% | Limiting Housing: 43%



(BUILDING MORE) Building more housing to bring down housing costs in New Hampshire.

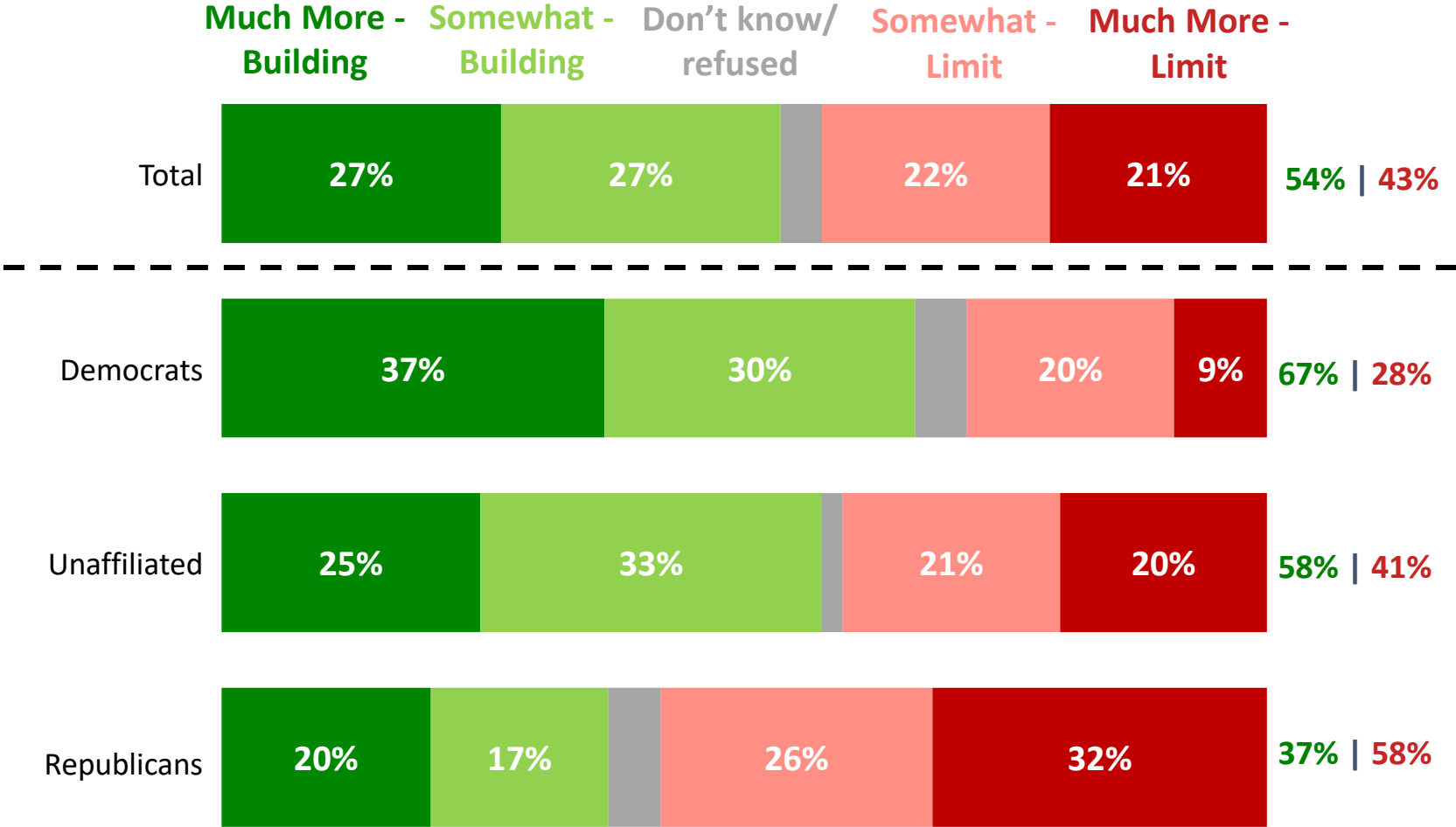
(LIMITING HOUSING) Limiting housing construction to preserve the rural character of New Hampshire.



Two-Thirds of Democrats Say That Building More Housing is a Higher Priority Than Preserving the Rural Character of NH

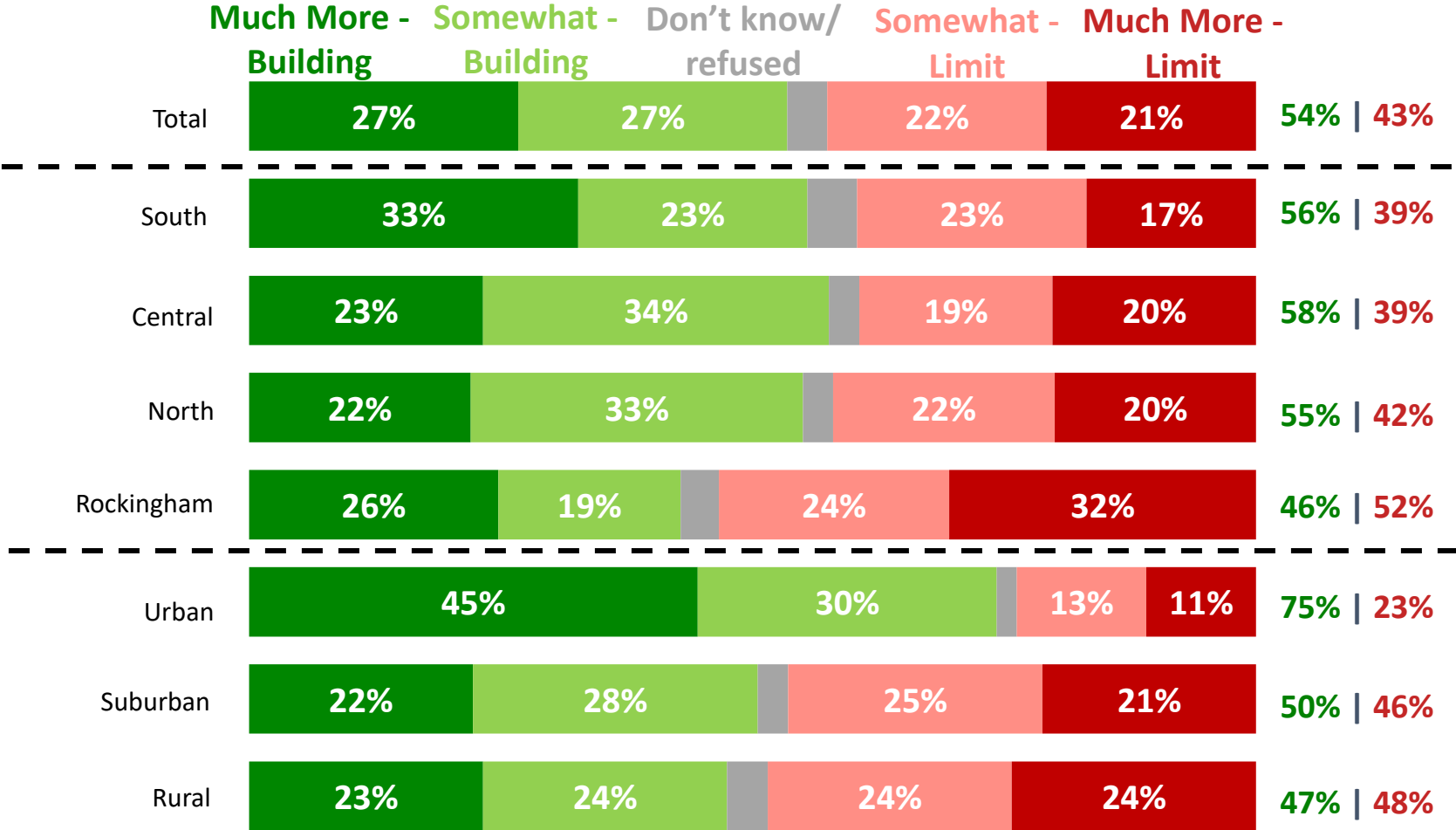
A majority of Republicans say preserving the rural character of New Hampshire is more important.

Building More vs. Limiting Housing by Party Registration



Voters in Southern New Hampshire and Urban Areas More Likely to Choose Building Housing to Bring Down Costs

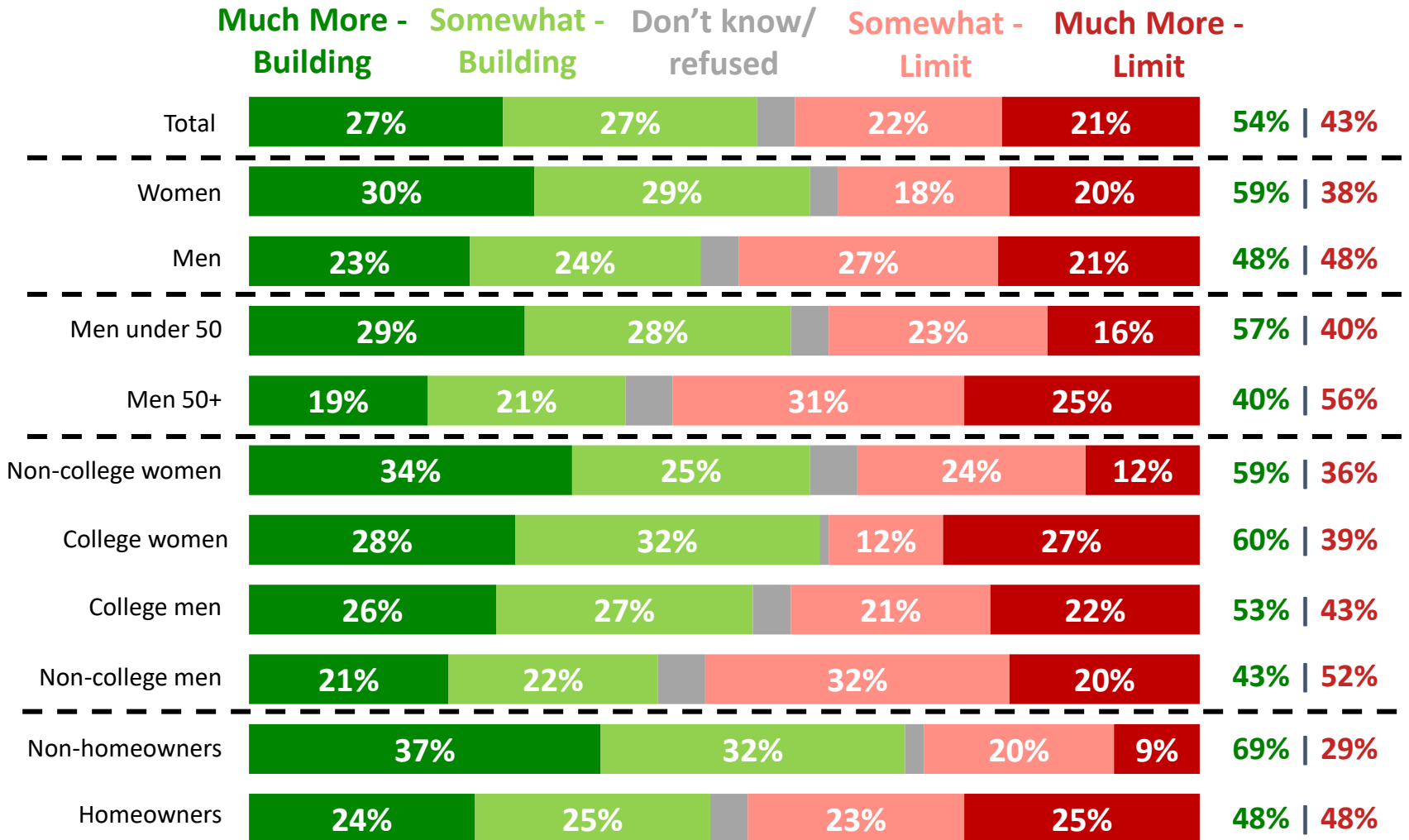
Building More vs. Limiting Housing by Region and Urbanicity



Q.14 Which is more important to you:

Women, Younger Men, and Non-Homeowners More Likely to Choose Building More Housing to Bring Down Costs

Building More vs. Limiting Housing by Gender, Gender/Age, Gender/Education, and Homeownership



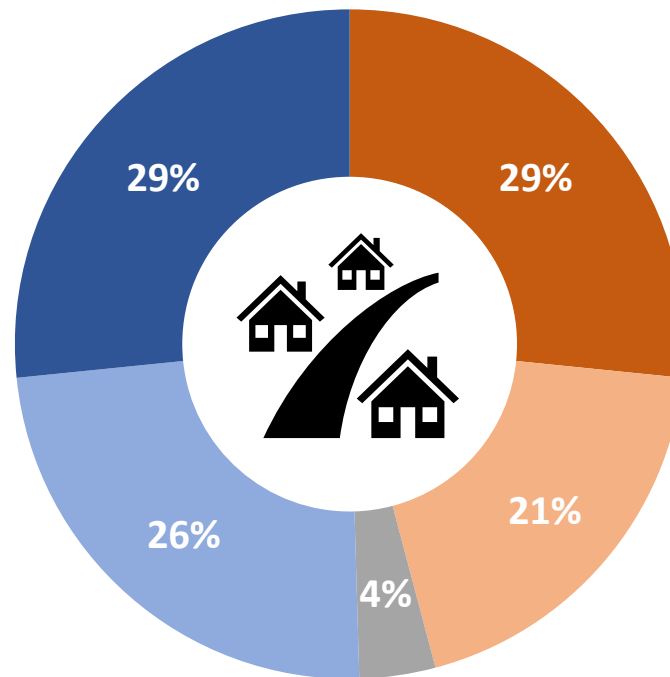
Q.14 Which is more important to you:

Voters Lean Towards Building Houses Closer Together in Town As The Best Way to Preserve Rural Character

Smaller Lots vs. Larger Lots

Smaller Lots: 54% | Larger Lots: 42%

(Option 2) We can preserve New Hampshire's rural character by building more housing closer together on smaller lots. This will decrease the amount of land needed for development. Building more densely protects open space like fields and forests.

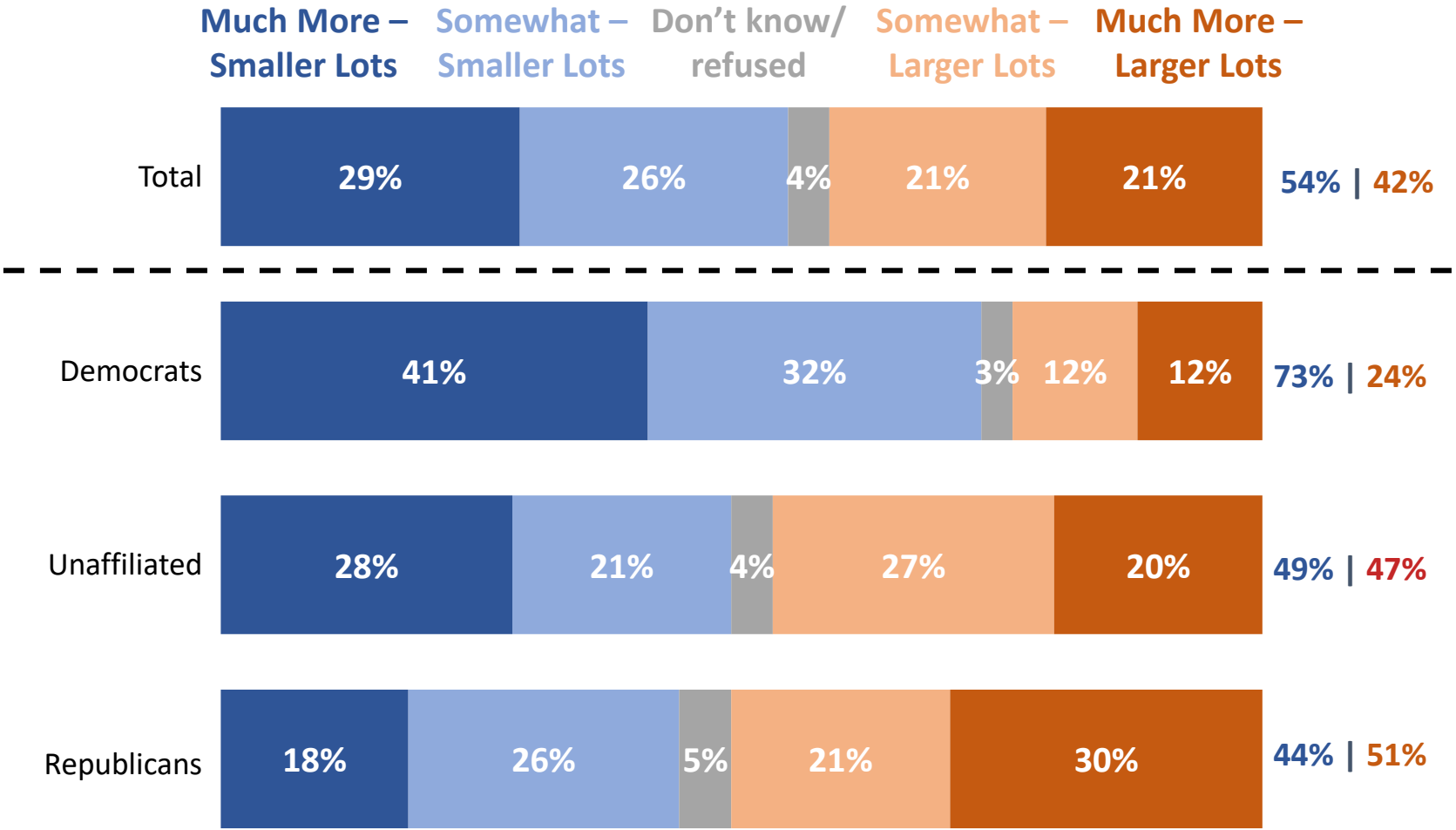


(Option 1) We can preserve New Hampshire's rural character by building single-family homes further apart on larger lots. This will mean fewer houses; and the fewer houses we build, the better we can protect the rural character of our communities.



Democrats More Likely to Want Single-Family Homes Built on Smaller Lots to Preserve Open Land Outside of Town

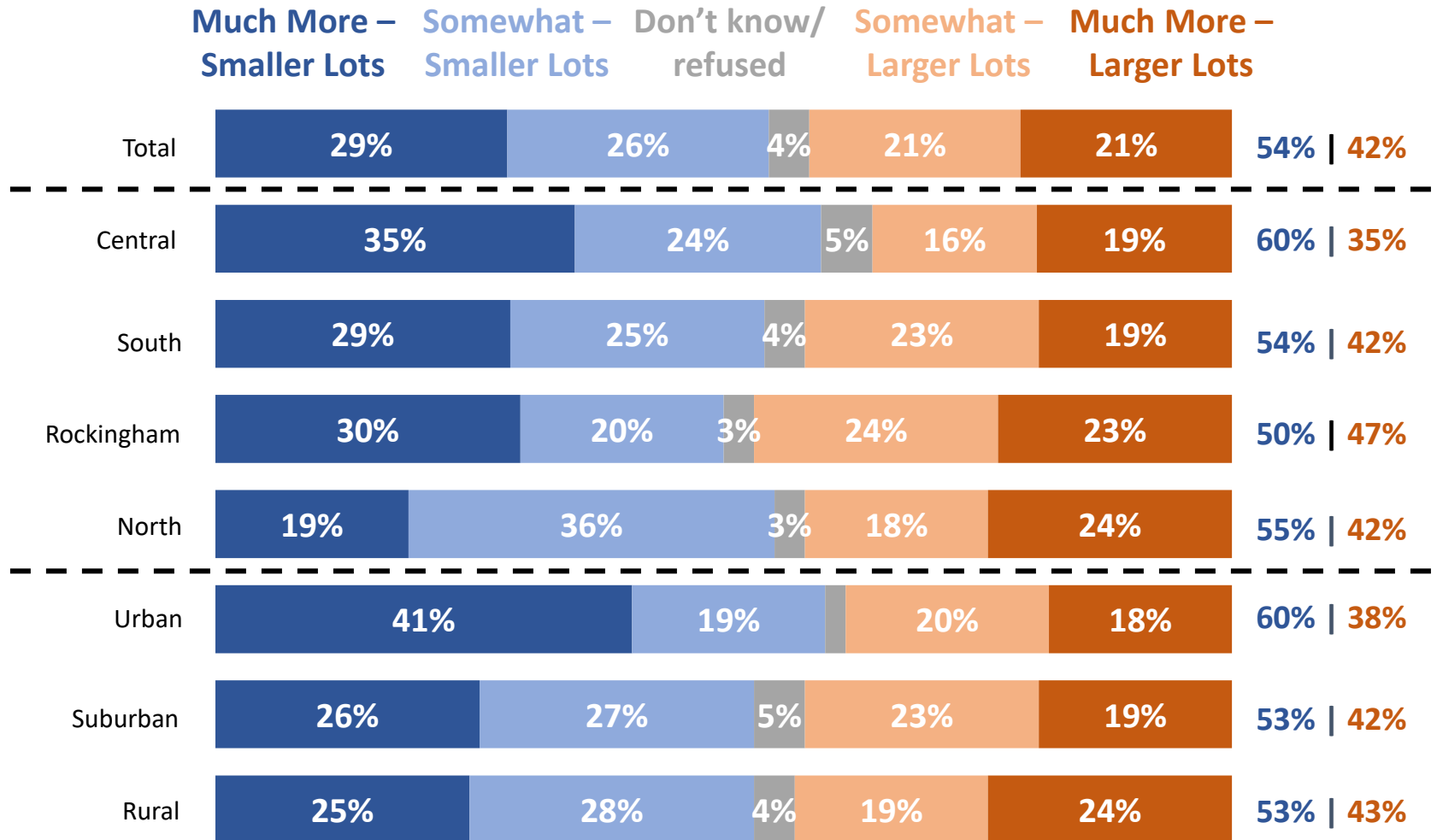
Smaller Lots vs. Larger Lots by Party Registration



Q.16 (PHONE) In your mind, what is the best way to balance building more housing with preserving the rural character of New Hampshire:

Voters in Central New Hampshire and Urban Areas More Likely To Want Single-Family Homes Built on Smaller Lots

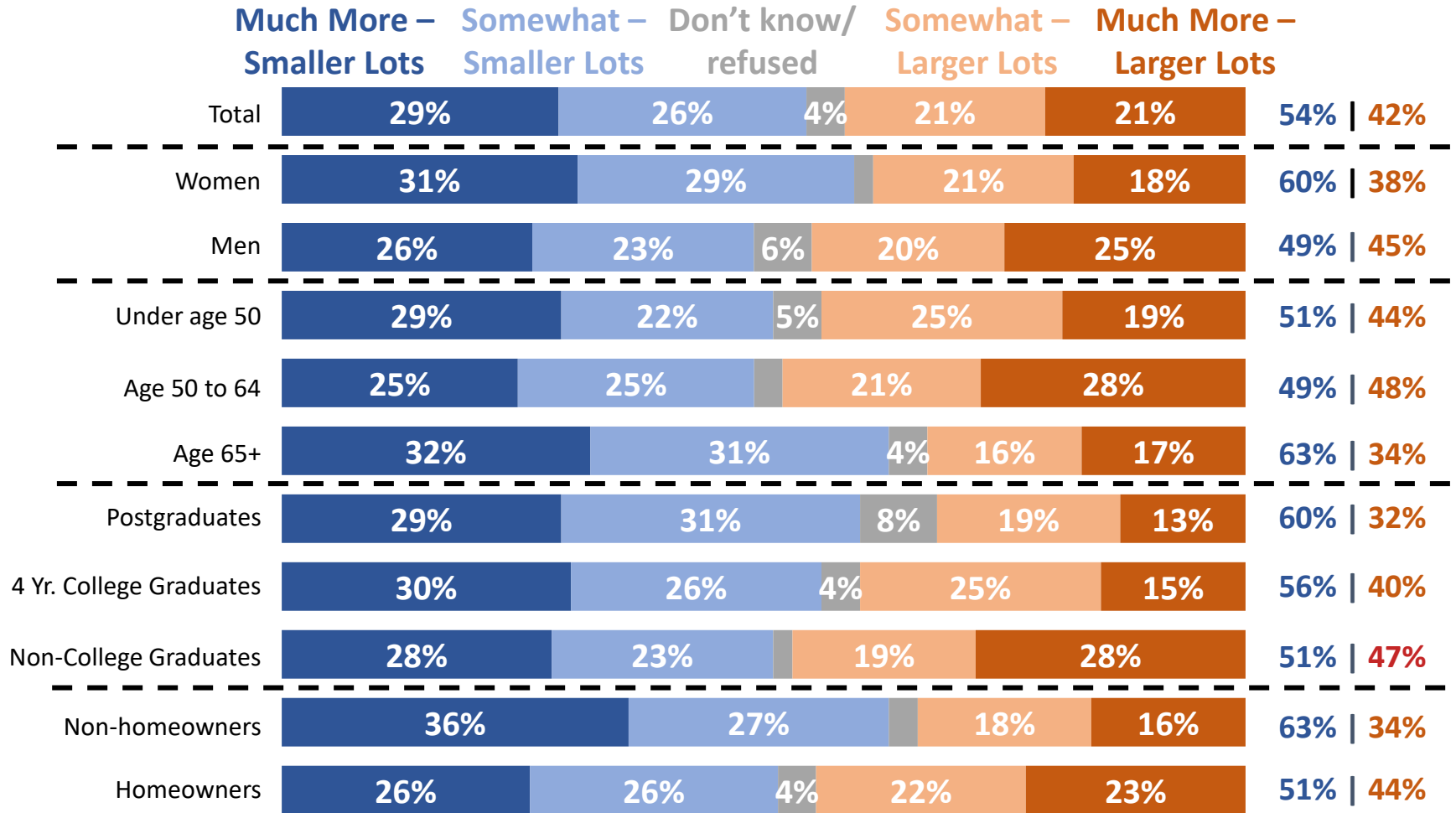
Smaller Lots vs. Larger Lots by Region and Urbanicity



Q.16 (PHONE) In your mind, what is the best way to balance building more housing with preserving the rural character of New Hampshire:

Women, Seniors, Postgraduates, and Non-Homeowners More Likely to Want Homes Built on Smaller Lots

Smaller Lots vs. Larger Lots by Gender, Age, Education, and Homeownership



Q.16 (PHONE) In your mind, what is the best way to balance building more housing with preserving the rural character of New Hampshire:

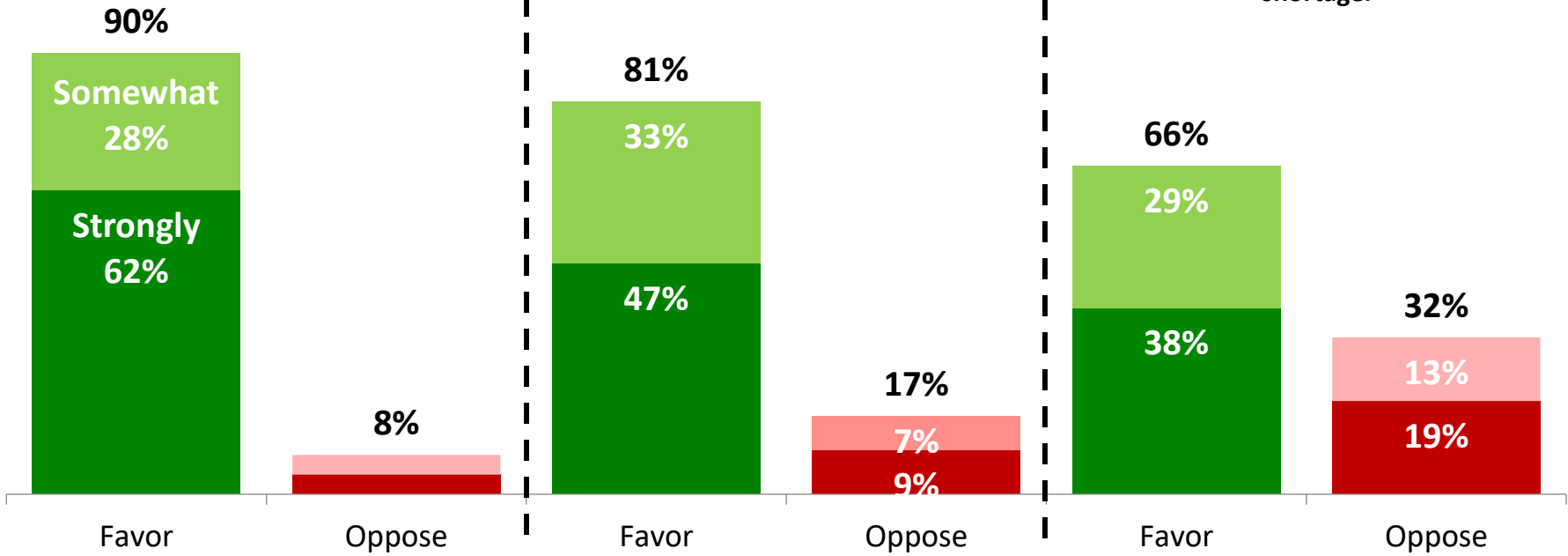
There is Strong And Broad Support for Allowing Attached ADUs, Detached ADUs, and Homes On Lots Smaller Than One Acre

Law Change Support

The New Hampshire state legislature recently passed a law that gives all property owners the right to build an attached accessory dwelling unit, or ADU, on their property. This means that they can add a basement apartment, attic apartment, garage apartment, or an in-law suite to their main residence.

The New Hampshire state legislature is considering a law that would give all property owners the right to build a detached accessory dwelling unit, or ADU, on their property. This means that property owners could add a separate structure, such as a guest house, that shares a lot with their main residence.

Many communities in New Hampshire only allow homes on lots that are an acre or more. An acre is about the size of a football field. The state legislature is considering a law that would allow homes on lots that are smaller than one acre. This would increase the amount of build-able land and help ease the housing shortage.



Q.16 (PHONE) In your mind, what is the best way to balance building more housing with preserving the rural character of New Hampshire:

There is Statewide and Bipartisanship Support For These Changes

Law Change Support by Region and Party Registration

Demographics	The New Hampshire state legislature recently passed a law that gives all property owners the right to build an attached accessory dwelling unit, or ADU, on their property. This means that they can add a basement apartment, attic apartment, garage apartment, or an in-law suite to their main residence.	The New Hampshire state legislature is considering a law that would give all property owners the right to build a detached accessory dwelling unit, or ADU, on their property. This means that property owners could add a separate structure, such as a guest house, that shares a lot with their main residence.	Many communities in New Hampshire only allow homes on lots that are an acre or more. An acre is about the size of a football field. The state legislature is considering a law that would allow homes on lots that are smaller than one acre. This would increase the amount of build-able land and help ease the housing shortage.
South	91%	84%	69%
Rockingham	89%	80%	59%
Central	89%	76%	70%
North	87%	81%	66%
Democrats	88%	81%	78%
Unaffiliated	94%	85%	68%
Republican	86%	76%	54%

Q.18 Do you favor or oppose this statewide law to allow/legalize attached ADUs?

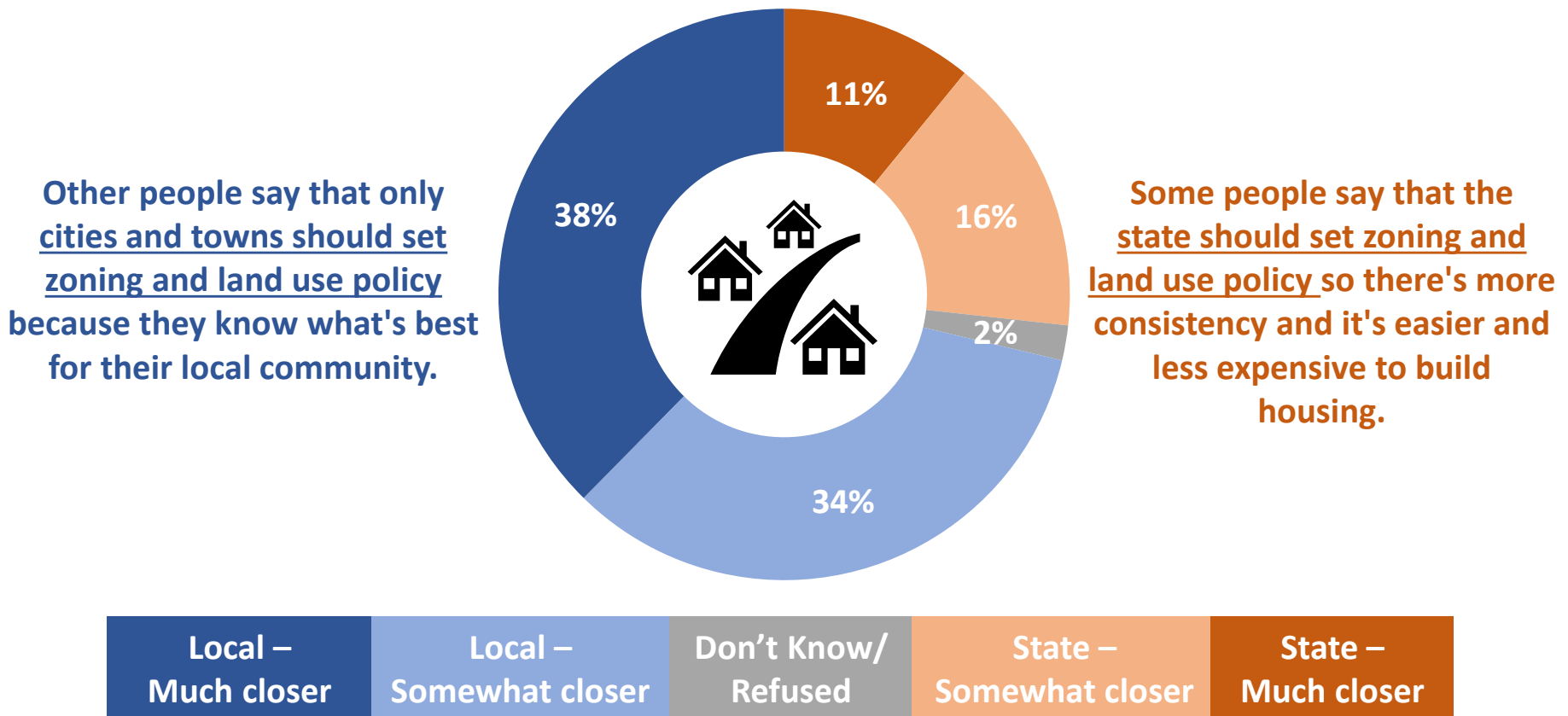
Q.19 Do you favor or oppose a statewide law to allow/legalize detached ADUs?

Q.20 Do you favor or oppose a statewide law to allow/legalize homes to be built on lots smaller than one acre?

Voters Much More Likely To Want Local Leaders To Set Zoning and Land Use Policy

Local vs. State to Set Zoning and Land Use Policy

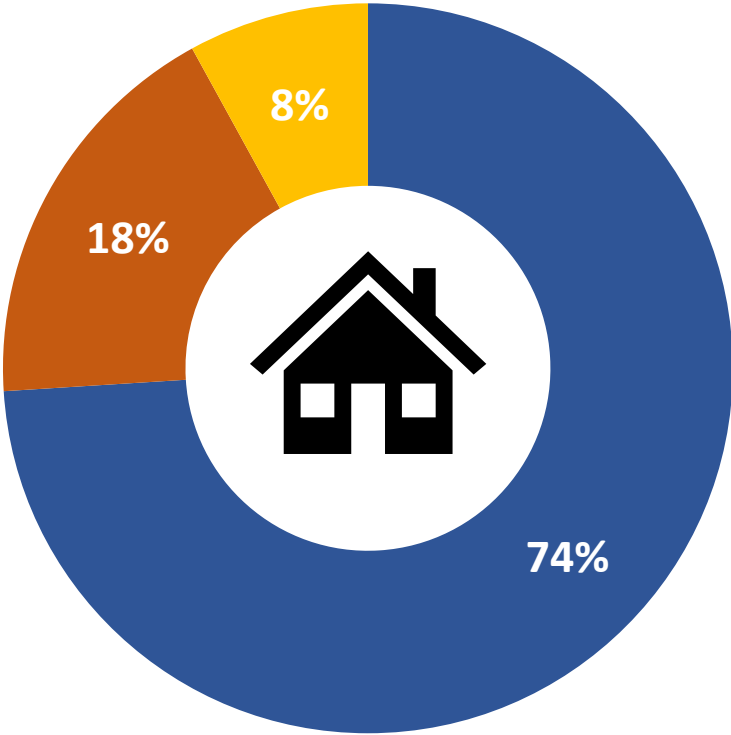
Local: 72% | State 27%



Personal Preferences

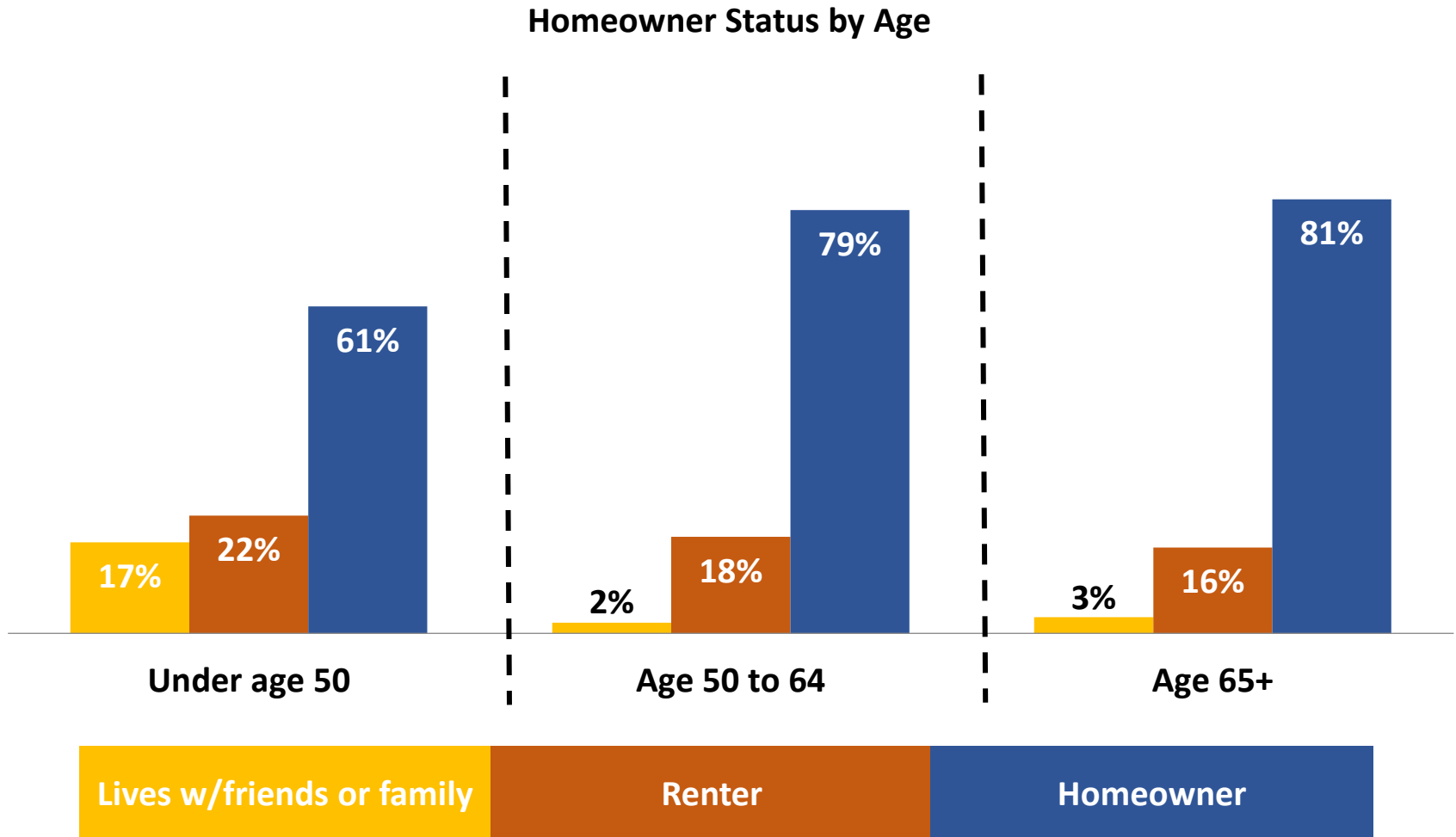
Three-Quarters of Voters Own Their Own Home

Homeowner Status



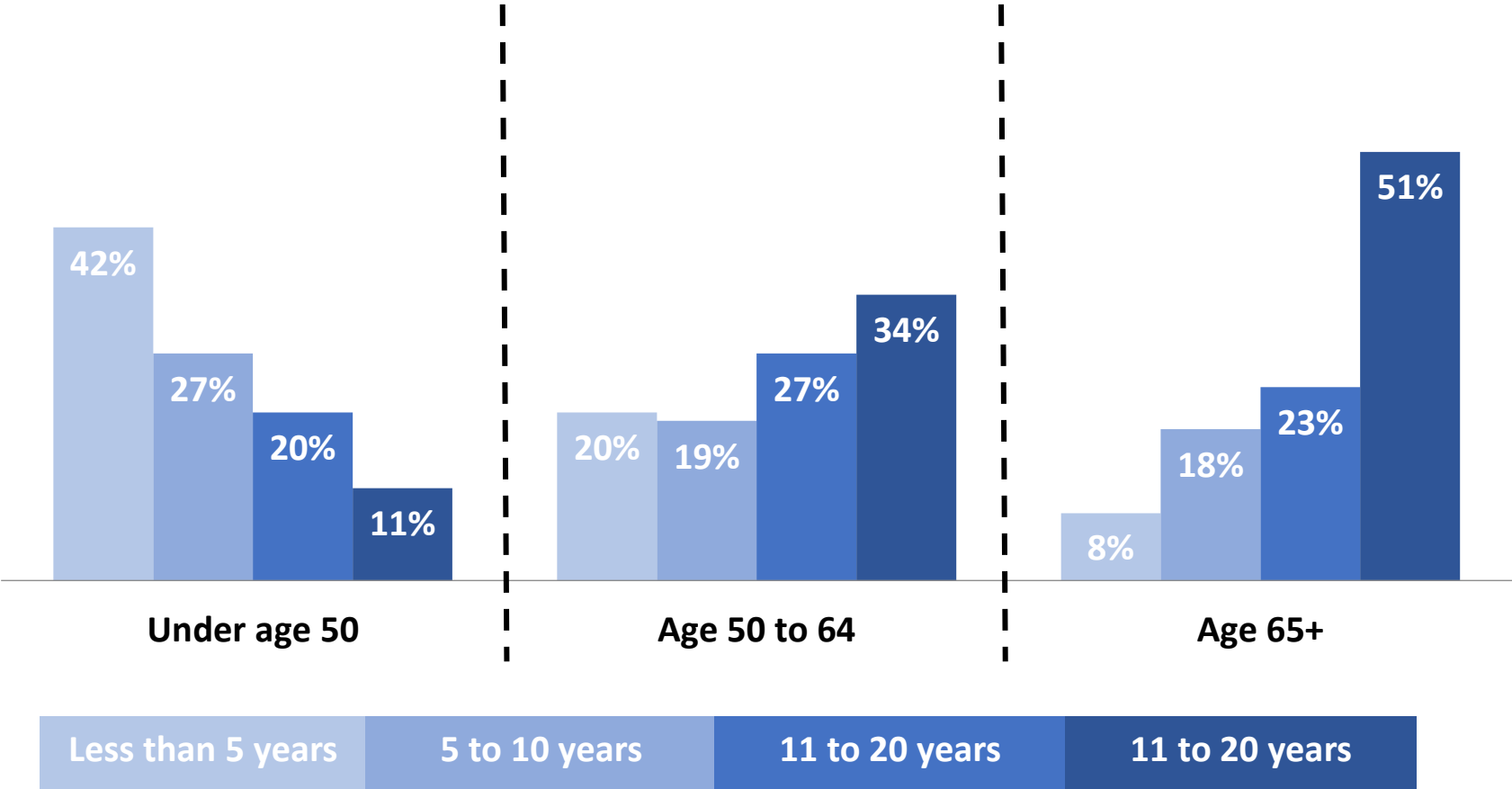
Q.26 Shifting to your own personal situation, do you currently own your home, rent your home, or are you living with friends or family?

Homeownership Correlates With Age; Older Voters More Likely To Own Home



Length of Tenure In Home Correlates with Age; Older Voters Have Lived in Current Homes Longer Than Younger Voters

Length of Residence by Age

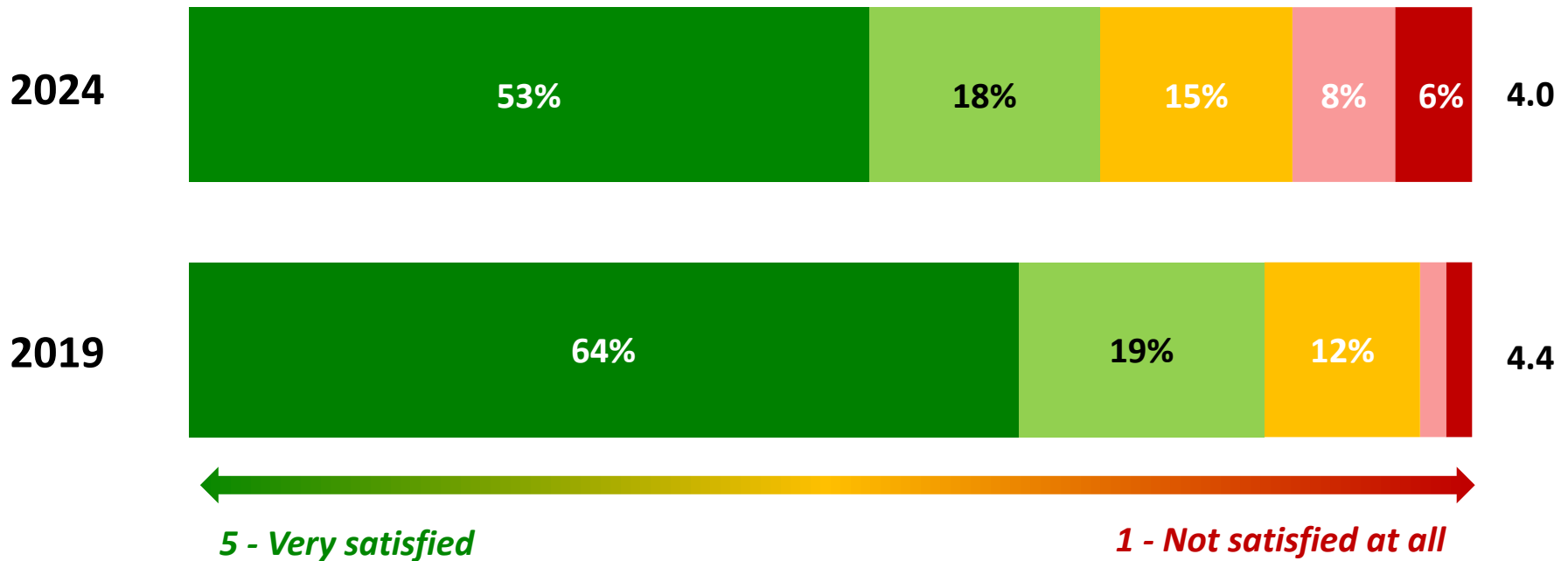


Q.36 How long have you lived in your current home?
 (PHONE ONLY, CONTINUE) Less than 5 years, 5 to 10 years, 11 to 20 years, or more than 20 years?

Half of Residents are Very Satisfied with Their Current Housing Situation; Less Satisfied Than Pre-Pandemic

Satisfaction with Your Current Housing Situation on a 5-Point Scale
2019 vs. 2024

Mean

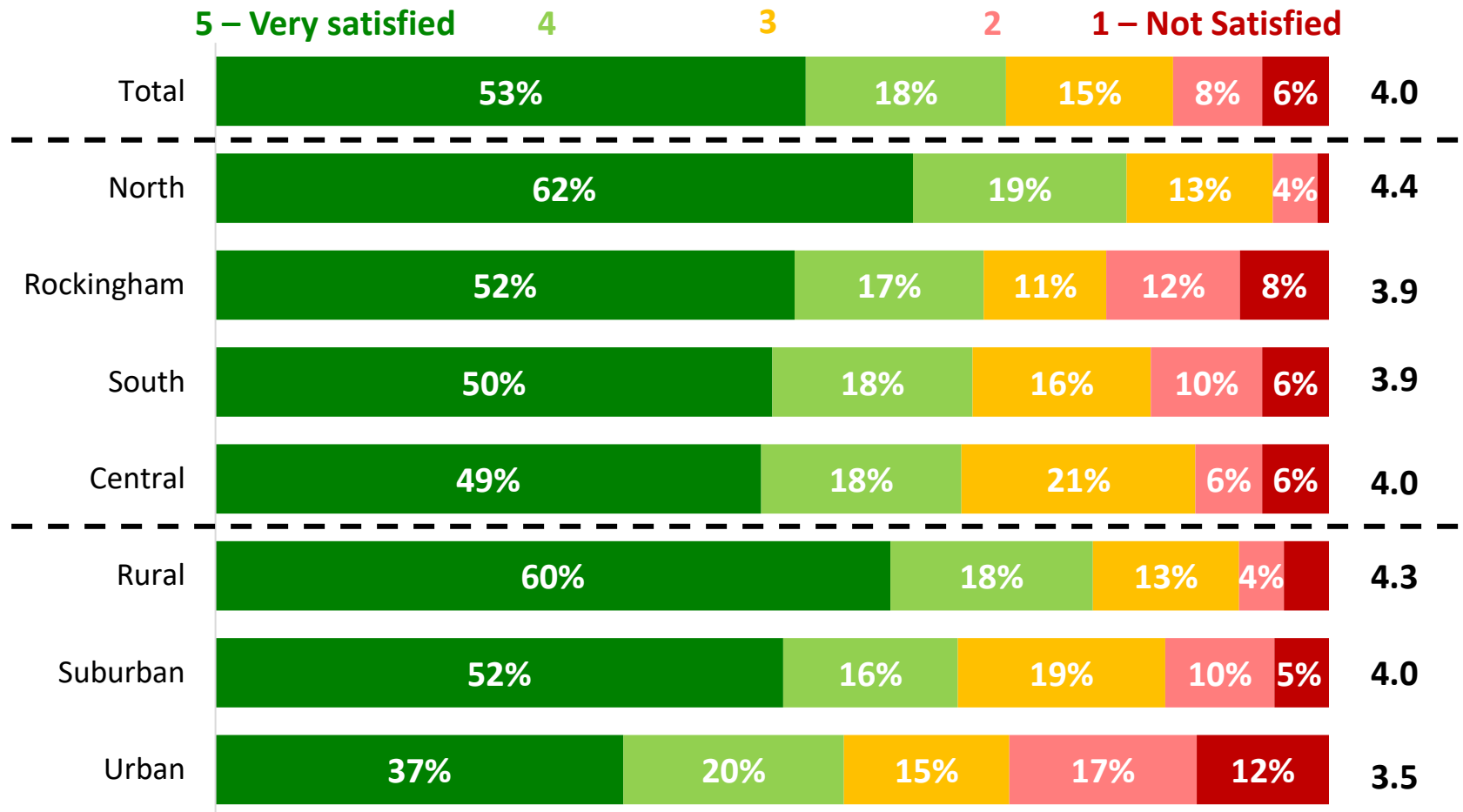


Q.27 On a scale of 1 to 5, where 5 means very satisfied and 1 means not satisfied at all, how satisfied are you with your current housing situation? You can use any number from 1 to 5, the higher the number, the more satisfied you are with your housing situation.

Residents in North and Rural Areas are More Satisfied With Their Current Housing Situation

Satisfaction with Your Current Housing Situation on a 5-Point Scale by Region and Urbanicity

Mean



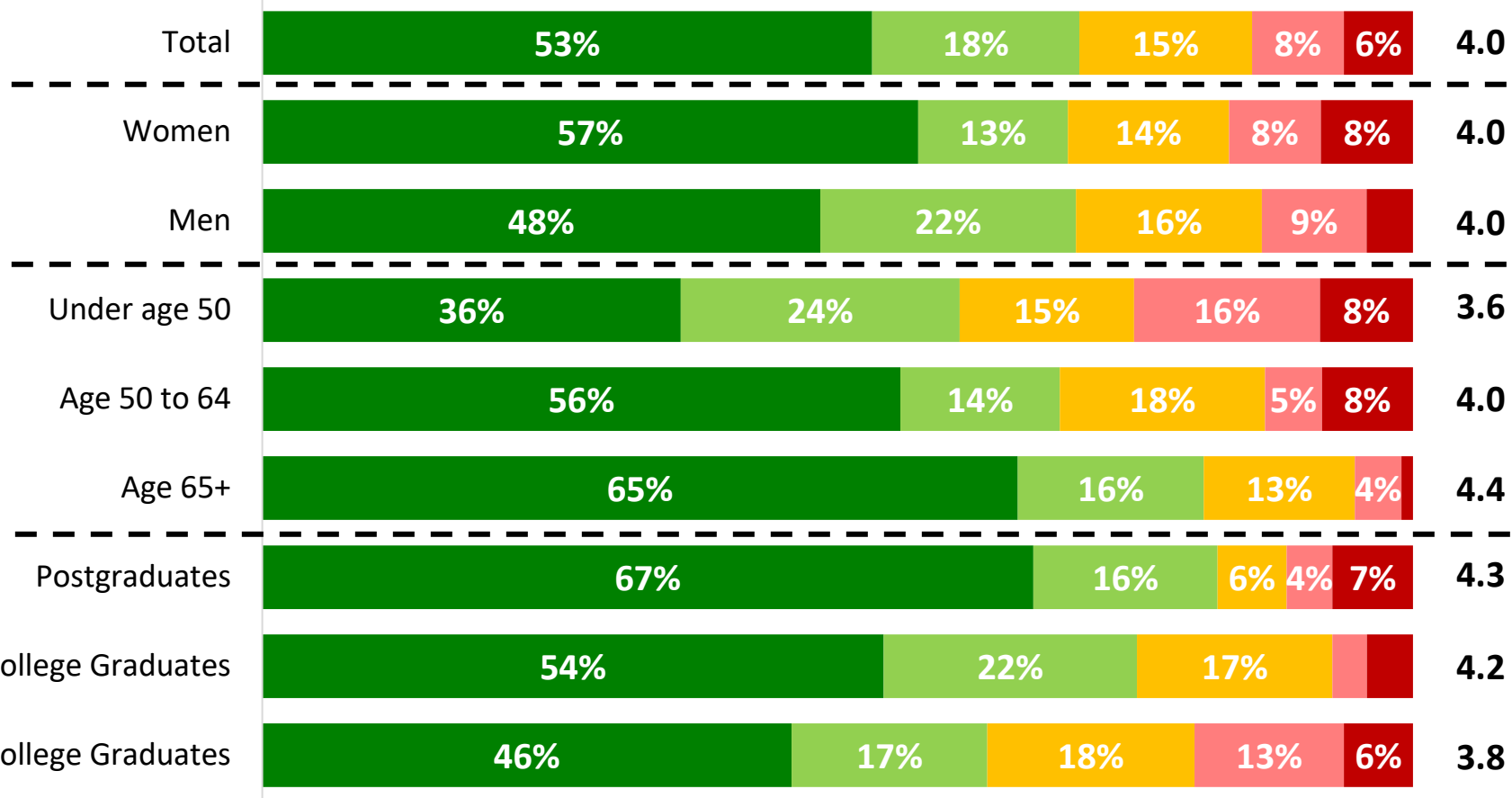
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Women, Older Voters, and Postgraduates Are More Satisfied with Their Current Housing Situation

Satisfaction with Your Current Housing Situation on a 5-Point Scale by Gender, Age, and Education

Mean

5 – Very satisfied 4 3 2 1 – Not Satisfied

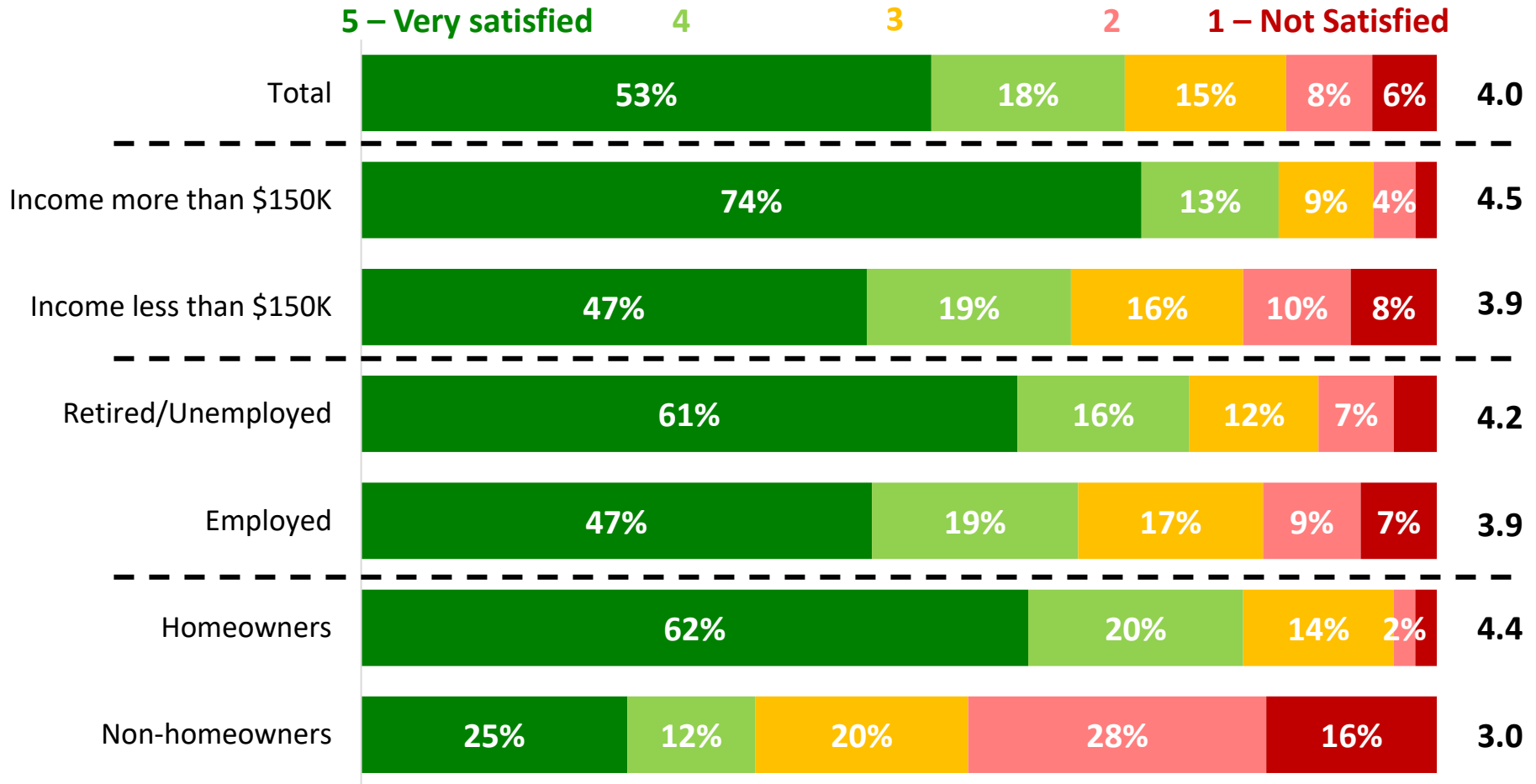


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Residents Making \$150K+, Those in the Workforce, and Homeowners are More Satisfied with Housing Situation

Satisfaction with Your Current Housing Situation on a 5-Point Scale
by Income, Employment, and Homeownership

Mean

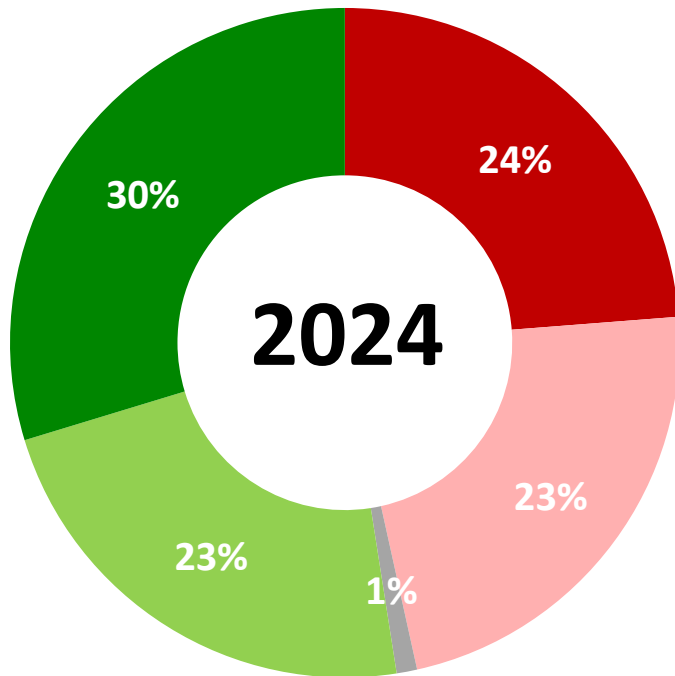


Q.27 On a scale of 1 to 5, where 5 means very satisfied and 1 means not satisfied at all, how satisfied are you with your current housing situation? You can use any number from 1 to 5, the higher the number, the more satisfied you are with your housing situation.

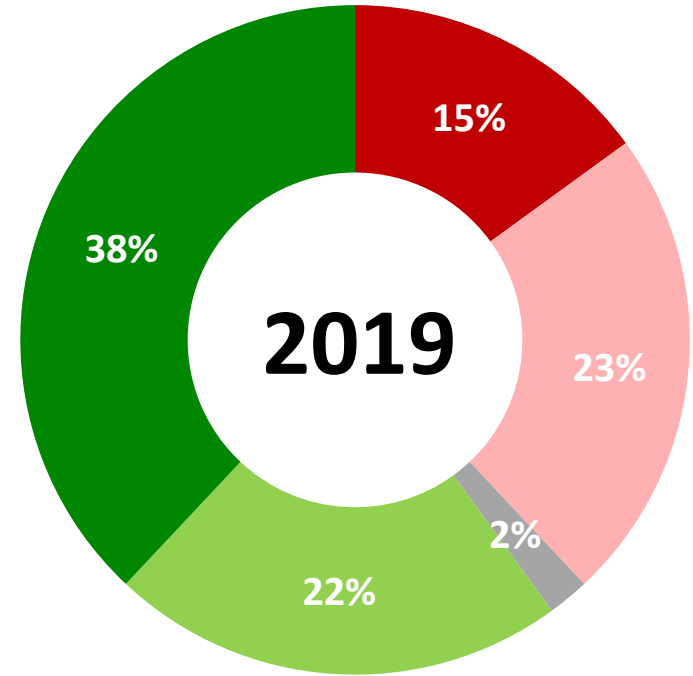
Almost Half Say Their Rent or Mortgage Puts a Significant or Slight Strain on Their Budget, Up From 2019

Financial Strain of Your Rent/Mortgage

No/Not Much Strain: 53%
Slight/Significant Strain: 47%

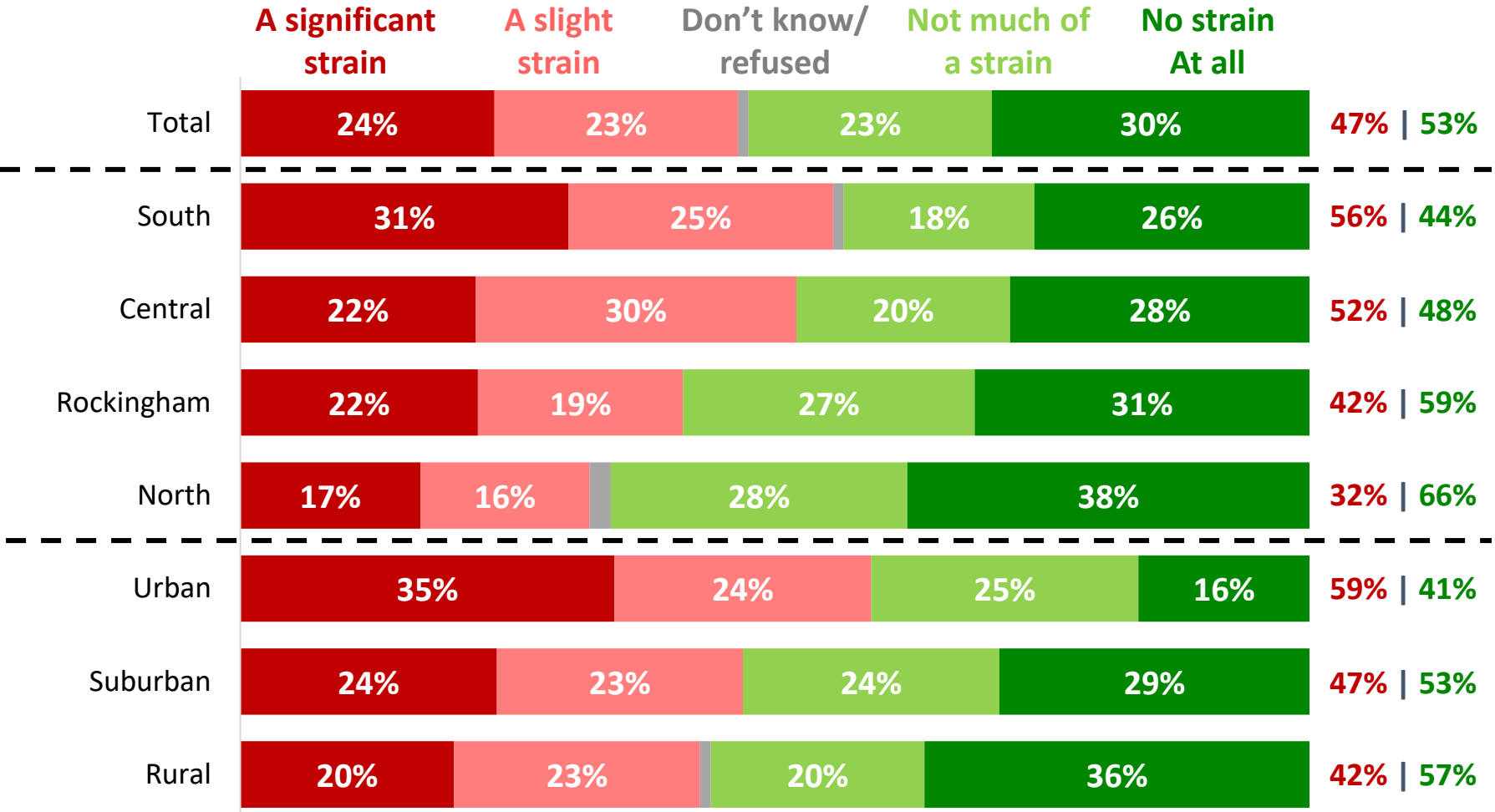


No/Not Much Strain: 61%
Slight/Significant Strain: 38%



Residents in South and Central Regions and Urban Residents More Likely To Say Paying Rent or Mortgage is a Strain

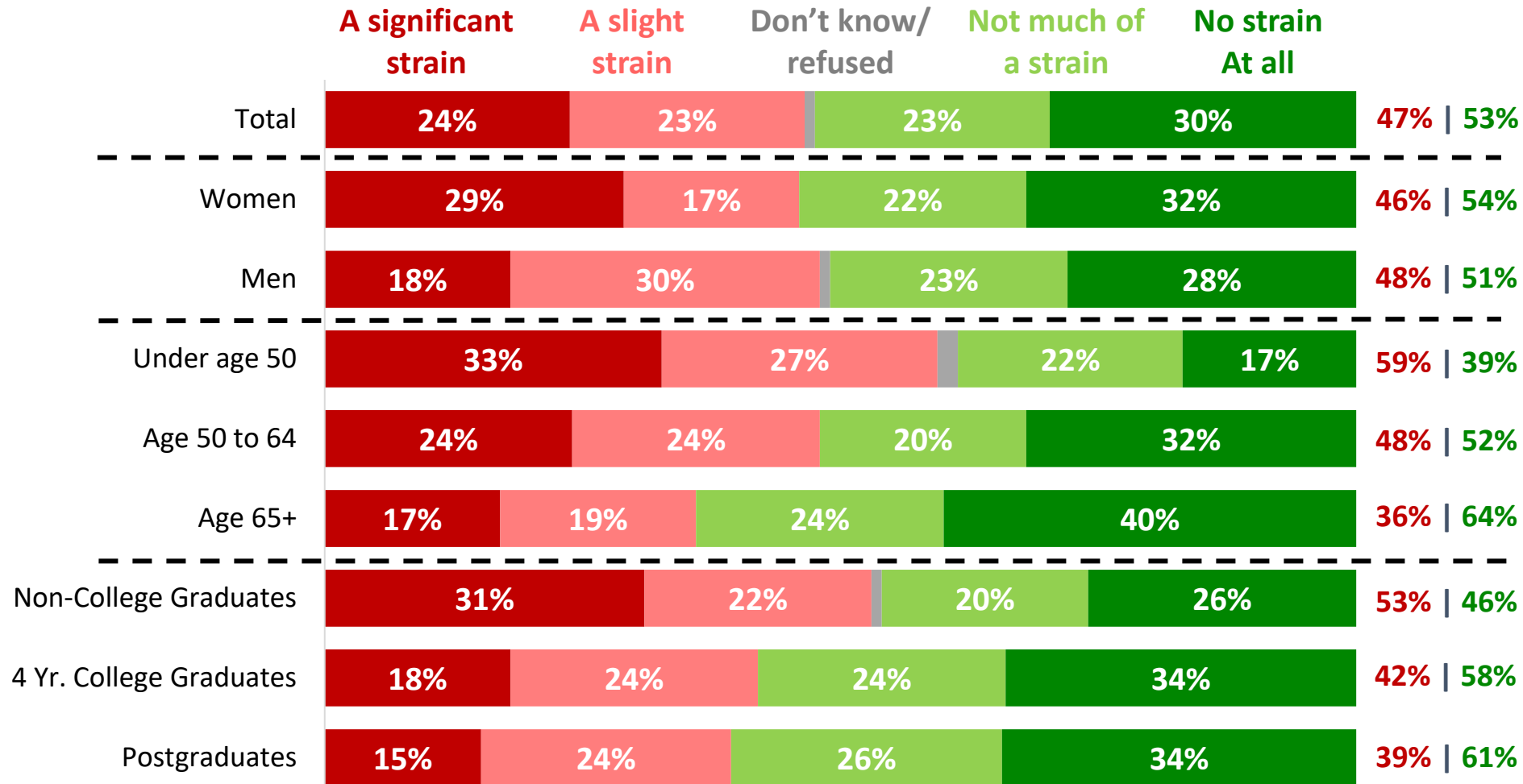
Financial Strain of Your Rent/Mortgage by Region and Urbanicity



Q.28 How much of a financial strain on your budget is paying your rent or mortgage each month?

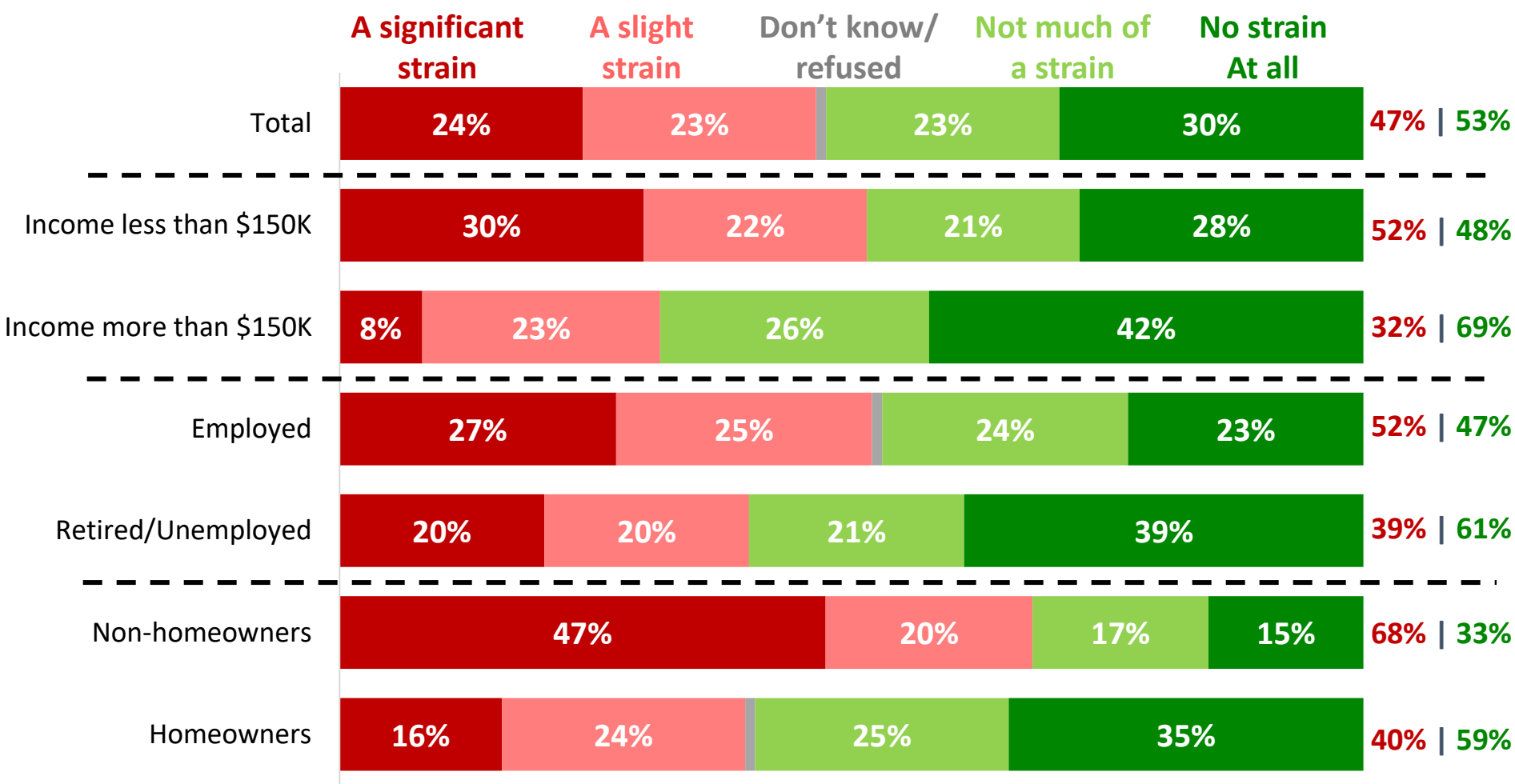
Women, Younger Residents, and Less Educated are More Likely To Say Paying Rent or Mortgage is a Strain

Financial Strain of Your Rent/Mortgage by Gender, Age, and Education



Those with Income Less Than \$150K, Employed, and Non-Homeowners More Likely To Say Paying Rent/Mortgage is a Strain

Financial Strain of Your Rent/Mortgage by Income, Employment, and Homeownership Status



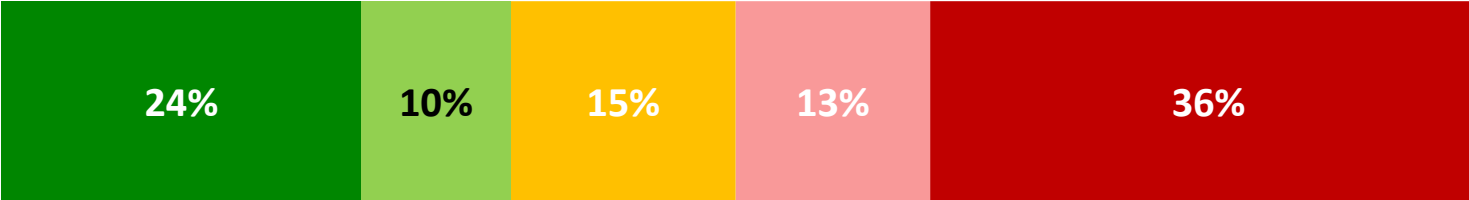
Q.28 How much of a financial strain on your budget is paying your rent or mortgage each month?

One-Third Are Not Confident At All In Affording the Kind of Home That Meets Their Needs; Up Significantly from 2019

Satisfaction with Your Current Housing Situation on a 5-Point Scale
2019 vs. 2024

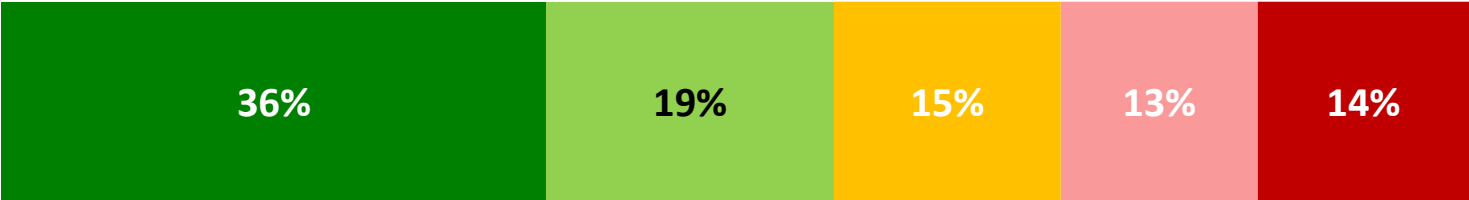
Mean

2024



2.7

2019



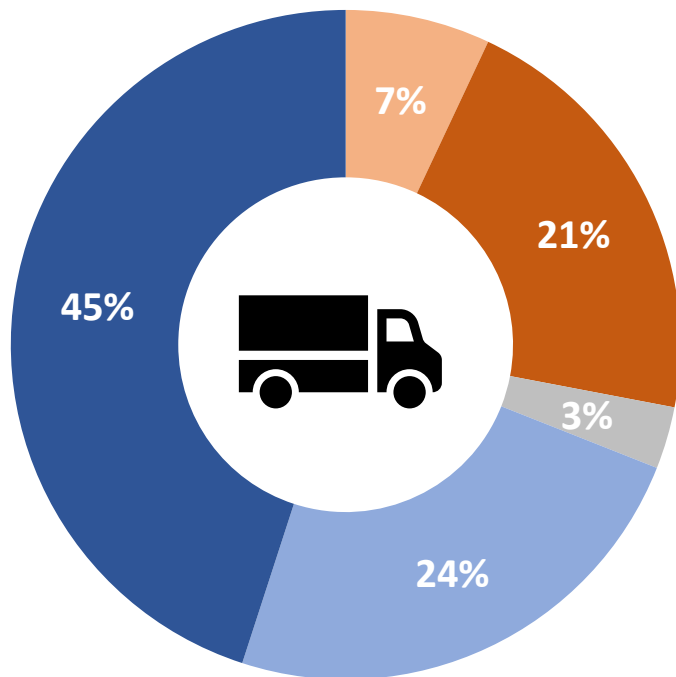
3.5



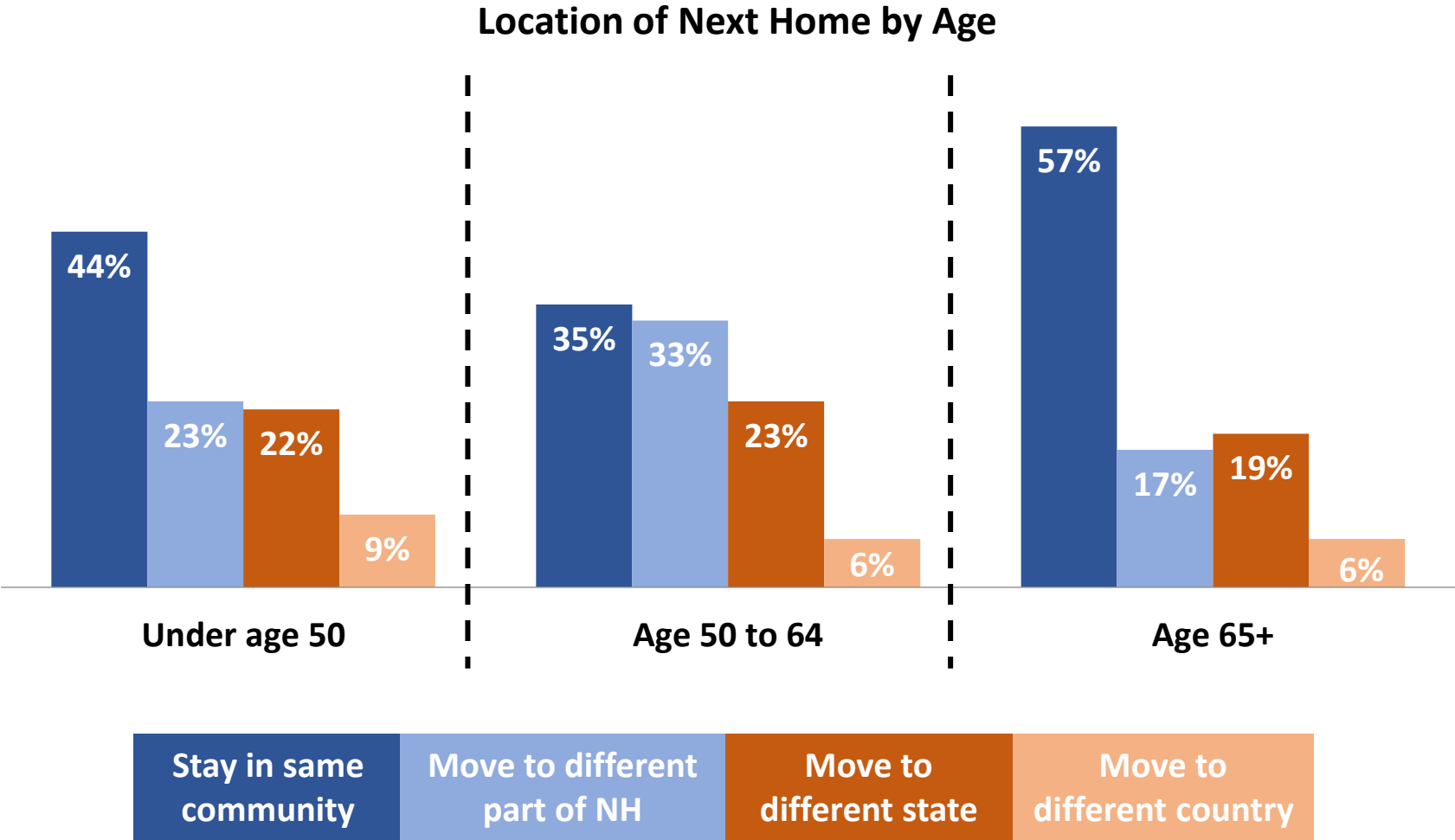
Q.39 On a scale of 1 to 5, where 5 means very confident and 1 means not at all confident, how confident are you that if you had to move from your current residence you would be able to afford to own or rent a home that meets your needs in your community?

Plurality Would Like To Stay in Their Current Community If or When they Move Next

Location of Next Home

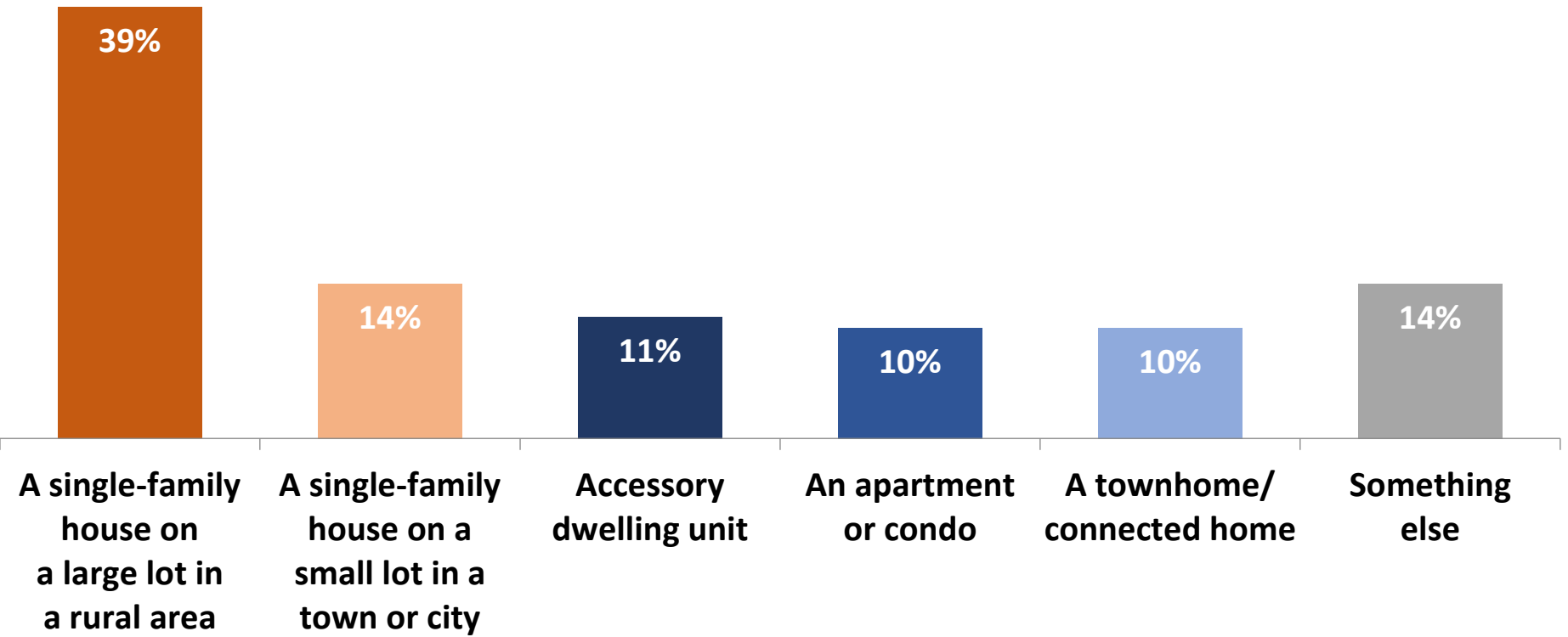


Seniors Most Likely To Want To Stay in Their Current Community If or When they Move Next; Younger Residents More Flexible



A Majority Would Still Rather Live In A Single-family Detached Home; Those Who Prefer A Single-Family Detached Home Would Also Prefer A House On A Large Lot In A Rural Area

Type of Next Home

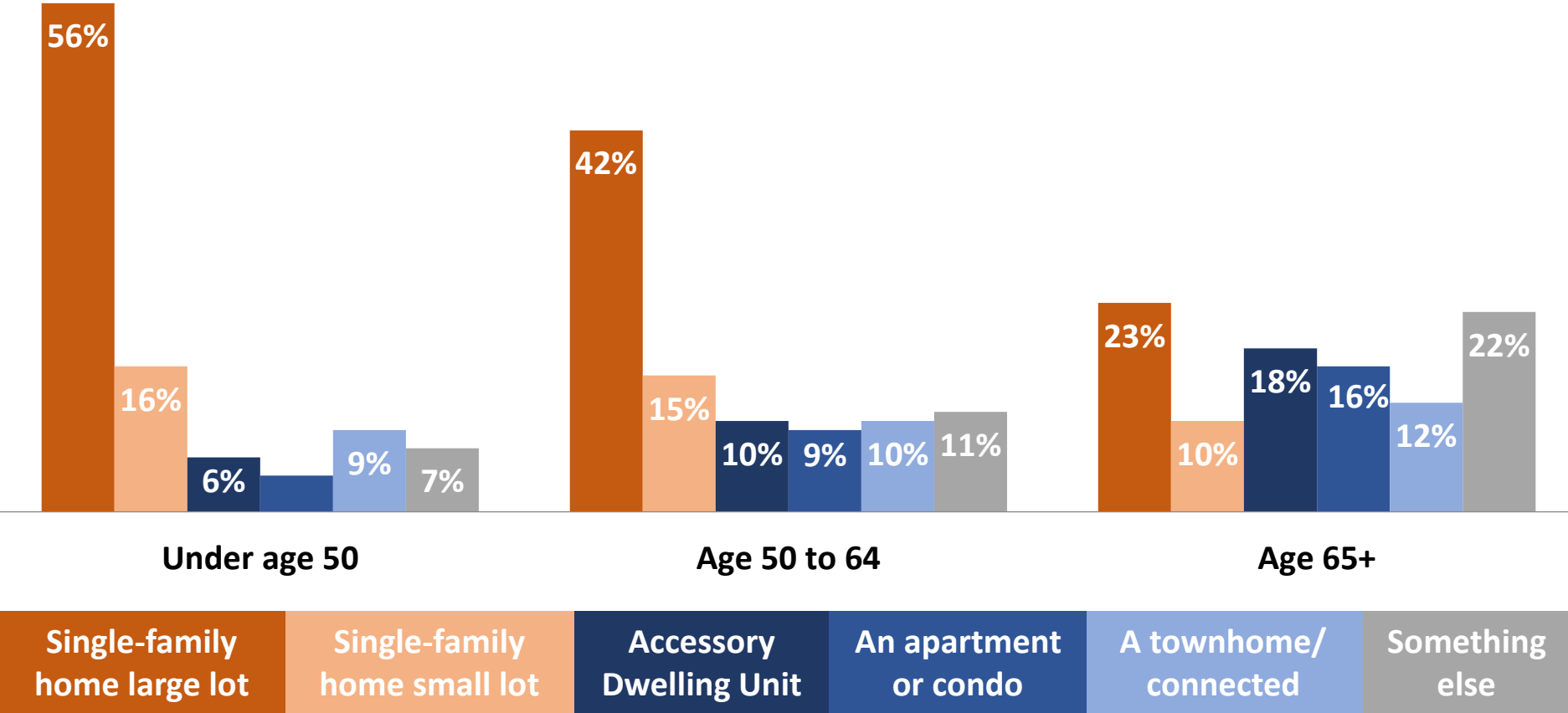


Q.41 Thinking about your next home, would you prefer:
Q.42 (IF SINGLE FAMILY DETACHED IN Q.41) Which would you rather have?

Type of Next Home Correlates with Age; Younger Residents Want Next Home To Be A Detached Single-Family Home on Larger Lots

Many seniors want a single-family home on a large lot, an ADU, an apartment, or something else for their next home.

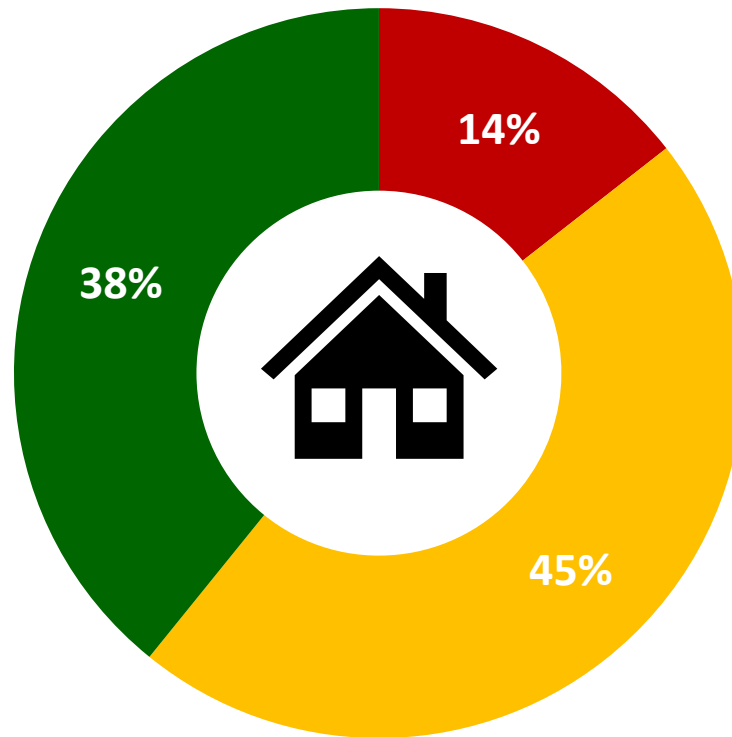
Type of Next Home by Age



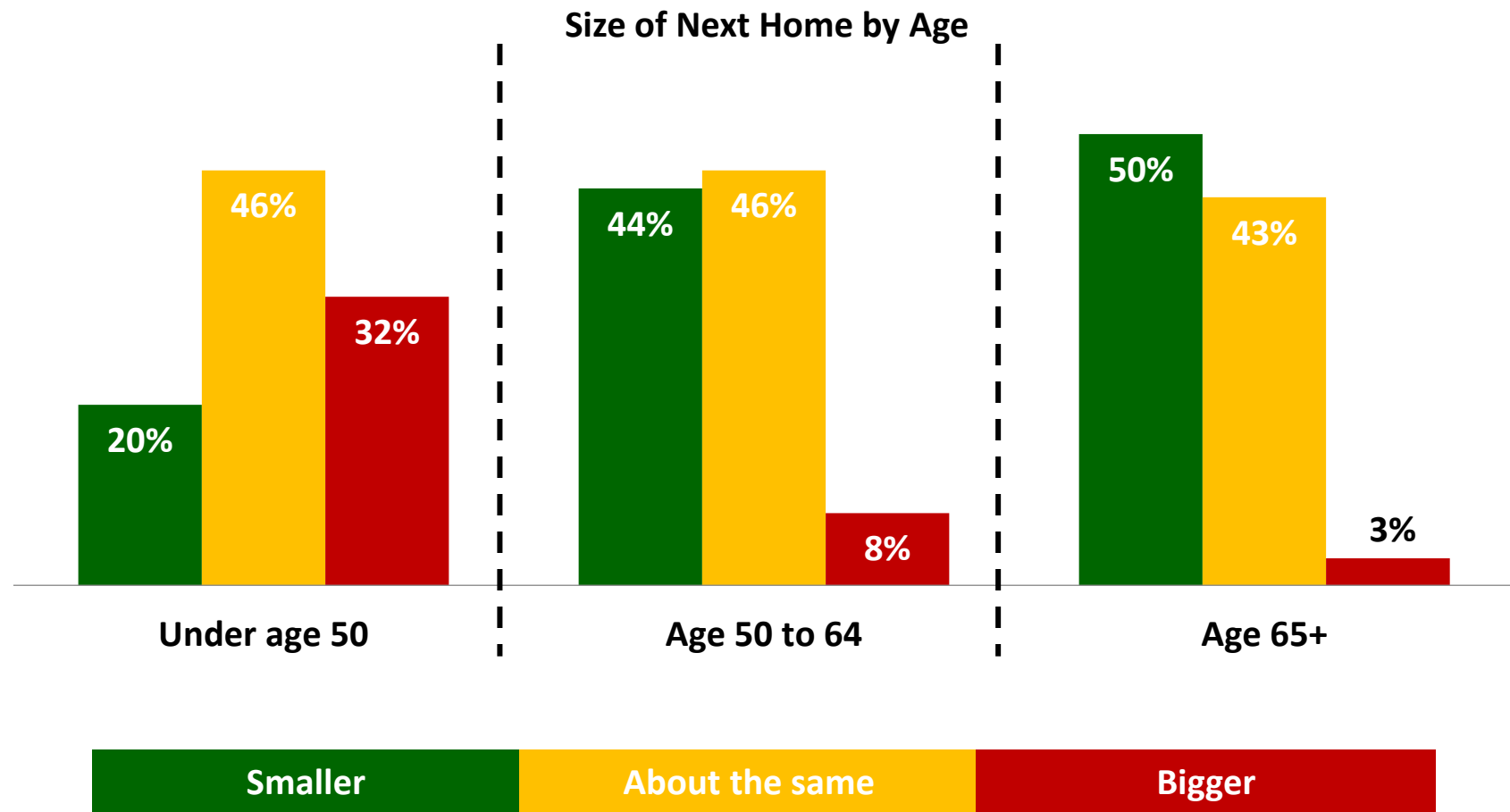
Q.41 Thinking about your next home, would you prefer:
 Q.42 (IF SINGLE FAMILY DETACHED IN Q.41) Which would you rather have?

Voters Would Like a House The Same Size As Their Current Home Or Smaller

Size of Next Home



Residents Under Age 50 Want Their Next Home To Either Be The Same Size or Bigger; Residents Over 50 Would Like Their Next Home To Be Either The Same or Smaller

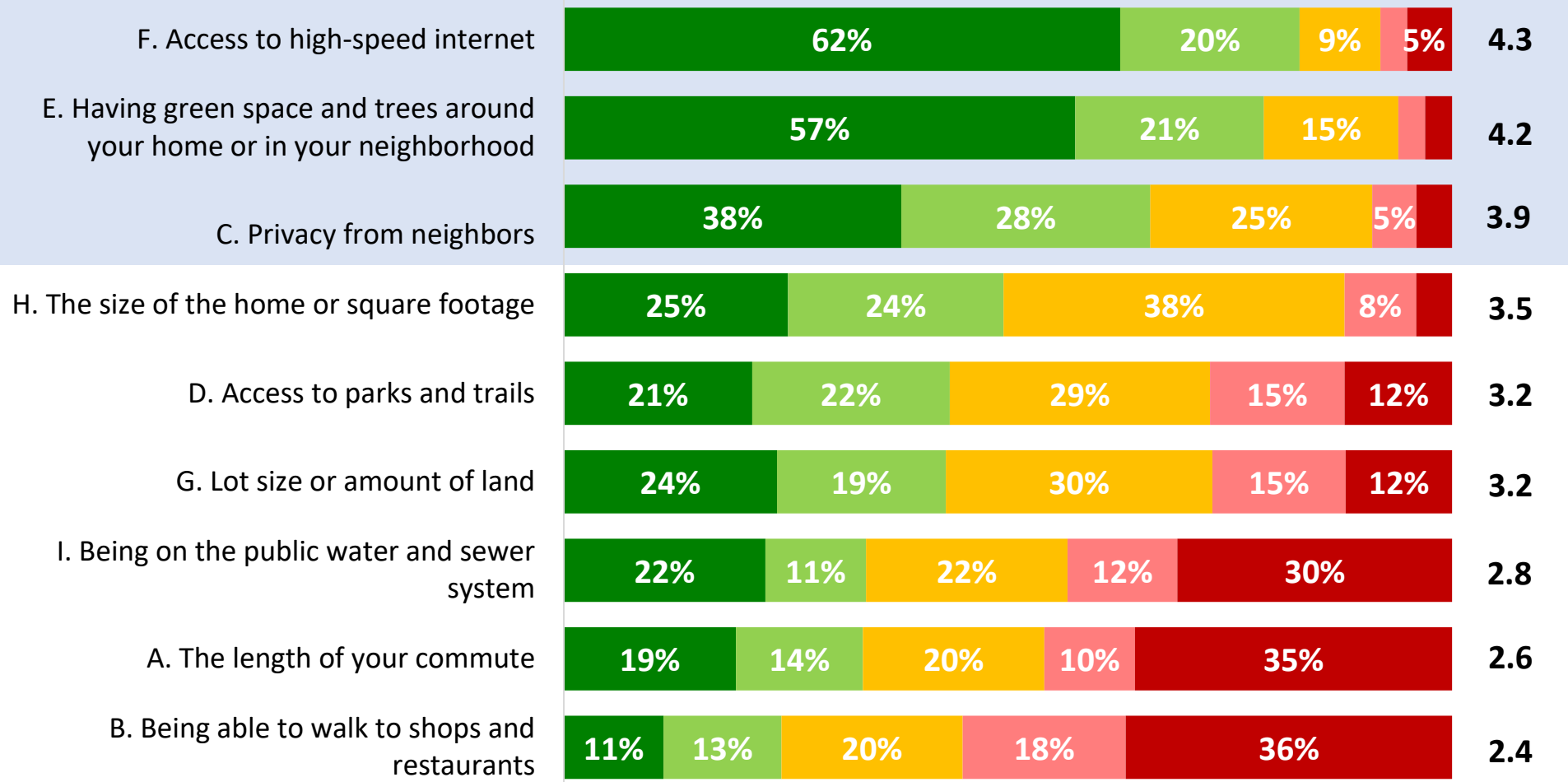


Voters Place the Highest Importance on High-Speed Internet, Green Spaces, and Privacy

Priority of Factors in Choosing Next Home

Mean

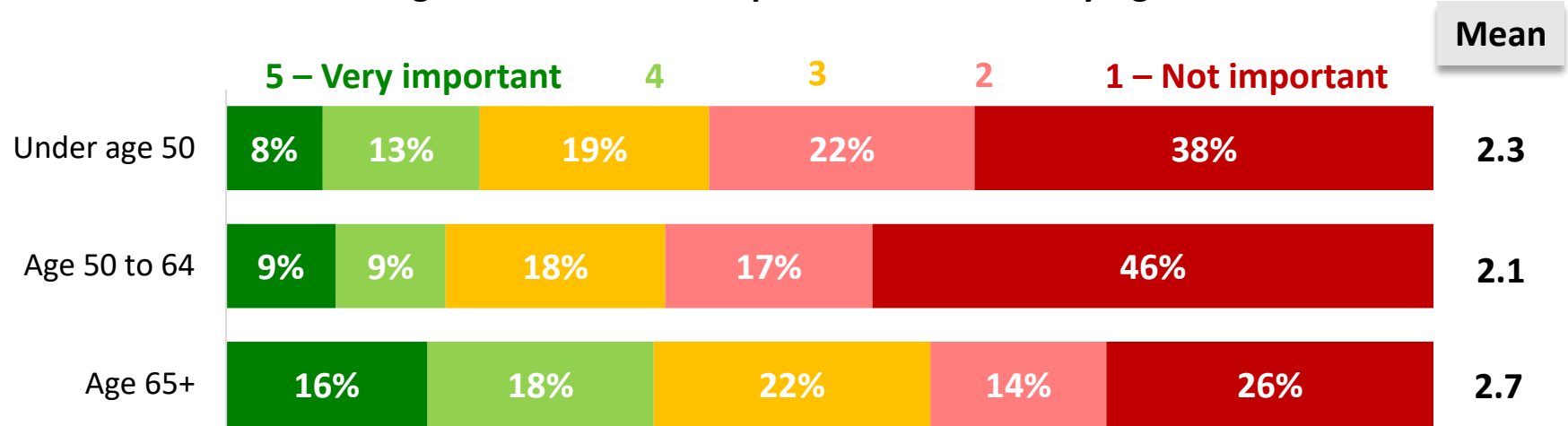
5 – Very important 4 3 2 1 – Not important



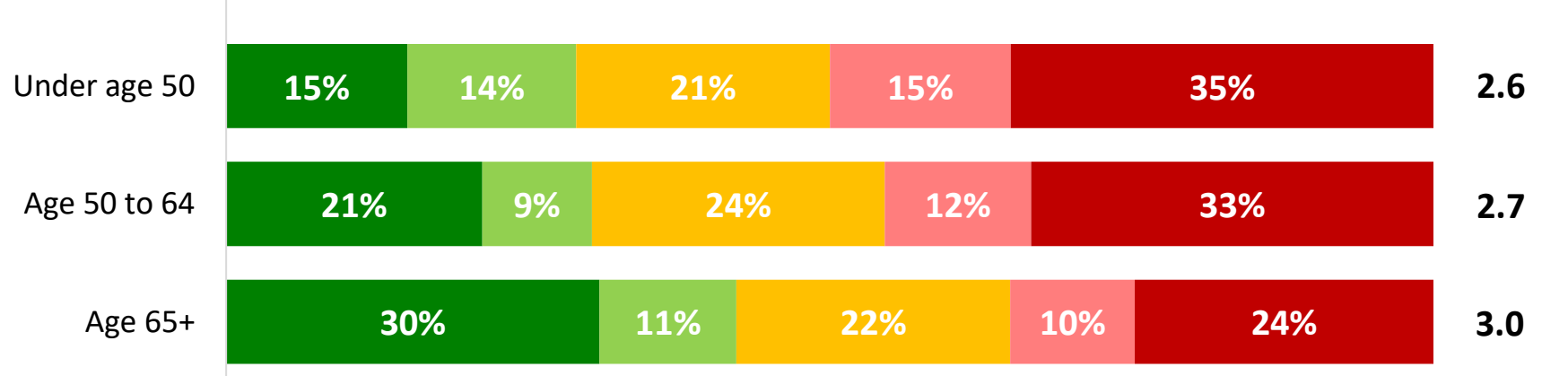
Q.44 Next, I am going to read some factors in choosing your next home. Please rate each of the following using a scale of one to five, where one means that it is not important at all to you and five means it is very important to you in choosing your next home. Of course, you can use any number between one and five, the higher the number the higher the importance of that factor.

Seniors More Likely To Prioritize Walkability and Being on the Public Sewer System

Being Able to Walk to Shops and Restaurants by Age



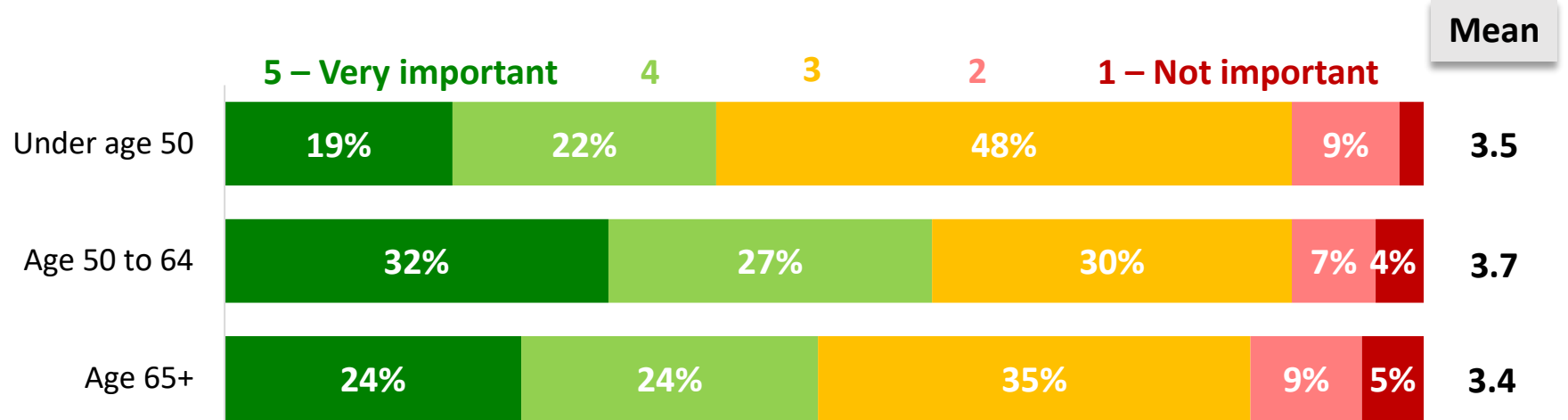
Being on the Public Water and Sewer System by Age



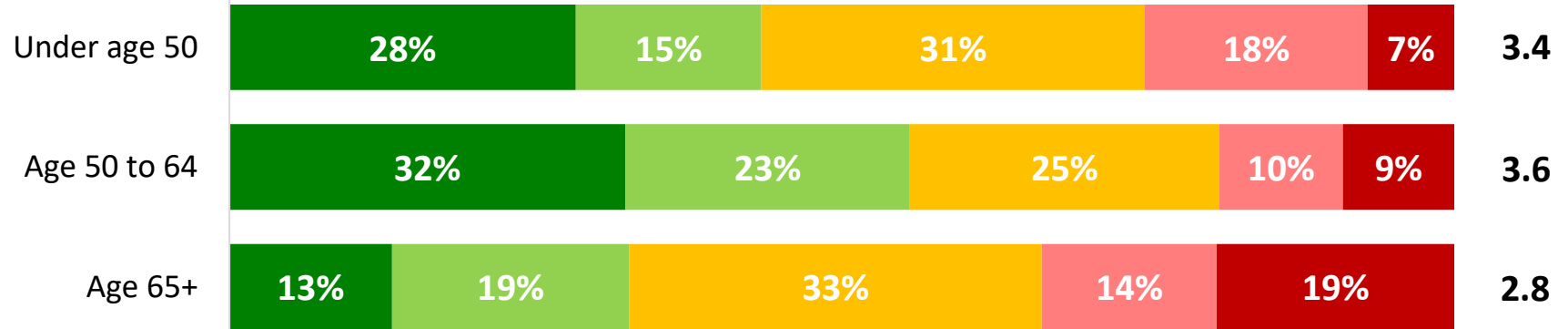
Q.44 Next, I am going to read some factors in choosing your next home. Please rate each of the following using a scale of one to five, where one means that it is not important at all to you and five means it is very important to you in choosing your next home. Of course, you can use any number between one and five, the higher the number the higher the importance of that factor.

Middle Aged Voters More Likely To Prioritize Size of Lot and Home

The Size of the Home or Square Footage by Age



Lot Size or Amount of Land by Age



Q.44 Next, I am going to read some factors in choosing your next home. Please rate each of the following using a scale of one to five, where one means that it is not important at all to you and five means it is very important to you in choosing your next home. Of course, you can use any number between one and five, the higher the number the higher the importance of that factor.

National Association of REALTORS®

New Hampshire Statewide Housing Preferences Survey

December 2024

American Strategies designed and administered this multi-modal survey conducted by professional interviewers and via an online platform. The survey reached 400 adults (400 weighted), age 18 or older, who indicated they were registered to vote in New Hampshire. The survey was conducted December 3-9, 2024.

Thirty-eight percent of respondents were reached on wireless phones and eleven percent on VOIP/landlines. Fifty percent of respondents were reached online. Quotas were assigned to reflect the demographic distribution of registered voters in New Hampshire, 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.