

National Association of REALTORS®

New Hampshire Statewide Short Term Rentals

September 2019

American Strategies designed and administered this telephone survey conducted by professional interviewers. The survey reached 750 adults, age 18 or older, who indicated they were registered to vote in New Hampshire, and indicated that they were almost certain or probably going to vote in the election for President, Congress, and other offices in November 2020. The survey was conducted from September 4-25, 2019.

Forty-one percent of respondents were reached on wireless phones, thirteen percent on VOIP phones, and forty-five percent on landlines. Quotas were assigned to reflect the demographic distribution of likely voters in New Hampshire and the data were downweighted to 500 and weighted to ensure an accurate reflection of the population. The sample was drawn from a third-party vendor voter file and based on vote history. The overall margin of error is +/- 4.4%. The margin of error for subgroups is larger and varies. Percentage totals may not add up precisely due to rounding.

Executive Summary: Short-Term Rentals

Eight-in-ten New Hampshire voters support allowing property owners to rent out their property for short-term stays through companies like Air BnB, HomeAway, and V.R.B.O.

Demographically, support is strongest among voters under the age of 50, college graduates, and voters in the North and White Mountain areas.

Nearly three-quarters of voters would support state-wide legislation to allow short-term rentals.

Forty-three percent of voters would strongly support the legislation, while another 32 percent of voters somewhat support the legislation. Just under a fifth of voters oppose the legislation (10 percent strongly oppose, 19 percent total oppose).

There is some drop-off between support for short-term rentals and support for legislation allowing short-term rentals. Once again, voters under the age of 50 are most supportive, and support is particularly high among these younger voters with a college education.

Executive Summary: Awareness and Usage

Most voters are familiar with short-term rental services and are open to using them. Most voters are familiar with short-term rental companies (37 percent very familiar, 31 percent somewhat familiar, 12 percent a little familiar), while a fifth (19 percent) are not familiar at all with the concept. Four-in-ten voters have used these services, and another 29 percent have not used the services but would consider doing so.

Four-in-ten voters have used short-term rental services; an additional three-in-ten have not yet used short term rentals but are open to the idea. Thirty-nine percent of voters have rented a home, apartment or room through a short-term rental company like AirBnB; 29 percent have not yet used short-term rentals but are open to doing so. Just under a third (29 percent) would not consider using a service like AirBnB, HomeAway or V.R.B.O.).

Executive Summary: Messaging

Persuading legislators to protect short-term rentals should start by underscoring the broad and bipartisan public support for the program. Overall, 79 percent of voters are in favor of allowing rentals with strong support from Democrats (75 percent in favor), Republicans (80 percent) and independents (79 percent).

Property rights and importance to local economy strongest “pro” arguments with voters.

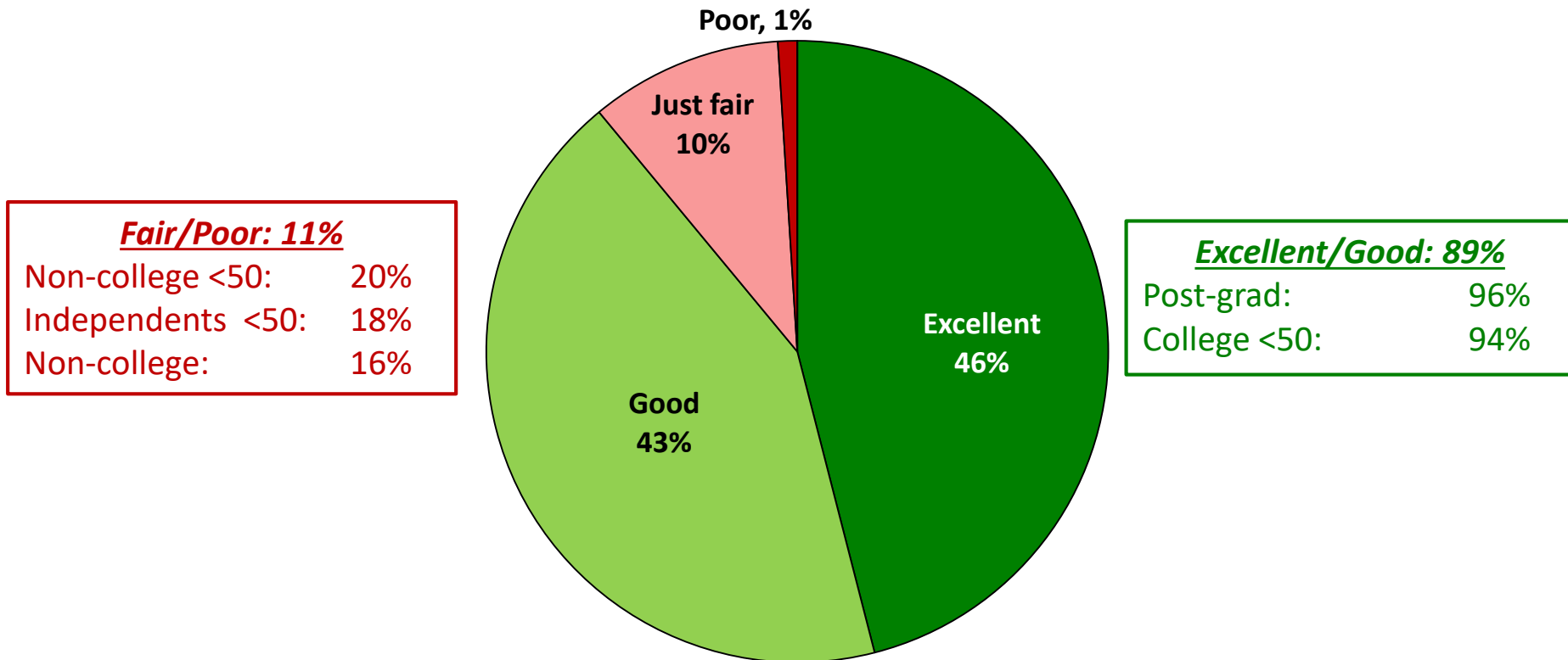
- Homeowners should be able to rent out their property if they have a need to do so or if they want to. (71 percent strongly agree, 91 percent total agree)
- Vacation rental properties are an important part of New Hampshire's tourism industry (62 percent strongly agree, 88 percent total agree)

Voters feel cities and counties know best when it comes to creating rental rules and regulations for their own communities (41 percent strongly agree, 70 percent total agree). They are also convinced by the argument that *local governments already have the tools to protect public safety and deal with bad behavior. If there are problems, we should enforce existing laws, not punish property owners by telling them when they can or can't rent out their property.* (46 percent very convincing, 28 percent somewhat convincing)

Quality of Life

Overwhelming Majority Say Quality of Life in New Hampshire is Excellent or Good

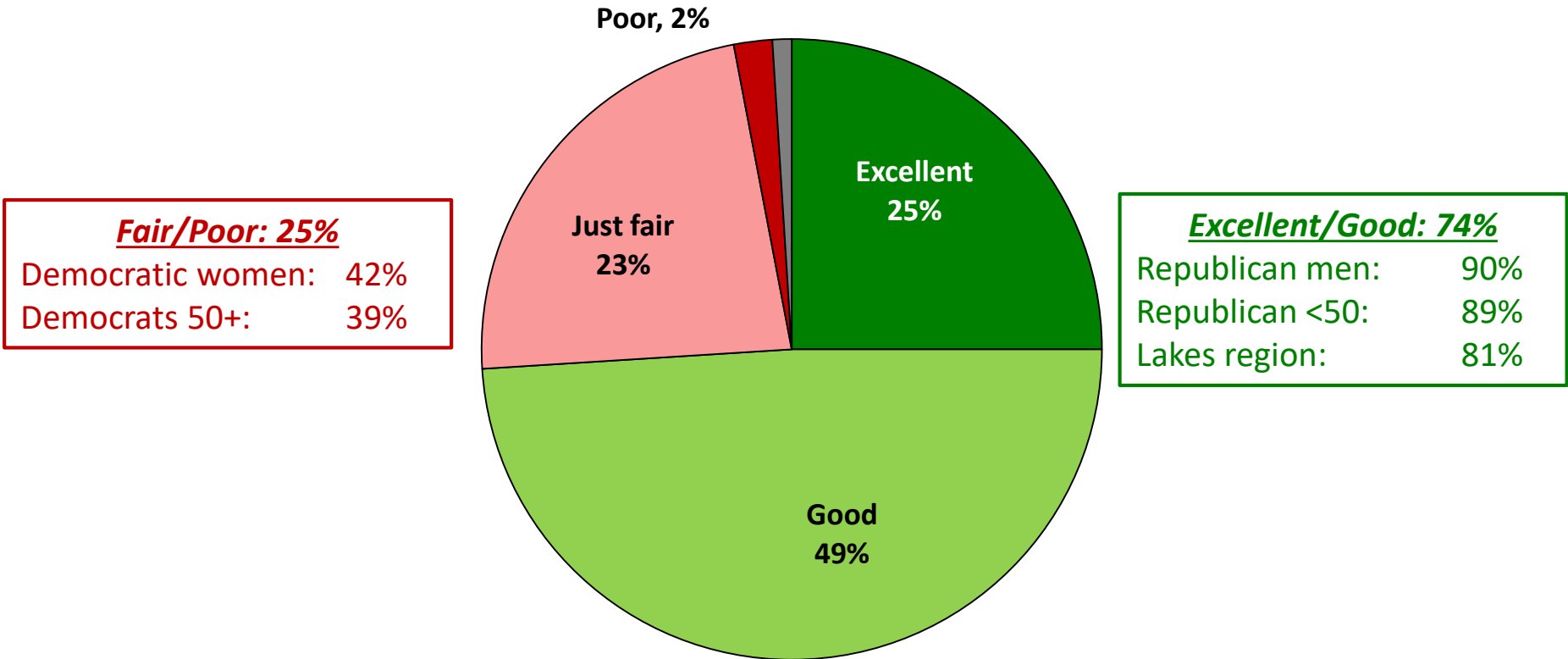
Quality of Life in New Hampshire



Q.5 Overall, how would you describe the quality of life in New Hampshire - excellent, good, just fair, or poor?

Majority Also Rate Economic Conditions in New Hampshire Positively

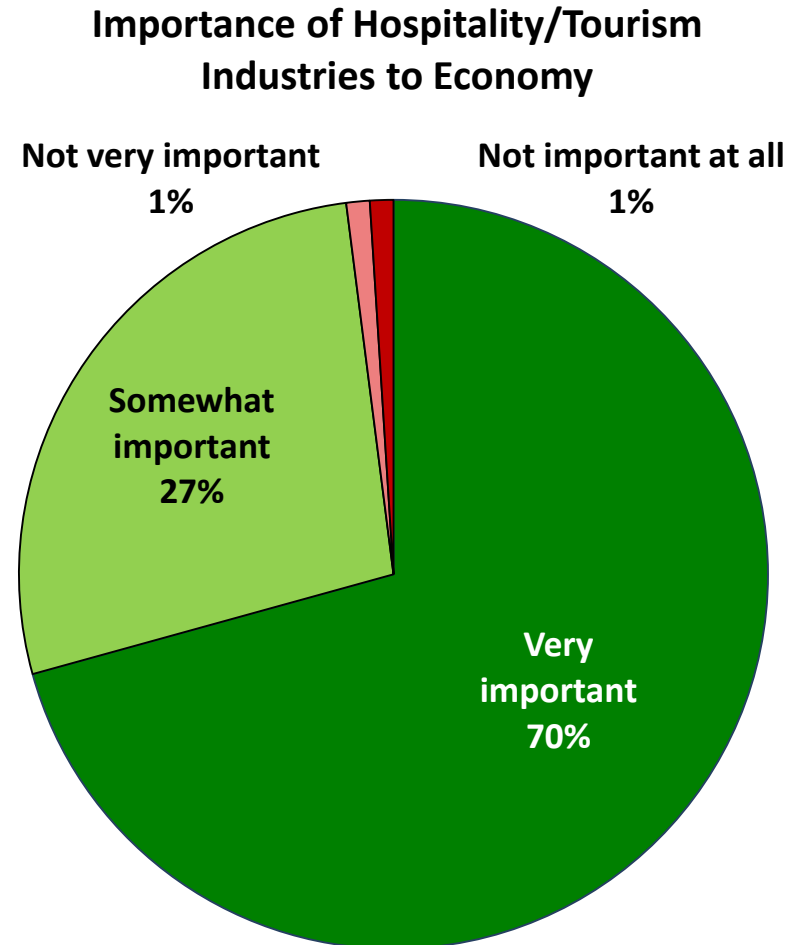
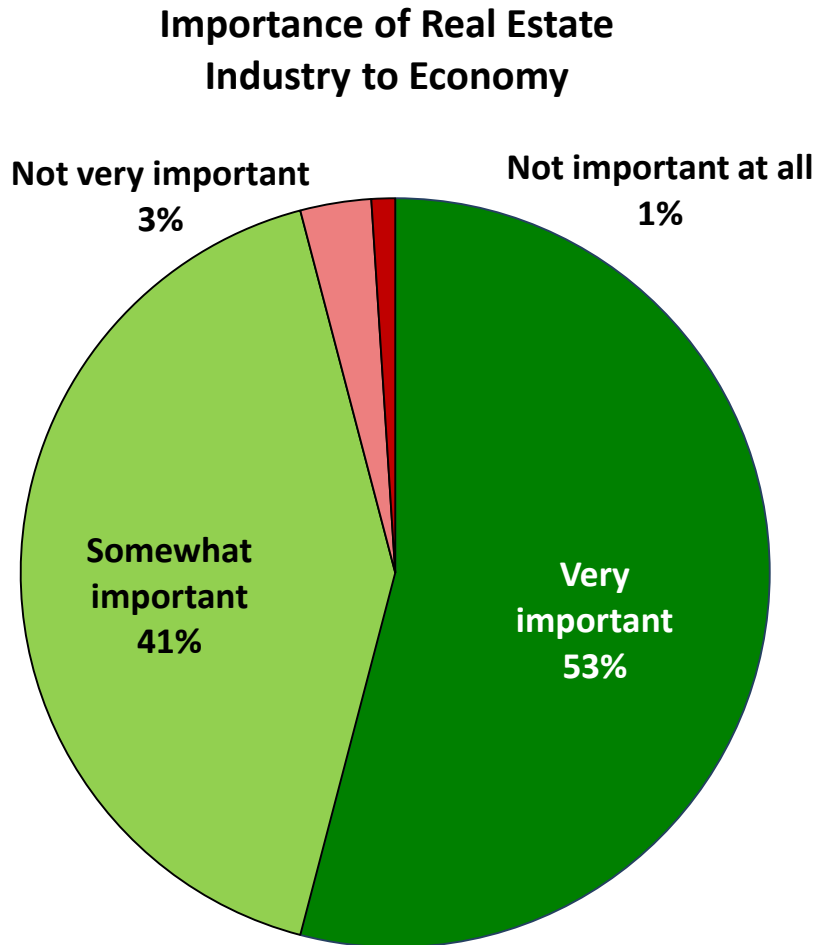
Economic Conditions in New Hampshire



Q.7 How would you rate economic conditions in New Hampshire today - excellent, good, just fair, or poor?

Majority of Voters See Real Estate and Tourism Industries as Very Important to State's Economy

Hospitality tourism is even more important in voters' minds than the real estate industry



Q.8 How important do you believe the real estate industry and housing market are to New Hampshire's overall economy?

Q.9 How important do you believe the tourism and hospitality industries are to New Hampshire's overall economy?

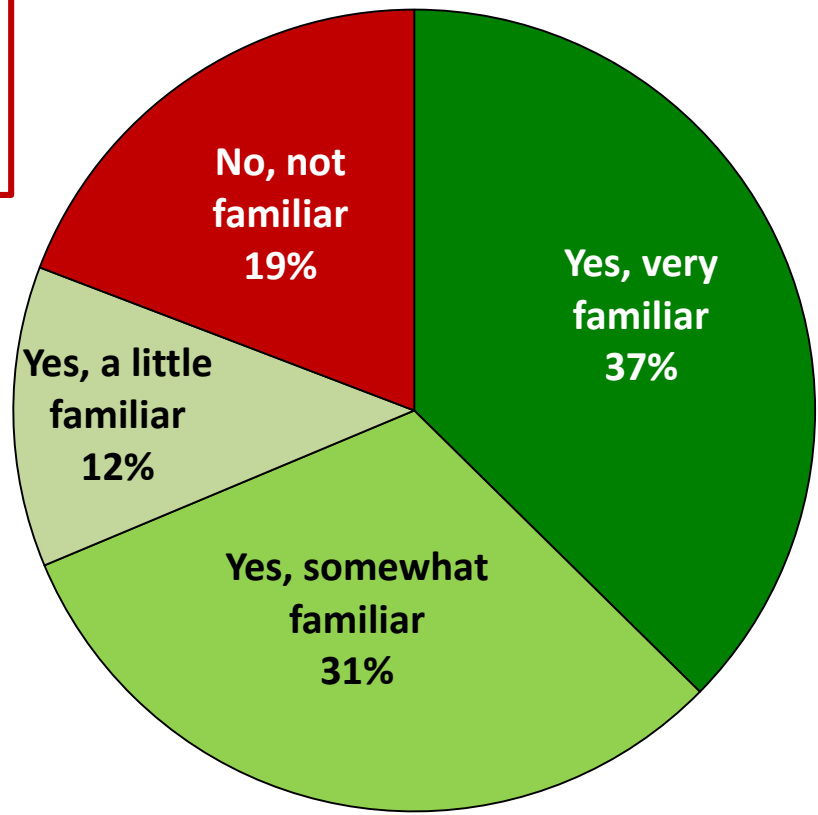
Experience With Short-Term Rentals

Majority Have At Least Some Familiarity with Companies like Air BnB, HomeAway and V.R.B.O.

Familiarity with Short-Term Rental Companies

<u>Least Familiar</u>	
High school or less:	43%
Non-college age 50+:	37%
Over 64:	36%

<u>Very Familiar</u>	
College <50:	59%
Age 35 to 49:	59%
White Mountain:	58%
Independent <50:	55%
Post-grad:	53%



80% Total Familiar

Q.10 Switching gears a bit, I'd like to ask you about companies that allow people to rent out their homes, apartments, or a room in a house for short-term stays, companies like Air BnB, HomeAway, and V.R.B.O. Are you familiar with this approach to providing short-term room or housing rentals?

Four-in-Ten Have Utilized a Service Like Air BnB, HomeAway or V.R.B.O.

Two-thirds of voters are open to using the services

Yes, Would Again

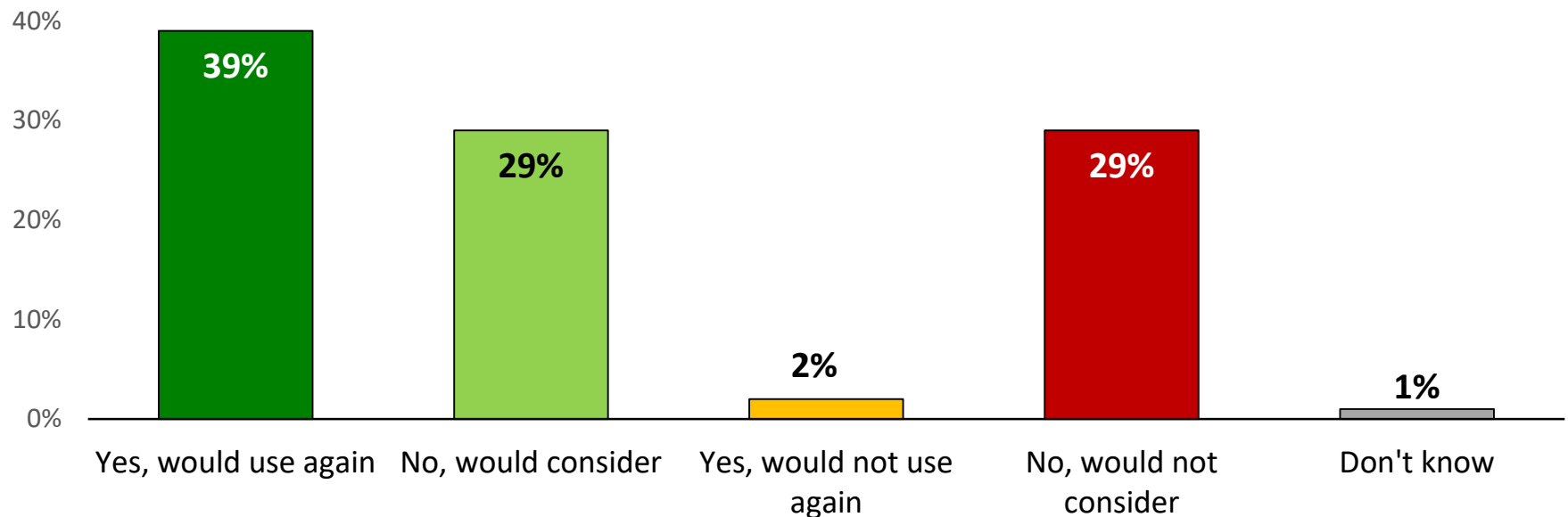
Age 18-34:	66%
College <50:	59%
Portsmouth area:	59%
Post-grad:	51%

No, Would Consider

North:	40%
Age 35-49:	37%
Central:	36%
Women under 50:	36%

Would Not Consider

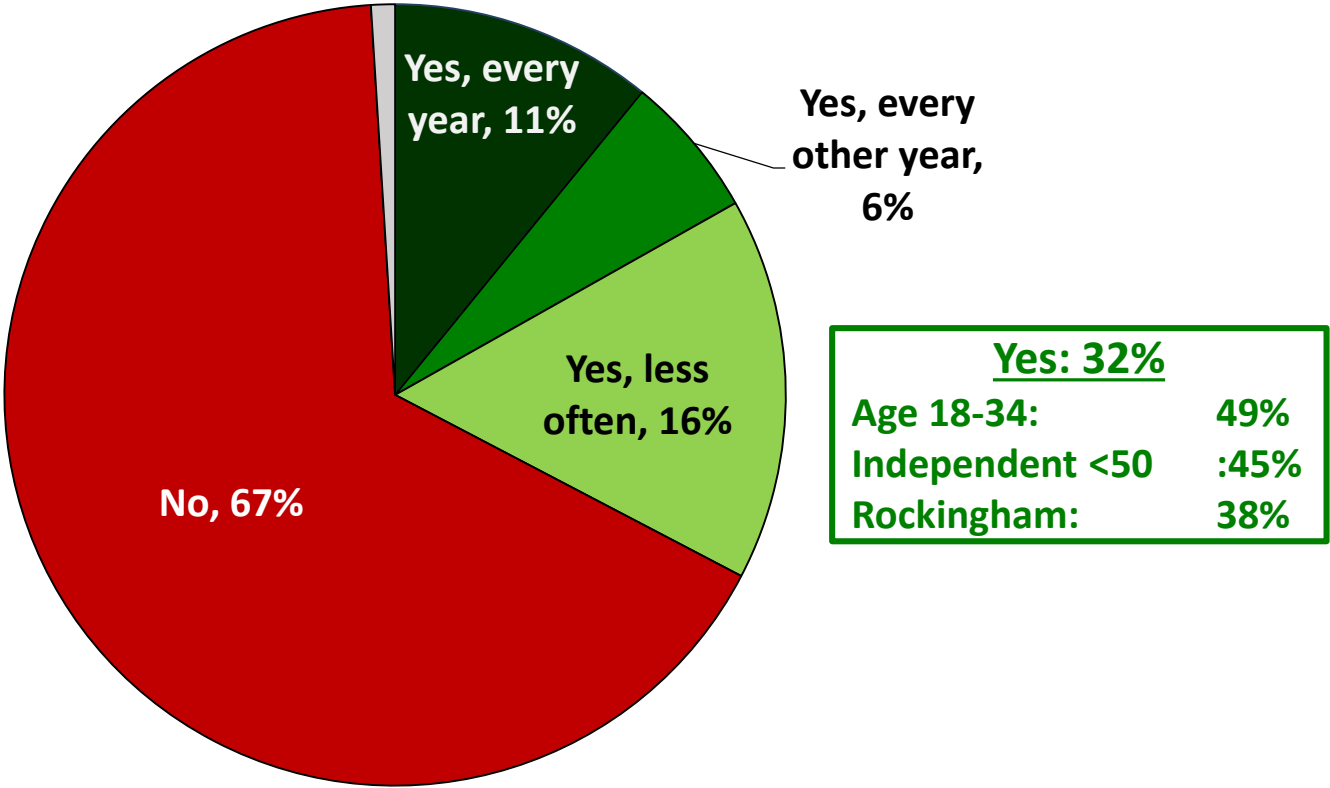
Over age 64:	52%
High school or less:	45%
Non-college 50+:	45%



Q.13 Have you or your family ever rented a home, apartment, or room using a service like AirBnB, HomeAway, or V.R.B.O.? (IF YES) Would you consider using one of these services again?
(IF NO) Would you consider using one of these services in the future?

One-Third of Residents Have Rented a Vacation Property in New Hampshire

Rent Vacation Property in New Hampshire

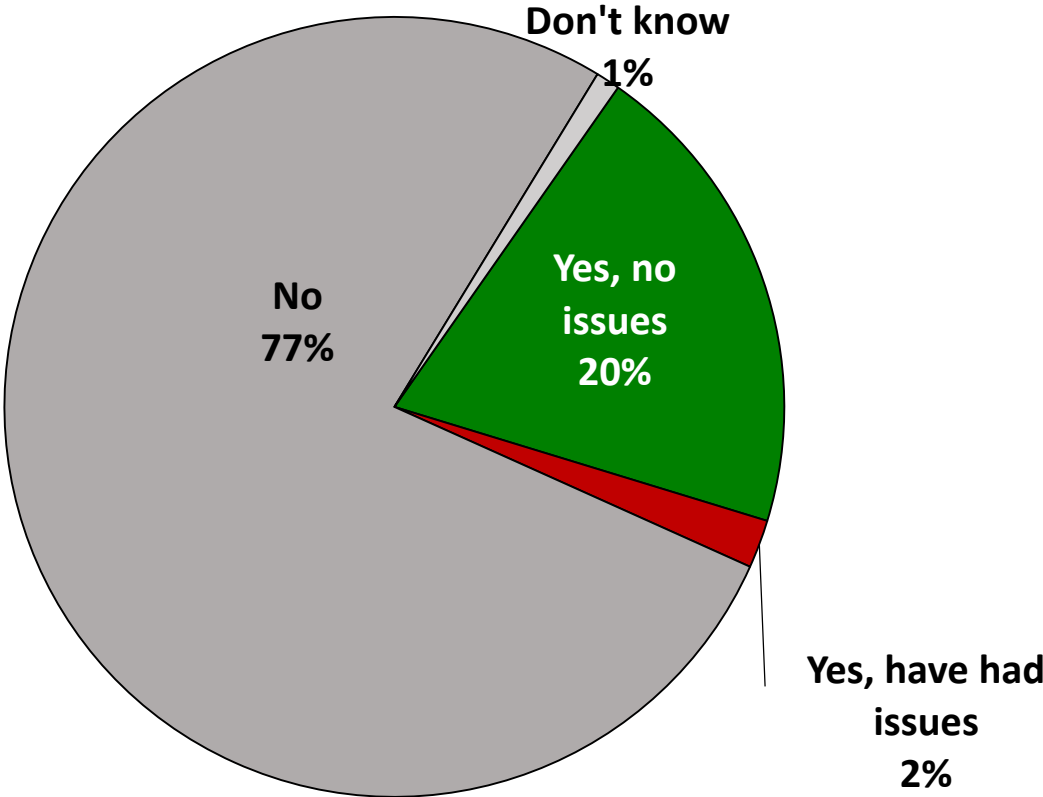


Q.14 Have you or your family ever rented a vacation property in New Hampshire, either through a short-term rental service, a local rental agency, or from family or friends? (IF YES) And would you say that you rent vacation properties in New Hampshire at least once a year, every other year or so, or less often than that?

One-in-Five Voters Know of A Short-Term Rental Property in their Neighborhood

Neighbors with no issues outnumber those with issues by ten-to-one

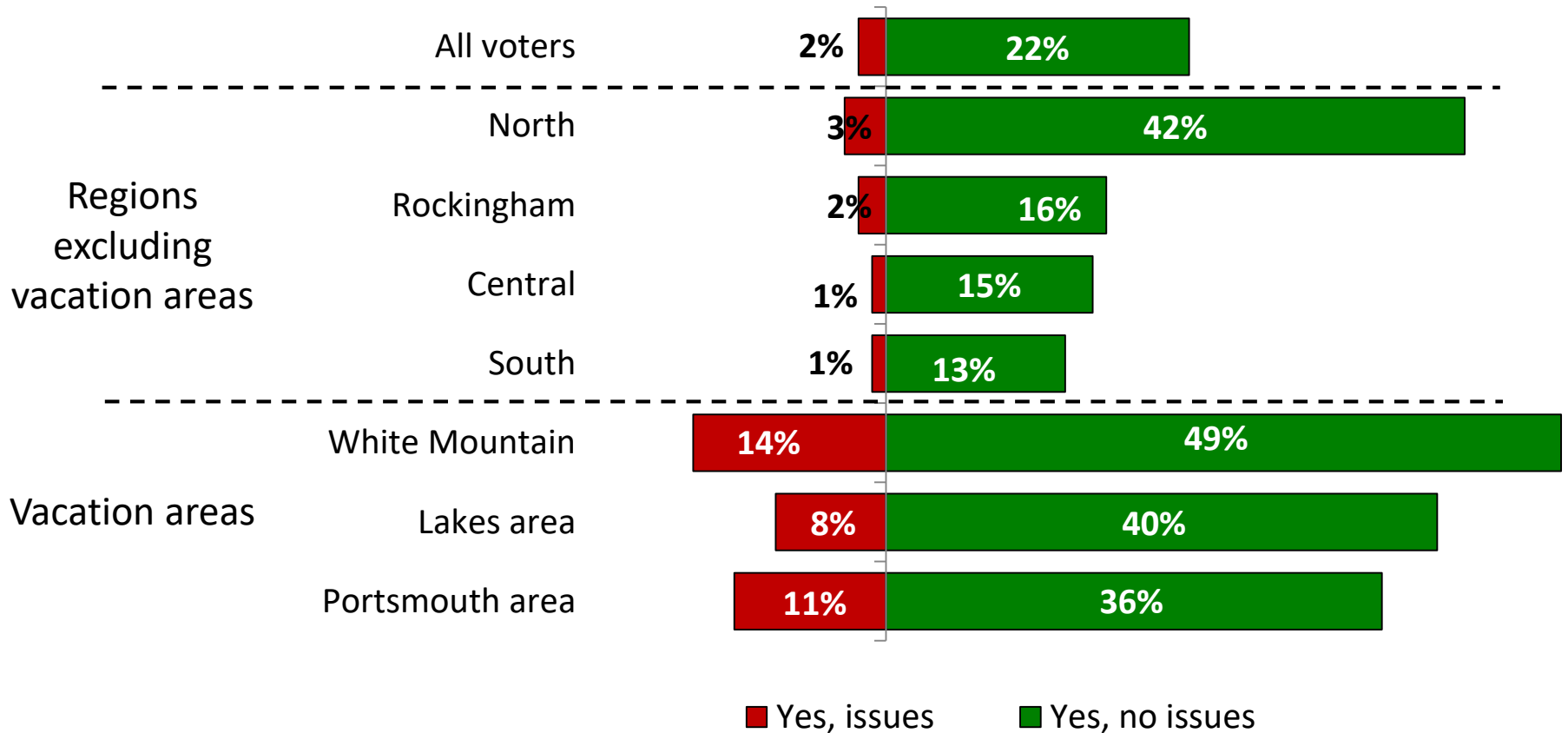
Aware of Neighborhood Properties Used as Short-Term Rentals



Q.15 Are you aware of any properties in your neighborhood that are rented out on a short-term basis using a service like AirBnB, HomeAway, or V.R.B.O.?(IF YES) And have you had any issues or problems related to the short-term rentals in your neighborhood?

Those in White Mountain Area Have Most Experience with Short-Term Rentals in Their Neighborhoods

Experience with Short-Term Rentals

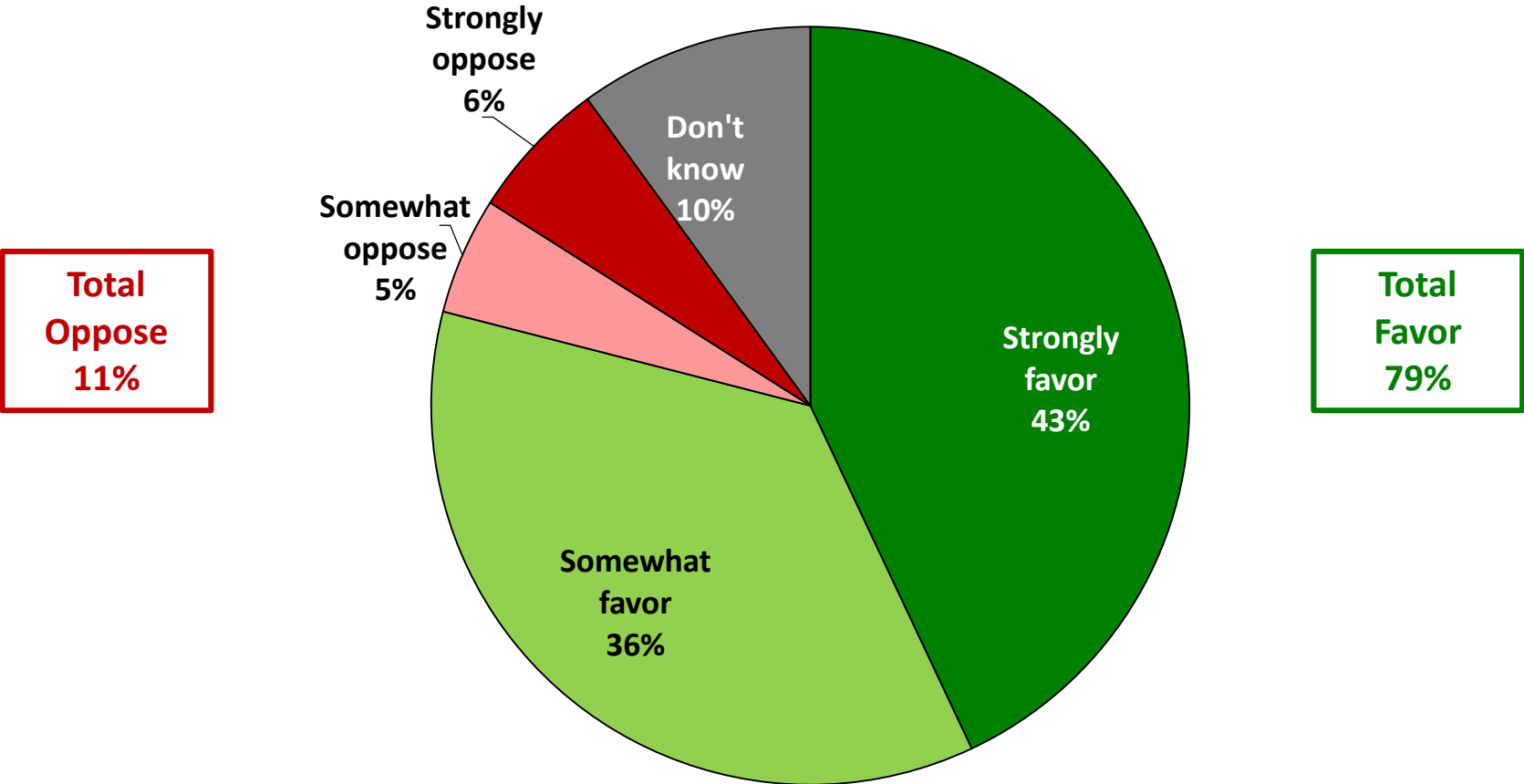


Q.15 Are you aware of any properties in your neighborhood that are rented out on a short-term basis using a service like AirBnB, HomeAway, or V.R.B.O.?(IF YES) And have you had any issues or problems related to the short-term rentals in your neighborhood?

Eight-in-Ten Support Allowing Property Owners to Rent Out Property for Short-Term Stays

Over four-in-ten STRONGLY support the proposal

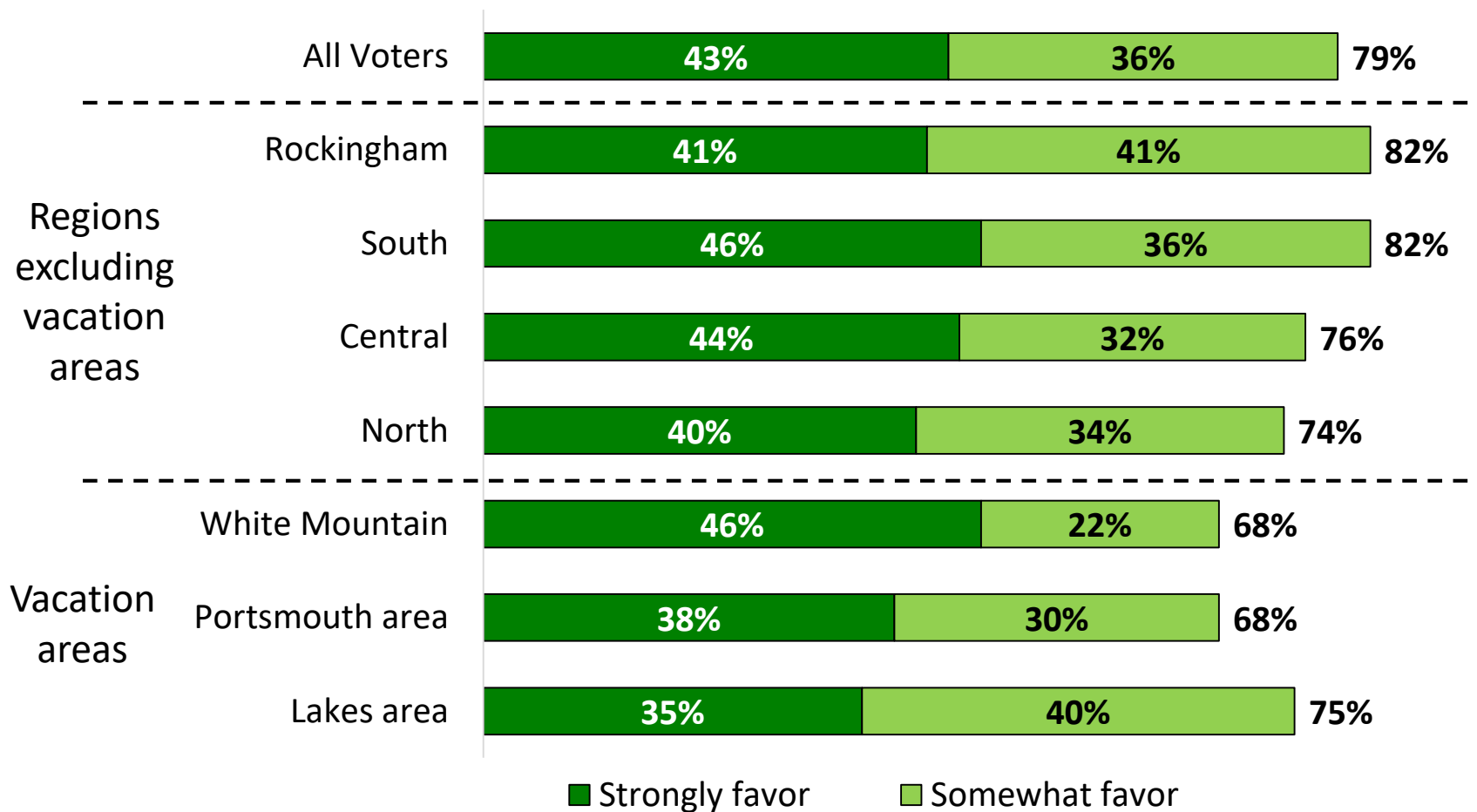
Allow Property Owners to Rent their Properties for Short-Term Rentals



Q.11 Overall do you (ROTATE) favor or oppose allowing property owners to rent out their property for short-term stays through companies like AirBnB, HomeAway, and V.R.B.O or local real estate offices?

Broad Support Across the State For Allowing Short-Term Rentals

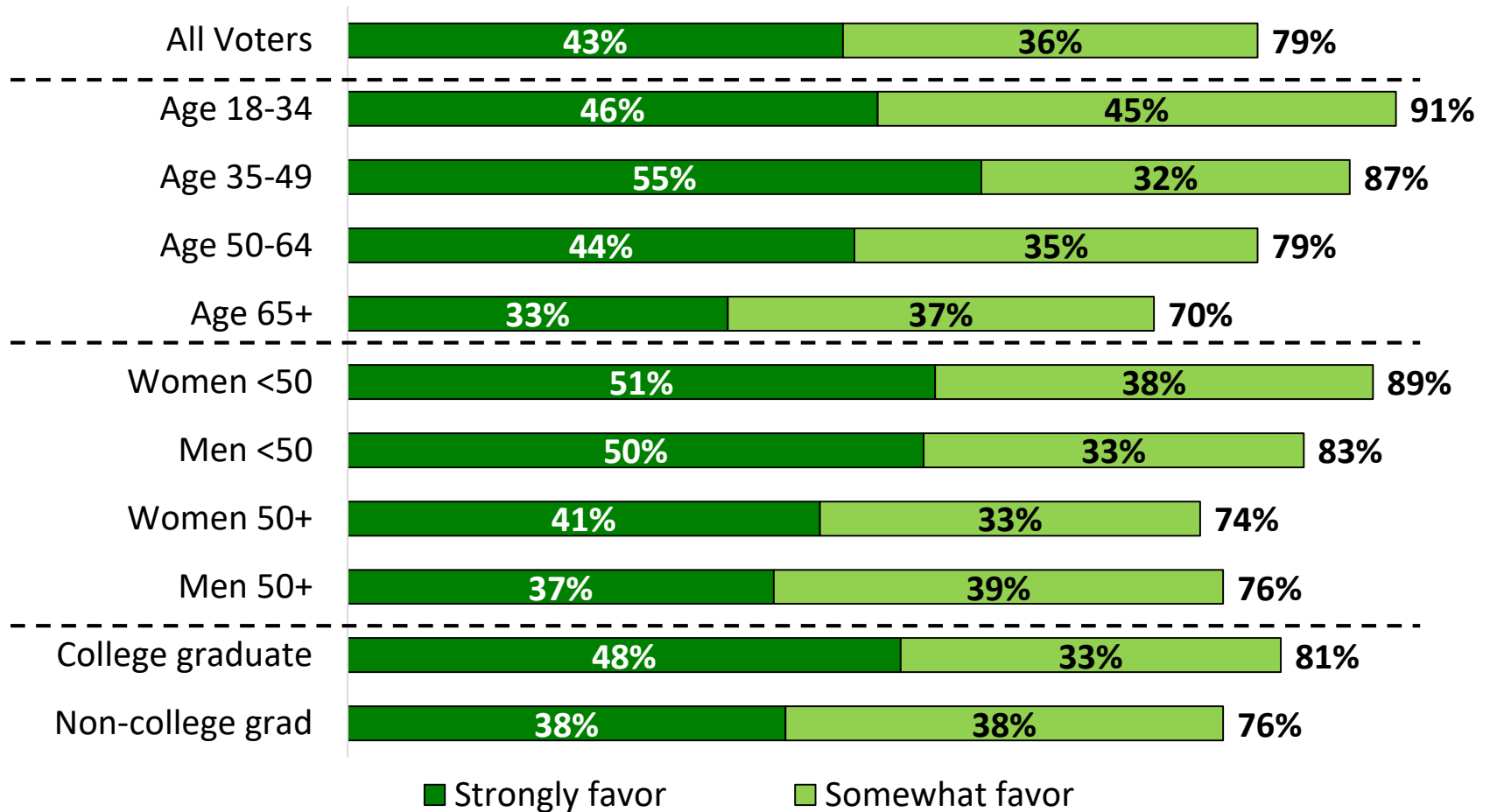
Allow Property Owners to Rent their Properties for Short-Term Rentals



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Young People, College Grads Most Likely to Favor Allowing Short Term Rentals

Allow Property Owners to Rent their Properties for Short-Term Rentals



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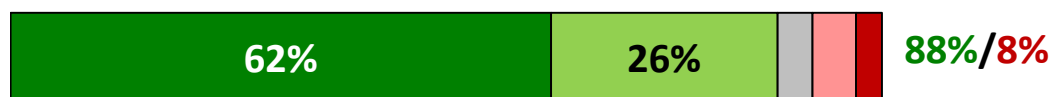
Vast Majorities Say Property Owners Should Be Able to Rent Their Properties and Vacation Rentals Are Important for Tourism

Disagree that regulations are already burdensome and rentals cause problems

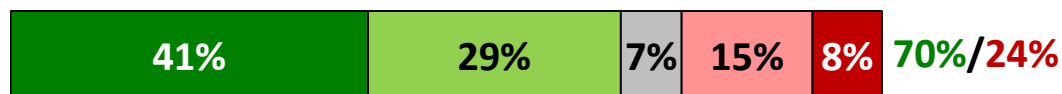
Homeowners should be able to rent out their property if they have a need to do so or if they want to.



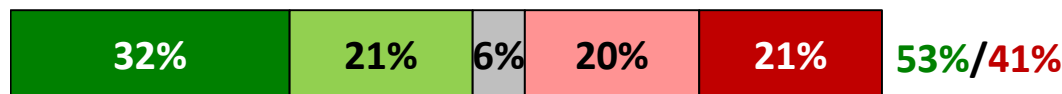
Vacation rental properties are an important part of New Hampshire's tourism industry.



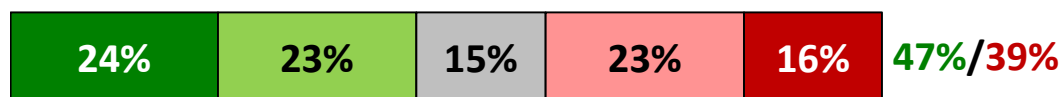
Cities and counties know better than the state government when it comes to creating rules and regulations for vacation rental properties in their own communities.



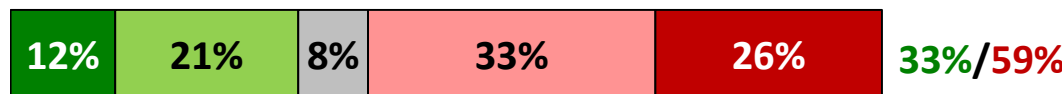
Vacation rental properties are an important part of the economy in the area where I live.



Government regulations on rental properties are a burden on private property owners and make it unnecessarily difficult to rent properties.



Short-term vacation rentals often result in safety or nuisance issues like traffic, loud parties, and crime.

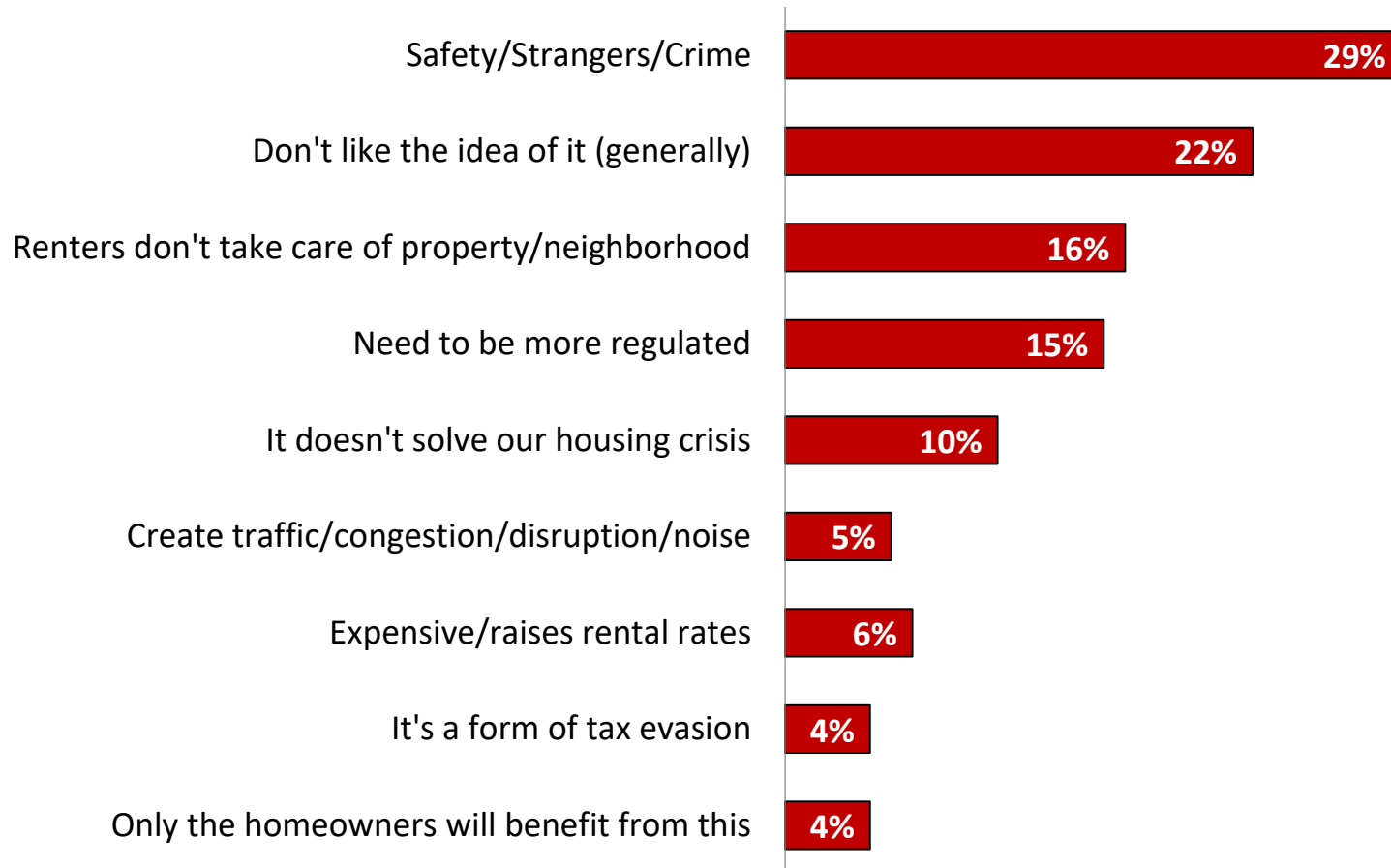


■ Strongly agree ■ Somewhat agree
■ Don't know ■ Somewhat disagree

Q.17 Now I am going to ask you some statements about vacation property rentals. Please tell me whether you (ROTATE) agree or disagree with each statement.

Oppositions is Minimal, Includes Concerns About Public Safety, Run Down Properties, and a Desire for Greater Regulations

Reasons for Opposition to Short-Term Rentals (n=55)

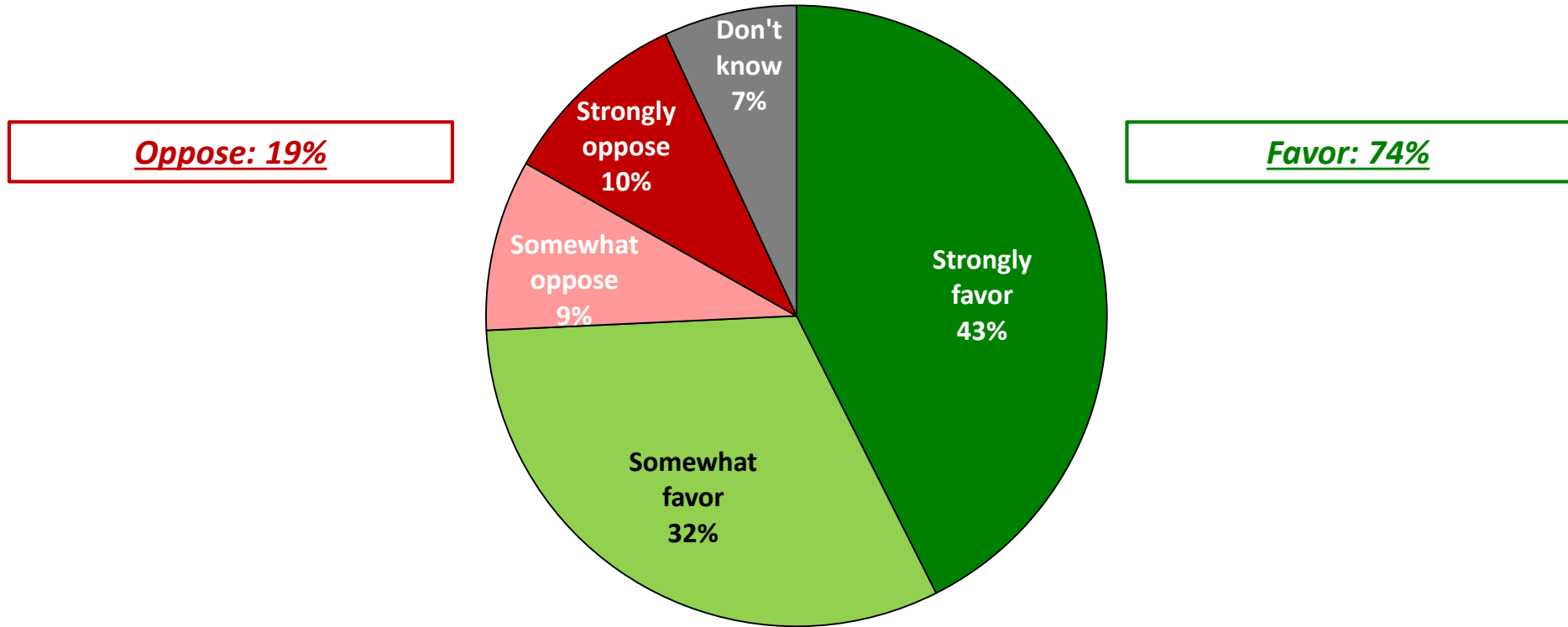


*Legislative Proposals to
Allow Short Term Rentals*

Nearly Three-Quarters of Voters Favor Legislation Allowing Short-Term Rentals Statewide

Four-in-ten STRONGLY support the proposal

Opinion of Statewide Legislation Allowing Short-Term Property Rentals

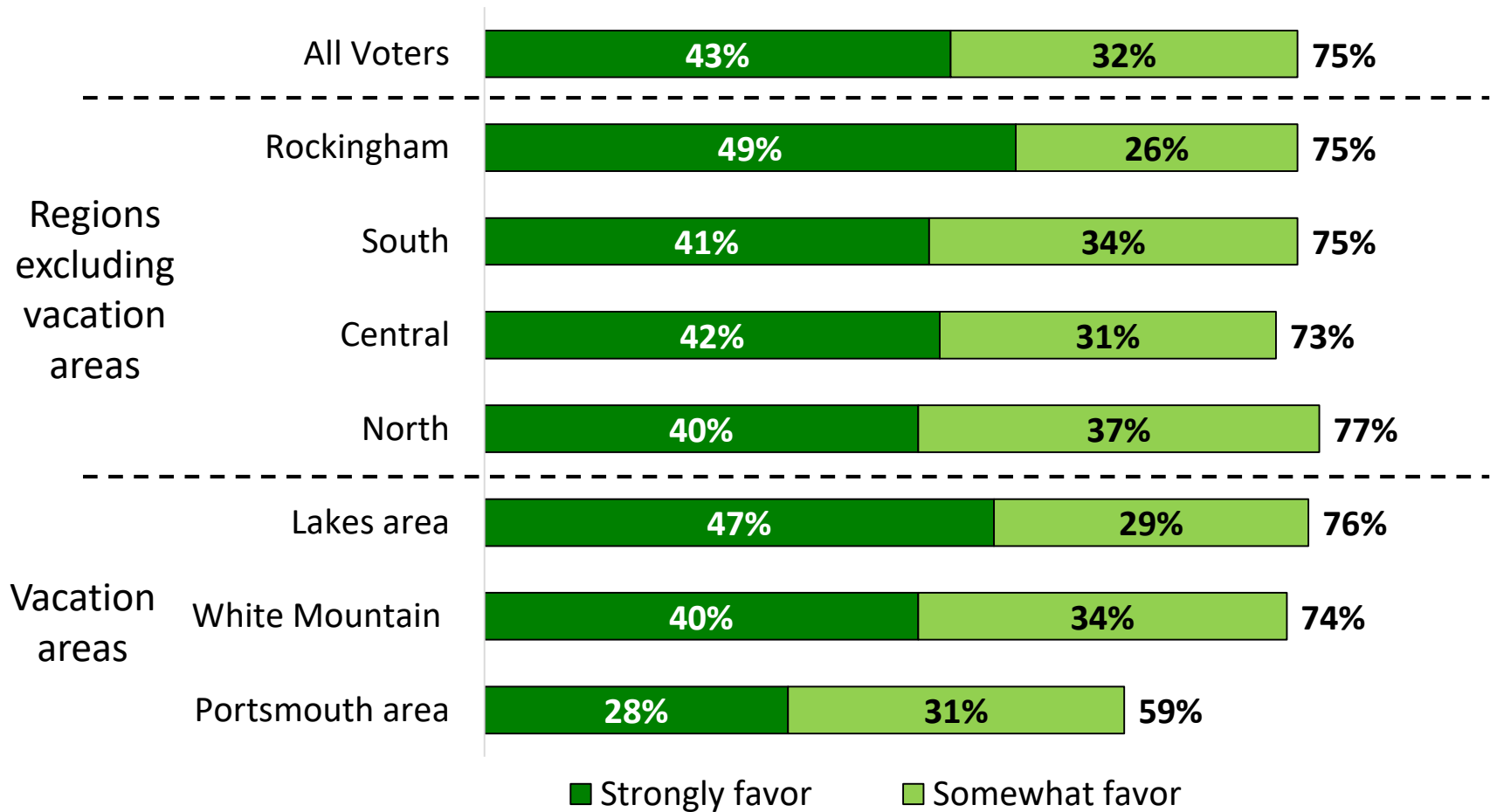


Q.18 As you may know, some New Hampshire towns have banned short-term rentals completely. There is a proposal in the New Hampshire state legislature that would guarantee the right of residential property owners to rent out their property as a short-term rental, as long as the property is registered with the town and complies with local noise, parking, and sanitation ordinances. Towns would have the authority to fine property owners when there are repeated and verified violations of these local ordinances, but they would not be allowed to ban short-term rentals. Do you (ROTATE) favor or oppose this statewide legislation allowing short-term property rentals in New Hampshire?

Broad Support Across the State for Legislation Allowing Short Term Rentals

Almost half of voters in the Lakes area and Rockingham County strongly support legislation allowing STRs.

Opinion of Statewide Legislation Allowing Short-Term Property Rentals

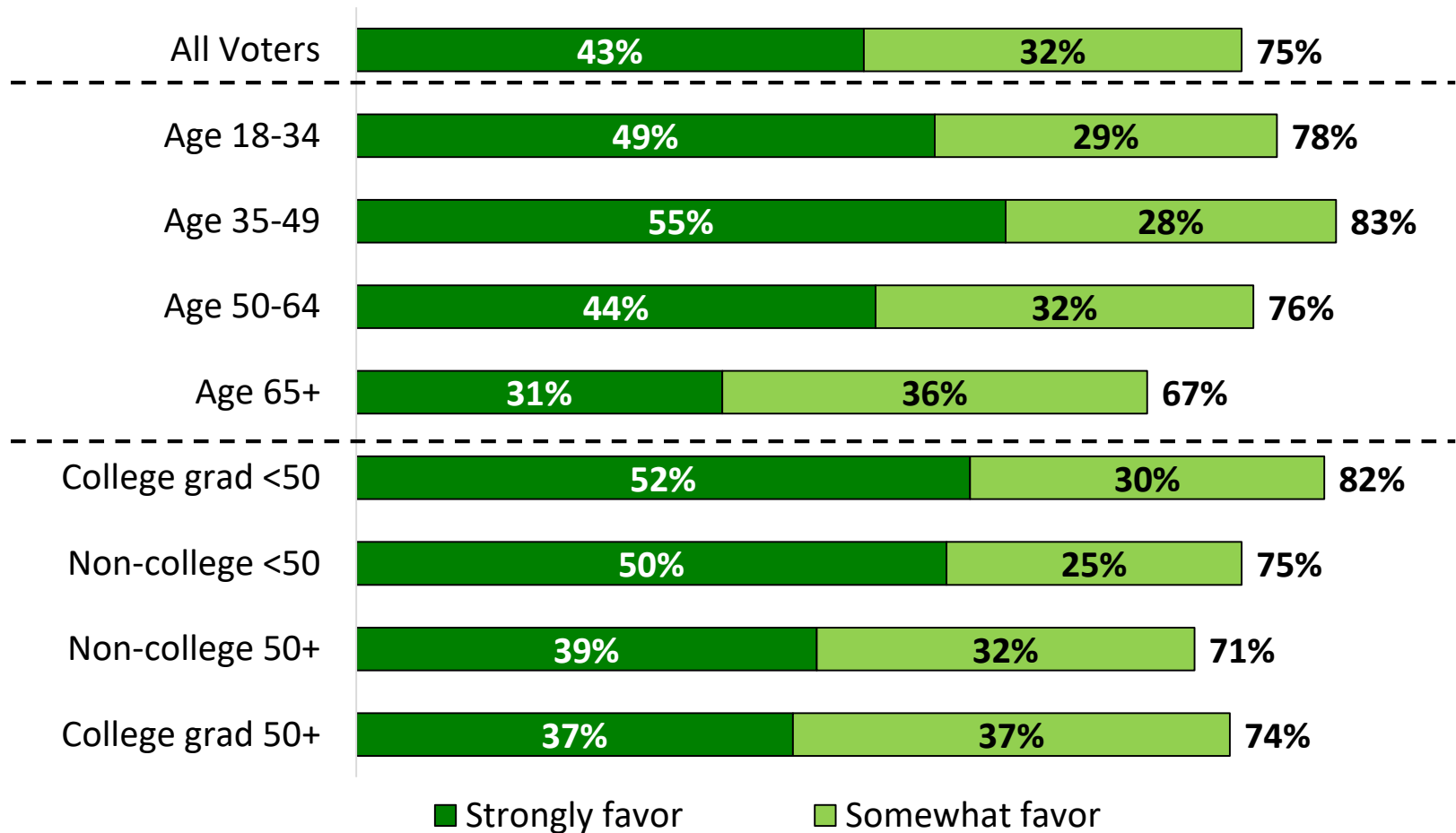


■ Strongly favor ■ Somewhat favor

Q.18 As you may know, some New Hampshire towns have banned short-term rentals completely. There is a proposal in the New Hampshire state legislature that would guarantee the right of residential property owners to rent out their property as a short-term rental,Do you (ROTATE) favor or oppose this statewide legislation allowing short-term property rentals in New Hampshire?

Middle-Aged Residents and Younger College Grads More Likely to Favor Legislation Allowing Short Term Rentals

Opinion of Statewide Legislation Allowing Short-Term Property Rentals



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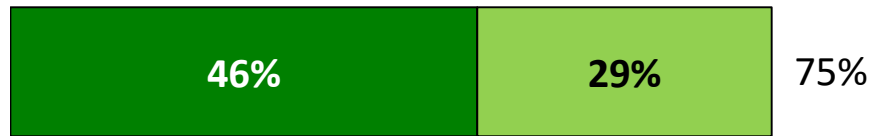
Voters Find Messaging About Private Property Rights Most Convincing

Arguments for State Legislation: Very or Somewhat Convincing

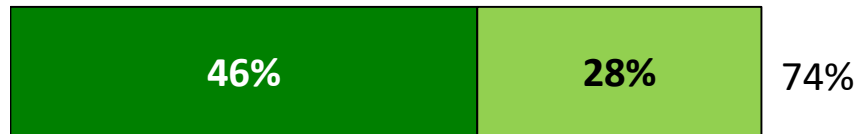
Homeowners should be able to rent out their property if they have a need to do so or if they want to. It's simply a matter of private property rights.



A vacation home is an important investment for many New Hampshire families. Being able to rent out a home helps pay for the cost of that investment.



Local governments already have the tools to protect public safety and deal with bad behavior. If there are problems, we should enforce existing laws, not punish property owners by telling them when they can or can't rent out their property.



Some families depend on the rental income from a room in their house or a vacation property to help them make ends meet. Restricting short-term rentals gives these families fewer options.



■ Very convincing

■ Somewhat convincing

Q.19 Now I am going to read you a series of reasons that people have given for why they would support this state legislation to protect the right to rent out vacation properties in New Hampshire. For each, please tell me whether this is a very convincing, somewhat convincing, a little convincing, or not at all convincing reason to support this legislation.

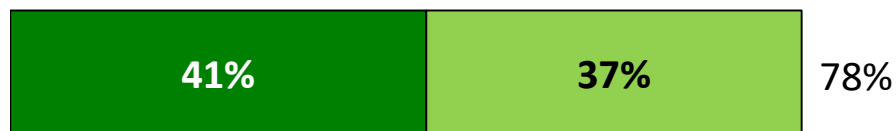
Messaging About Tourism Industry is Only Slightly Weaker

Arguments for State Legislation: Very or Somewhat Convincing

The revenue generated by visitors and tourists who rent homes and vacation properties creates jobs and helps the local economy and small businesses.



Companies that make it easy for people to rent out their properties, like AirBNB, FlipKey or HomeAway, are the future. New Hampshire needs to protect the right of property owners to offer short term rentals so that our state can fully participate in the new economy.



Rental homes and properties provide additional options for tourists who may not be able to afford pricey resorts or expensive hotels.



Homes in tourist areas have been a mainstay of New Hampshire's economy for generations. Many rural communities depend on property tax revenue from vacation homes to pay for local schools and essential services. Short-term rentals help families pay for second homes and strengthen rural communities.



■ Very convincing

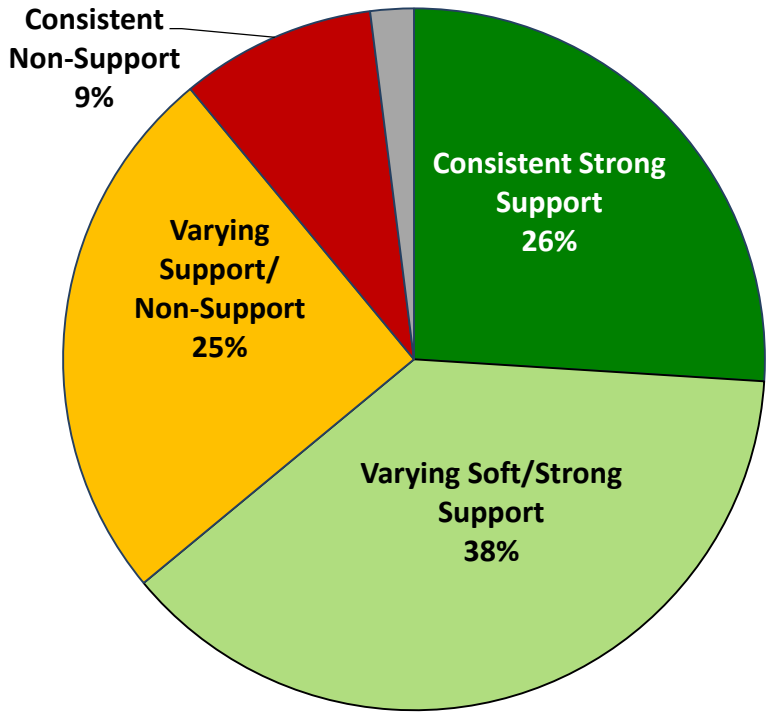
■ Somewhat convincing

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Targets and Messaging

Mobilization Targets are Voters Who Show Consistent, Strong Support for Short-Term Rentals and Legislation

Target Groups



Consistent, strong supporters: Strongly favor allowing short-term rentals, strongly favor short-term rental legislation

Varying soft/strong support: Move between strongly and somewhat favoring the short-term rentals in initial test and legislation test

Varying support/non-support: Favor allowing rentals or legislation in one of the two tests, but oppose or and unsure in the other test

Consistent non-support: Do not support rentals in initial test and legislation test

Uncommitted: Respond don't know or unsure in both initial test and legislation test

Supporter Base

Strongest, consistent supporters (26%) are more likely to include:

- Party score 3.6 or below (39%)
- Registered Republicans (38%)
- Age 35-49 (35%)
- Republican women (33%)
- Independent under age 50 (33%)
- College graduates under age 50 (32%)
- White Mountain Region (31%)

Consistent supporters, but who vary in their strength of support (38%), are more likely also to include:

- Age 18 to 34 (48%)
- Party Score 39.7-95.5 (46%)
- Independent women (43%)
- College graduates under age 50 (43%)

Inconsistent and Opponents

Inconsistent and Unsure (27%) are composed of:

- Over age 64 (36%)
- Lakes Region (34%)
- Republican men (34%)
- Non-college men (33%)
- Partisan score 3.7-38.1 (32%)
- Portsmouth region (32%)

Non-Supporters – consistent non-supporters (9%) are more likely to be:

- Portsmouth area (20%)
- H.S. or less (15%)

Consistent, Strong Supporters Almost Universally Back Property Rights and See Importance of STRs to Tourism Industry

Less consensus among strong, consistent supporters for whether the state or local gov. should make rules.

	% Strongly agree			
	All Voters	Consistent strong supporters (26%)	Varying soft/strong supporters (38%)	Vacation regions
Homeowners should be able to rent out their property if they have a need to do so or if they want to.	71%	98%	75%	61%
Vacation rental properties are an important part of New Hampshire's tourism industry.	62%	76%	63%	67%
Cities and counties know better than the state government when it comes to creating rules and regulations for vacation rental properties in their own communities.	41%	57%	35%	46%
Vacation rental properties are an important part of the economy in the area where I live.	32%	45%	29%	61%
Government regulations on rental properties are a burden on private property owners and make it unnecessarily difficult to rent properties.	24%	36%	20%	22%
Short-term vacation rentals often result in safety or nuisance issues like traffic, loud parties, and crime.	12%	4%	9%	18%

Q.17 Now I am going to ask you some statements about vacation property rentals. Please tell me whether you (ROTATE) agree or disagree with each statement.

Consistent Supporters See Private Property Rights as Paramount; Believe Local Governments Already Have the Tools They Need to Protect Public Safety

	% Very convincing			
	All Voters	Consistent strong supporters (26%)	Varying soft/strong supporters (38%)	Oversample/ vacation regions
Homeowners should be able to rent out their property if they have a need to do so or if they want to. It's simply a matter of private property rights.	60%	86%	62%	57%
Local governments already have the tools to protect public safety and deal with bad behavior. If there are problems, we should enforce existing laws, not punish property owners by telling them when they can or can't rent out their property.	46%	71%	43%	42%
A vacation home is an important investment for many New Hampshire families. Being able to rent out a home helps pay for the cost of that investment.	46%	66%	49%	47%
Some families depend on the rental income from a room in their house or a vacation property to help them make ends meet. Restricting short-term rentals gives these families fewer options.	44%	67%	42%	47%

Q.19 Now I am going to read you a series of reasons that people have given for why they would support this state legislation to protect the right to rent out vacation properties in New Hampshire. For each, please tell me whether this is a very convincing, somewhat convincing, a little convincing, or not at all convincing reason to support this legislation.

Messaging About the Tourism Industry is Slightly Less Persuasive

	% Very Convincing			
	All Voters	Consistent strong supporters (26%)	Varying soft/strong supporters (38%)	Oversample/ vacation regions
The revenue generated by visitors and tourists who rent homes and vacation properties creates jobs and helps the local economy and small businesses.	44%	65%	46%	43%
Rental homes and properties provide additional options for tourists who may not be able to afford pricey resorts or expensive hotels.	43%	66%	46%	43%
Companies that make it easy for people to rent out their properties, like AirBNB, FlipKey or HomeAway, are the future. New Hampshire needs to protect the right of property owners to offer short term rentals so that our state can fully participate in the new economy.	41%	66%	41%	36%
Homes in tourist areas have been a mainstay of New Hampshire's economy for generations. Many rural communities depend on property tax revenue from vacation homes to pay for local schools and essential services. Short-term rentals help families pay for second homes and strengthen rural communities.	40%	58%	48%	42%

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