

National Association of REALTORS®

Talbot County, MD Smart Growth July 2022

American Strategies designed and administered this telephone survey conducted by professional interviewers. The survey reached 325 adults, age 18 or older, who indicated they were registered to vote in Talbot County, Maryland. The survey was conducted July 18-21, 2022.

Sixty-eight percent of respondents were reached on wireless phones, six percent on VOIP phones, and twenty-seven percent on landlines. Quotas were assigned to reflect the demographic distribution of Talbot County, Maryland. The sample was drawn from a third-party vendor file. The overall margin of error is +/- 5.4%. The margin of error for subgroups is larger and varies.

Percentage totals may not add up precisely due to rounding.

Executive Summary

Residents of Talbot County are overall very satisfied with their quality of life. They value both the historic nature of Talbot's towns and villages and its natural resources, but also understand the need for additional housing – and in particular for more affordable housing for young people and those with lower incomes. Residents are supportive of efforts to develop underused land, so long as this does not impact the natural or historic attractiveness of the county.

- **Residents rank the quality of life in Talbot very highly (86 percent excellent/good).** Nearly four-in-ten (38 percent) say the quality of life is excellent while another 48 percent call it “good.” These numbers vary based on location and income, with lower-income households less likely to rank it as “excellent.”
- **Affordable housing, the cost of living, and homelessness account for 24 percent of voters' top concerns.** When asked to name in their own words the biggest issue facing Talbot County decisionmakers, residents most often cite housing or cost of living issues like affordable housing (13 percent), homelessness (4 percent) or inflation. Many are also concerned about overcrowding and development (16 percent).

Executive Summary

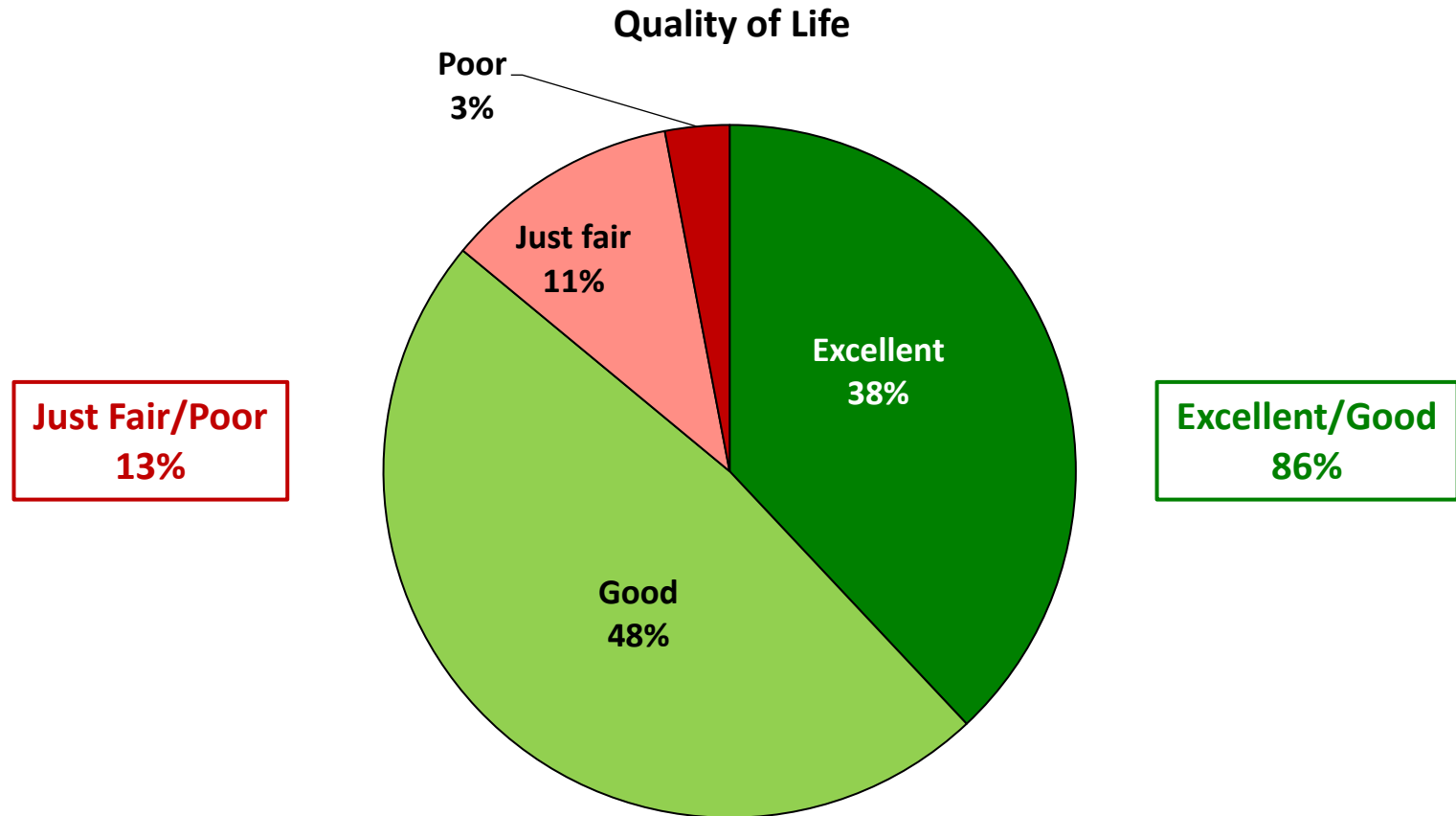
- **Protecting Talbot’s quality of life is a major policy priority for residents, but residents are also concerned about affordable housing.** Protecting the county’s coast, rural areas and historic character top the list of resident’s priorities for local elected officials, but fifty-one percent also say “creating more housing that is affordable to low and middle-income people” is a top priority.
 - Younger residents, Easton residents, and women are more likely to see housing affordability as a top priority.
- **A majority of Talbot residents consider the county’s stock of available housing to be a “fairly big” or “very big” problem (60 percent total), and that housing affordability is a problem (66 percent total).** This was especially pronounced among Easton residents and non-homeowners.
- **Sizeable majorities of residents believe that there is too little housing for people with low incomes and people just starting their careers.** Non-owners and Easton residents also report that there is too little housing available to rent full-time.

Executive Summary

- **Talbot County residents support a range of government-led proposals to increase housing opportunities for the county.** Sixty-seven percent of residents favor (36 percent strongly) a proposal that requires developers to set aside sub-market rate housing for new projects, and 62 percent favor (22 percent strongly) providing tax breaks to developers who do so.
 - Younger women and non-owners are most supportive of these proposals; older residents are least supportive.
 - Support for most of these proposals lack intensity.
- **Residents support utilizing under-developed land for housing.** A majority of residents (61 percent) support Easton annexing unincorporated land from Talbot County as a means to increase housing opportunities and 74 percent support the practice of infill development.
 - While there is some intensity to support for annexation and infill development, most are only “somewhat” supportive of these two measures. It is unclear how existing support would hold up under opposition.

Mood and Priorities in Talbot County

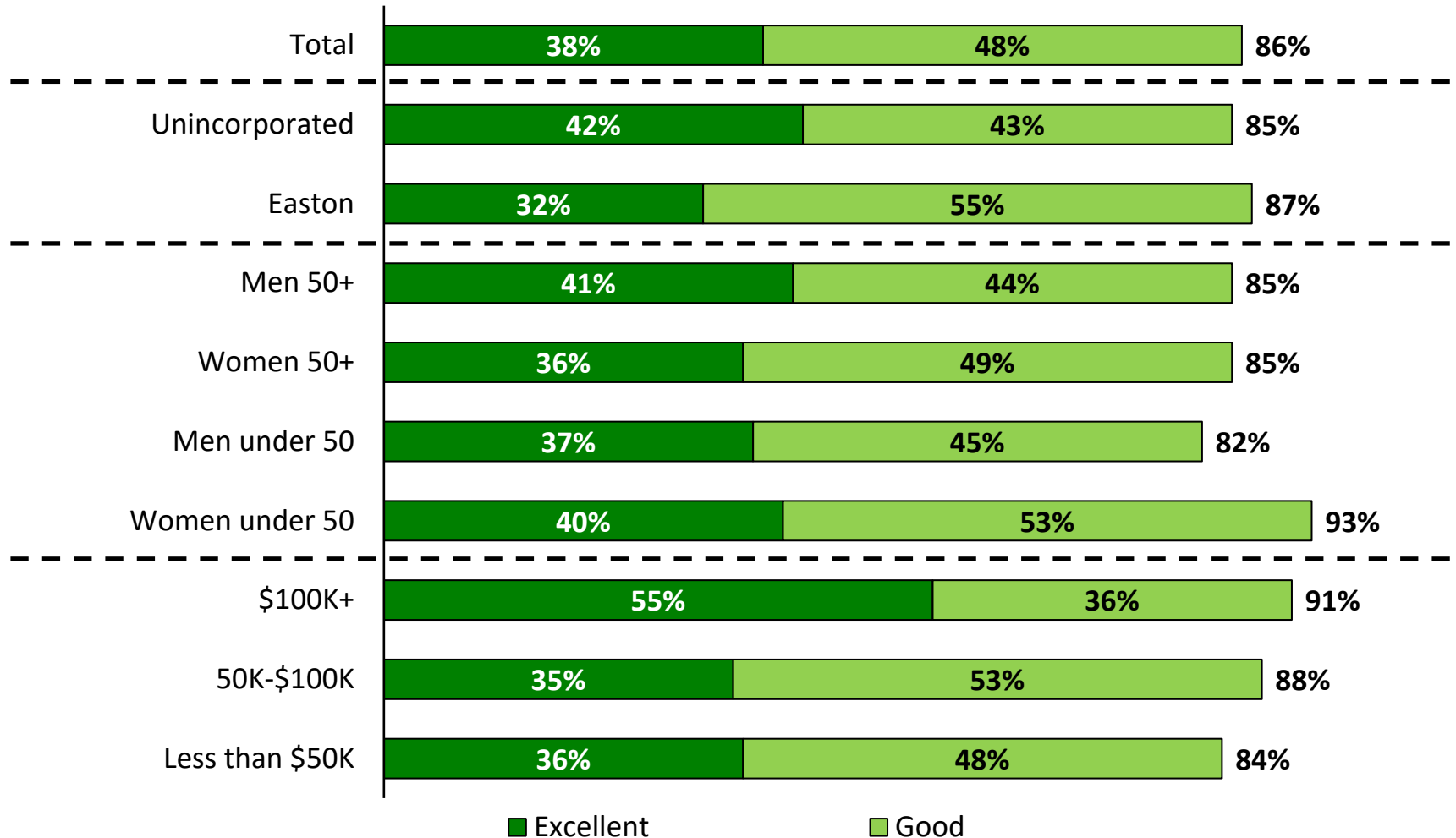
Almost Nine-in-Ten View Quality of Life in Talbot County as Excellent or Good



Q.3 Overall, how would you describe the quality of life in Talbot County - (ROTATE FIRST TO LAST, LAST TO FIRST) excellent, good, just fair, or poor?

Quality of Life is High Across Demographic Groups; Intensity Varies

Quality of Life “Excellent/Good” by Municipal District, Gender/Age, and Income

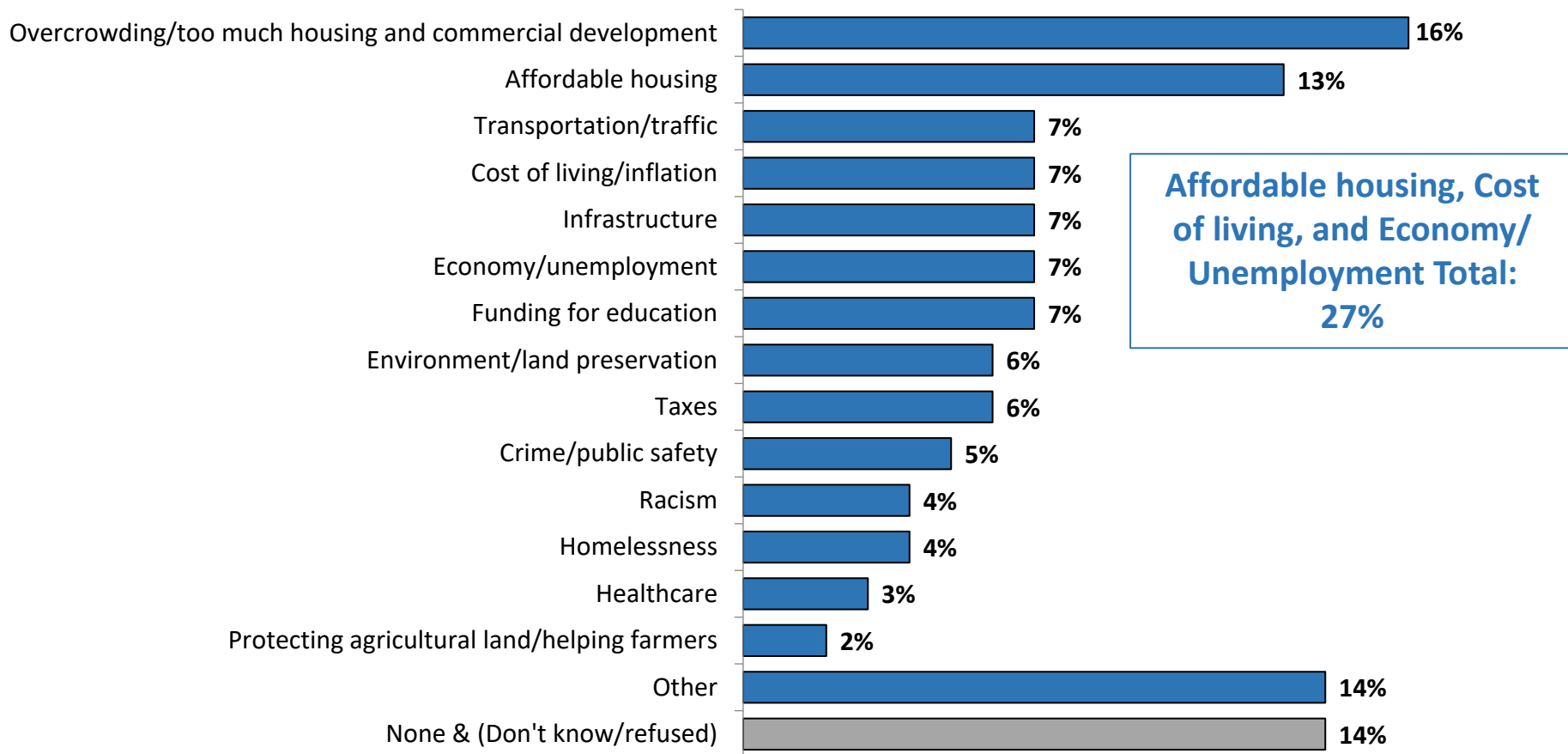


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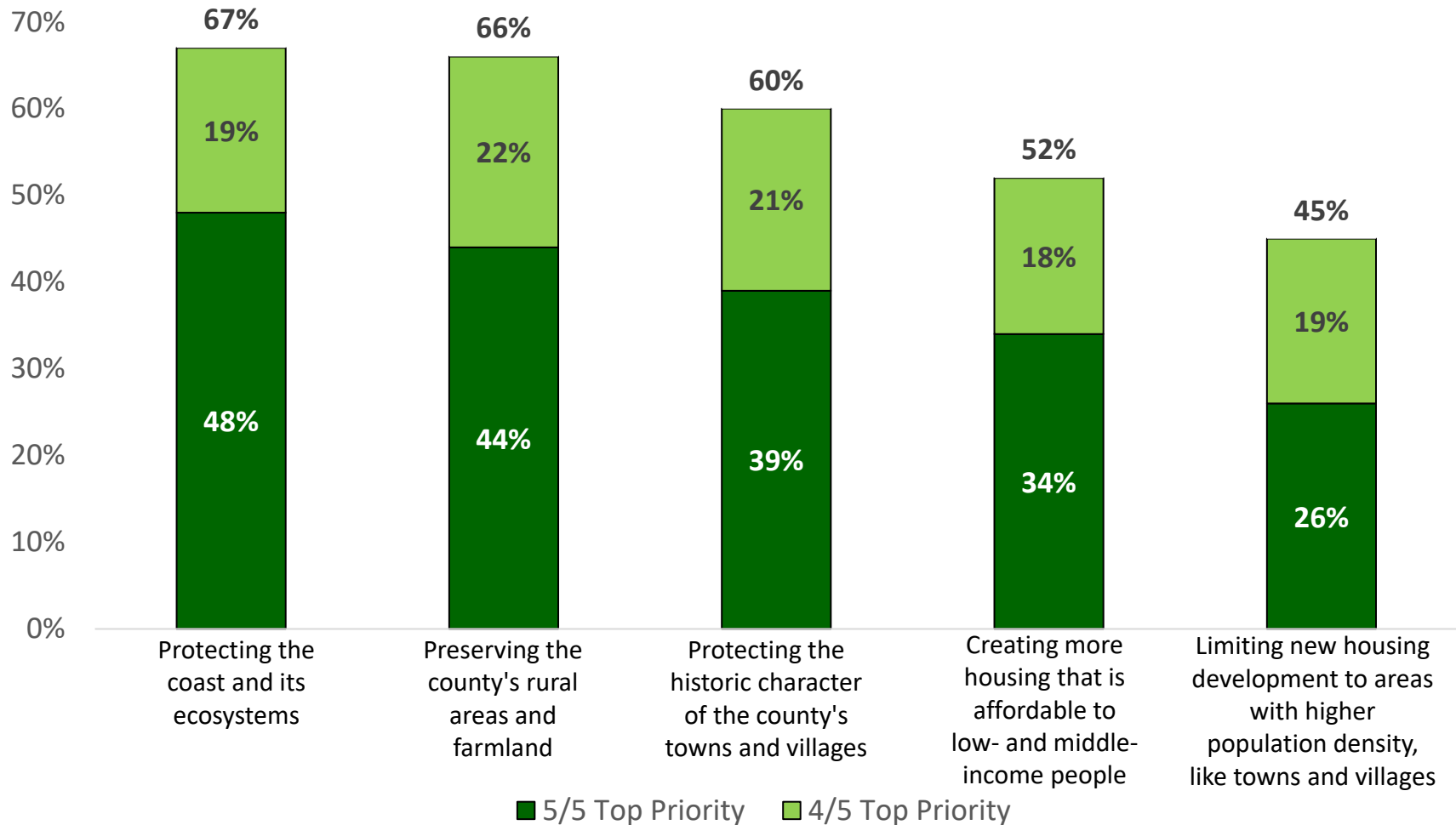
Voters Most Often Cite Overcrowding as Their Top Issue

Affordable housing and cost-of-living considerations rank higher in total

Biggest Issues in Talbot, 2022



Residents Place a High Priority on Protecting the County's Environment, Rural Areas, and Historic Character



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

Protecting the Countryside and Historic Character of Towns More Important to Homeowners, Older Female Residents

Affordable housing more important to non-homeowners

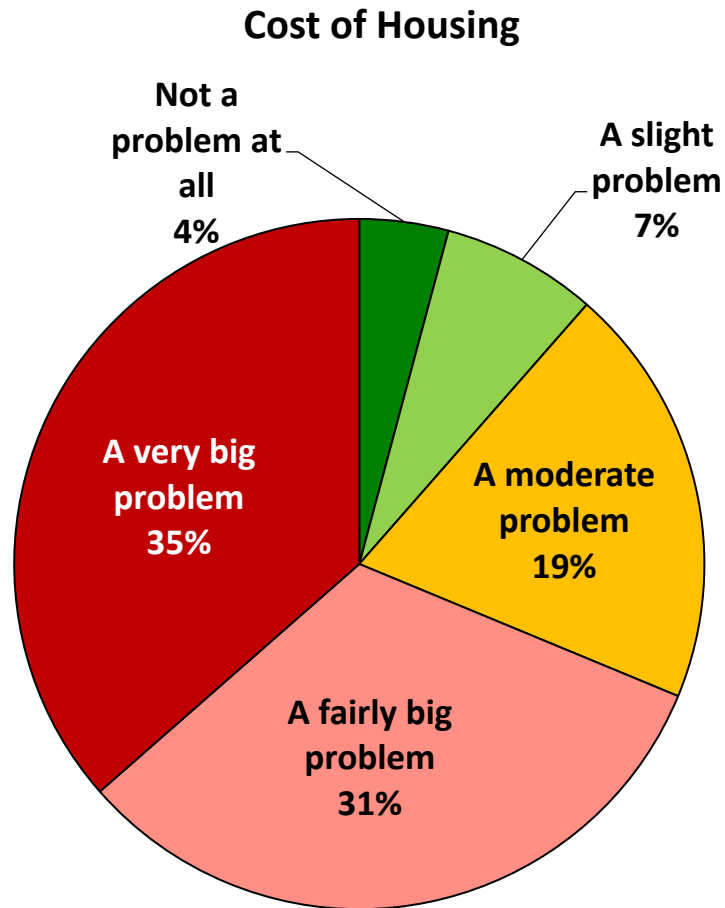
4-5 Scores by Region, Gender/Age, and Homeownership Status	Total	Younger Men	Older Men	Younger Women	Older Women	Own	Total Non - owner
Protecting the coast and its ecosystems	67	63	63	67	75	71	61
Preserving the county's rural areas and farmland	66	60	59	68	72	71	55
Protecting the historic character of the county's towns and villages	59	52	57	45	71	64	45
Creating more housing that is affordable to low- and middle- income people	51	48	39	55	64	44	61
Limiting new housing development to areas with higher population density, like towns and villages	44	45	41	35	51	47	33

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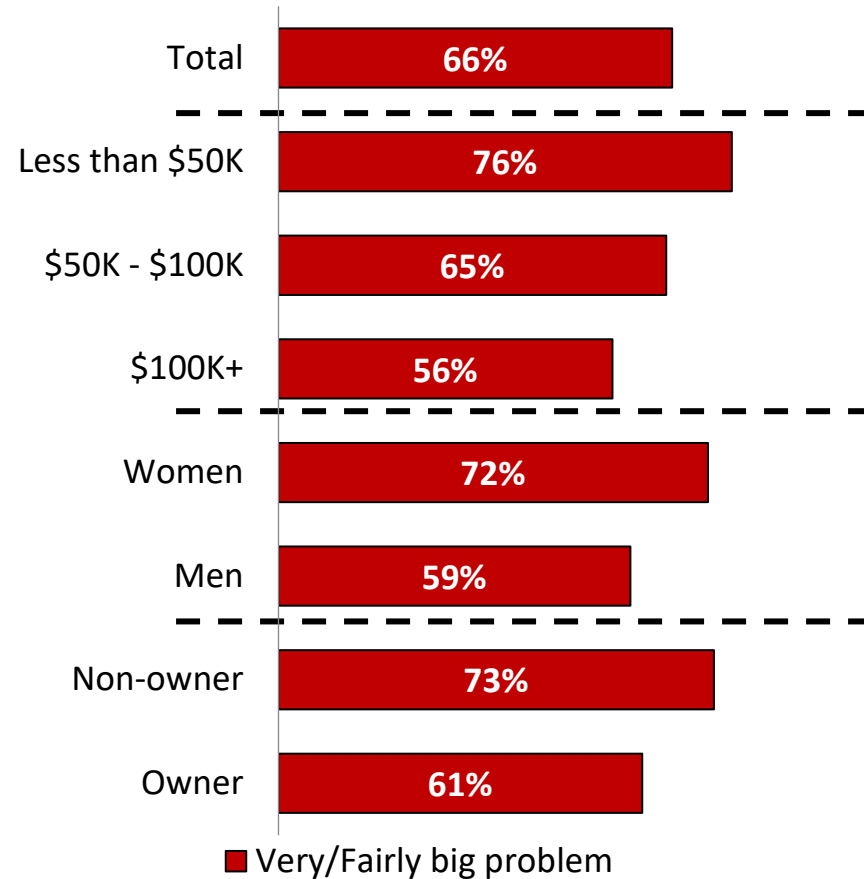
Housing Costs & Development

Nearly Seven-in-Ten Say Housing Affordability is a Big Problem

Women, non-homeowners, and lower-income residents most likely to see it as a major issue



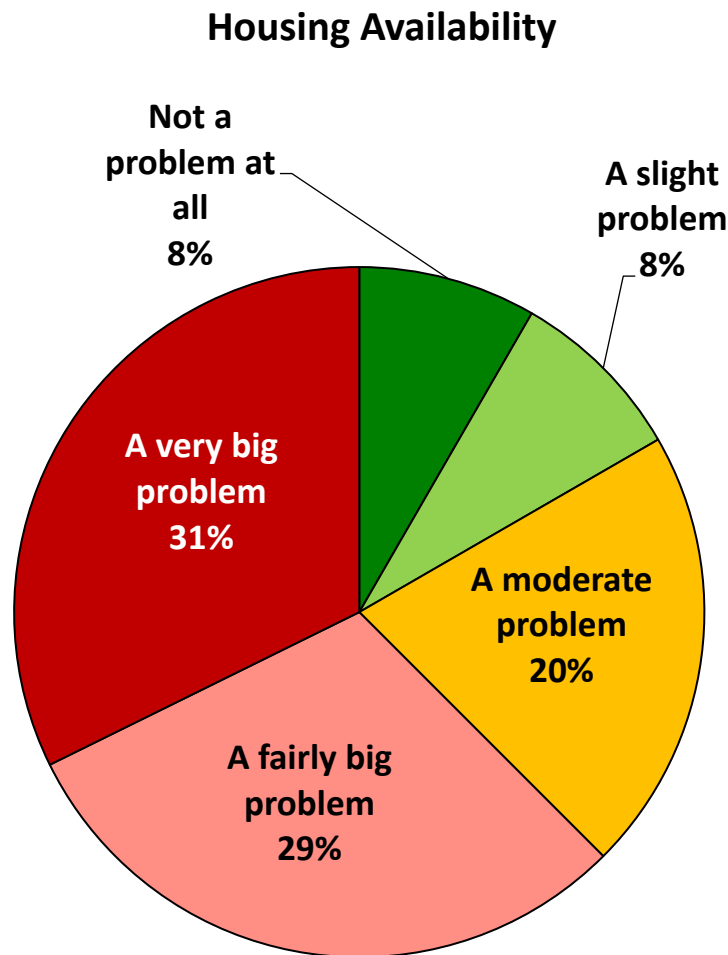
Very/Fairly Big Problem By Income, Gender, and Homeownership Status



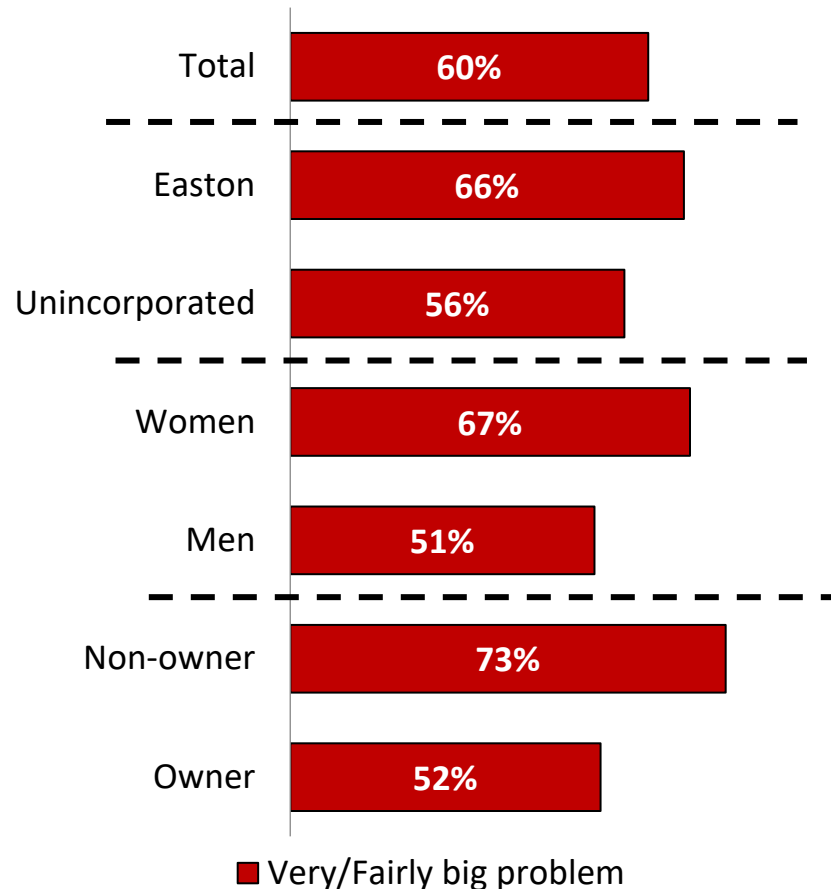
Q.7 (ROTATE Q.6 AND Q.7) In general, how much of a problem is housing affordability in Talbot County, including its towns and villages? That is to say, how much it costs to buy or rent a home?

Six-in-Ten Say Housing Availability is a Big Problem

Easton residents, women, and non-homeowners most likely to see it as a major issue

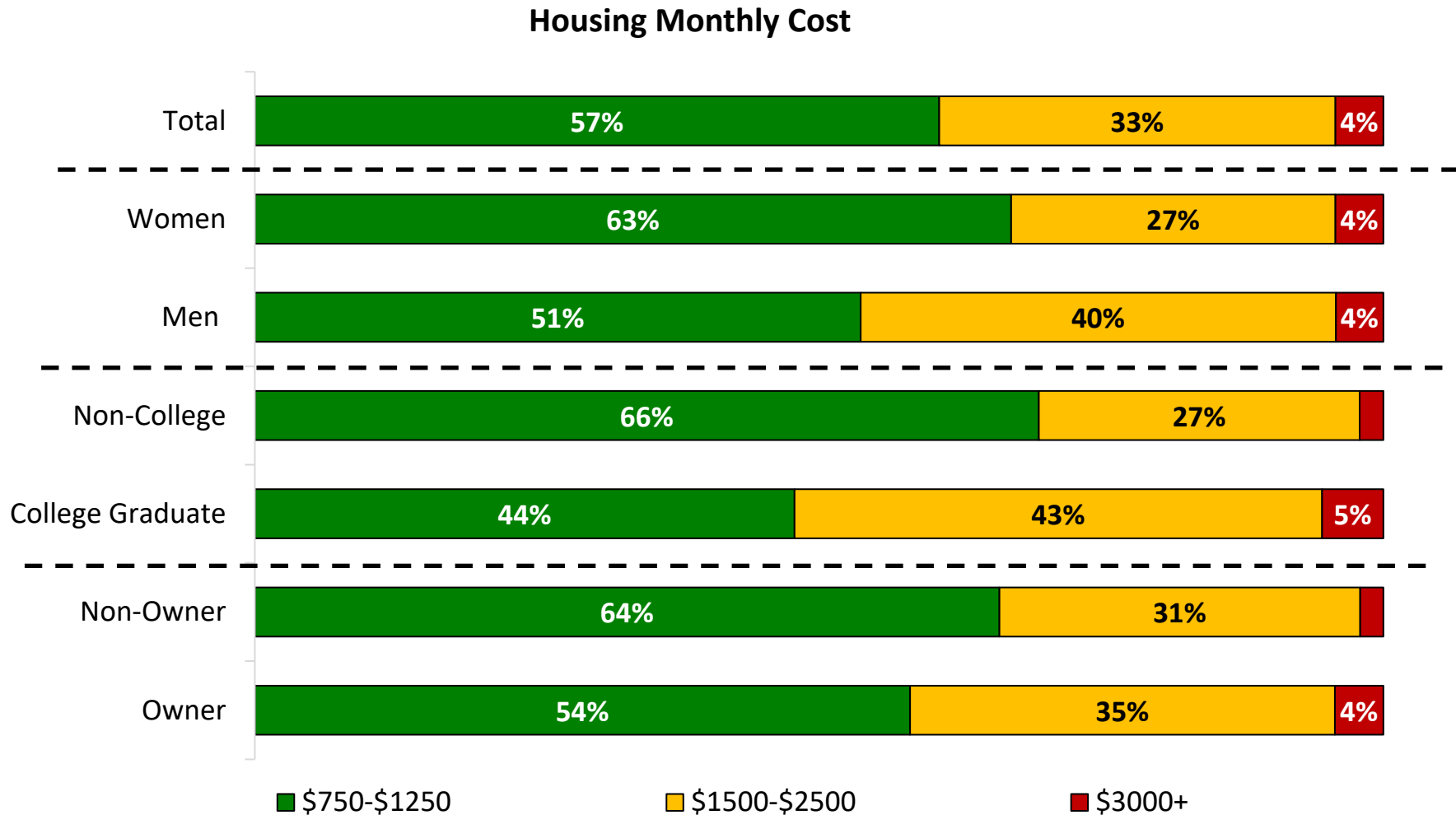


Very/Fairly Big Problem By Region, Gender, and Homeownership Status



Q.6 Next, I am going to ask you some questions about housing in Talbot County. (ROTATE Q.6 AND Q.7) In general, how much of a problem is the availability of housing in Talbot County, including its towns and villages? That is to say, the number of homes, condominiums, or apartments that are available to buy or rent?

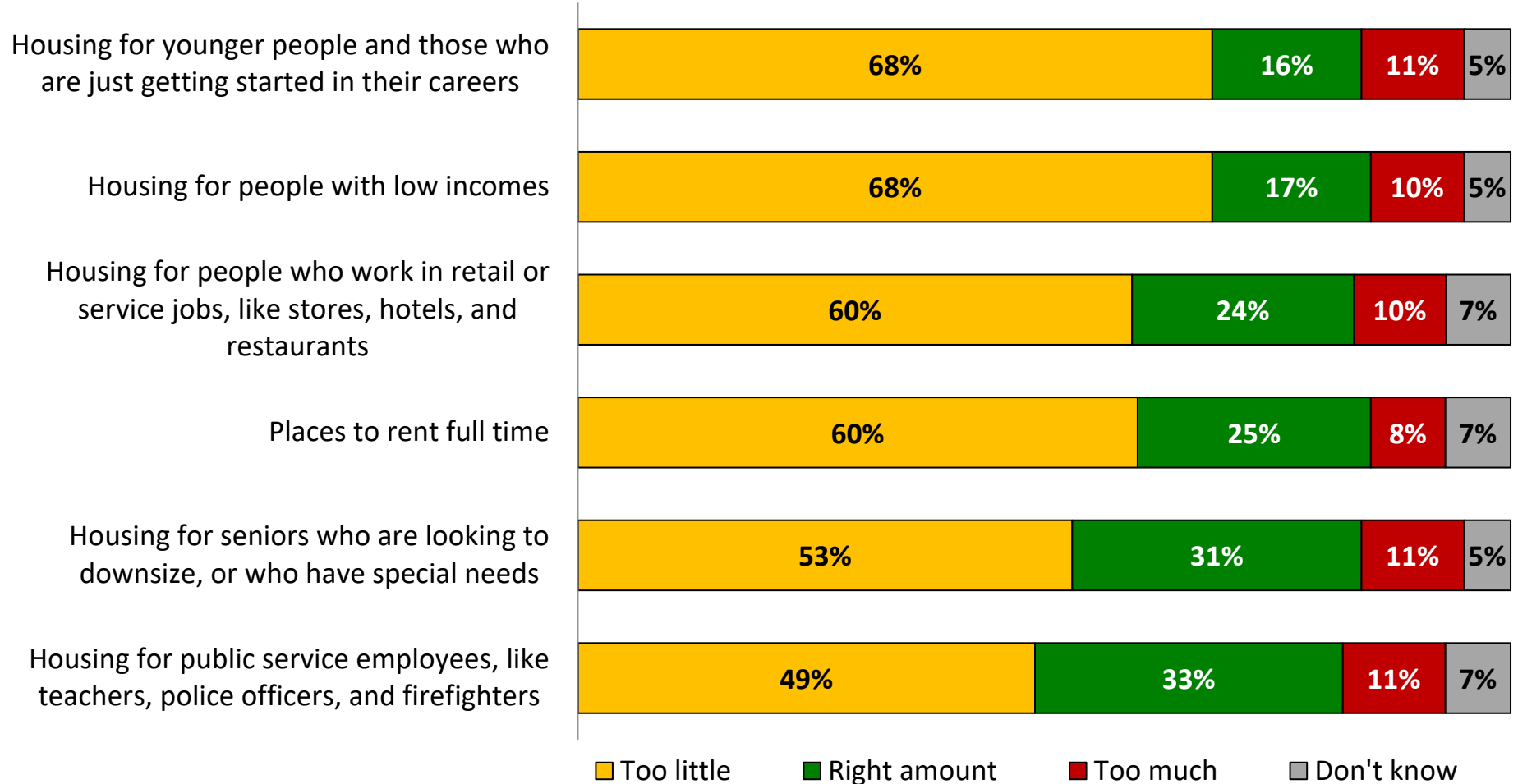
Most Residents Define “Affordable” Rent/Mortgage As Below \$1250 per Month



Q.8 In general, what would you say is the monthly cost for housing that is affordable for most families in Talbot County? In other words, what do you think most families in your community can afford to pay for their rent or mortgage each month? Just stop me when I get to the right amount. (READ OPTIONS TOP TO BOTTOM)

Most Agree: Too Little Housing in Talbot County

Amount of Housing Available in Talbot County



Most Say Too Little Housing for Low Income, Younger People

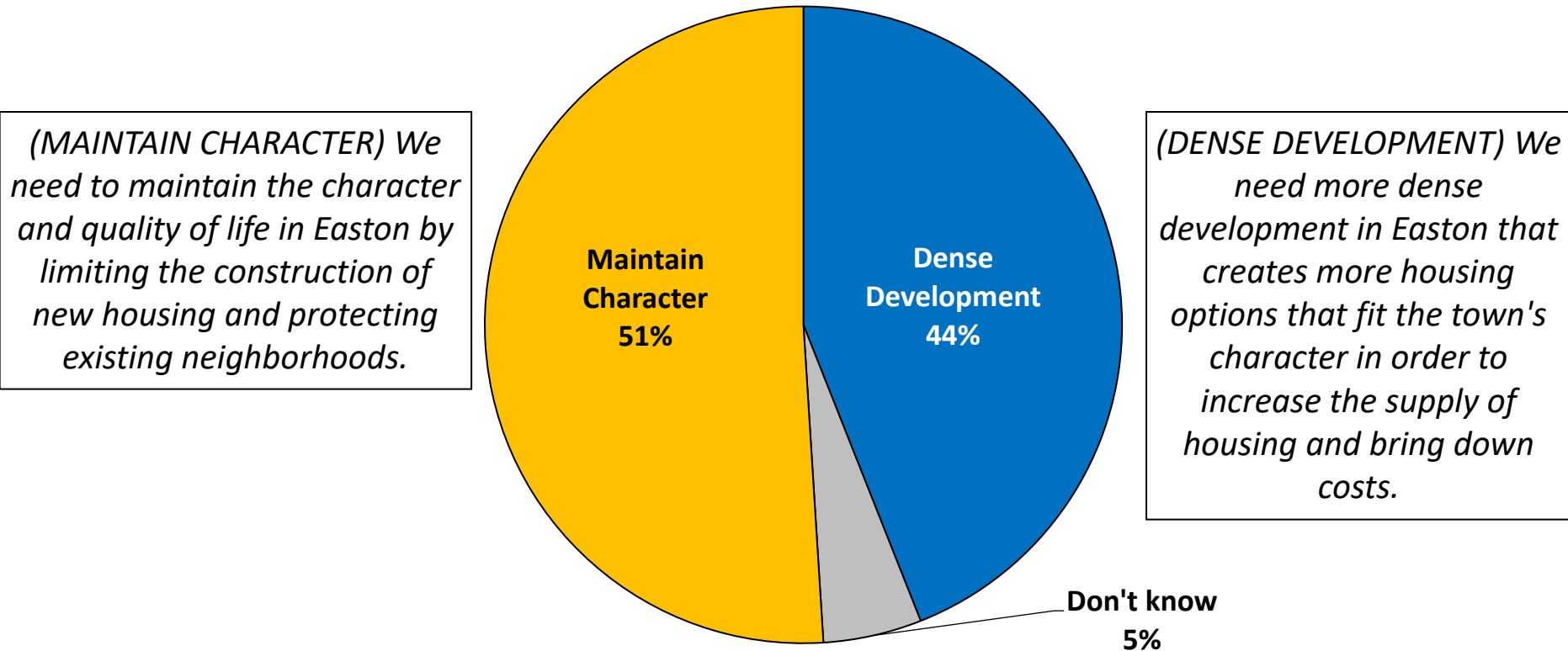
Non-owners, Easton residents concerned with full-time rentals

Too Little Housing by Region, Gender/Age, and Homeownership Status	Total	Easton	Unincorp / Other	Own	Total Non - owner
Housing for people with low incomes	68	74	65	64	76
Housing for younger people...	68	71	66	61	78
Housing for people in the services industry	60	59	61	56	67
Places to rent full time	60	66	57	54	72
Housing for seniors...	53	53	54	47	63
Housing for public service employees...	49	57	44	44	58

Q.9 Still thinking about housing, please tell me if you think there is (ROTATE TOO MUCH/TOO LITTLE) too much, too little, or the right amount of each of the following in Talbot County, including its towns and villages.

Policy Proposals

Voters Split on Maintaining Character vs. More Dense Development

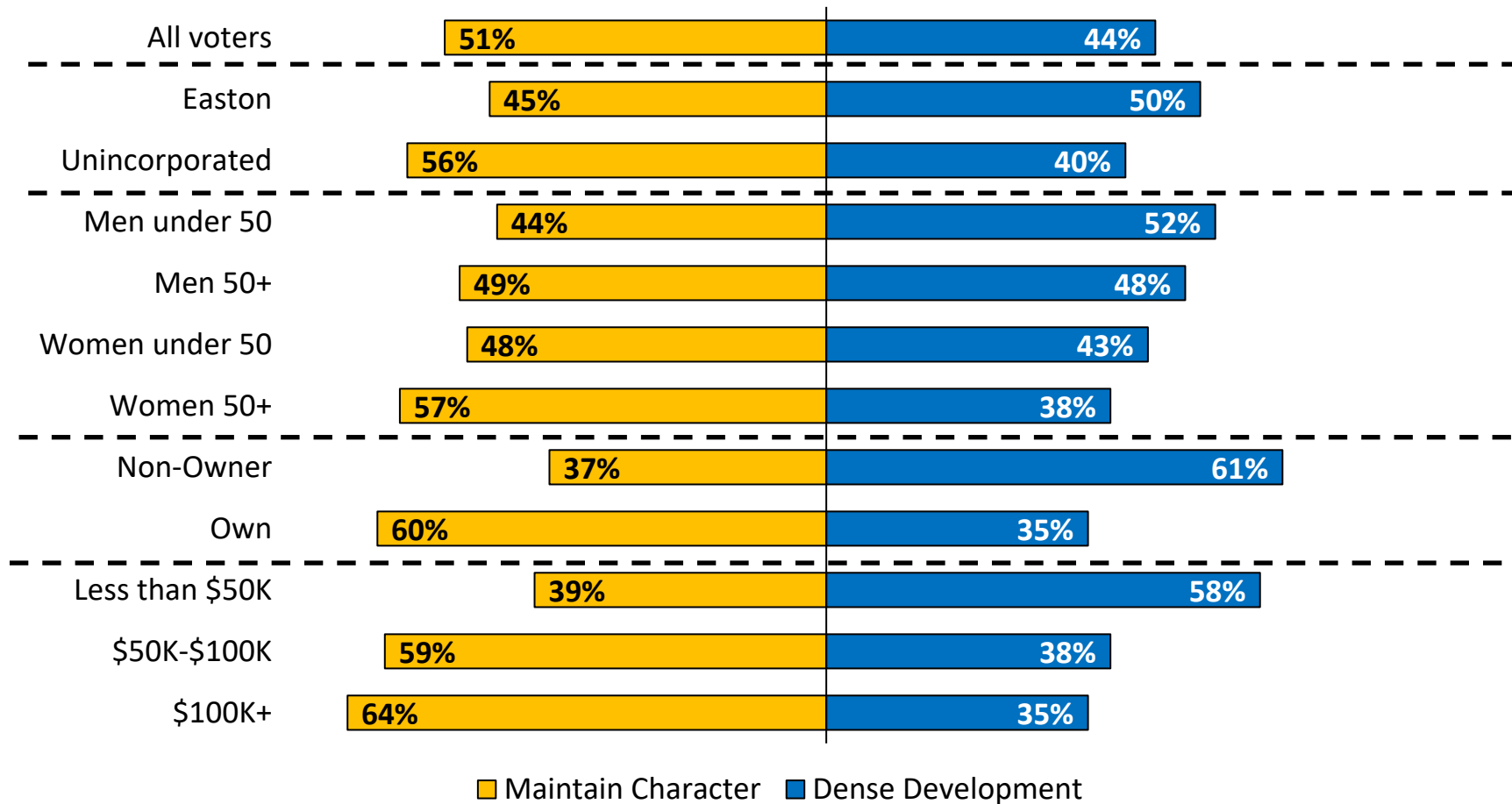


Q.13 As you may know, housing density refers to the number of homes or apartments that are allowed in a neighborhood, city, or county area. I am going to read two statements about housing density IN THE TOWN OF EASTON. Please tell me which one comes closer to your way of thinking, even if neither one is exactly right.

Voters Split on Character vs. Density

Easton residents, younger men, non-property owners, and lower-income residents most attracted to density

Views on Housing Density

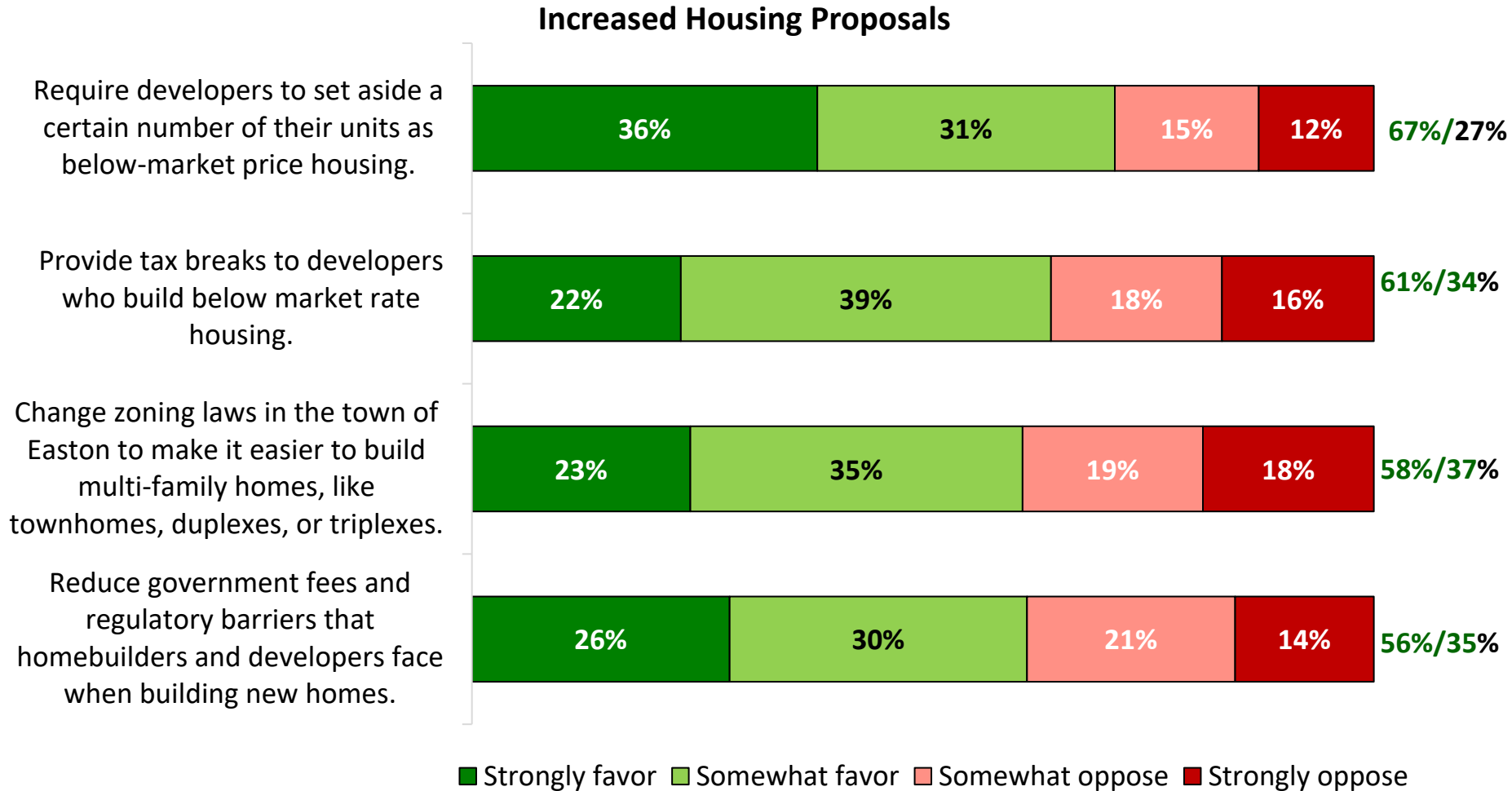


■ Maintain Character ■ Dense Development

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Residents Broadly Approve of Housing Proposals

Affordable housing requirements for new developments and tax breaks for affordable housing most popular



Q.10 Next, I am going to read to you some proposals intended to increase housing opportunities for Talbot County residents. For each one, please tell me whether you (ROTATE) favor or oppose that proposal.

Easton Residents, Younger Residents, Non-Owners More Supportive of Policies Overall

*Older women and owners are least supportive of changing zoning laws
and reducing government barriers for developers*

Total Favor Housing Proposals by Region, Gender/Age, and Homeownership Status	Total	Easton	Unincorp / Other	Younger Men	Older Men	Younger Women	Older Women	Own	Total Non - owner
Require developers to set aside a certain number of their units as below-market price housing.	67	66	67	65	60	78	67	63	74
Provide tax breaks to developers who build below market rate housing.	62	67	58	69	57	70	58	56	72
Change zoning laws in the town of Easton to make it easier to build multi-family homes, like townhomes, duplexes, or triplexes.	57	67	51	61	58	65	51	52	64
Reduce government fees and regulatory barriers that homebuilders and developers face when building new homes.	56	55	57	66	61	60	45	53	61

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Non-Owners, Younger Women, and Easton Residents Strongly Favor Requiring Developers to Plan for Affordability

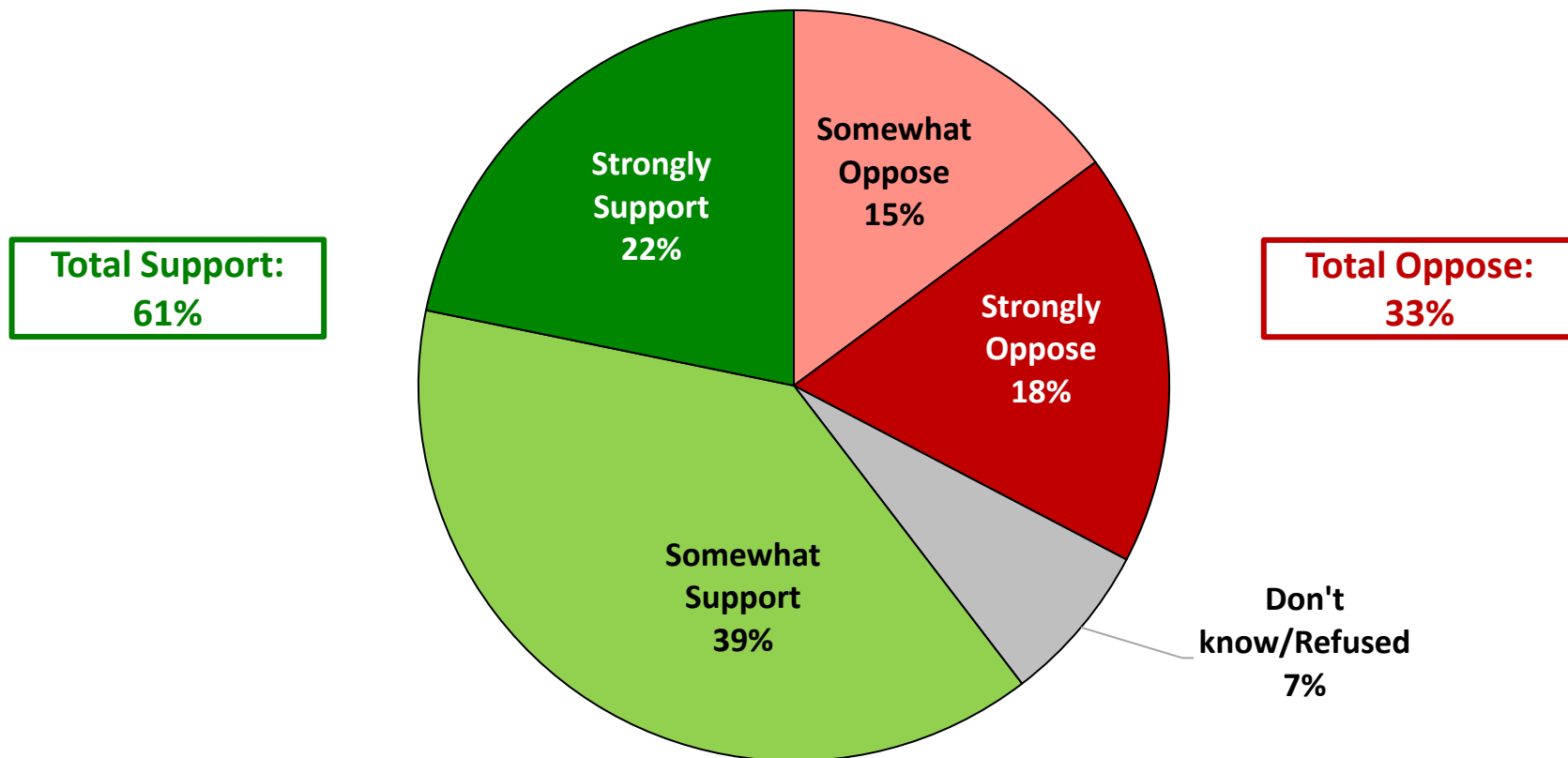
Strongly Favor Housing Proposals by Region, Gender/Age, and Homeownership Status	Total	Easton	Unincorp / Other	Younger Men	Older Men	Younger Women	Older Women	Own	Total Non - owner
Require developers to set aside a certain number of their units as below-market price housing.	36	40	33	27	36	43	36	33	43
Reduce government fees and regulatory barriers that homebuilders and developers face when building new homes.	26	29	25	31	34	27	17	25	29
Change zoning laws in the town of Easton to make it easier to build multi-family homes, like townhomes, duplexes, or triplexes.	23	27	20	19	30	23	19	20	28
Provide tax breaks to developers who build below market rate housing.	22	26	19	27	22	22	22	21	26

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Majority of Residents Support Annexation

Though most do not feel strongly one way or another

Views on Town of Easton Annexing Unincorporated Land

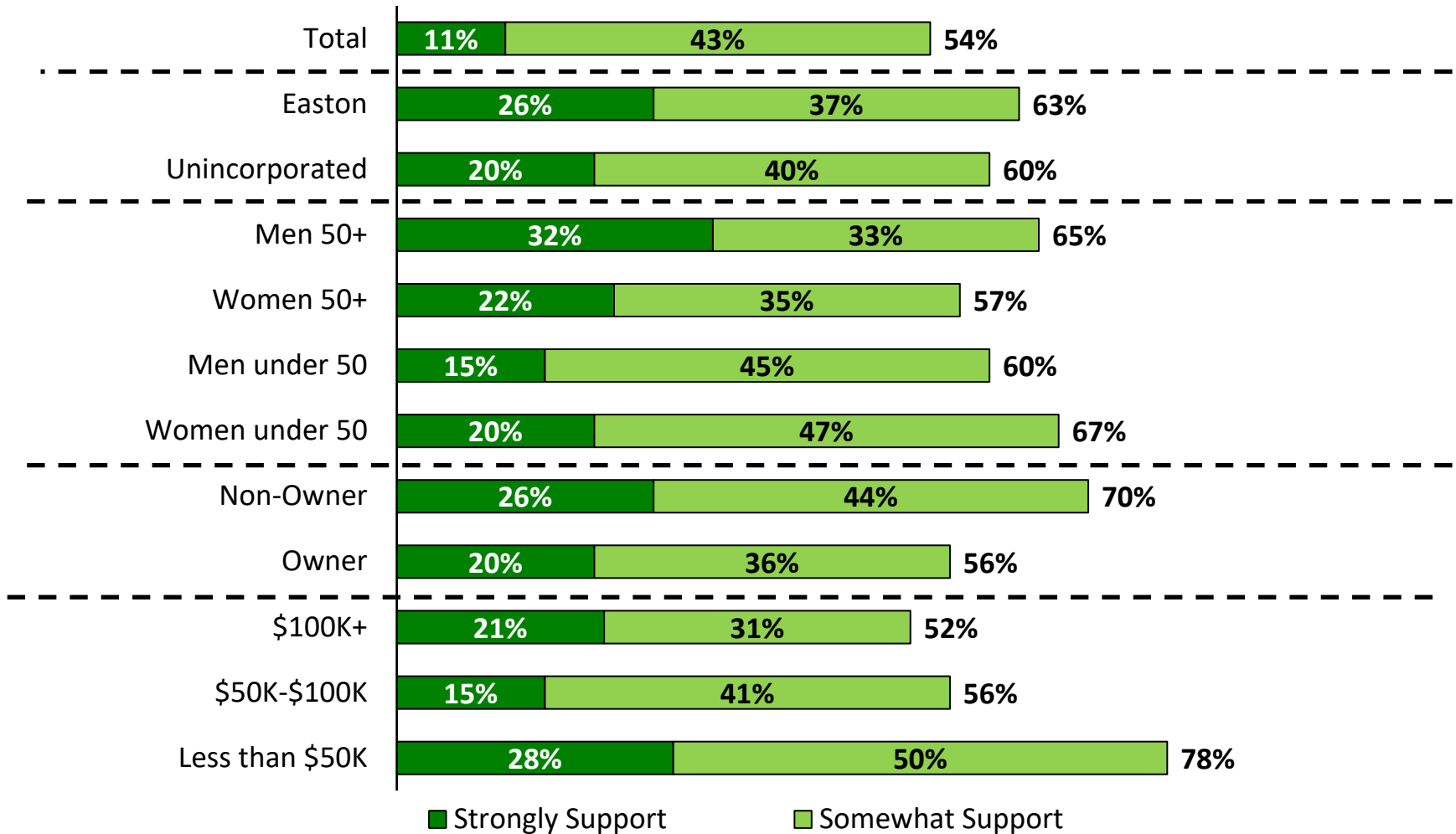


Q.11 Another way to deal with the housing issue in Talbot County is to expand the Easton town limits to include vacant county land near existing town boundaries. This would increase the amount of land available for housing opportunities. Do you generally (ROTATE) support or oppose allowing the Town of Easton to annex unincorporated land from Talbot County?

Majority of Residents Support Annexation

Highest among younger women, non-property owners, lower income, Easton residents

Town of Easton Annexation By Region, Gender/Age, Homeownership Status, and Income

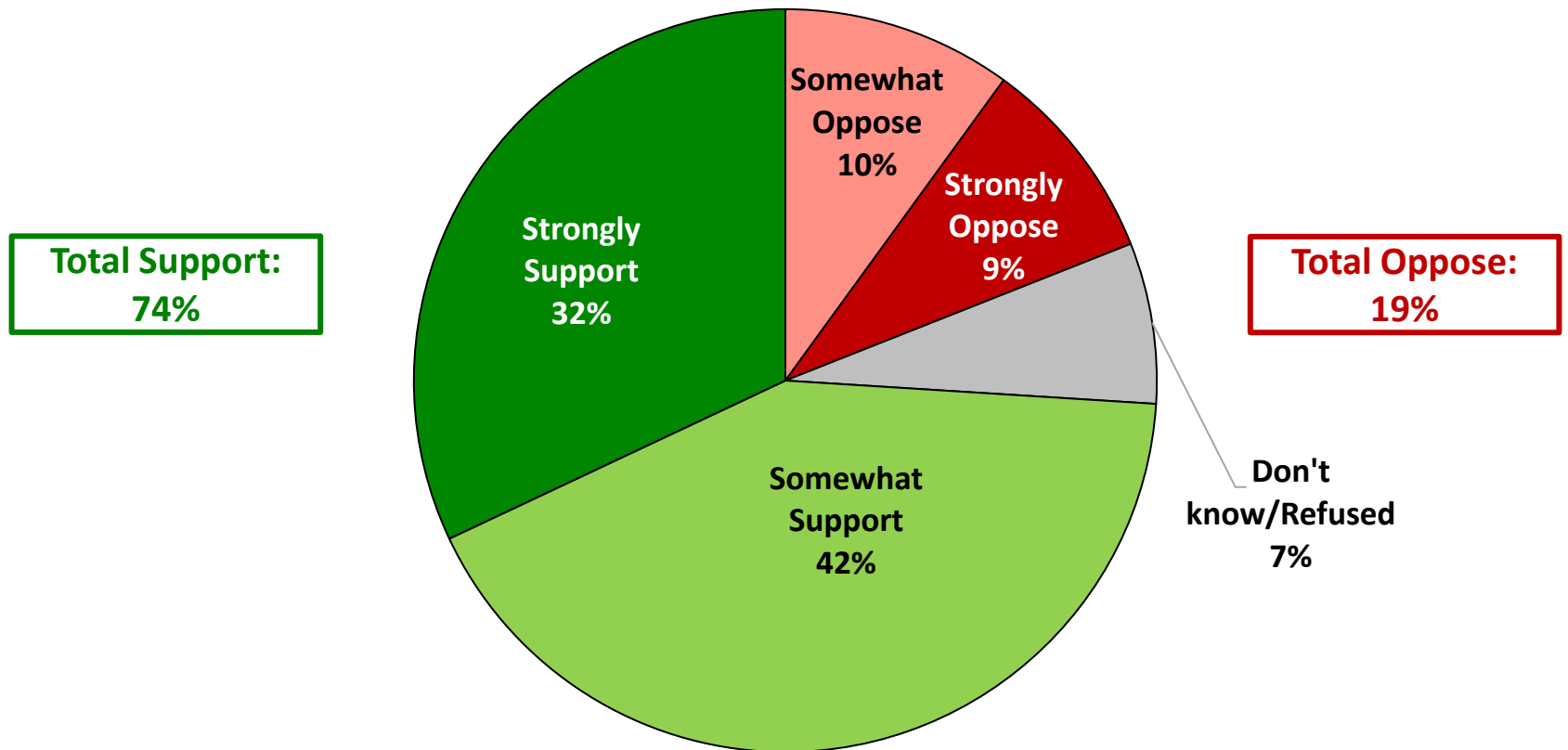


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Vast Majority Support Infill Development

A plurality approve while lacking intensity

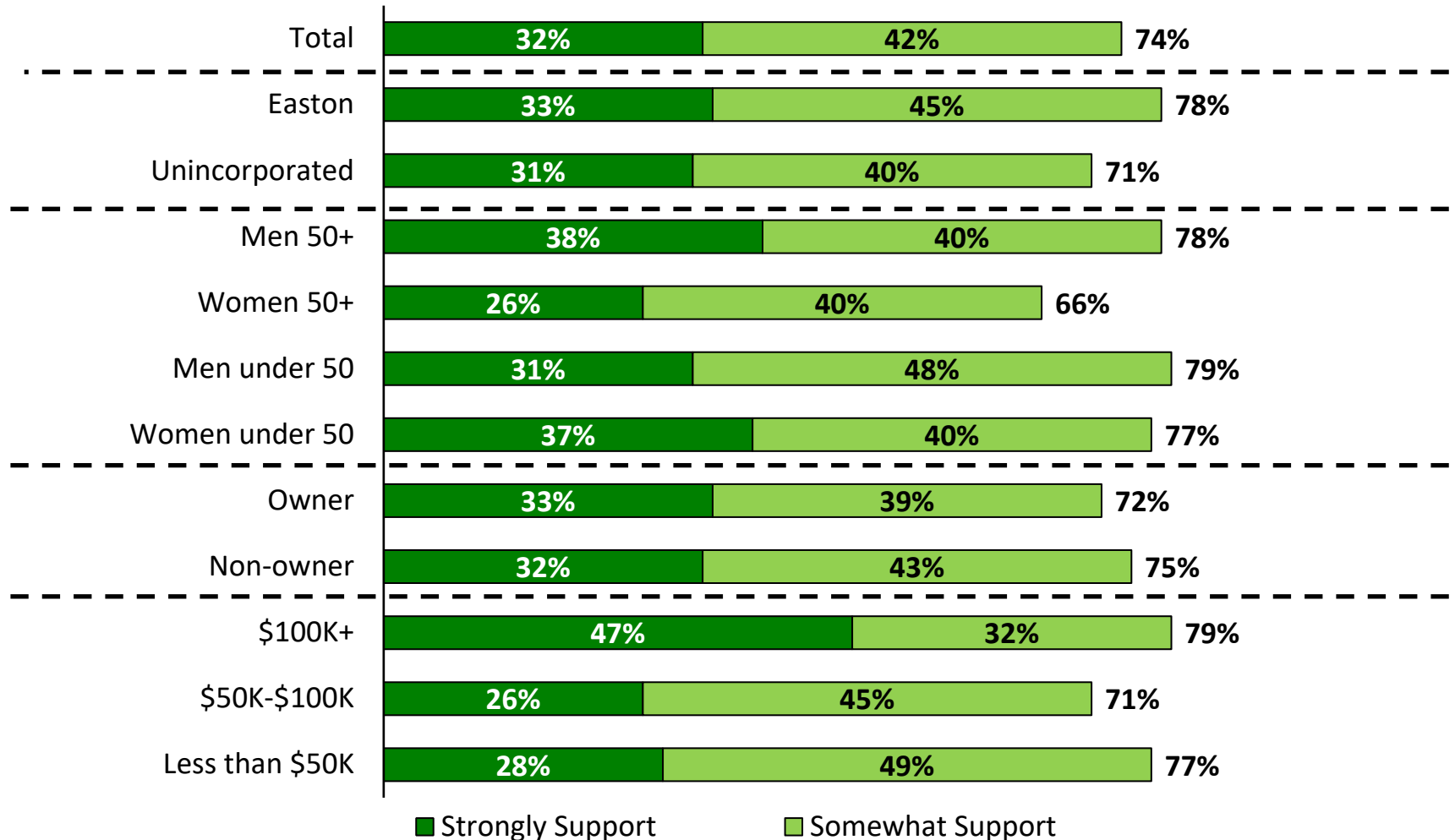
Views on Infill Development in the Town of Easton



Q.12 Another way to deal with the housing issue in towns and villages is to make use of something called infill development, which converts vacant lots and decaying properties into homes and businesses. (PROMPT) In general, do you (ROTATE) SUPPORT or OPPOSE the use of infill development in the Town of Easton?

Easton Residents, Men, Higher-Income Households Most Supportive of Infill Development

Support for Infill Development
By Region, Gender/Age, Homeownership, and Income



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