

2022 Legislative Priorities Survey

Local Association Results

NOVEMBER 2022

Conducted by
American Strategies &
the REALTOR® Party





October 6-28, 2022

137 Respondents

Margin of error: ± 8.4 percentage points

National Association of REALTORS®
NAR Local Association Priority Survey 2022
Frequencies (% responding)

Q.2 In which state or U.S. territory is your association located? (DROPDOWN MENU)

	Total
Region 1	3
Region 2	6
Region 3	10
Region 4	9
Region 5	10
Region 6	7
Region 7	8
Region 8	5
Region 9	7
Region 10	7
Region 11	10
Region 12	8
Region 13	12

Q.3 How large is your association's membership?

	Total
Less than 500	19
500 to 1,999	39
2,000 to 6,999	25
Over 7,000	17

Q.4 What is your function at your REALTOR® association?

	Total
Chief Executive Officer/Association Executive	51
Government Affairs Director	41
Serve as both Chief Executive Officer and GAD	4
Other (Specify):	4

Q.5 Please think about the top two (2) legislative, regulatory or electoral issues your local association faces in the next 12 months. We will ask you about each issue separately.

For each issue, please summarize it in three words or less and then, if necessary, provide a brief description about the issue in the "More details space" area.

	Total
Short term rentals	15
Housing inventory/supply	12
Housing costs/affordability/workforce housing	12
Real estate regulations/local ordinances	10
Zoning - Land use/smart growth/agricultural/municipal land use	9
Landlord/tenant/eviction regulations	7
Infrastructure/transportation/roads/water/sewer	4
Zoning - housing supply/stock	3
Tax increases (general)/tax reform	3
Impact fees	3
Flood insurance	3
Rent control	2
Property taxes	2
Health insurance	2
Rental/mortgage assistance	2
Professional and licensing issues	2
Local government/elections/advocacy	2
Environmental issues	2
Economy and jobs/inflation	2
Broadband	2
Private property rights (general)	1
Fair Housing/Diversity, Equity and Inclusion efforts	1
Education/schools	1
Transfer taxes	-
Tax on services	-
Natural disaster response	-
Homeowner association (HOA) issues	-
First time home buyers	-
Other	3
None	-

Second legislative priority

	Total
Infrastructure/transportation/roads/water/sewer	10
Real estate regulations/local ordinances	10
Housing costs/affordability/workforce housing	10
Housing inventory/supply	9
Zoning - housing supply/stock	7
Zoning - Land use/smart growth/agricultural/municipal land use	7
Short term rentals	7
Property taxes	4
Rent control	4
Local government/elections/advocacy	4
Transfer taxes	3
Private property rights (general)	3
Professional and licensing issues	2
Landlord/tenant/eviction regulations	2
Flood insurance	2
Environmental issues	2
Tax increases (general)/tax reform	2
Homeowner association (HOA) issues	2
Economy and jobs/inflation	2
Rental/mortgage assistance	1
Impact fees	1
Health insurance	1
First time home buyers	1
Education/schools	1
Broadband	1
Tax on services	-
Natural disaster response	-
Fair Housing/Diversity, Equity and Inclusion efforts	-
Other	3
None	2

Combined Priorities (Categorized)

	Total
Housing Availability & affordability	54
Housing inventory/ supply	21
Zoning – housing supply/ stock	11
Housing costs/ affordability/ workforce housing	22
Rental/ mortgage assistance	2
First time home buyers	1
Rental regulations	37
Short term rentals	21
Landlord/ tenant/ eviction regulations	9
Rent control	6
Taxes	18
Tax increases (general)/ tax reform	4
Impact fees	4
Property taxes	7
Transfer taxes	3
Real estate regulations/ local ordinances	20
Zoning – Land use/ smart growth	15
Infrastructure/ transportation-roads/ water/ sewer	14
Other (real estate)	24
Professional and licensing issues	4
Flood insurance	5
Health insurance	3
Local government/ elections/ advocacy	5
Homeowner association (HOA) issues	2
Fair Housing/Diversity, Equity and Inclusion efforts	1
Private property rights (general)	4
Other (general)	11
Broadband	2
Environmental issues	4
Economy and jobs/ inflation	3
Education/ schools	2
Other	6
None	2

Q.6 Which ONE of the following best describes what your association is planning to do on the issue of [PIPE IN PRIORITY 1]?

	Total
Take action	65
Monitor	35

Q.7 Which ONE of the following best describes what your association is planning to do on the issue of [PIPE IN PRIORITY 2]?

	Total
Take action	45
Monitor	56

Q.8 And when it comes to the top two legislative, regulatory or electoral priorities for your association in the next 12 months, which of the following best describes your situation:

(ROTATE FIRST TWO CHOICES OFFENSIVE/DEFENSIVE)

	Total
Our association is primarily on the offensive and working to change existing laws, regulations or candidates	18
Our association is primarily on the defensive and working to protect existing laws, regulations or candidates	18
Our association is playing both offense and defense on our top legislative, regulatory and electoral issues	65

Q.9 As you probably know, NAR offers local associations a number of services and grants through the REALTOR® Party program. Do you anticipate using any REALTOR® Party grants or services in the next twelve months?

	Total
Yes	61
No (SKIP TO Q.12)	4
Not sure/Haven't decided	36

(132 respondents)

Q.10 (IF YES OR NOT SURE IN Q.9) Which NAR service/s or program/s do you intend to use or do you think you might use? Check all that apply.

(ALLOW MULTIPLE RESPONSES)

	Total
Housing Opportunity Grant	43
RPAC Fundraising Grants	40
Placemaking Grant	39
Issues Mobilization Grant	36
Consumer Advocacy Outreach Grant	35
Fair Housing Grant	33
Smart Growth Grant	31
State or Local IE Program (Independent Expenditure)	28
Advocacy Everywhere	28
Diversity Grant	27
Land Use Initiative	23
Issues Polling	21
Consumer Advocacy Outreach Program	20
Request a REALTOR® Party Speaker	16
Smart Growth Polling	15
(Not sure)	14
Rural Outreach Grant	11
Transforming Neighborhoods Program	8
REALTOR® Party Travel Team Visit	8
REALTOR® Party Plus	5

(37 respondents)

Q.11 (IF SELECT "ADVOCACY EVERYWHERE" IN Q.10) Do you intend to engage REALTORS®, Consumers, or both REALTORS® and Consumers in your Call for Action campaign?

	Total
REALTORS only	14
Consumers only	-
Both REALTORS and consumers	81
Not sure	5

Q.12 As you know, NAR provides resources and information to assist you with your legislative, issue and electoral priorities. To help NAR allocate its resources, please indicate how important each of the following issue areas are likely to be to YOUR local REALTOR® association over the next twelve months: Very important, important, somewhat important, not too important, or not important at all

(RANDOMIZE)

	Very important	Important	Somewhat important	Not too important	Not important at all	Total Very/important	Not too/Not at all important
B. Housing inventory and stock	79	16	4	1	-	95	1
A. Housing affordability	77	19	3	1	-	96	1
J. Planning and zoning issues	61	26	12	1	1	87	2
E. Tax issues (property taxes, transfer taxes, etc.)	55	30	12	4	-	85	4
D. Rent control and rent stabilization	42	26	16	12	4	67	17
K. Short term rental regulations	39	28	18	12	4	67	15
C. Fair Housing issues (discrimination in the home buying or renting process; Expanding homeownership to underrepresented groups, etc.)	39	29	25	7	1	67	8
F. Water issues, like water quality, wells, sewer and septic	37	37	17	8	2	74	10
G. Transportation issues, like traffic and congestion, road maintenance and public transit	26	34	26	14	1	60	15
I. Energy use policies, like electric appliance mandates and home energy scores	23	26	33	14	4	49	18
H. Preparing for natural disasters like floods, storms, sea level rise and forest and brush fires	22	24	31	18	4	46	23
L. Cybersecurity / Data Privacy	12	37	31	18	3	49	20

Q.14 To the best of your knowledge, are there any rent control ordinances within your association's jurisdiction?

	Total
Yes	15
No	73
Unsure	12

Q.15 (IF NOT YES IN Q.14) How concerned are you about the creation of any new rent control ordinances in your jurisdiction, by either the state government or a municipal government?

(ROTATE FIRST TO LAST, LAST TO FIRST)

	Total
Very concerned	22
Somewhat concerned	42
Not too concerned	22
Not concerned at all	15
Very/Somewhat concerned	64
Not too/Not at all concerned	37

Q.16 To the best of your knowledge, are there down payment assistance programs with support from local government funds available within your association's jurisdiction?

	Total
Yes	61
No	22
Unsure	18

Q.17 In general, does your association support or oppose local government-funded down payment assistance programs?

	Total
Support	66
Oppose	4
Neutral	18
Not sure/Don't know	12
Support - Oppose	63

Q.18 On a different topic, would you say your association's level of concern about extreme weather and weather-related events has (ROTATE) increased, decreased, or stayed about the same over the past three years?

	Total
Increased	32
Decreased	2
Stayed about the same	66

Q.19 Thinking now about the racial homeownership gap and segregation that persists in many communities; have your local governments proposed, implemented, or discussed any changes in real estate related policies with the goal of creating more equitable communities?

	Total
Yes	34
No	42
Unsure	24

(46 respondents)

Q.20 (IF YES IN Q.19) Do you believe your association should take a position on the proposed changes in real estate-related policies with the goal of creating more equitable communities?

	Total
Yes	68
No	6
Unsure	26

(46 respondents)

Q.21 ([IF YES IN Q.20) And which of the following have been proposed, implemented, or discussed by your local governments with the goal of creating more equitable communities? Please check all that apply.

	Total
Incentives to build affordable housing	72
Low-income housing assistance programs	65
Incentives to build workforce housing	61
Changes in city or county zoning policies	54
Down Payment Assistance (DPA)	50
Changes in city or county master plans	33
Property appraisal or assessment reforms	26
Changes in covenant language	26
Community design changes	24
Other (Please specify):	22

Q.22 Now, thinking specifically about the issue of short-term rentals. As you probably know, a short-term rental, or vacation rental, is the renting out of a furnished home, apartment, cabin, or condominium for a short-term stay, usually for a week or less, but oftentimes for longer than that. Short-term rentals are often facilitated by companies like Airbnb, HomeToGo, or HomeAway.

Do your local governments have regulations that are specific to short-term rentals, or have your local governments made any efforts to create regulations that are specific to short-term rentals?

	Total
Yes, regulations in place	51
Yes, has tried to regulate	21
No	16
Unsure [GO TO 2022WINS]	13
Total Yes	72

(99 respondents)

Q.23 (IF YES IN Q.22) Which of the following have your local governments done or tried to do with regard to short-term rentals? Please select all that apply. (RANDOMIZE)

	Total
Require registration or a license	84
Imposed a local tax on the use of short-term rentals	52
Require inspections	42
Require minimum stays	40
Nuisance ordinances	40
Banned short-term rentals	38
Changed zoning requirements	32
Require property owner on site	24
Only allow in commercial districts	19
Other (Please specify):	14

Q.24 Are there any NEW attempts underway by your state or any locality in your association's jurisdiction to regulate or have oversight into HOAs (Home Owner Associations), condo associations or co-ops? Please choose all that apply:

	Total
Yes, by my state	23
Yes, by one or more locality in my association's jurisdiction	3
No [GO TO Q.27]	42
Unsure [GO TO Q.27]	34

(33 respondents)

Q.26 (IF YES IN Q.24, PUNCH 1 OR 2) Has your association taken action to OPPOSE or SUPPORT any new attempt(s) at regulation or oversight?

	Total
Yes, we have taken action to OPPOSE the new regulation(s)	-
Yes, we have taken action to SUPPORT the new regulation(s)	39
Yes, we have taken action both supporting and opposing new regulations	12
No, we have not taken action	49
Not sure/Don't know	-
Total Yes	52

Q.28 Finally, we have just a few questions for demographic purposes.

Are you:

	Total
Male	40
Female	54
Prefer not to say	6

Q.29 Respondent age

	Total
18-29	7
30-39	6
40-49	25
50-64	37
65+	17
(Don't know/refused)	8

(75 respondents)

Q.30 (ASK AE/CEO RESPONDENTS ONLY) How many years experience do you have as an Association Executive or Executive Officer for a REALTOR® association?

	Total
0-2 years	17
3-5 years	13
6-10 years	19
11-20 years	32
21-30 years	12
31-40 years	5
41-50 years	1
51+ years	-
Mean	12.9

(61 respondents)

Q.31 (ASK GAD RESPONDENTS ONLY) How many years have you served as a GAD for a REALTOR® association?

	Total
0-2 years	25
3-5 years	26
6-10 years	16
11-20 years	30
21-30 years	3
31-40 years	-
41-50 years	-
51+ years	-
Mean	7.8

Region by State

	Total
Mid-Atlantic and South	29
Midwest	20
Northeast	9
South Central	13
West	29

Survey Methodology

American Strategies designed and administered this online survey distributed to local association Chief Executive Officers, Association Executives, and Government Affairs Directors. The survey reached 137 local association Chief Executive Officers, Association Executives, and Government Affairs Directors. The survey was conducted from October 6-28, 2022.

Quotas were assigned to reflect the geographic distribution of local association Chief Executive Officers, Association Executives, and Government Affairs Directors, and the data were weighted to ensure an accurate reflection of the population. The overall margin of error is +/- 7.1%. The margin of error for subgroups is larger and varies. Percentage totals may not add up precisely due to rounding.