

National Association of REALTORS®

*VA – Culpeper County Smart Growth
March 2023*

American Strategies designed and administered this multi-modal survey. The survey reached 461 adults, age 18 or older, who indicated they were registered to vote in Culpeper County, Virginia. The survey was conducted March 16-21, 2023, via live phones with trained operators, and online via SMS using Qualtrics.

Sixty-five percent of respondents were reached on phones. Thirty-five percent took the survey online. Quotas were assigned to reflect the demographic distribution of registered voters in Culpeper County, Virginia. The data were weighted to ensure an accurate reflection of the population. Percentage totals may not add up precisely due to rounding.

National Association of REALTORS®

Culpeper County Smart Growth

Survey Methodology



Wireless (181)
Non-Wireless (119)
Online (161)



461 Voting-Age
Residents in
Culpeper County, VA



Interviews
conducted
March 16-21, 2023

The overall margin of error is +/- 4.6%. The margin of error for subgroups is larger and varies. Percentage totals may not add up precisely due to rounding..

Executive Summary

A sizeable majority of Culpeper County residents are satisfied with the county's quality of life, and most value the community's safe, small-town atmosphere. Entertainment options and housing affordability are cited as areas for improvement, as well as the county's public education system. Majorities of residents believe that housing affordability is a problem in Culpeper, and that there is a lack of housing for younger people in the early stages of their careers. While a quarter of residents report being retired, a majority of employed residents (84 percent) commute to their jobs at least once a week – usually beyond the county's borders. Residents rate expanding internet access, protecting open space, and attracting good jobs to the area as top policy priorities, while they are less concerned about limiting alternative energy and solar farms.

- **Residents broadly satisfied with quality of life.** Seventy-eight percent say that quality of life in Culpeper County is either *excellent* (22 percent) or *good* (56 percent), while just 21 percent consider it *just fair* (16 percent) or *poor* (5 percent).
 - In their own words, residents cited the rural setting (29 percent), community amenities (19 percent), and small-town feel (16 percent) as things they like *most* about Culpeper.
 - When asked to describe what they like *least* about the community, residents cite issues like traffic and overcrowding (16 percent) and a lack of activities for youth and adults (13 percent).
 - Quality of life varies by region within the county, and generally higher incomes, men, and households without children are more likely to rank their quality of life as *excellent*.
- **Entertainment, housing, and recreation are areas for improvement.** When asked to rank a series of changes that could improve Culpeper County's quality of life, 55 percent rate *more dining and entertainment options* as having the greatest impact (four or five on a five-point scale), while 54 percent say the same of *more affordable housing options to rent or buy*, and 52 percent for *more parks and recreational opportunities*.
 - Younger residents and residents in Central Culpeper consistently rate areas like dining and entertainment options as higher priorities than their older counterparts in less dense areas.

Executive Summary

- **Safety and ease of transit are highlights in Culpeper; quality of public education a low point.** Seventy-eight percent say that the overall feeling of safety in Culpeper is either *excellent* (24 percent) or *good* (54 percent), while 77 percent say the ease of getting to commonly visited places is *excellent* (30 percent) or *good* (47 percent). Residents are also upbeat about the sense of community in Culpeper, with 64 percent rating it as *excellent* (15 percent) or *good* (49 percent). However just 42 percent rank the quality of public education in Culpeper as *excellent* (eight percent) or *good* (34 percent), while a plurality of residents (48 percent) say it is *just fair* (35 percent) or *poor* (13 percent).
 - The perceived ease of transit within the county increases with income and varies by region.
 - Households with children are most critical of the county's public education system.
- **Housing affordability is a more pressing issue than inventory.** While 33 percent say that the availability of housing in Culpeper is a *very* (17 percent) or *fairly* (15 percent) big problem, a plurality (41 percent) say that housing affordability is a *very* (24 percent) or *fairly* (17 percent) big problem. In total, 68 percent consider housing affordability at least a *moderate* problem in Culpeper.
- **Most cite shortage of housing for young people.** While a majority (53 percent) say there is *about the right amount* of single-family homes and townhouses (47 percent) to meet the community's needs in the coming years, residents are split over the inventory of apartments and condominiums (41 percent *too little*; 41 percent *about right*). A plurality (47 percent) says there is *too little* housing for seniors, and 65 percent agree that there is *too little* housing for young people and those at the early stages of their career.

Executive Summary

- **Bare majority think taxes are too high.** Fifty-five percent of homeowners say that taxes are *too high* relative to the services they receive from the county, while 44 percent believe taxes are about right (42 percent) or *too low* (two percent).
- **Majority of commuters work outside of Culpeper.** Eighty-four percent of employed residents say they commute to work one or two days a week (nine percent), three or four days a week (19 percent) or every day of the week (55 percent), while 16 percent say they work from home full-time. Among those who commute at least once per week, 65 percent say they commute outside of Culpeper.
 - Commuters to outside communities cite Fauquier County (24 percent), Fairfax/Arlington Counties (19 percent), and Prince William County (18 percent) as top commute destinations.
- **Majority stays within Culpeper for errands.** Fifty-eight percent say they must leave Culpeper once a month or less to purchase common items, like food, clothes, and medicine. Nineteen percent say they must leave two or three times a month, while 7 percent say four or five times a month, and 13 percent say they must leave more than five times a month.
- **Expanding internet, protecting open space, attracting jobs are top priorities.** When asked to rate a series of local policy priorities on a scale of one to five, 70 percent ranked *expanding internet access for county residents* either a four or five. Sixty-six percent say the same of *protecting open spaces like field, forests, and farmland from development*, and 65 percent for *attracting business and good paying jobs to the area*.
 - While most cite housing affordability as a concern, 48 percent assign *increasing the amount of housing that is affordable for most families* a four or five on a five-point scale, placing it in the middle cohort of priorities.
 - Relatively few prioritize *limiting the construction of large industrial facilities* (38 percent four or five) and *limiting the development of alternative energy generation facilities* (28 percent four or five).

Demographics

Gender



Women
52%



Men
48%

Job Status

Employed: 63%
Unemployed: 3%
Retired: 27%
Student: 1%
Homemaker: 4%
(Other/Disability/etc.): 3%

Region

Central Culpeper: 24%
South/East Culpeper County: 30%
West Culpeper County: 30%
North Culpeper County: 16%

Age

18-29: 9%
30-39: 18%
40-49: 17%
50-64: 26%
65+: 27%
(Don't know/refused): 3%

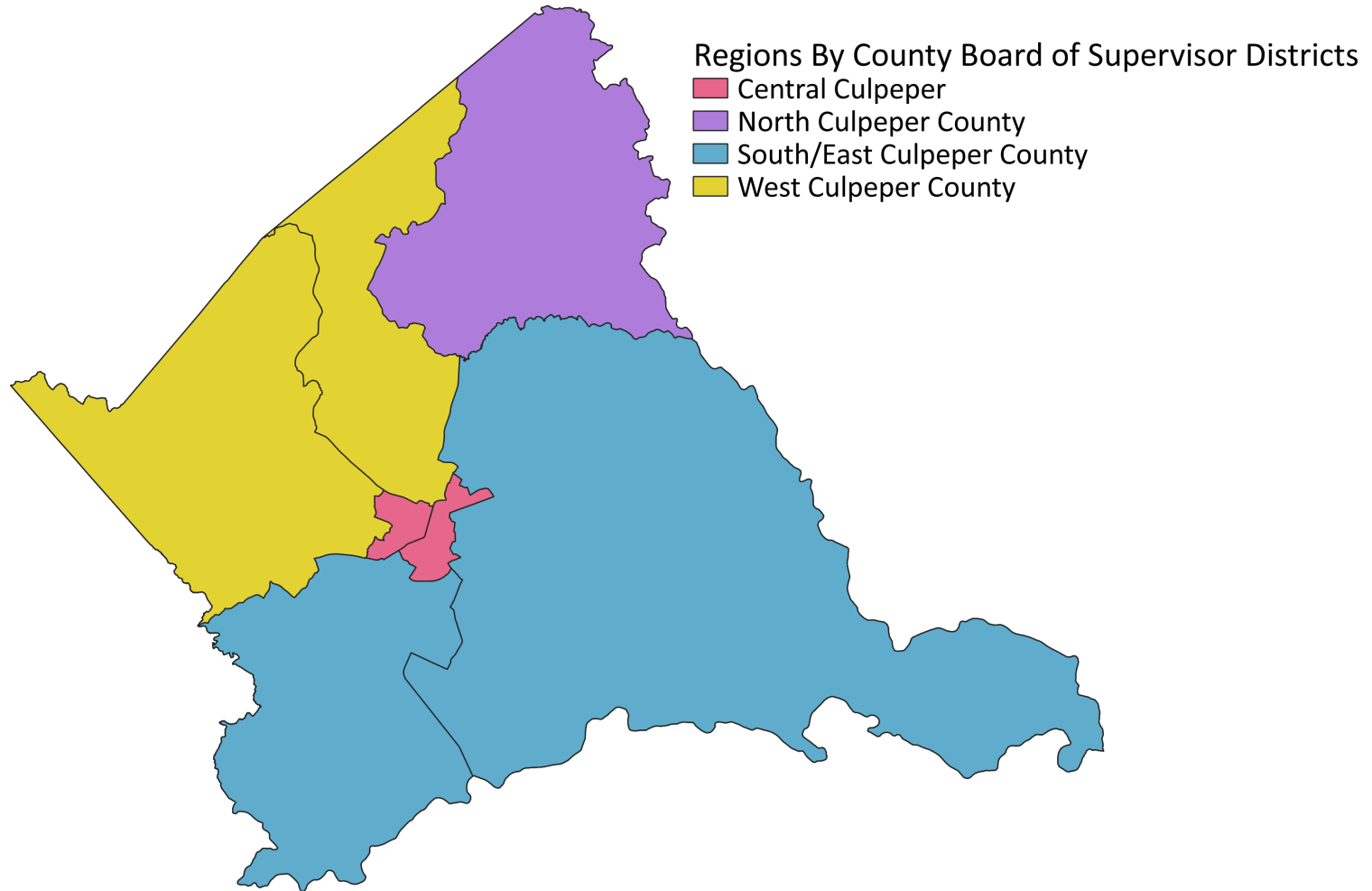
Owner/Renter

Homeowner: 80%
Renter: 11%
Lives with Friends/Family: 9%

Education

High School or Less: 22%
Post-High School: 35%
College Graduate: 43%

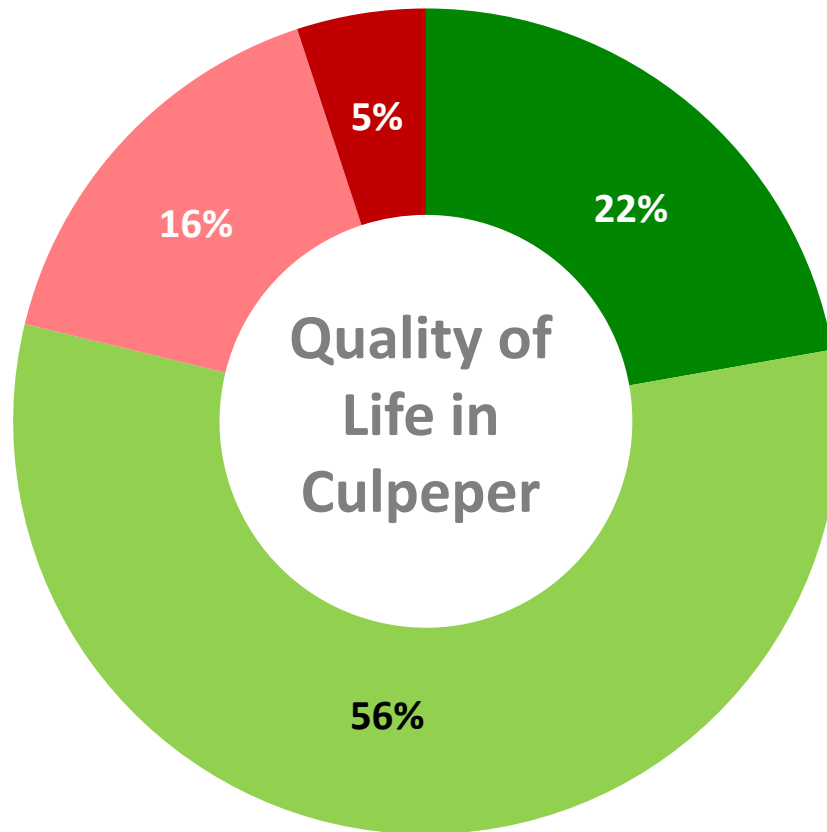
Culpeper Regional Definitions



Quality of Life & Housing

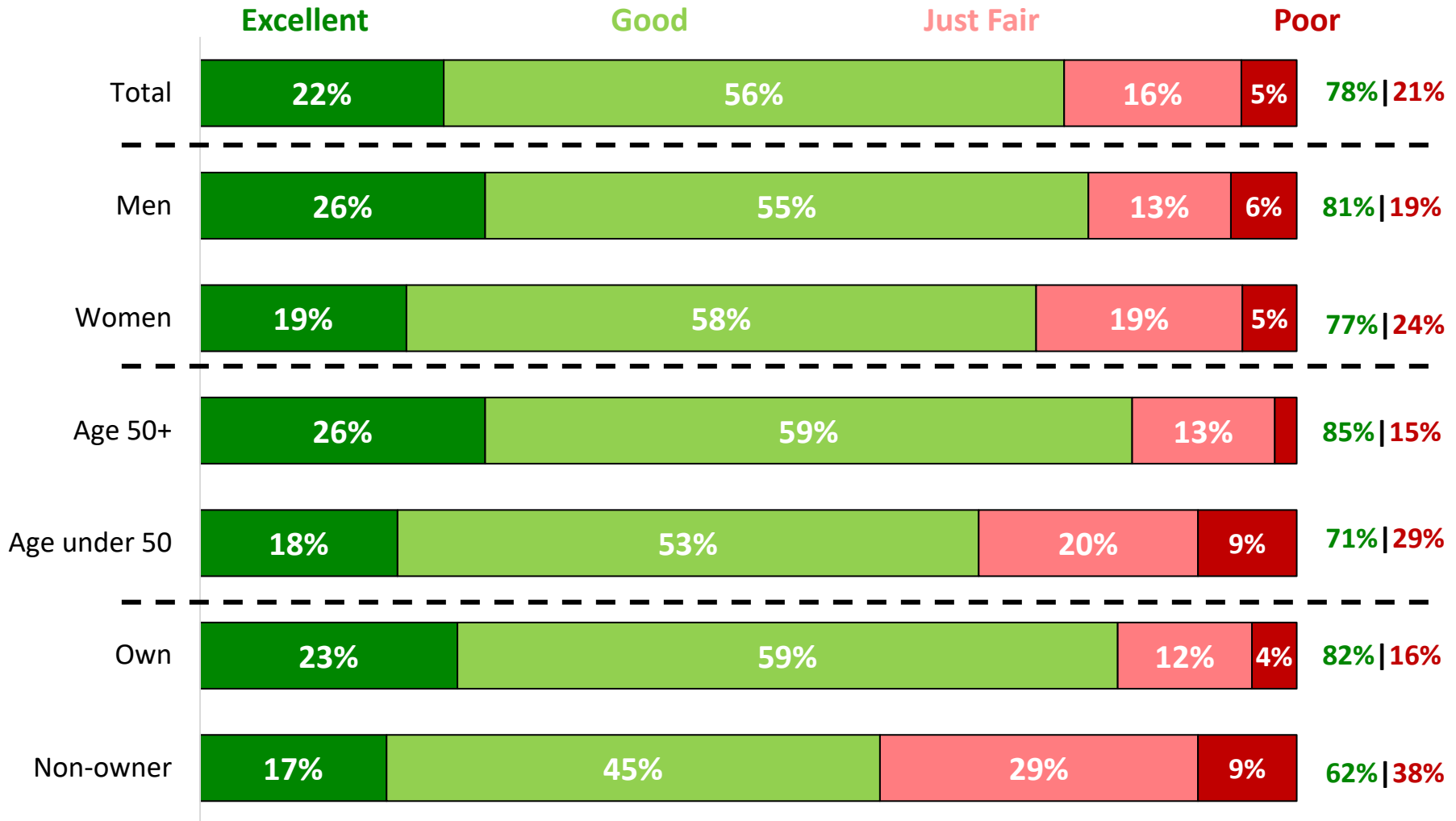
Large Majority Say Quality of Life is Excellent or Good

Excellent/Good: 78% | Just fair/Poor: 21%



Men, Older Residents, Homeowners More Likely to Say Quality of Life is *Excellent*

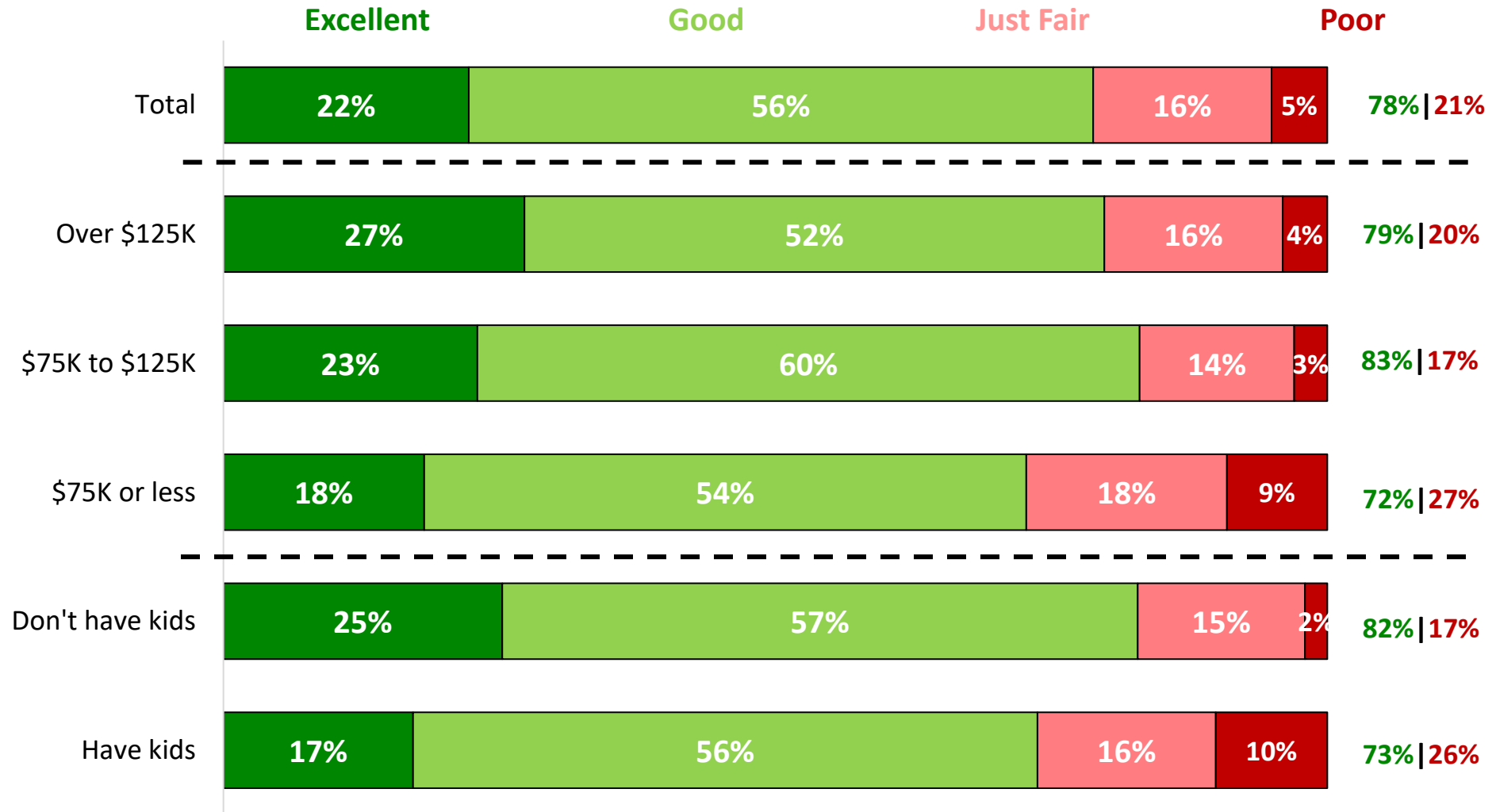
Quality of Life Rating by Gender, Age, and Homeownership



Q.4 Overall, how would you describe the quality of life in Culpeper County - (ROTATE FIRST TO LAST, LAST TO FIRST) excellent, good, just fair, or poor?

Wealthier, Childless Residents More Likely to Say Quality of Life is *Excellent*

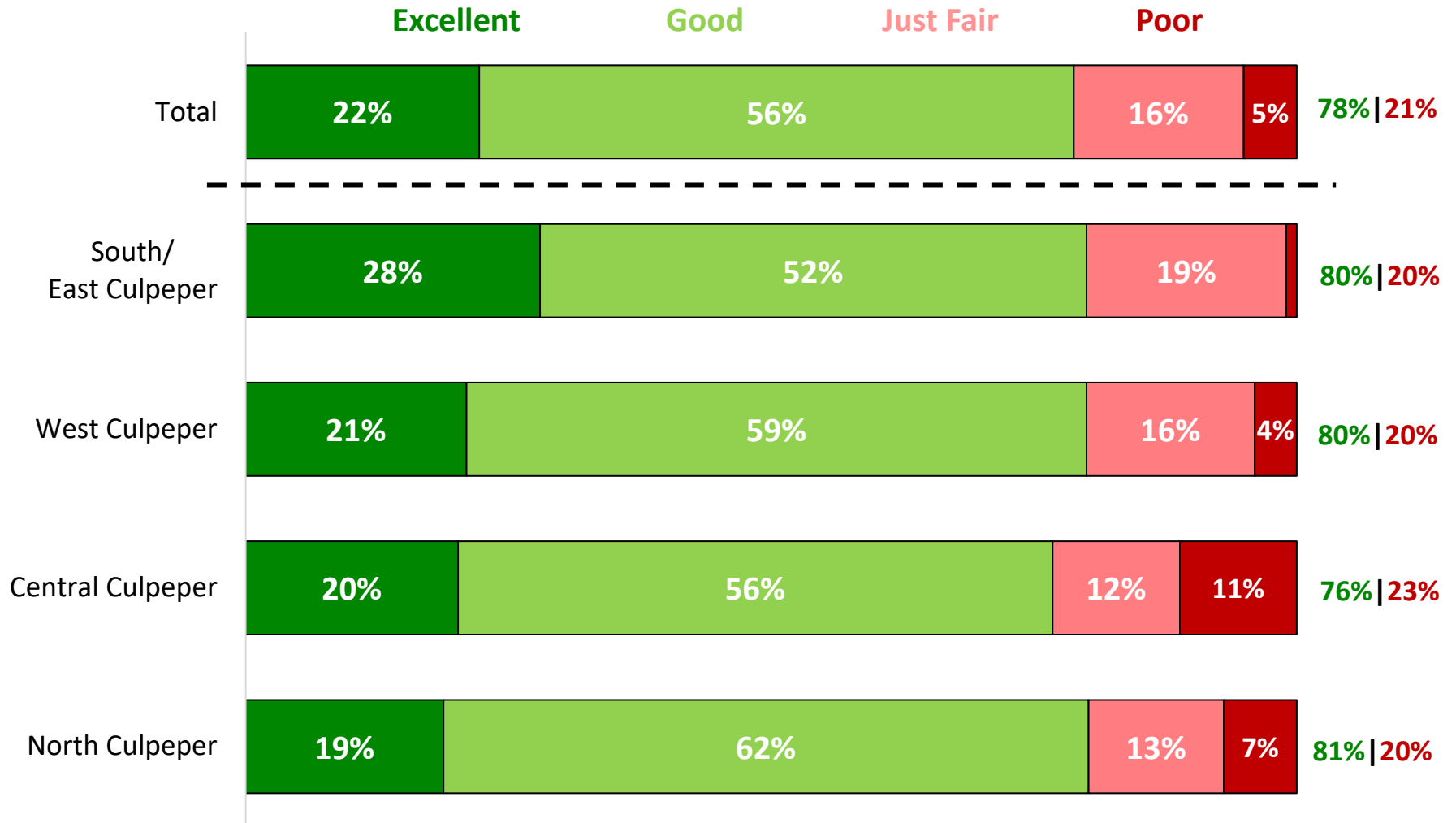
Quality of Life Rating by Income, Kids in Household



Q.4 Overall, how would you describe the quality of life in Culpeper County - (ROTATE FIRST TO LAST, LAST TO FIRST) excellent, good, just fair, or poor?

Quality of Life Varies by Region

Quality of Life Rating by Region



Q.4 Overall, how would you describe the quality of life in Culpeper County - (ROTATE FIRST TO LAST, LAST TO FIRST) excellent, good, just fair, or poor?

Residents Cite Small-Town Feel, Rural Setting, Amenities as Most Liked Aspects of Culpeper



Q.5 What one or two things do you like most about living in Culpeper County?

Most Liked Aspects of Culpeper in Residents' Own Words:

I like that it is a small-town feel. We have a lot of restaurants and boutique type of stuff.

The rural setting, slower pace of life, and small-town values.

The environment of central Virginia, the geographical location, not far from D.C., not far from the water, and access to a train station.

Ease of getting around, lack of traffic. Cost of living.

I love being able to have rural life but also a lively town to come to.

Residents Cite Traffic, Lack of Activities, and Taxes as Least Appealing Parts of Culpeper



Q.6 What one or two things do you like least about living in Culpeper County?

Least Liked Aspects of Culpeper in Residents' Own Words:

Northern Virginia encroachment turning us into another bedroom community where residents have NoVa values, not Culpeper ones.

Not enough stores to go to; overcrowding in the schools.

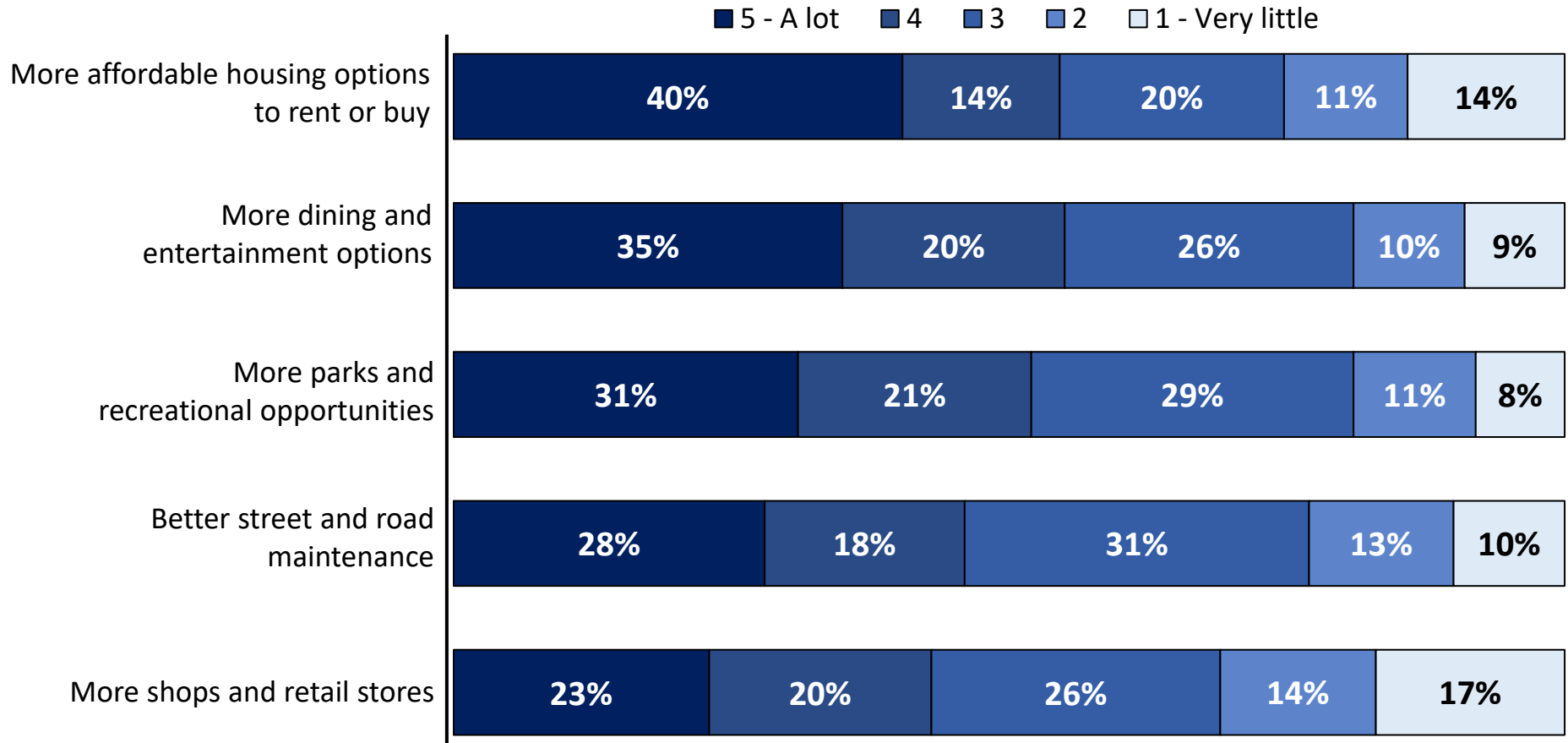
I feel enough is not being done or put in place to protect our schools from gun violence and drugs. I also feel we are lacking help for those with mental illnesses

Not a lot of things to do for little ones. Lack of quality grocery stores.

It is getting too crowded, and they need to improve the roads.

Affordable Housing, Dining and Entertainment Top List of Items That Would Improve Quality of Life

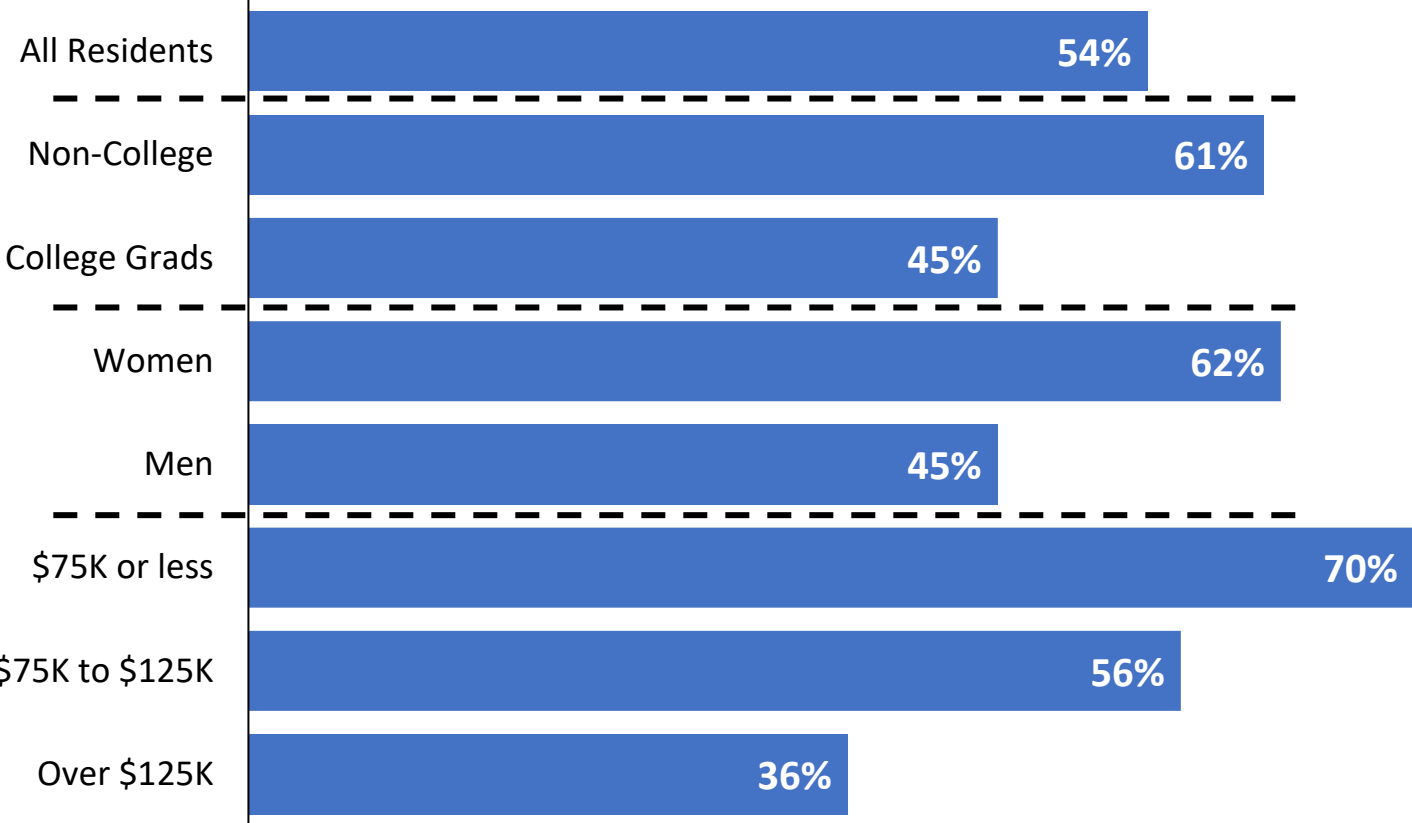
Improvements to Quality of Life



Q.7 Next, I am going to read you a list of things that people say would improve the quality of life in Culpeper County. Please rate each item on a scale of 1 to 5, where 1 means that it would do very little to improve the quality of life, and 5 means it would do a lot to improve the quality of life. You can use any number from 1 to 5; the higher the number, the more it would improve the quality of life in Culpeper County.

Affordable Housing Would Have Most Quality-of-Life Impact on Non-College Educated, Women, Lower-Income Residents

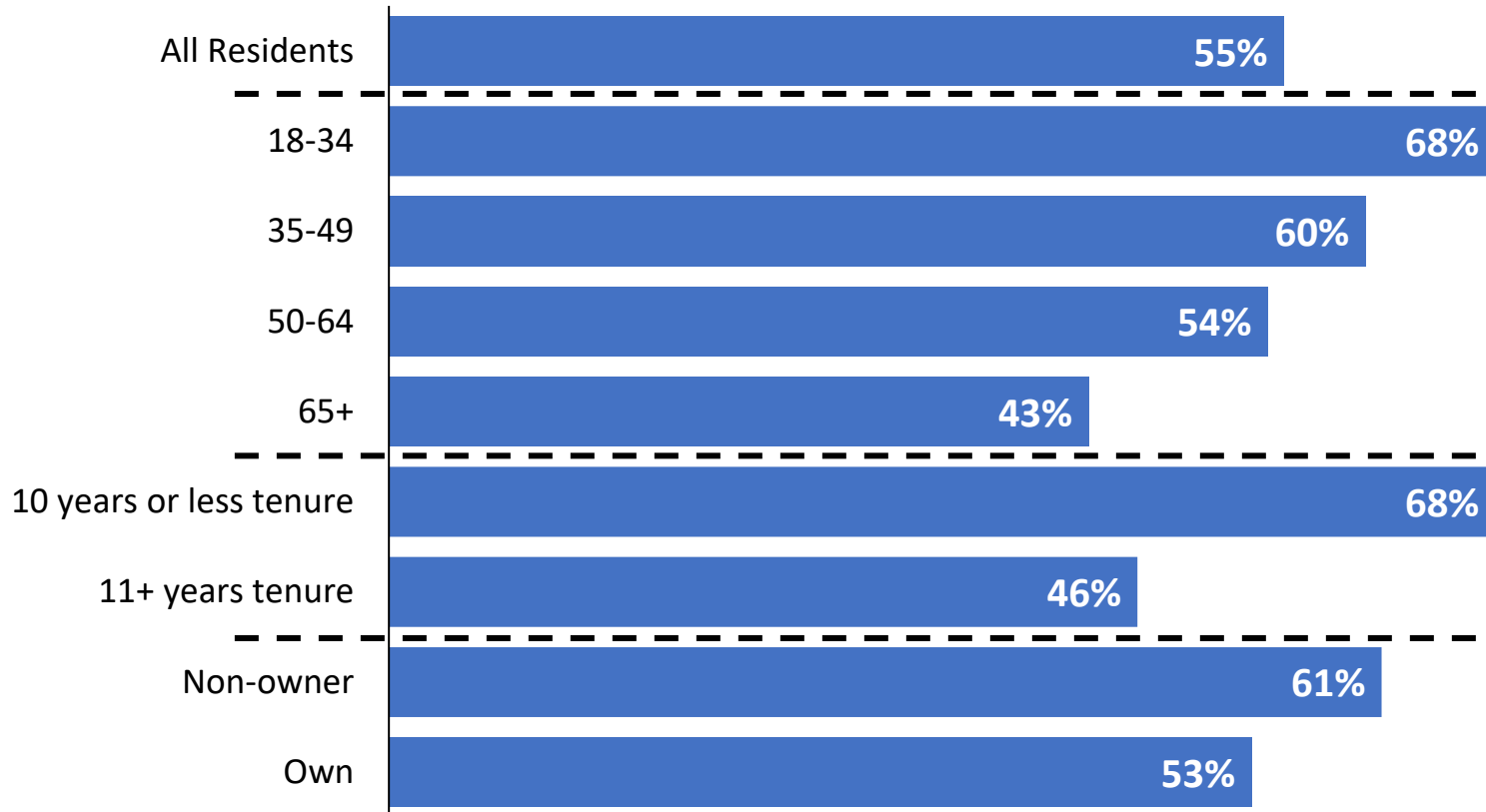
*Having More Affordable Housing Options Ranked 4 or 5
By Education, Gender, and Income*



Q.7A Next, I am going to read you a list of things that people say would improve the quality of life in Culpeper County. Please rate each item on a scale of 1 to 5, where 1 means that it would do very little to improve the quality of life, and 5 means it would do a lot to improve the quality of life. You can use any number from 1 to 5; the higher the number, the more it would improve the quality of life in Culpeper County.

Younger Residents, Newer Residents, Non-Homeowners Most Interested in More Dining & Entertainment

*More Dining and Entertainment Options Ranked 4 or 5
By Age, Tenure, and Homeownership*



Q.7C Next, I am going to read you a list of things that people say would improve the quality of life in Culpeper County. Please rate each item on a scale of 1 to 5, where 1 means that it would do very little to improve the quality of life, and 5 means it would do a lot to improve the quality of life. You can use any number from 1 to 5; the higher the number, the more it would improve the quality of life in Culpeper County.

Quality of Life Improvements by Group



More shops and retail stores is most important to relative newcomers, with 54 percent of those who have lived in Culpeper 10 years or less ranking the priority either a four or five on a five-point scale. Men under age 50 (49 percent) and women 50 or older (48 percent) also rank it a higher priority.



Better street and road maintenance is a higher priority for those in the lowest household income bracket (less than \$75K per year), with 54 percent ranking it a four or five on a five-point scale, as well as those in the densest areas of the county (58 percent).



More parks and recreation is also highly cited among quality-of-life improvements, with high response among residents in the densest area of the county (66 percent four or five), women (59 percent), residents under 50 (60 percent), non-homeowners (59 percent) and families with kids (59 percent).

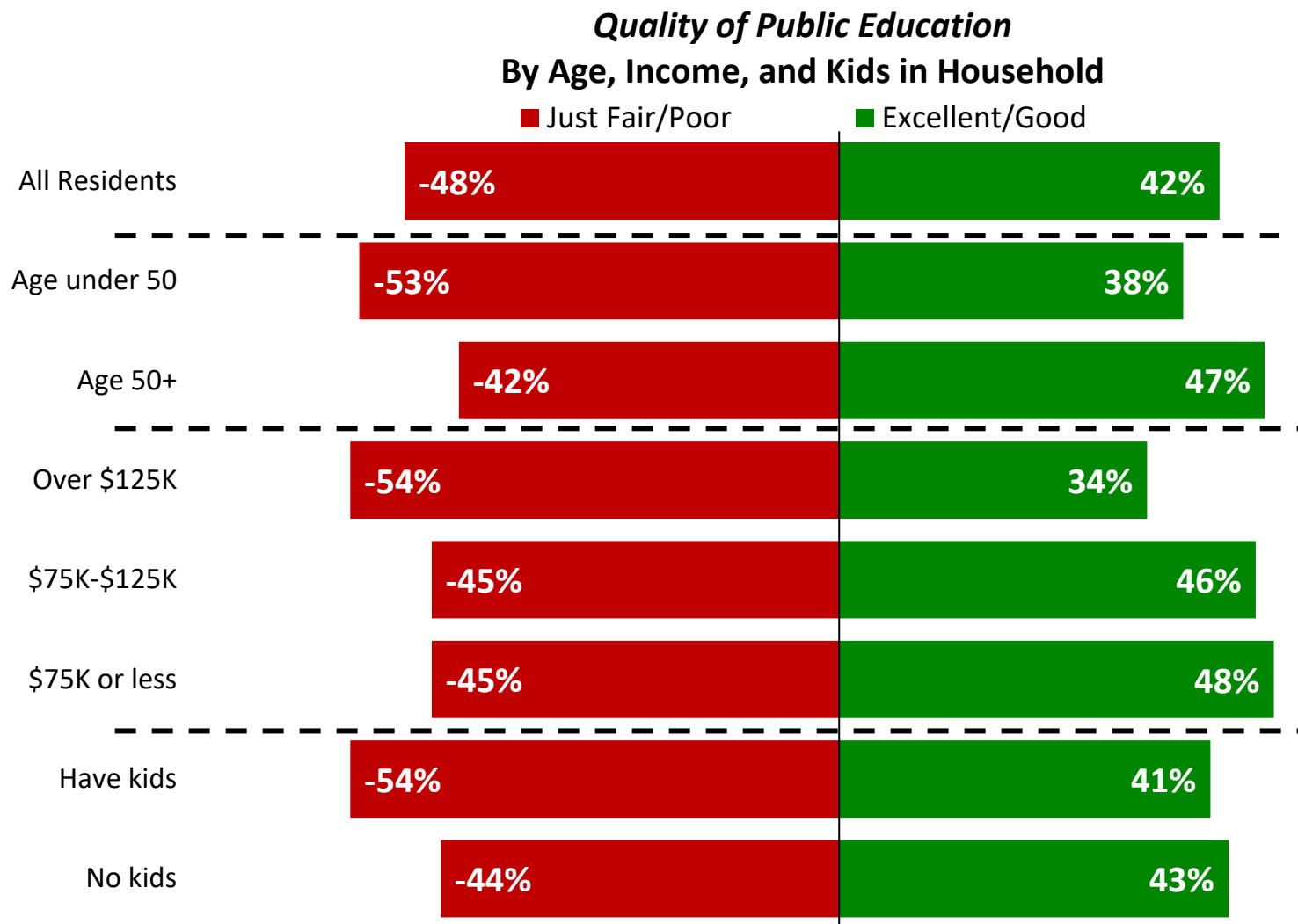
Residents Rate Overall Safety, Ease of Transit, Sense of Community Highly

Characteristics of Culpeper County Rating



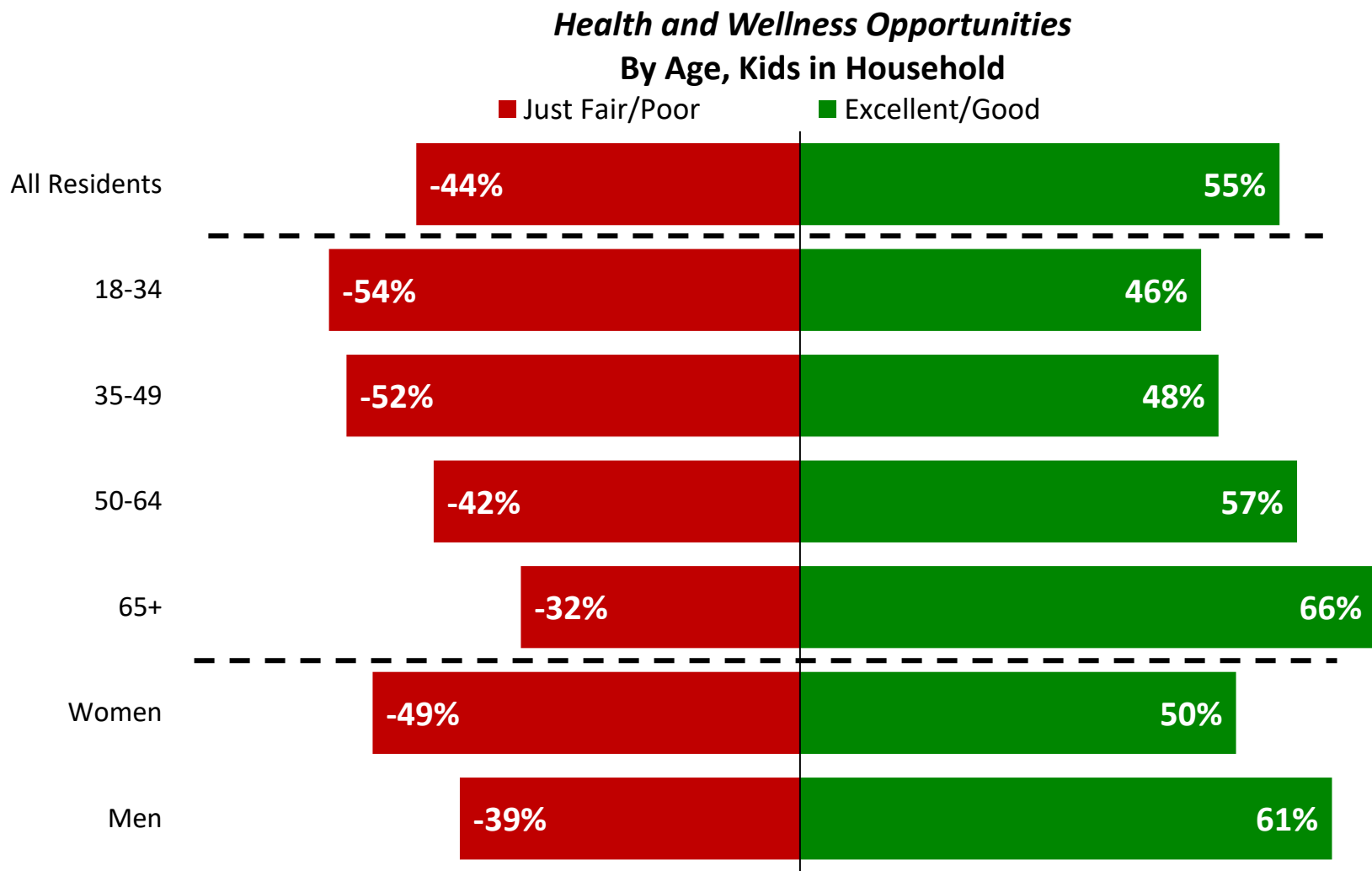
Q.8 Switching gears a bit, now I am going to read you some characteristics of Culpeper County and I would like you to rate each one as excellent, good, just fair, or poor.

Younger, Wealthier Residents, Households with Children Most Critical of Public Education



Q.8E Switching gears a bit, now I am going to read you some characteristics of Culpeper County and I would like you to rate each one as excellent, good, just fair, or poor.

Younger Residents, Women Most Critical of Health and Wellness Opportunities



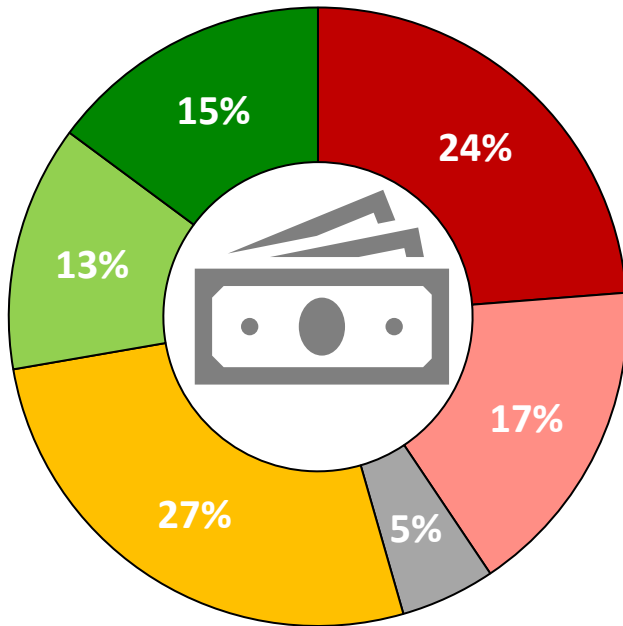
Q.8C Switching gears a bit, now I am going to read you some characteristics of Culpeper County and I would like you to rate each one as excellent, good, just fair, or poor.

Housing Affordability Seen as Major Issue

Availability considered less acute problem

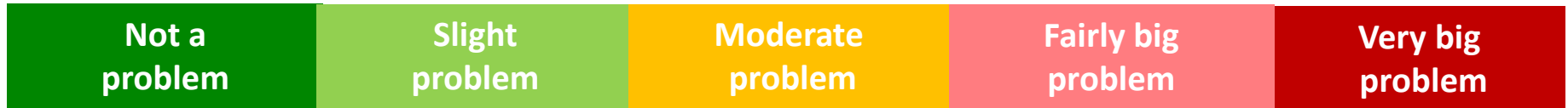
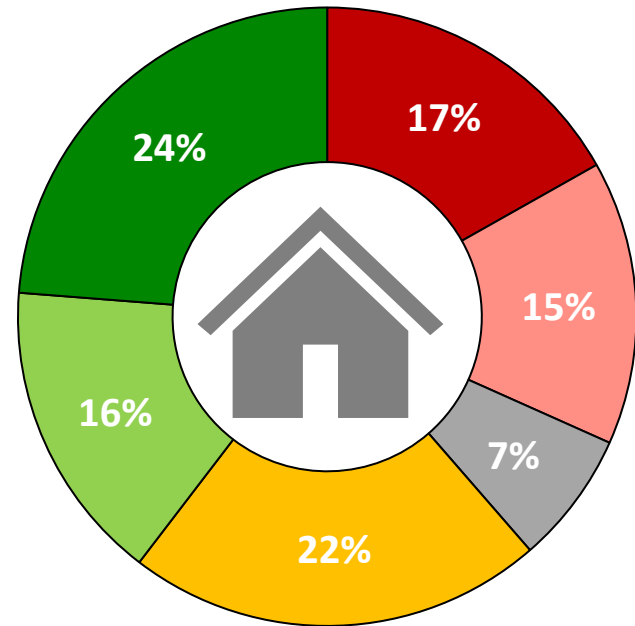
Housing Affordability

Slight/Not a problem: 28% | Very/fairly big problem: 41%



Housing Availability

Slight/Not a problem: 40% | Very/fairly big problem: 32%



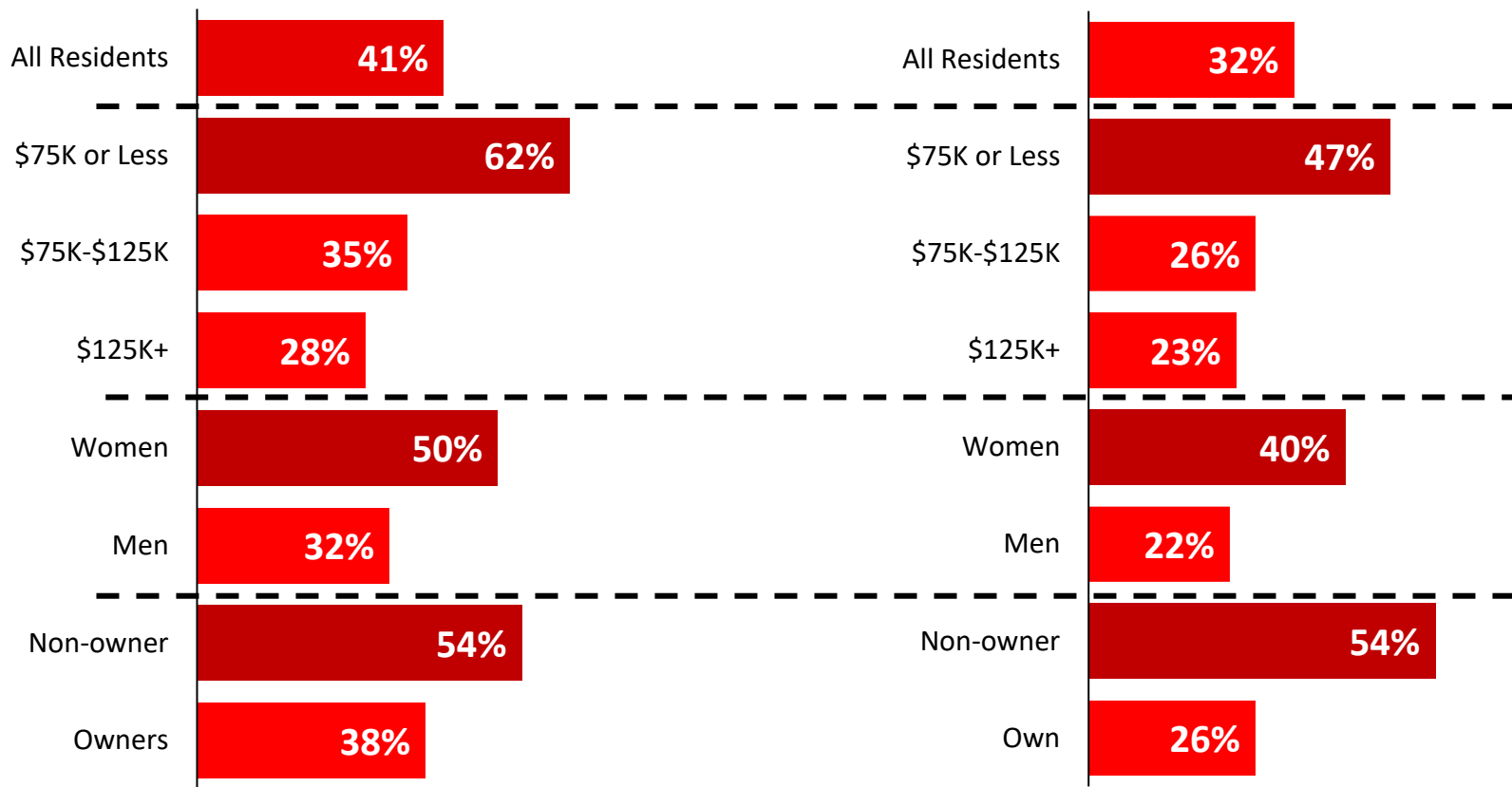
Q.9 (ROTATE Q.9 AND Q.10) How much of a problem is the availability of housing in Culpeper County, that is to say, the number of houses, condominiums, or apartments that are available to buy or rent?

Q.10 (ROTATE Q.9 AND Q.10) How much of a problem is housing affordability in Culpeper County, that is to say, how much it costs to buy or rent a home?

Lower-Income Households, Women, Non-Homeowners See More Pronounced Housing Crisis

**Affordability Very/Fairly Big Problem
By Income, Gender, and Homeownership**

**Availability Very/Fairly Big Problem
By Income, Gender, and Homeownership**

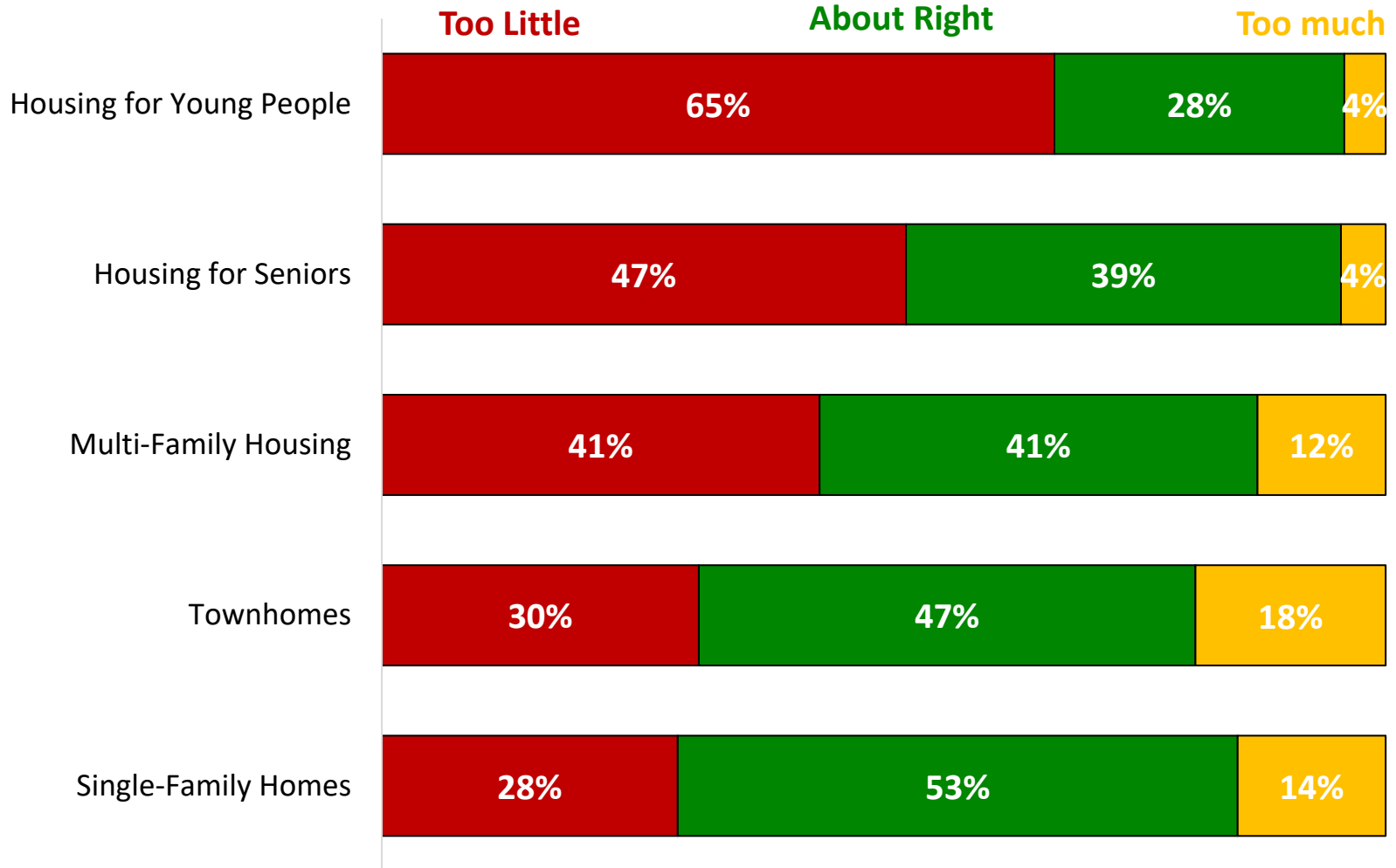


Q.9 (ROTATE Q.9 AND Q.10) How much of a problem is the availability of housing in Culpeper County, that is to say, the number of houses, condominiums, or apartments that are available to buy or rent?

Q.10 (ROTATE Q.9 AND Q.10) How much of a problem is housing affordability in Culpeper County, that is to say, how much it costs to buy or rent a home?

Two-Thirds Say *Too Little* Housing for Young People

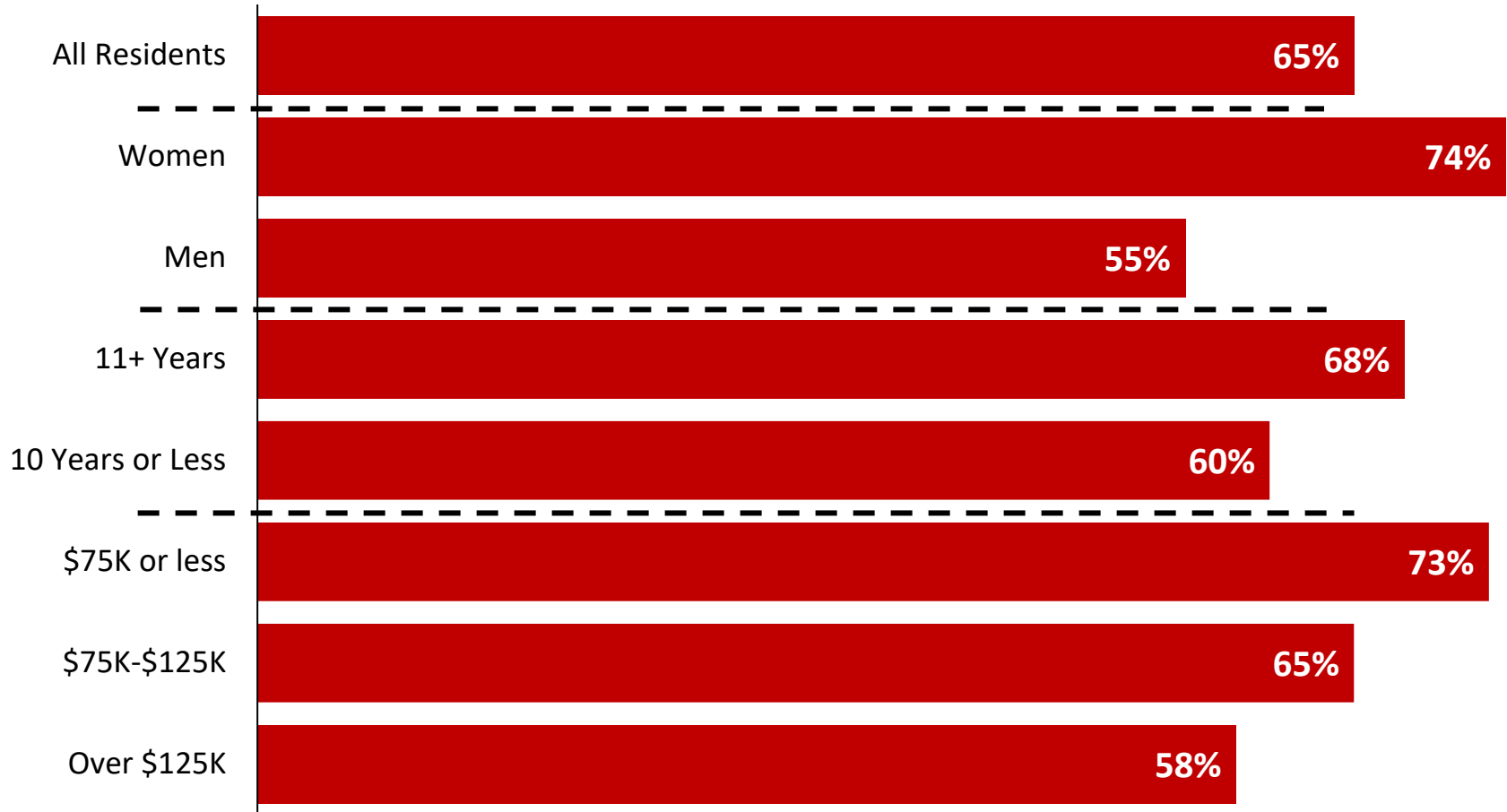
Inventory of Housing Types in Culpeper County



Q.11 Thinking ahead a few years, please indicate if you feel there is (ROTATE TOO MUCH/TOO LITTLE) too much, too little, or about the right amount of each of the following housing types in Culpeper County to meet the community's needs in the coming years.

Women, More Tenured, Less Wealthy Residents Rate Housing for Young People a More Pronounced Problem

Too Little Housing for Young People
By Gender, Tenure, and Income

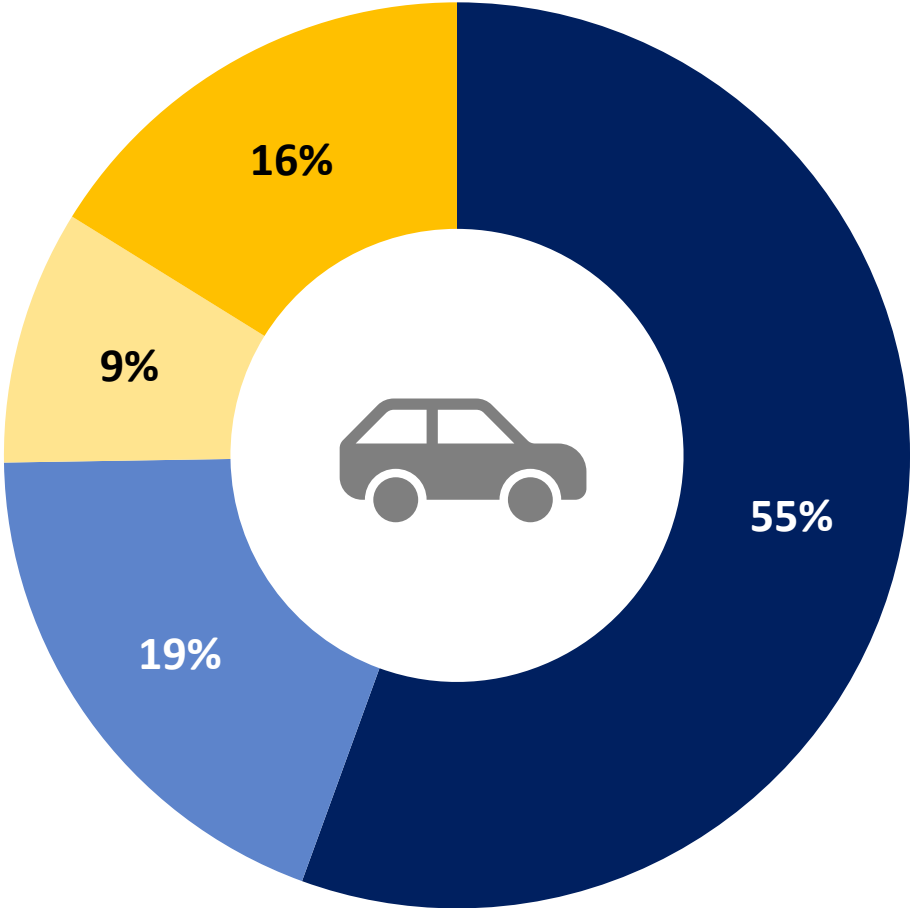


Q.11E Thinking ahead a few years, please indicate if you feel there is (ROTATE TOO MUCH/TOO LITTLE) too much, too little, or about the right amount of each of the following housing types in Culpeper County to meet the community's needs in the coming years... *Housing options for young people*

Commuting and Amenities

Majority of Employed Residents Commute Daily

Commute Frequencies



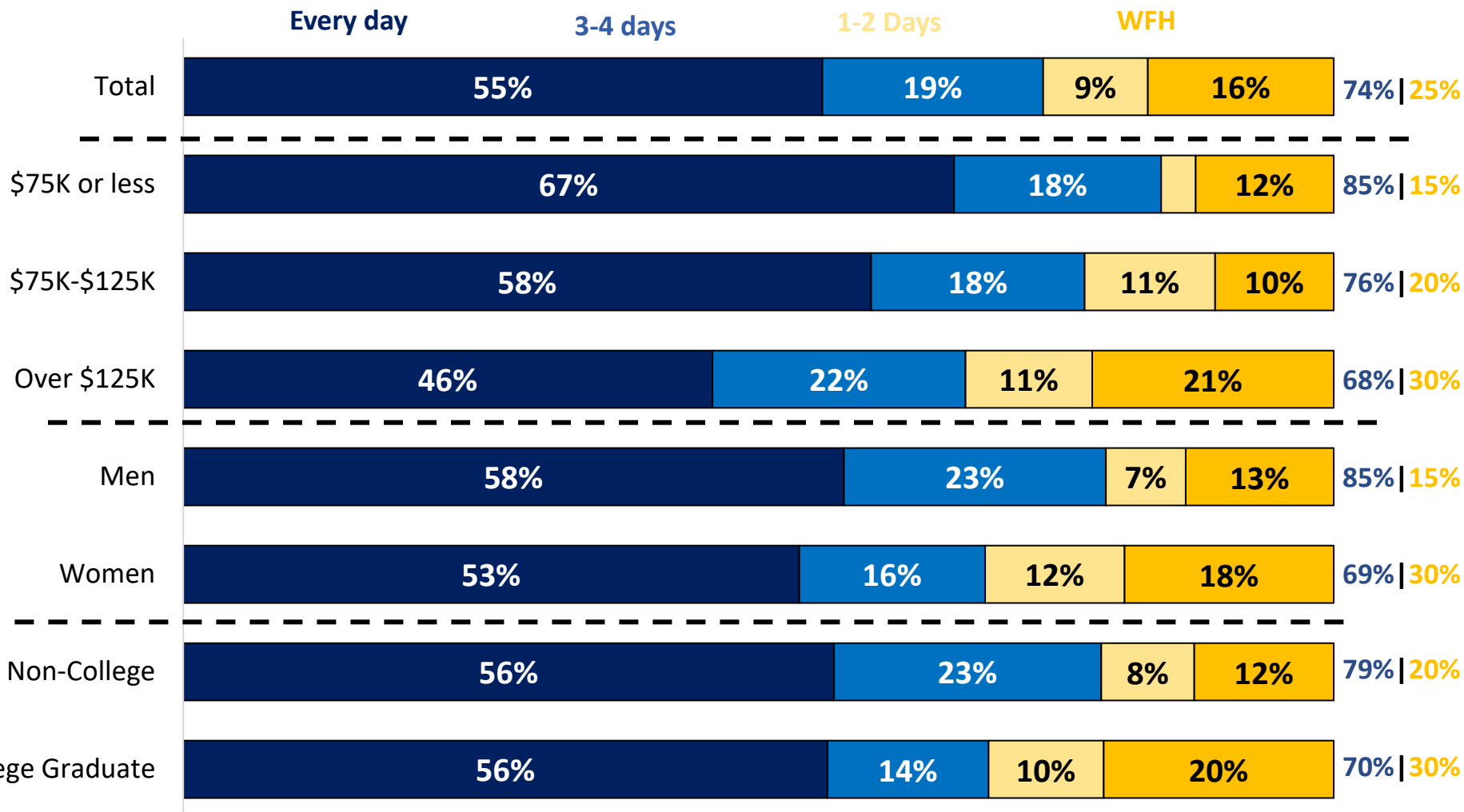
Every Day **3-4 Days** **1-2 Days** **Work From Home**

Q.16 (IF EMPLOYED IN Q.15) Do you commute to work at least once a week, or are you able to work from home full-time? (IF COMMUTE) How many days a week do you usually commute to work?

Lower-Income Residents Most Frequent Commuters

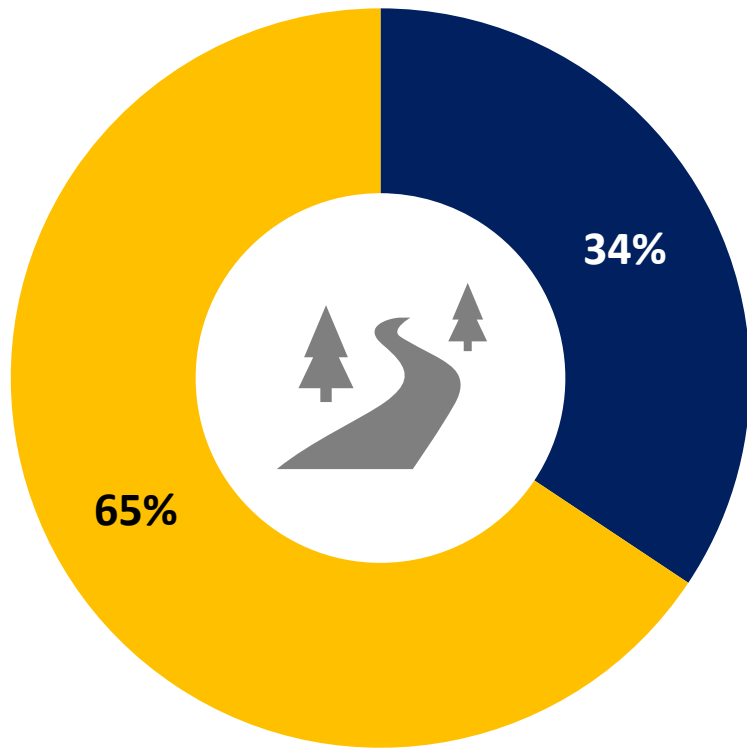
Work-from-home numbers higher among upper-income and women

Commuting v. Working from Home by Income, Gender, and Education



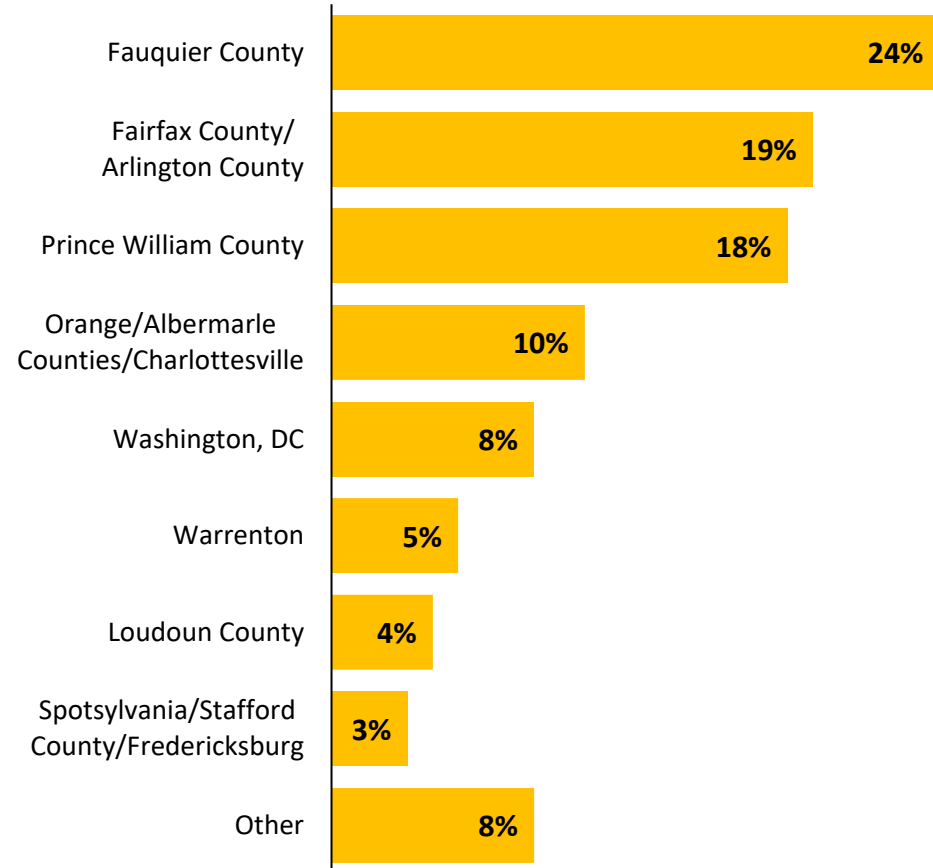
Q.16 (IF EMPLOYED IN Q.15) Do you commute to work at least once a week, or are you able to work from home full-time? (IF COMMUTE) How many days a week do you usually commute to work?

Most Commuters Travel Towards the Capital Region



In Culpeper **Outside Culpeper**

Commute Destination (n=156)

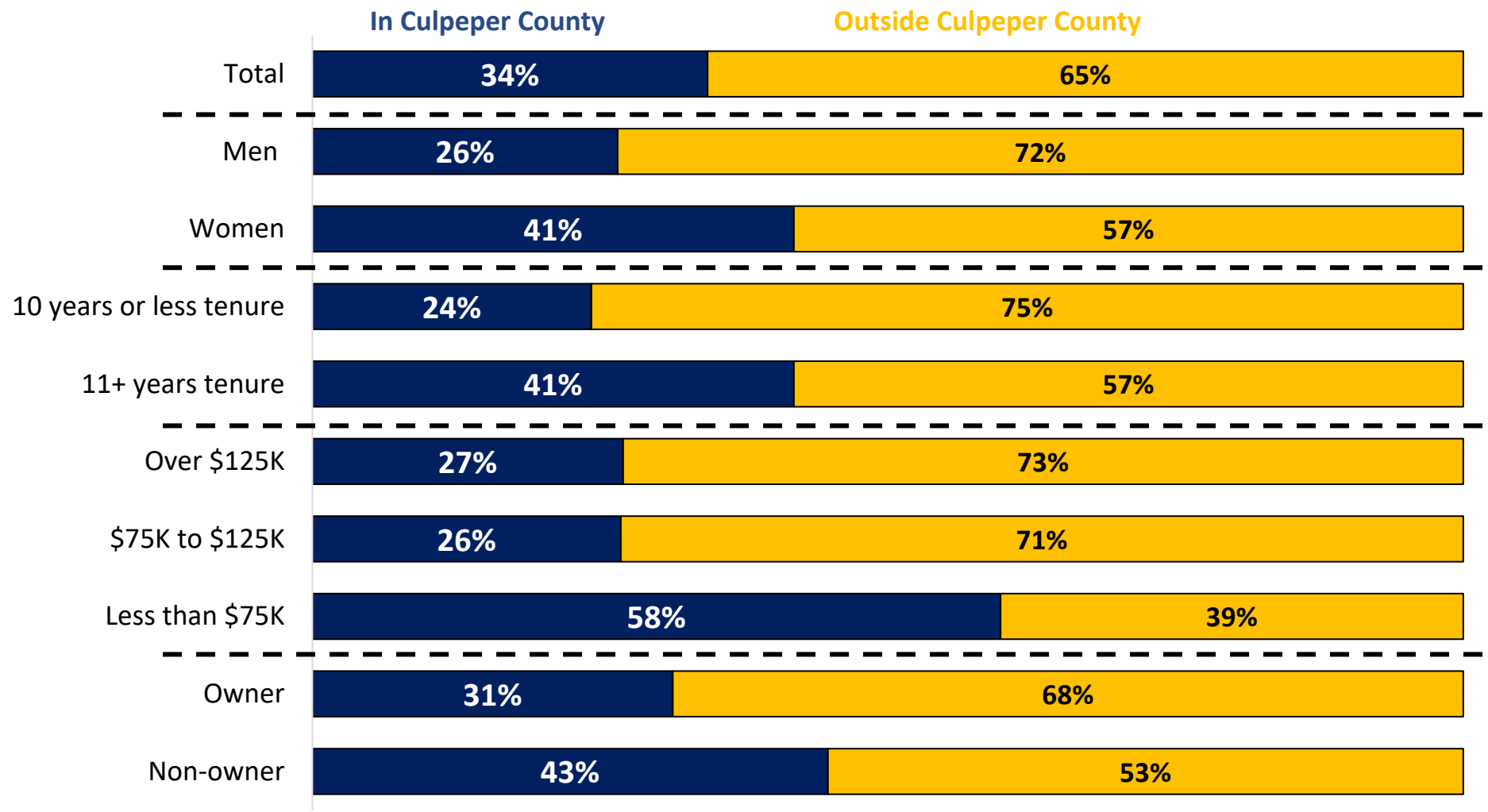


Q.17 (IF COMMUTE AT LEAST ONCE A WEEK IN Q.16) Are you commuting to someplace in Culpeper County, or are you commuting outside of Culpeper County?

Q.18 (IF OUTSIDE OF CULPEPER COUNTY IN Q.17) May I ask which city or county you are commuting to?

Men, Newer Residents, Wealthier Households, Homeowners Most Likely to Commute Outside of Culpeper

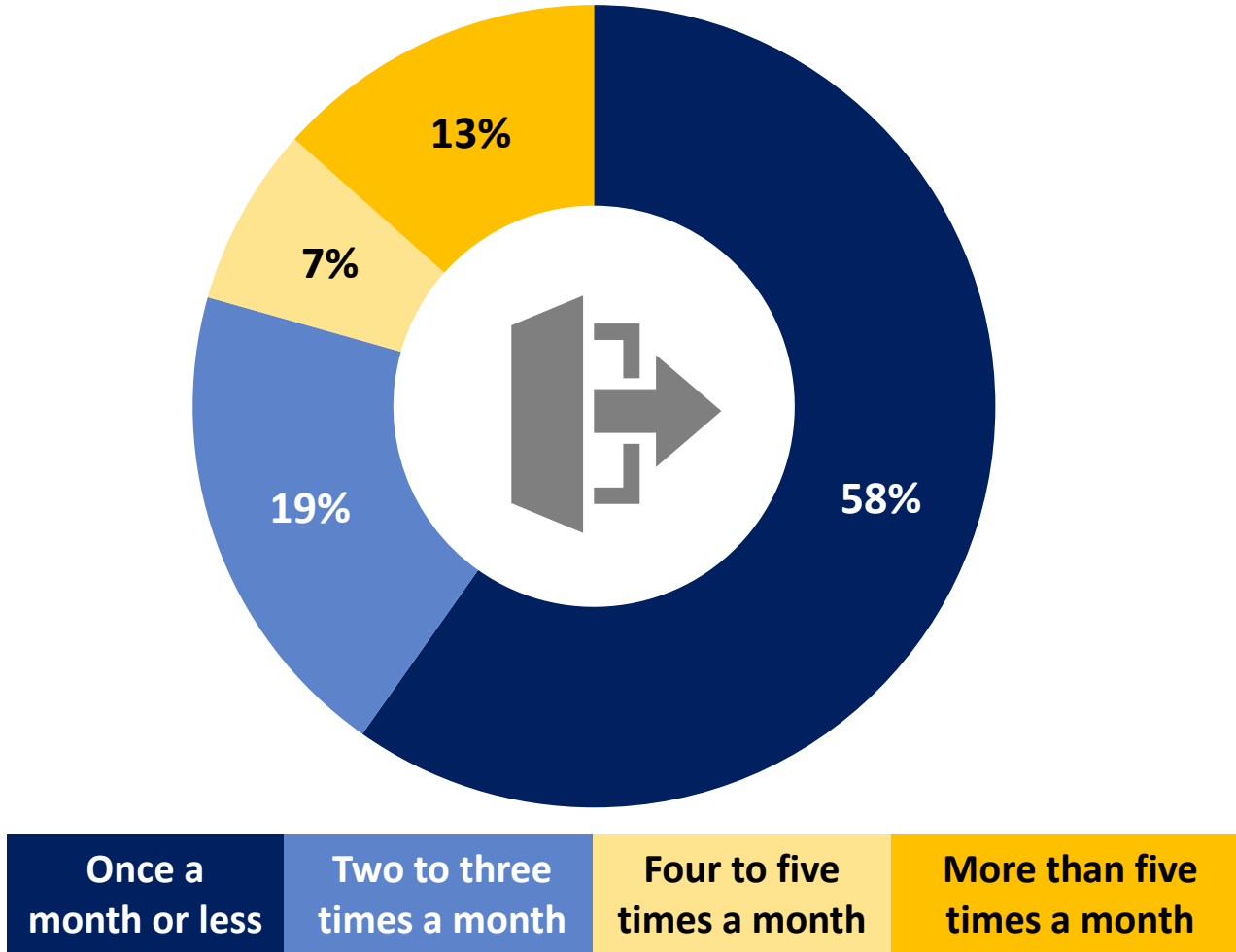
Commute Destination by Gender, Tenure, Income, and Homeownership



Q.17 (IF COMMUTE AT LEAST ONCE A WEEK IN Q.16) Are you commuting to someplace in Culpeper County, or are you commuting outside of Culpeper County?

Majority Only Leave Culpeper Once a Month or Less for Common Errands

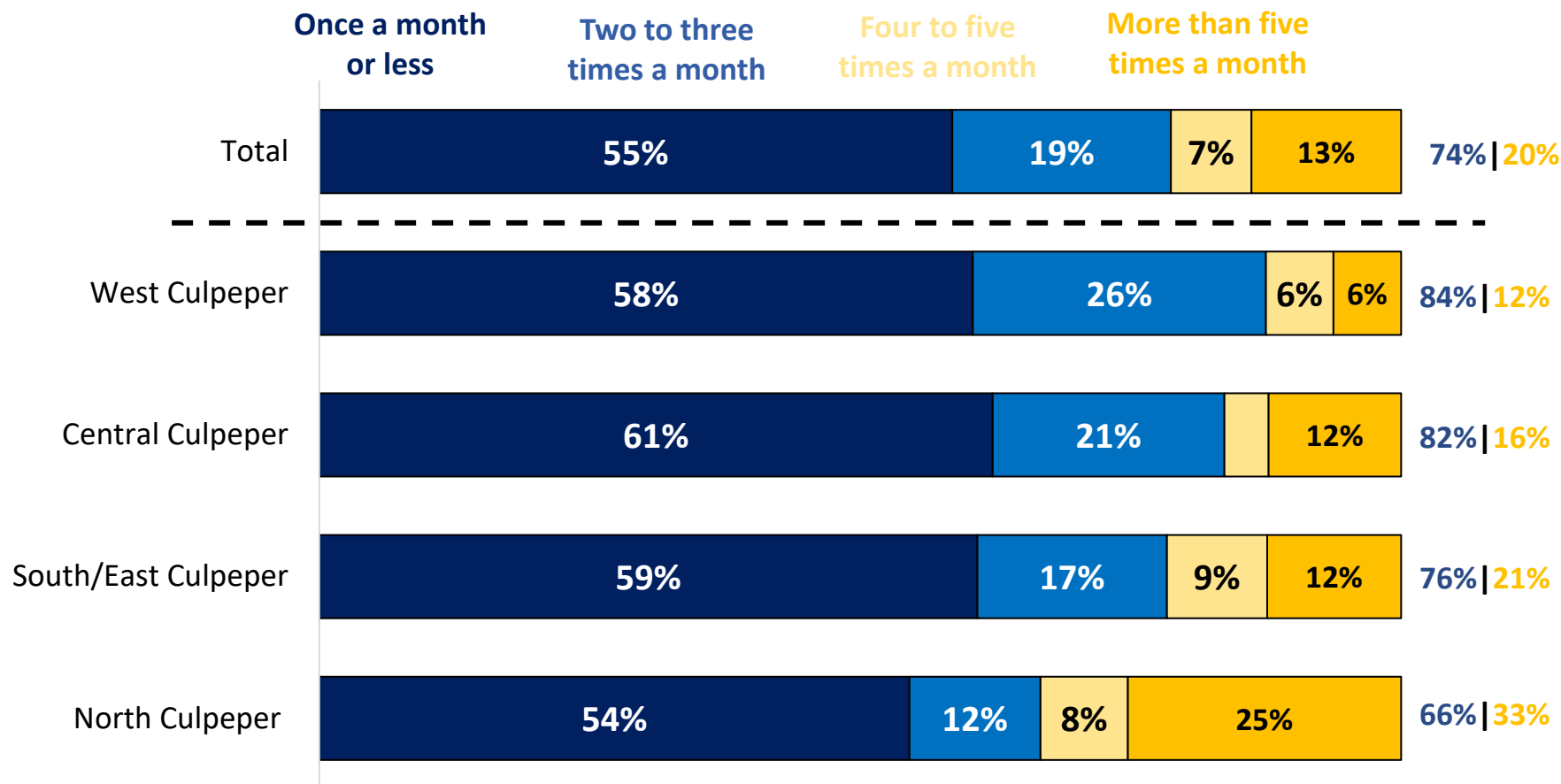
Frequency of Leaving Culpeper County to Purchase Common Items



Q.19 And in an average month, how often would you say that you have to leave Culpeper County in order to purchase common items, like clothes, food, household goods, or medical supplies and medications because those products are not available within the county? Is it (ROTATE) once a month or less, two to three times a month, four to five times a month, or more than five times a month?

West Culpeper, Central Culpeper Residents Least Likely to Leave Culpeper Frequently

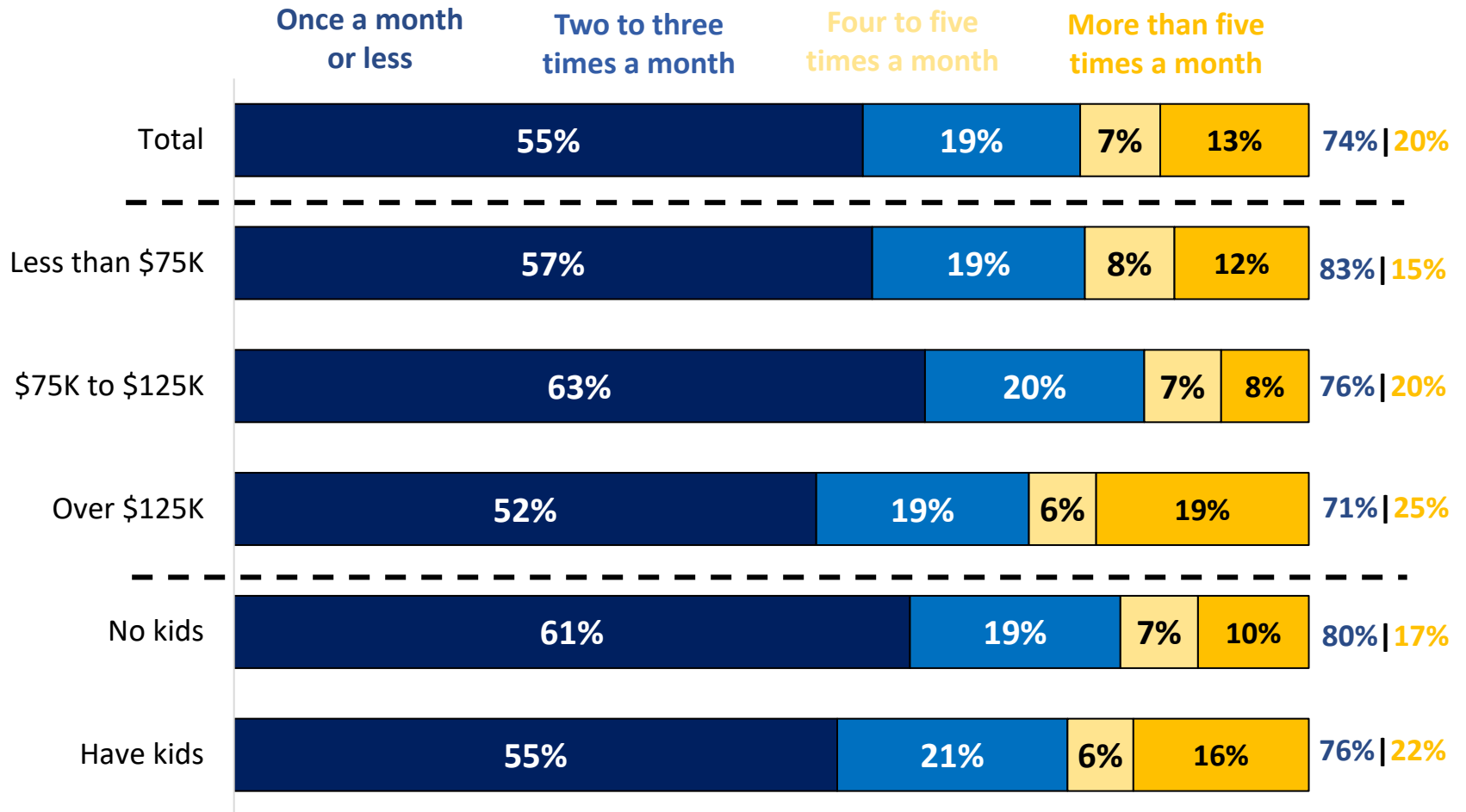
Frequency of Leaving Culpeper by Region



Q.19 And in an average month, how often would you say that you have to leave Culpeper County in order to purchase common items, like clothes, food, household goods, or medical supplies and medications because those products are not available within the county? Is it (ROTATE) once a month or less, two to three times a month, four to five times a month, or more than five times a month?

Lower Income, Childless Households Also Less Likely to Leave Culpeper Frequently

Frequency of Leaving Culpeper by Income and Kids in Household



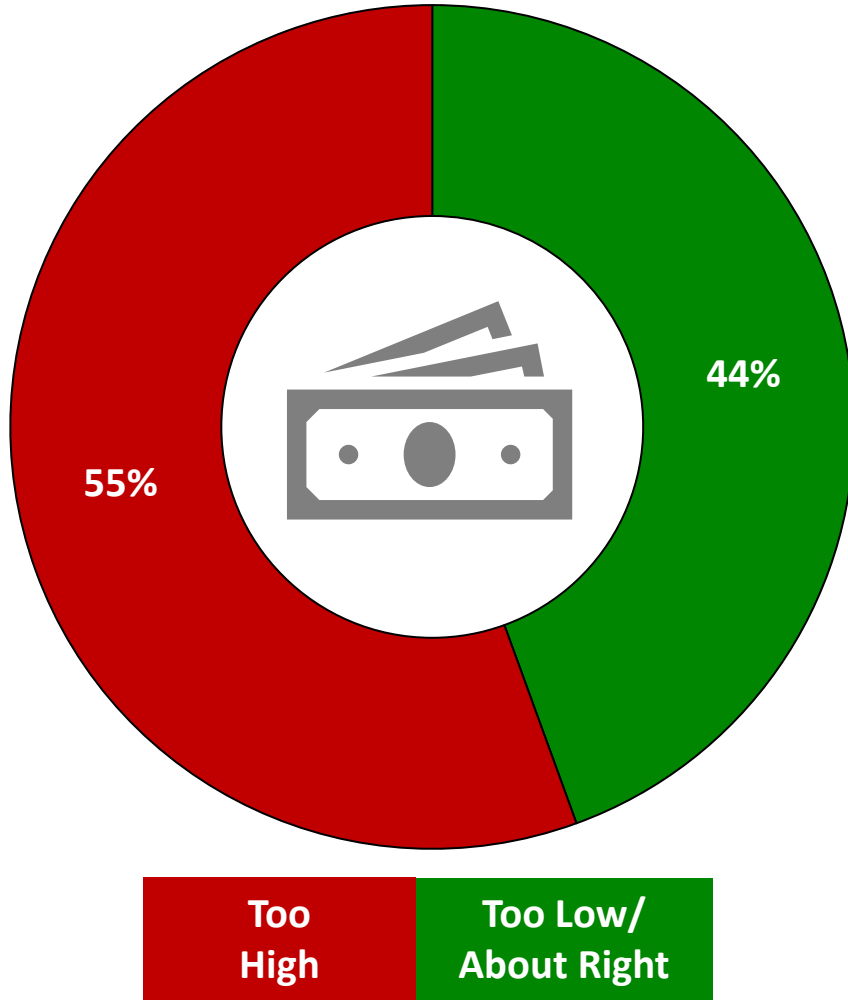
Q.19 And in an average month, how often would you say that you have to leave Culpeper County in order to purchase common items, like clothes, food, household goods, or medical supplies and medications because those products are not available within the county? Is it (ROTATE) once a month or less, two to three times a month, four to five times a month, or more than five times a month?

Policy Disposition & Priorities

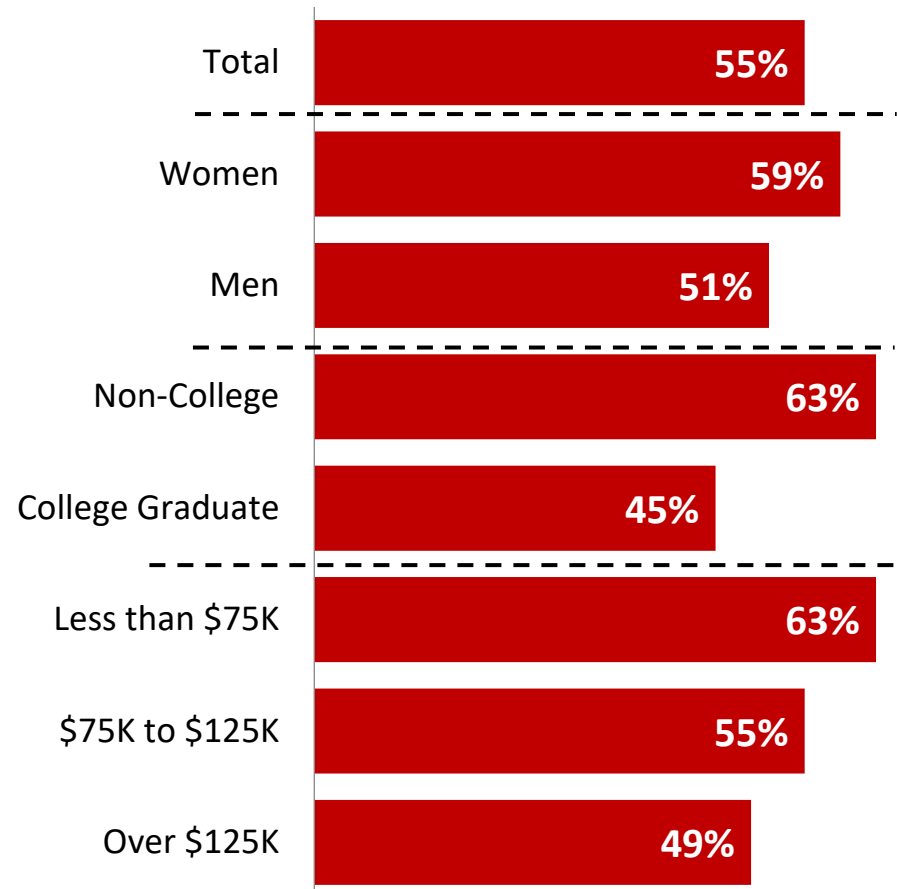
Slight Majority Believe Taxes are Too High

Women, non-college educated, lower-income households more likely to be critical of tax rate

Views on Current Property Tax Rate



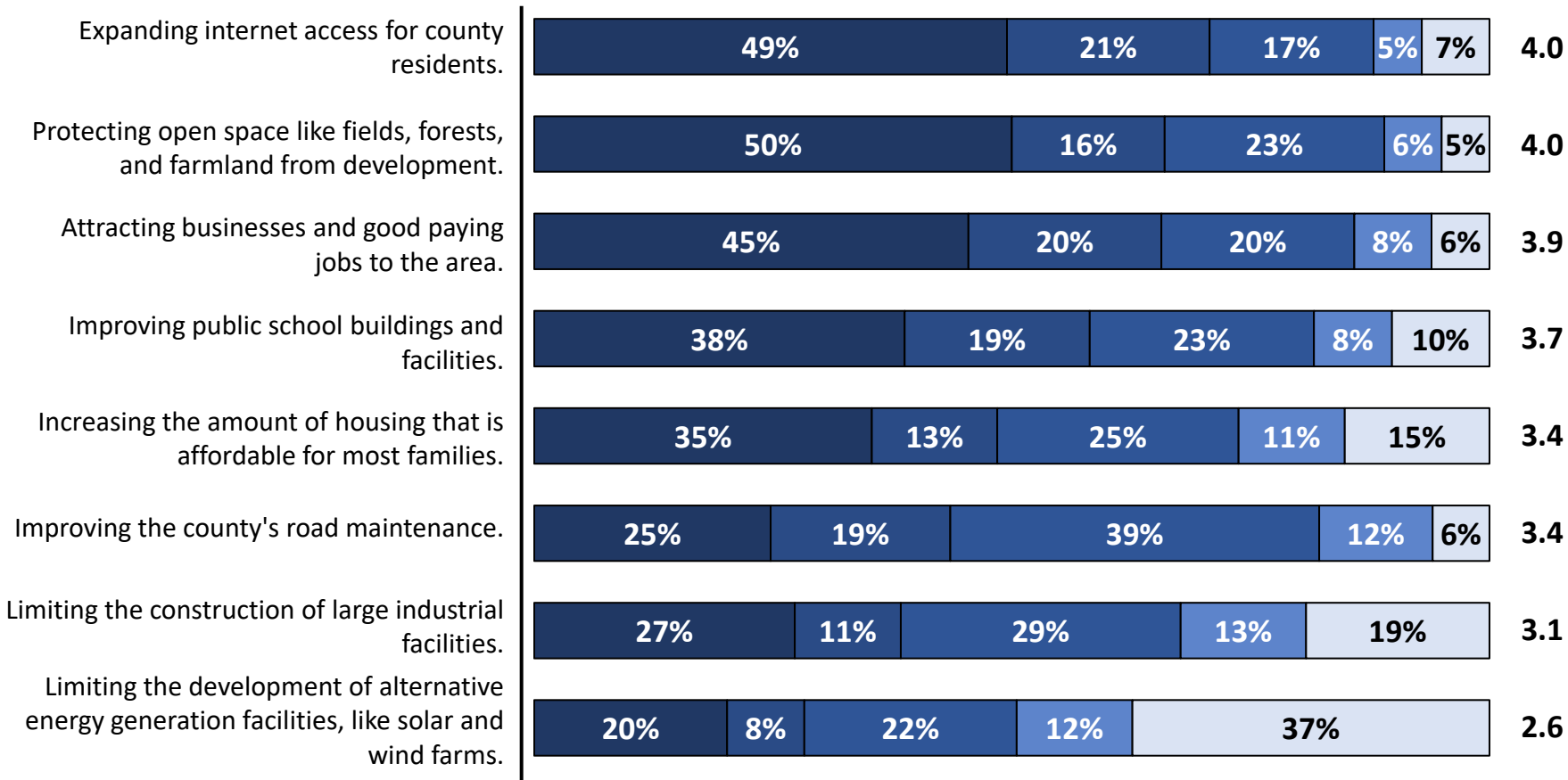
Taxes Too High by Region and Income



Internet Access and Protecting Open Space are Top Priorities Across The Board

Issue Priorities for Local Government

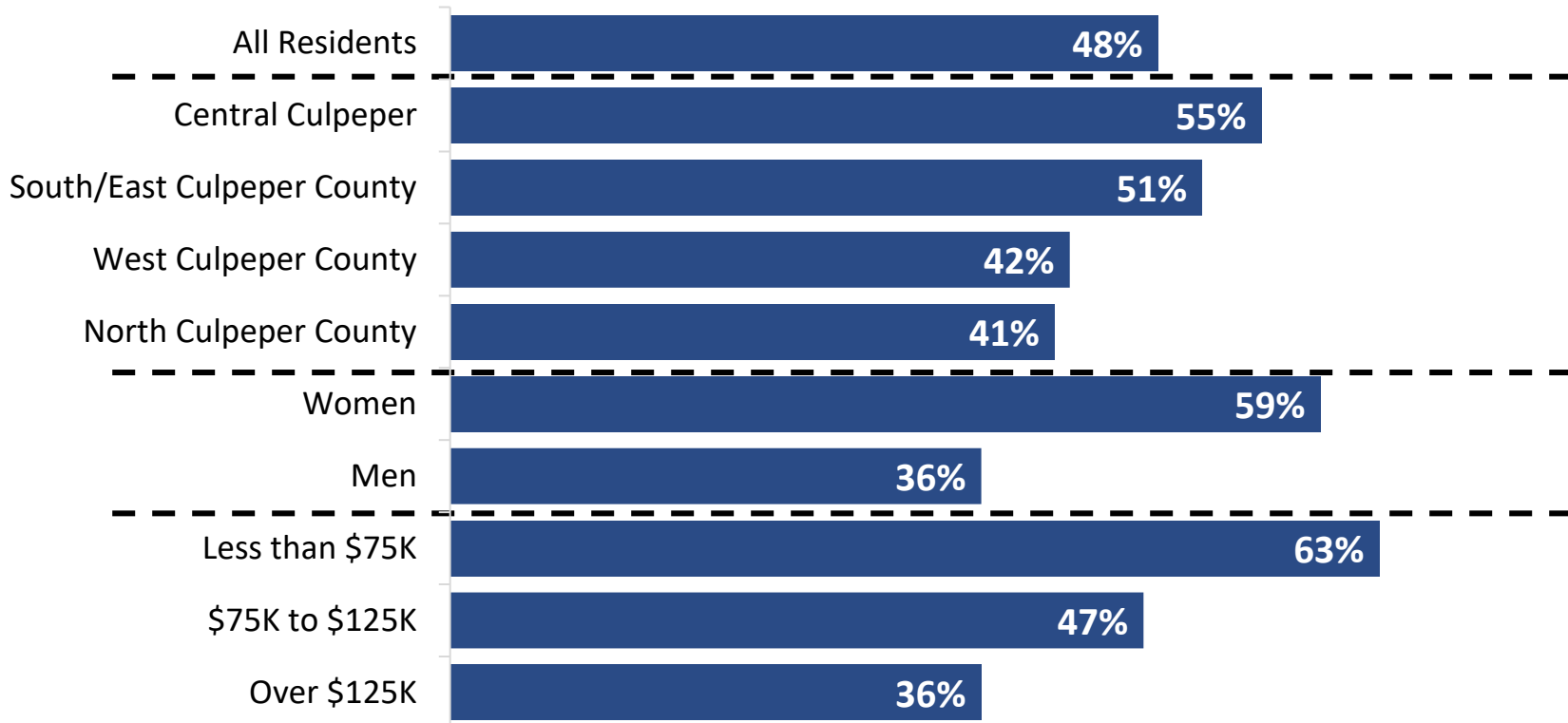
■ 5 - Top priority ■ 4 ■ 3 ■ 2 ■ 1 - Not a priority



Q.20 Next, I am going to read some issues that people say should be a priority for the local government and elected officials in Culpeper 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. Of course, you can use any number between one and five; the higher the number, the higher the priority you place on that issue.

Central Culpeper Residents, Women, Lower-Income Households More Likely to Prioritize Affordable Housing

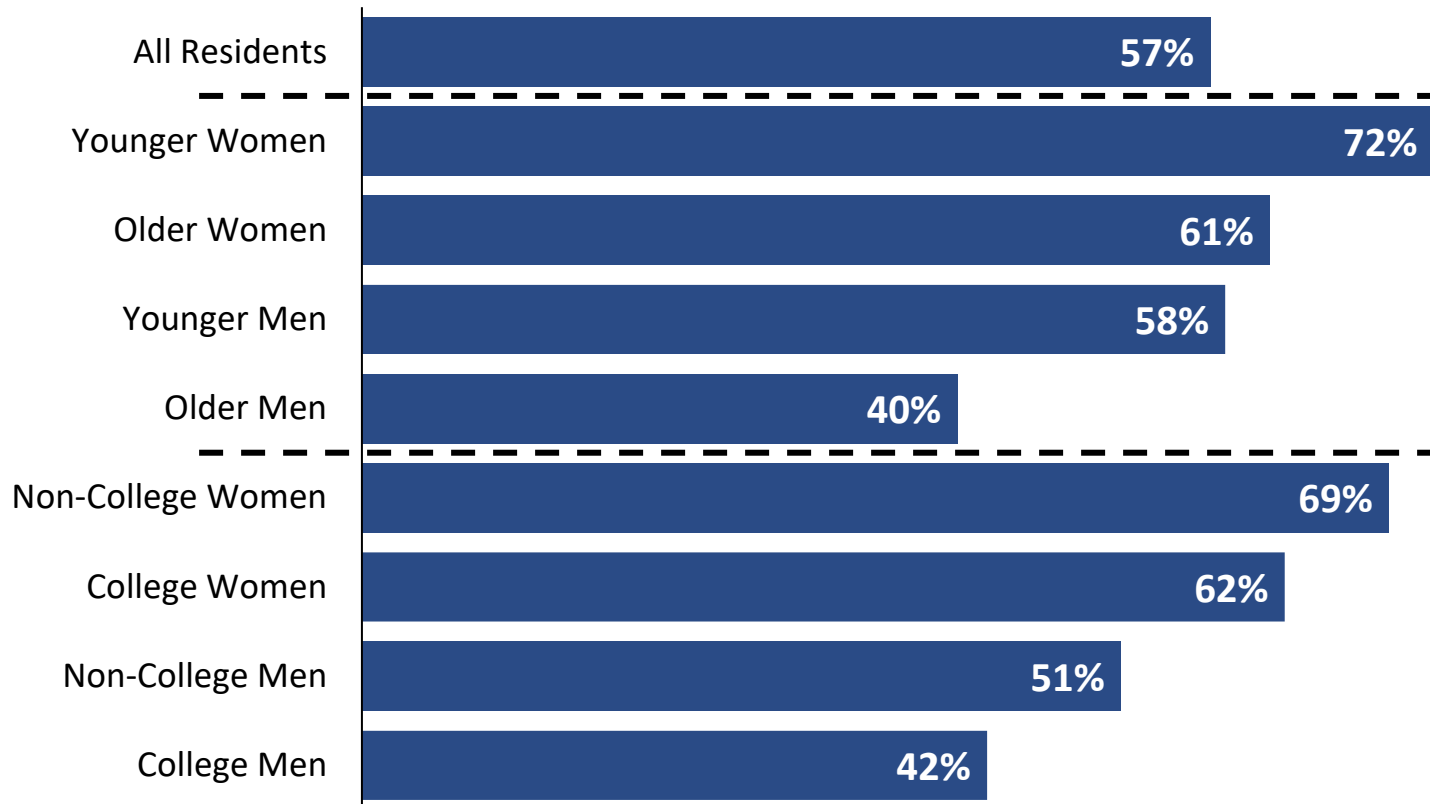
Increasing number of affordable houses for families Ranked 4 or 5
By Region, Gender, and Income



Q.20C Next, I am going to read some issues that people say should be a priority for the local government and elected officials in Culpeper 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. Of course, you can use any number between one and five; the higher the number, the higher the priority you place on that issue.

Younger, Non-College Educated Women Most Likely to Rank Improving Schools a High Priority

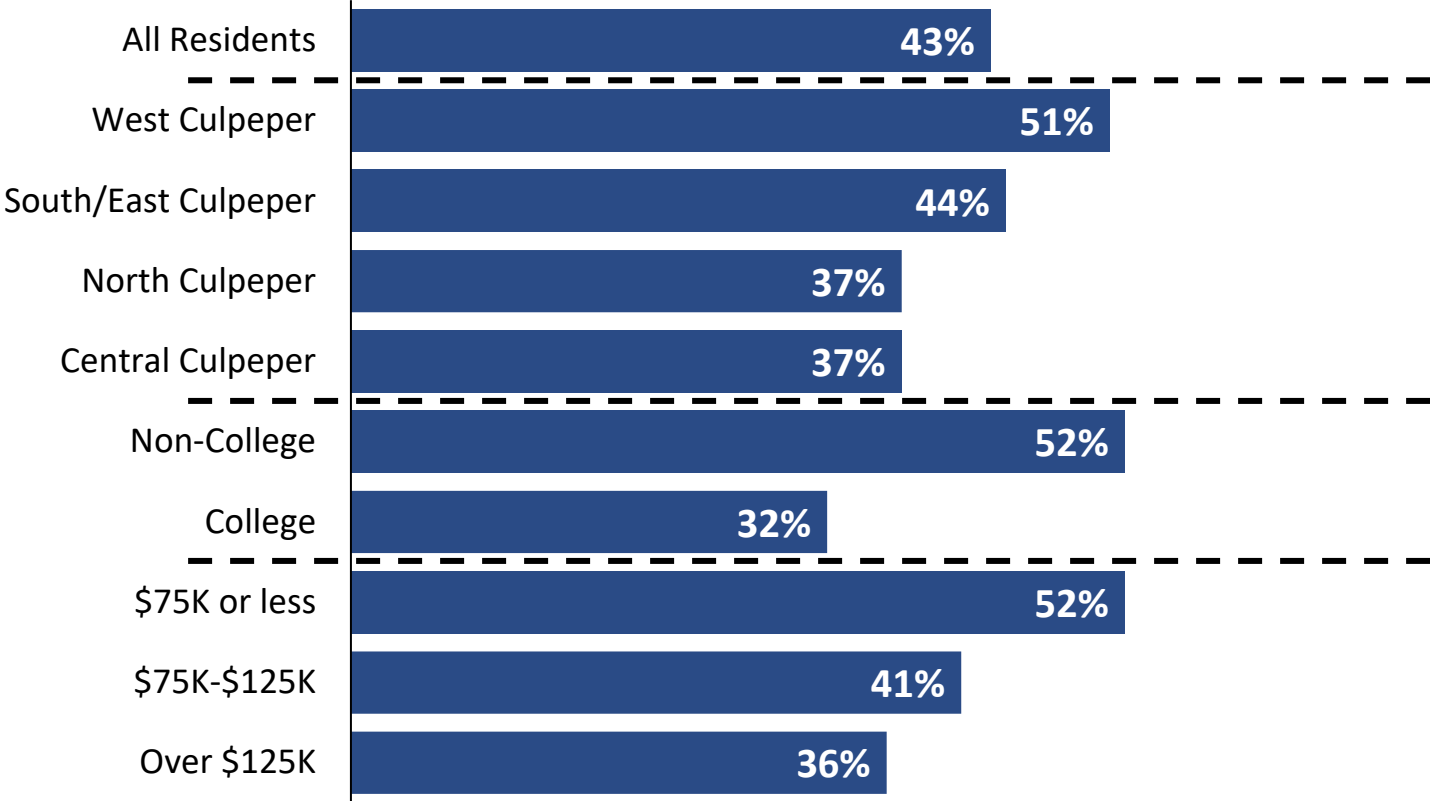
Improving public school buildings and facilities Ranked 4 or 5
By Gender/Age, Gender/Education



Q.20G Next, I am going to read some issues that people say should be a priority for the local government and elected officials in Culpeper 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. Of course, you can use any number between one and five; the higher the number, the higher the priority you place on that issue.

West Residents, Non-College, Lower-Income Residents More Likely to Rank Improving Roads a High Priority

Improving the county's road maintenance Ranked 4 or 5
By Region, Education, and Income



Q.20D Next, I am going to read some issues that people say should be a priority for the local government and elected officials in Culpeper 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. Of course, you can use any number between one and five; the higher the number, the higher the priority you place on that issue.

Policy Priorities by Region



In Central Culpeper, attracting businesses and good paying jobs to the area is the top priority for residents, with 73 percent rating it a four or five on a five-point scale of importance. Expanding internet access follows with 66 percent.



In South/East and West Culpeper, expanding internet access is the top priority with 72 percent rating it a four or five in each region. In South/East Culpeper, attracting businesses and jobs receives 69 percent, while in West Culpeper protecting open space is the second-rated priority with 64 percent.



In North Culpeper, Protecting open space is the top priority for 71 percent, followed by expanding internet access with 67 percent rating it a four or five out of five.

National Association of REALTORS®

*VA – Culpeper County Smart Growth
March 2023*

American Strategies designed and administered this multi-modal survey. The survey reached 461 adults, age 18 or older, who indicated they were registered to vote in Culpeper County, Virginia. The survey was conducted March 16-21, 2023, via live phones with trained operators, and online via SMS using Qualtrics.

Sixty-five percent of respondents were reached on phones. Thirty-five percent took the survey online. Quotas were assigned to reflect the demographic distribution of registered voters in Culpeper County, Virginia. The data were weighted to ensure an accurate reflection of the population. Percentage totals may not add up precisely due to rounding.