ORLEANS HOUSING NEEDS ASSESSMENT

ORLEANS COMMUNITY SURVEY SUMMARY

Prepared by JM Goldson LLC July 2023

OVERVIEW

The Orleans Housing Needs Assessment project team launched a survey between June 5 and June 29, 2023, to solicit community members' perspectives, better understand their experiences navigating housing in Orleans, and hear their direct observations of the housing needs and opportunities within the Town. This survey was not intended to be a statistically significant poll but rather to reach more community members than may traditionally be heard at a public forum. The survey was active for one month and received 364 submissions.

KEY FINDINGS

Survey respondents were most likely to identify as women, white, and aged 55 or older

Survey respondents were most likely to hold a bachelor's degree or higher and be retired.

67%

When asked, 67 percent of homeowners and 47 percent of renters indicated they would not be able to afford the current average housing costs in Orleans ($1,222,500 median single-family sales price, ($1,092/month for renters)

47%

The three most supported housing types were:

1. Year-round rental and ownership housing
2. Housing for moderate-income (between 81% and 120% AMI) and Affordable housing (80% AMI or lower)
3. Cottage style housing

86%

Orleans residents showed a slight preference for remaining in Town (86 percent importance) over their current home (81 percent) when considering aging in place

81%

When asked if they would consider building an accessory dwelling unit on their property:

- 59 percent would consider creating an ADU
- 32 percent would not consider an ADU
- 7 percent do not own a single-family home
- 2 percent already have an ADU

Survey respondents feel the most pressing challenges are:

1. Lack of affordable year-round rental and home-ownership housing options
2. Lack of housing for workers
3. Lack of small housing options (one- or two-bedrooms)
4. Limited developable land available for new housing

51%

Over half of businesses had had trouble recruiting or retaining employees in the past five years (51 percent). The high cost of housing was the most common theme mentioned as the primary reason for trouble recruiting or retaining employees.

70%

Non-resident survey respondents were more than twice as likely to be families with children under 18 (27 percent) than Orleans residents (12 percent). Non-residents' most significant barrier to living in Orleans was the high cost of housing (70 percent).

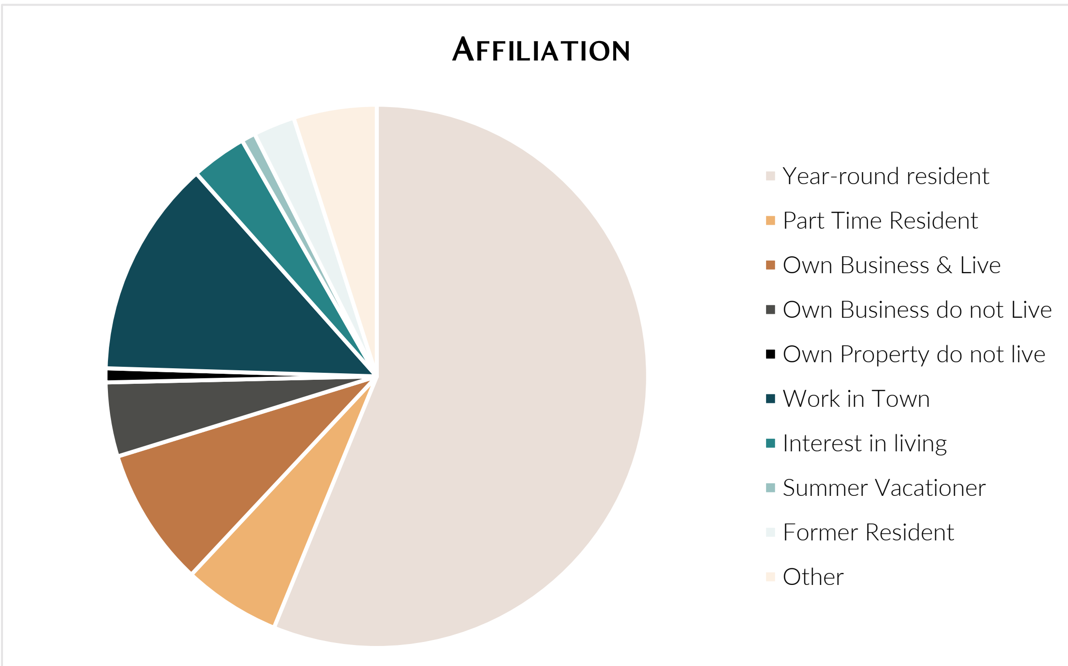
WHO TOOK THIS SURVEY?

The following information summarizes the overall trends of the Orleans survey respondents and compares them to the overall population of Orleans and Barnstable County.[1] Survey participants were asked to share different pieces of their identity through a series of questions, each including a 'Prefer not to answer' option. Representation is determined by those who chose to disclose. Over and underrepresentation were calculated based on five percentage points. Please see the appendix for a full demographic breakdown.

Affiliation & Residency

Most survey respondents (56 percent) were full-time, year-round Orleans residents, with an additional six percent being part-time or seasonal residents.

> ***Roughly 3.71 percent of Orleans participated in this survey.[2]***



About 10 percent of survey respondents stated that they currently had children or dependents enrolled in Orleans/Nauset public schools.

Tenure

Homeowners were overrepresented, making up 90 percent of survey respondents, but only 80 percent of the town's housing stock is owner-occupied housing. Renters were underrepresented, making up only nine percent of survey respondents, but about 20 percent of the town population.

[1] Survey responses are compared to the most recent U.S. Census (2020) and American Community Survey 5-Year Estimates (2017-2021) unless otherwise stated.
[2] Calculated by dividing the number of "Year-Round Resident" responses by Orleans's 2020 Census population.

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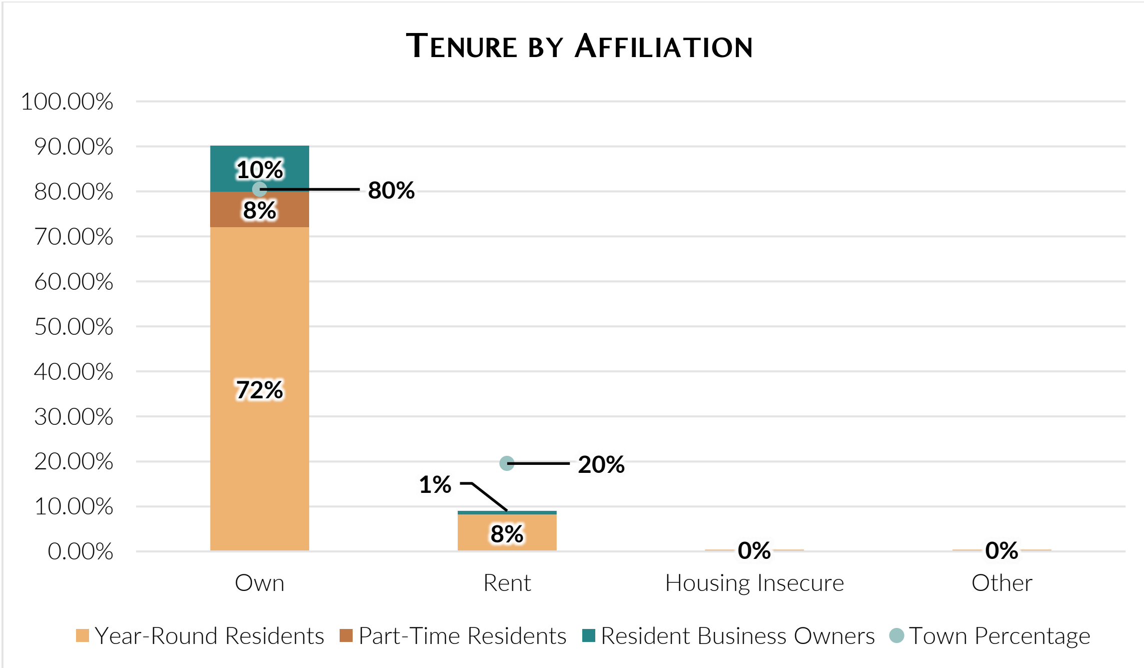
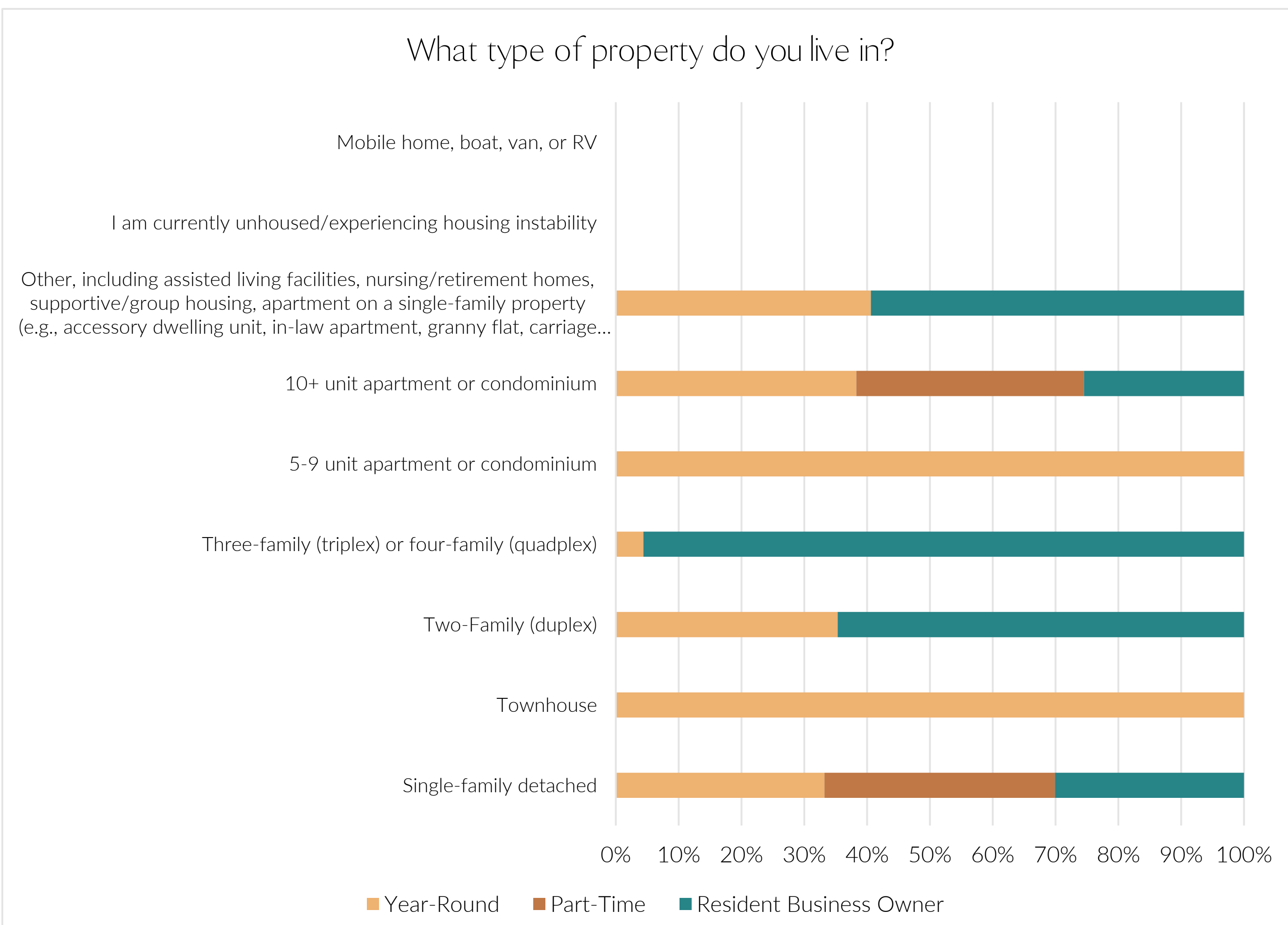


Property Type



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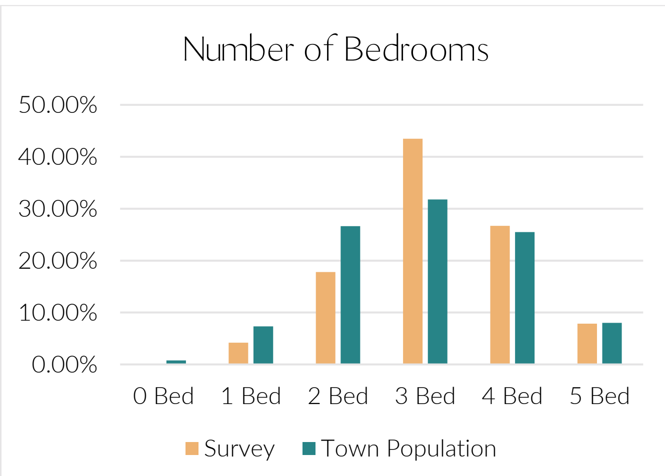
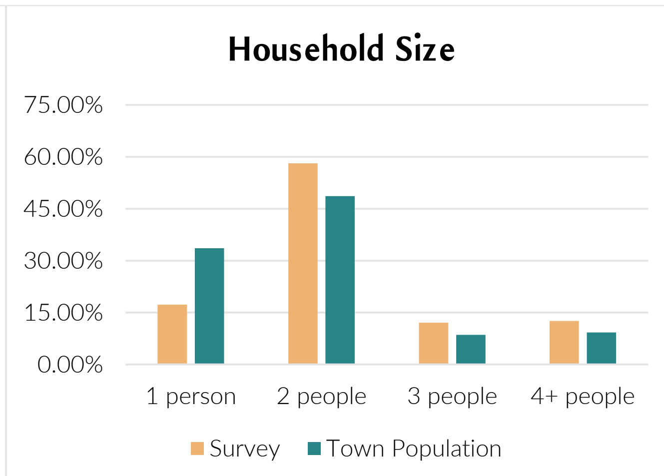
Part-time residents who responded to the survey were most likely to live in a single-family home (95 percent), with the remaining five percent reporting living in an apartment or condominium building with ten or more units. 86 percent of year-round resident respondents reported living in single-family homes, with the second largest group reporting living in an apartment or condominium building with 10 or more units (six percent). Resident Business owners followed a slightly different trend, with 78 percent reporting they live in a single-family home and the second largest group (11 percent) reporting that they live in a three-family (triplex) or four-family (quadplex). Additionally, one year-round Orleans resident lived in 2 or more homes in Orleans each year.

Household Makeup & Housing Characteristics

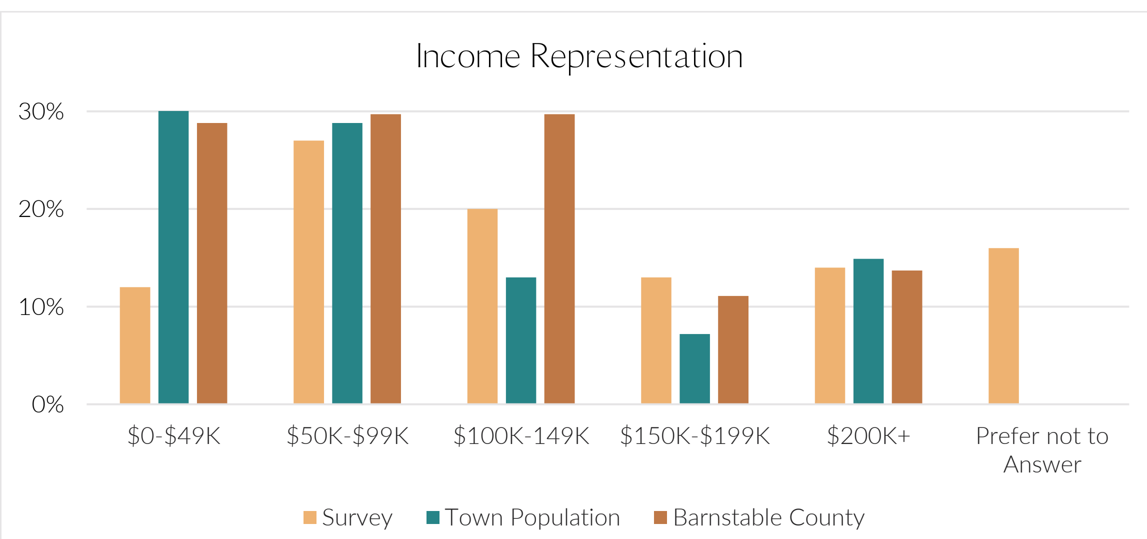
> ***About 58 percent of respondents live in a household with just one other person, and 17 percent live alone. Most respondents live in households with three to four bedrooms, (70 percent), which indicates an overrepresentation of individuals with three to four bedrooms, as the town population is only 57 percent.***





Income

At 20 percent of survey respondents, the highest identified income was those making between $100,000 and $149,000 per year. The second highest percentage of survey participants (16 percent) selected 'Prefer not to answer' when asked about their household income.



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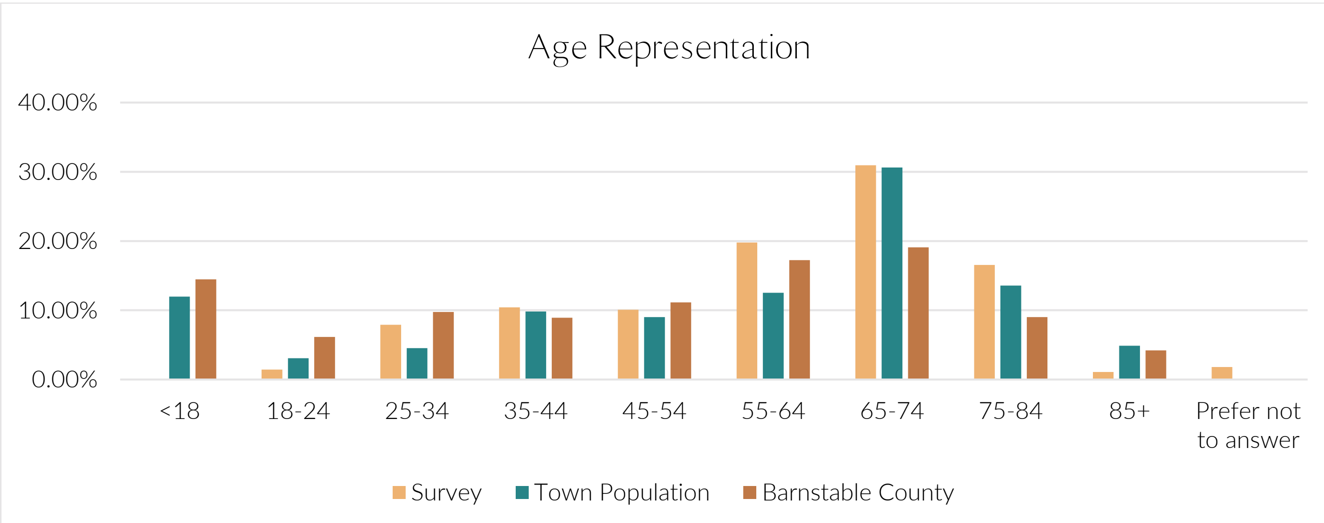
Age

The majority of survey respondents were aged 55-84 (67 percent) with those being aged 65-74 being the most represented group (31 percent). This was over representative of this age group compared to both the Town of Orleans as a whole as well as Barnstable County, with ages 55-84 making up 57 percent and 45 percent of the populations respectively.



Gender

Just over 60 percent of survey respondents identified as women, with men being underrepresented, making up about 33 percent of respondents despite making up 47 percent of the town's population. No survey respondents identified as non-binary or gender non-conforming, and five percent of respondents opted not to answer this question.

Race

Most of the Orleans population (93 percent) identifies as white, which was underrepresented in this survey by about eight percentage points at 84 percent. Those identifying as two or more races were underrepresented in this survey by about 2 percent when compared to the town population. All other racial identities were well represented (within two percentage points) compared to their portion of total town population.

Educational Attainment & Employment Status

83 percent of survey respondents had earned a bachelor's degree or higher

28 percent of survey respondents were employed full time

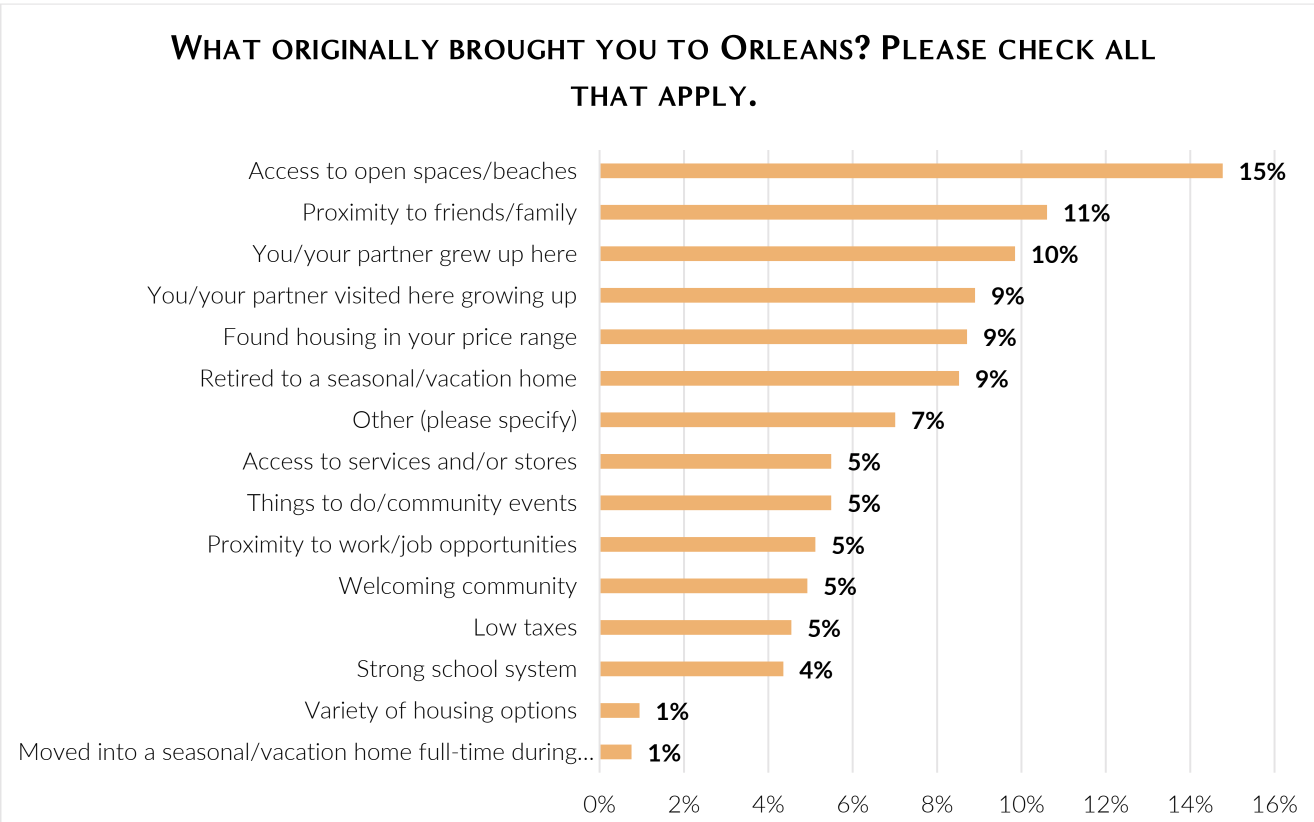
52 percent of survey respondents were retired

SURVEY TOPICS

Questions for this survey were populated based on the answer to previous questions. People were directed to answer questions based on their experiences.

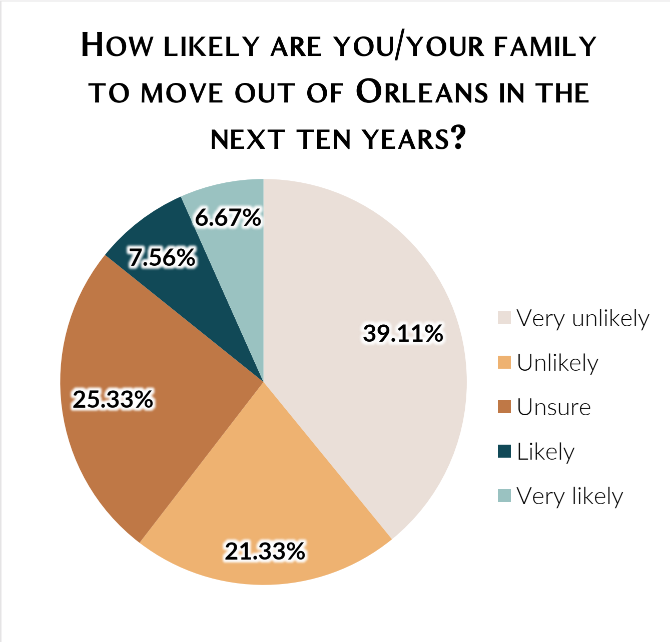
Orleans's Assets

> ***When asked what brought them to Orleans, 37 percent of year-round survey respondents stated 'Access to open spaces/beaches' attracted them to Orleans. More resident-business owners, at 38 percent, stated that they were brought to Orleans because they or their partner visited while growing up.***



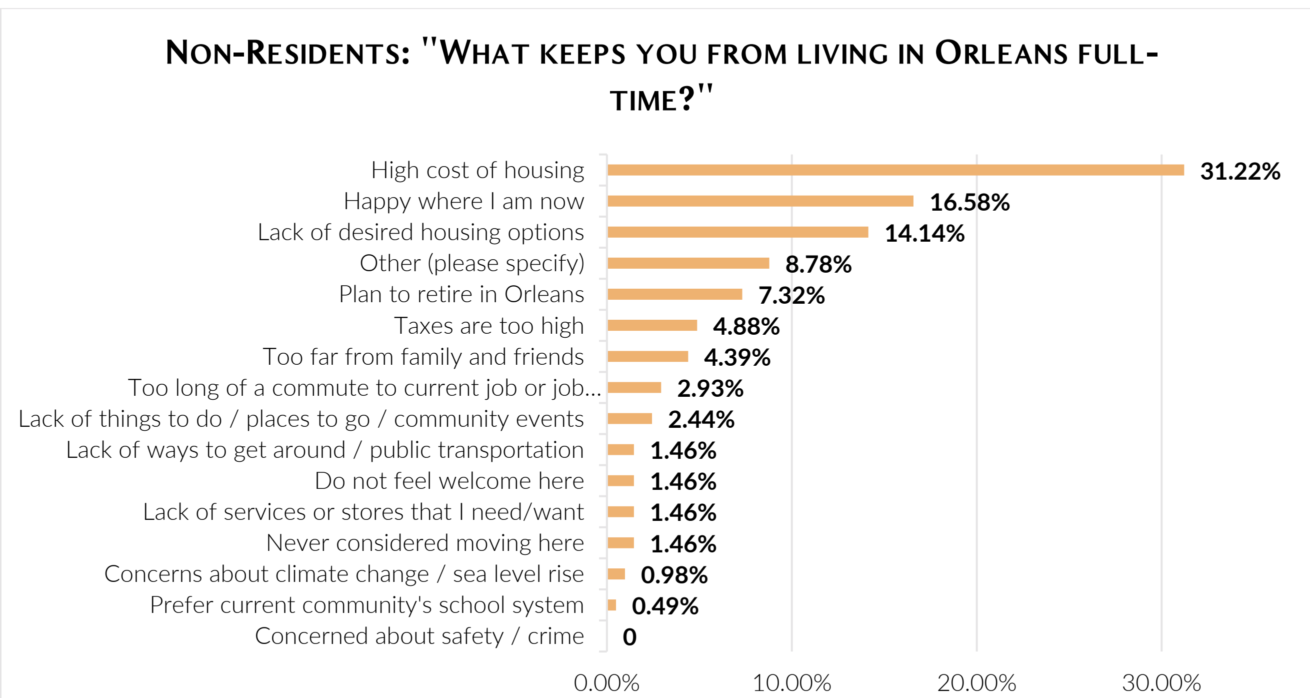
Barriers to Residency

> ***Most survey respondents responded that they would be very unlikely or unlikely to move out of Orleans in the next ten years.***



One in seven Orleans residents are considering moving in the next ten years.

> ***High mortgage/rent costs were the reasons most respondents were thinking of moving from Orleans in the next 10 years. High housing costs was also the main reason non-residents and part-timers do not move to Orleans year-round (31 percent).***

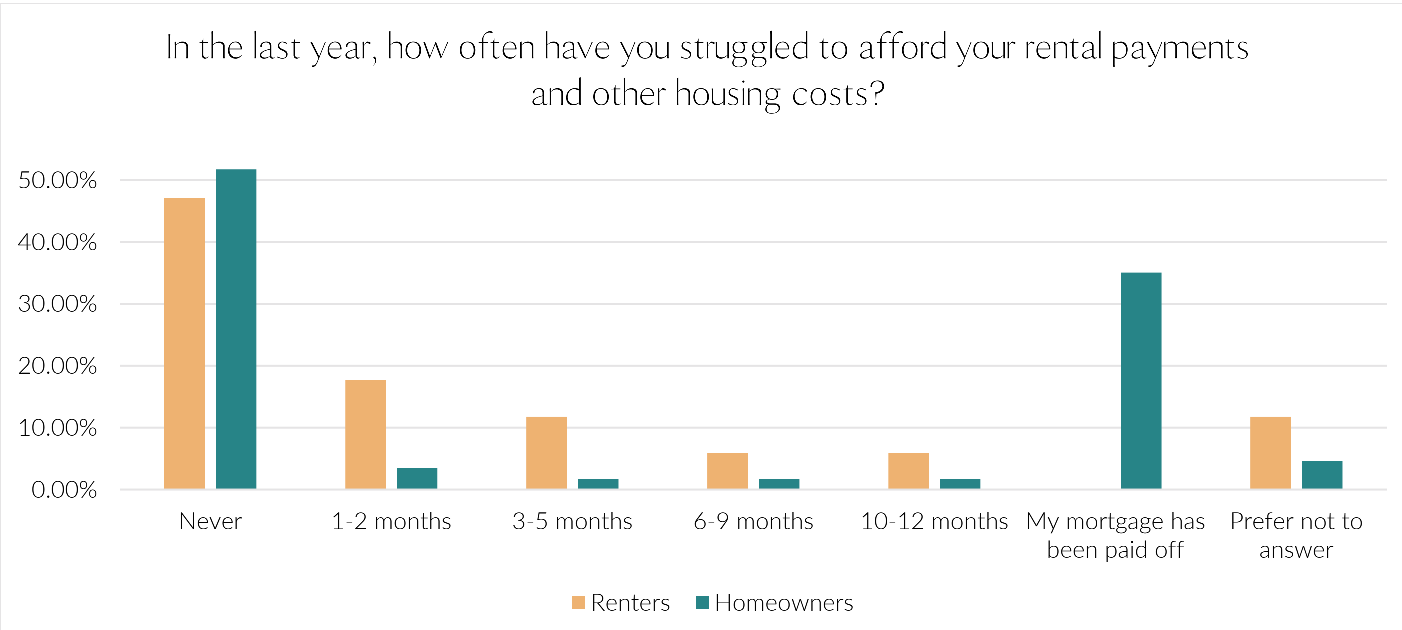


Adult Children & Adult Children Barrier

Roughly six percent of respondent households have an adult child or dependent living in their home. Of these 21 respondents, ten (48 percent) indicated their adult child(ren) or dependent(s) would consider seeking housing in Orleans. When asked what is currently preventing their adult child(ren) or dependent(s) from living in Orleans, 83 percent shared that high housing costs are a barrier and 33 percent selected 'Lack of desired housing options'.

Housing Affordability

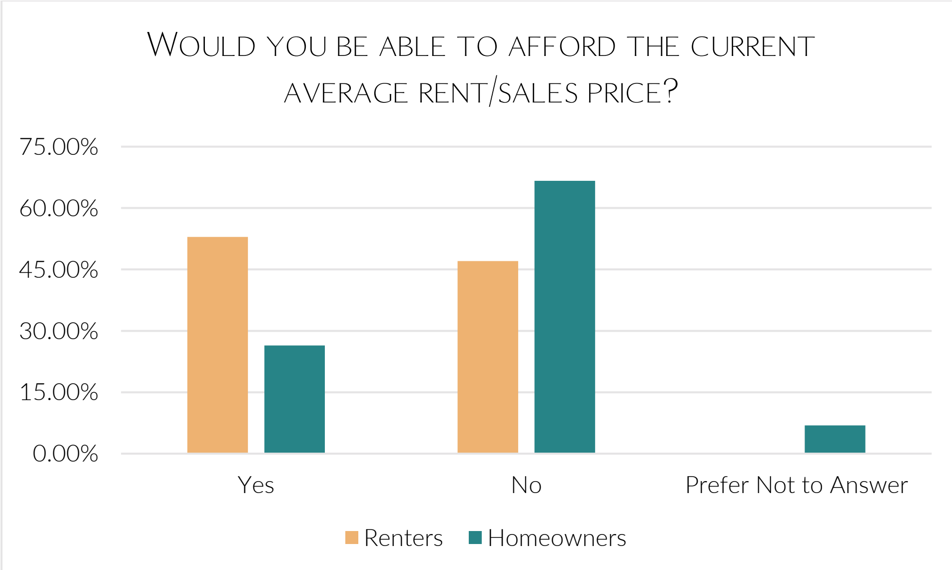
Renters indicated more difficulty making monthly housing payments than homeowners. 41 percent of renters indicated difficulty at least one month in the last year as compared to the nine percent of homeowners. This may, in part, be due to the recent rise in rent costs and that 35 percent of homeowners had already paid their mortgage off. When asked, 75 percent of renters indicated their rent had increased in the last two years, with increases between less than $100 and $499 per month. Exactly 50 percent of respondents saw increases of $100 and $249 per month in the last five years, and 12.50 percent of respondents rents increasing by both less than $100 per month and $250 and $499 per month.



Despite most homeowners being more easily able to make monthly payments than renters, homeowners were less likely to be able to afford the current median sales price of a single-family home ($1,222,500 Massachusetts Association of Realtors, YTD April 2023) than renters who would be able to afford the median gross rent ($1,092, American Community Survey 2021)[3].

> ***When asked, 67 percent of homeowners and 47 percent of renters indicated they would not be able to afford the average housing costs in Orleans.***

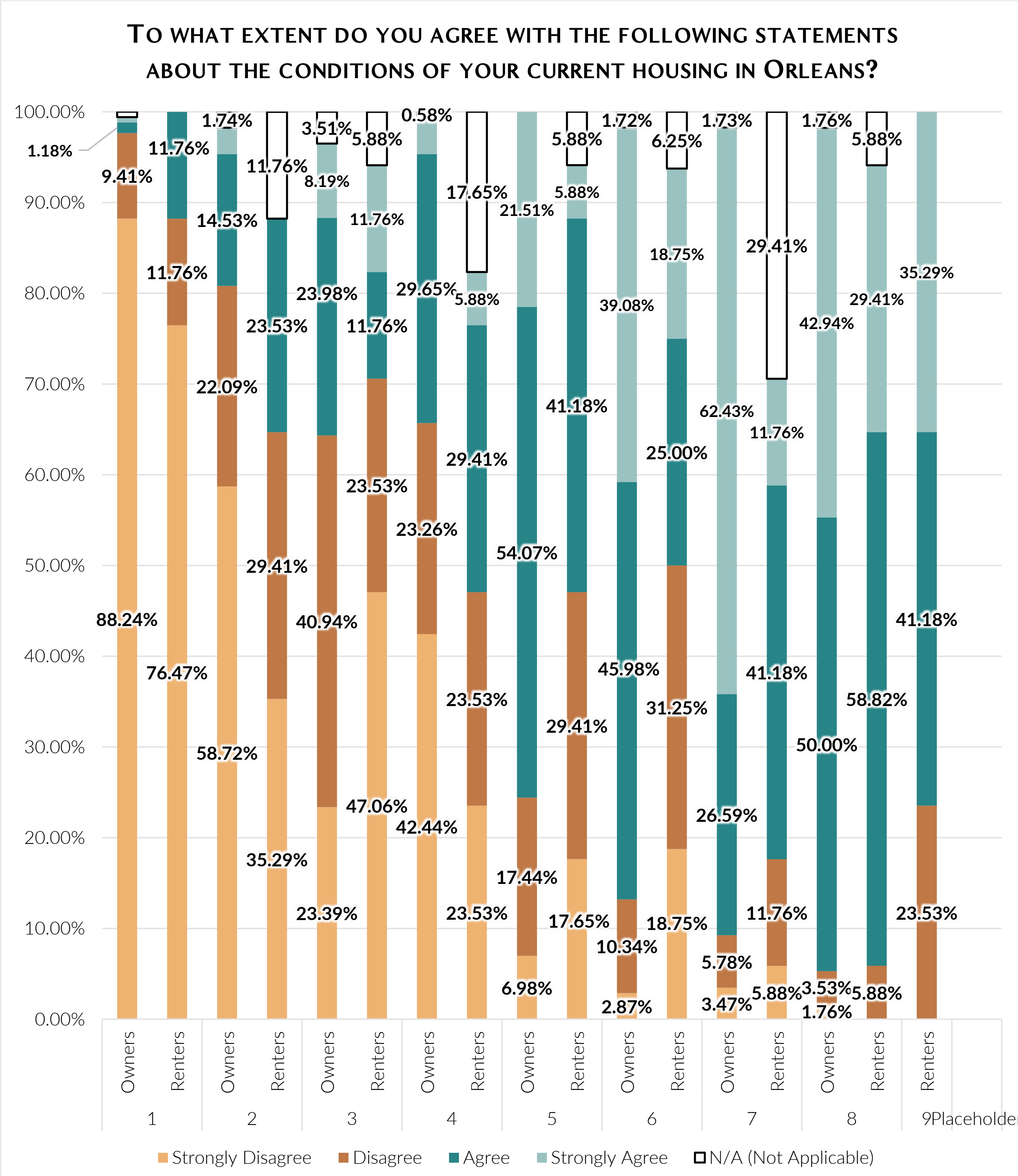
[3] 2021 American Community Survey data was the most recent rental data available at the time this survey was launched in June 2023.



Housing Conditions

Survey respondents who indicated they were either renters or homeowners were given a series of statements regarding the current conditions of their homes and asked to mark each with, "Strongly Agree", "Somewhat Agree", "Somewhat Disagree", "Strongly Disagree", or "N/A (Not Applicable)".

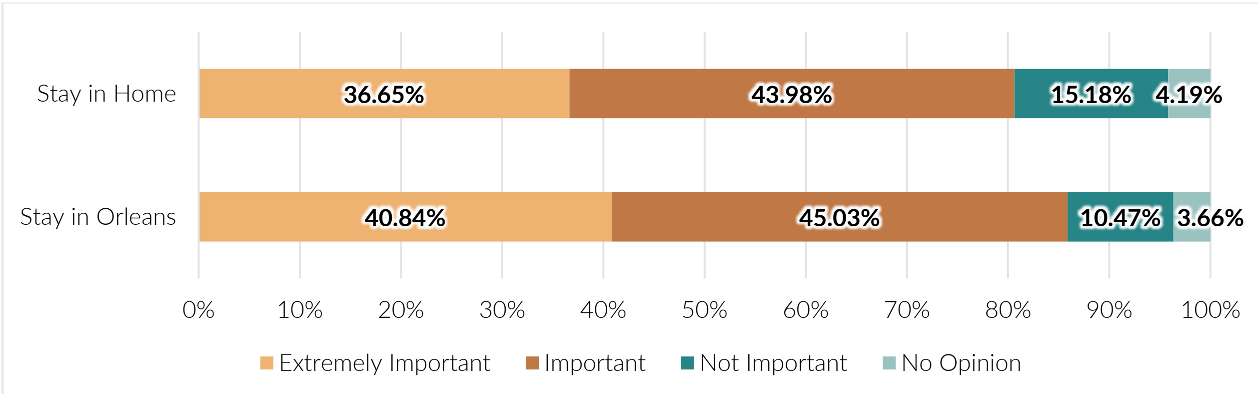
> ***Orleans residents felt most strongly that their homes were safe and sanitary but needed infrastructural renovations.***



1	My home is physically unsafe or unsanitary.	6	I expect my current home will comfortably and safely meet my housing needs for the next ten years.
2	My home needs infrastructural renovations (repairs to roof, foundation, entry way, plumbing, electrical)	7	My home has enough bedrooms/space to support my family.
3	My home is suitable for someone with mobility challenges (zero-step entrances, wide doorframes)	8	My home has sufficient parking.
4	My home needs aesthetic renovations (modernization, new fixtures, paint)	9	My landlord is responsive and manages my home well.
5	My home is energy efficient.		

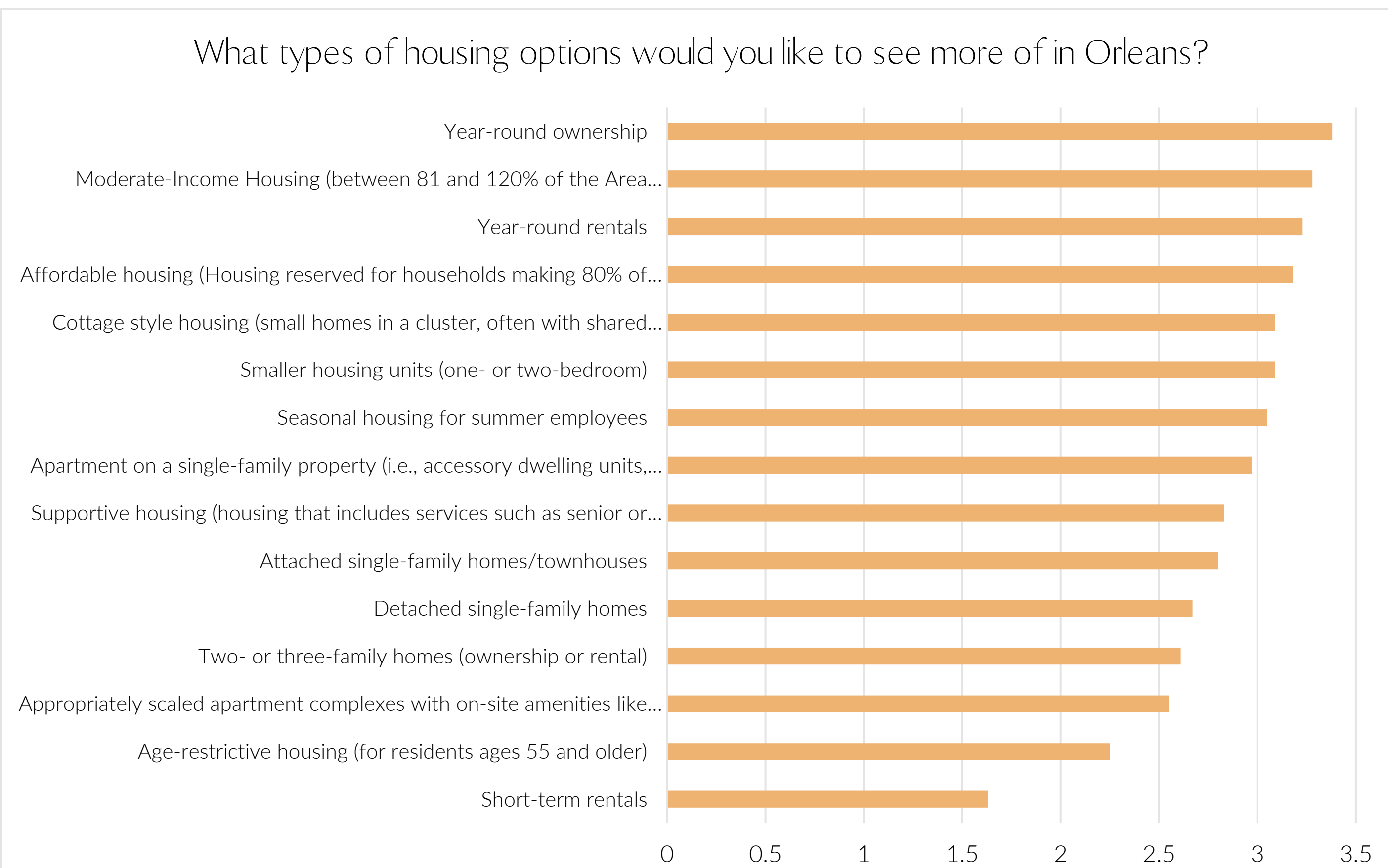
Age in Place

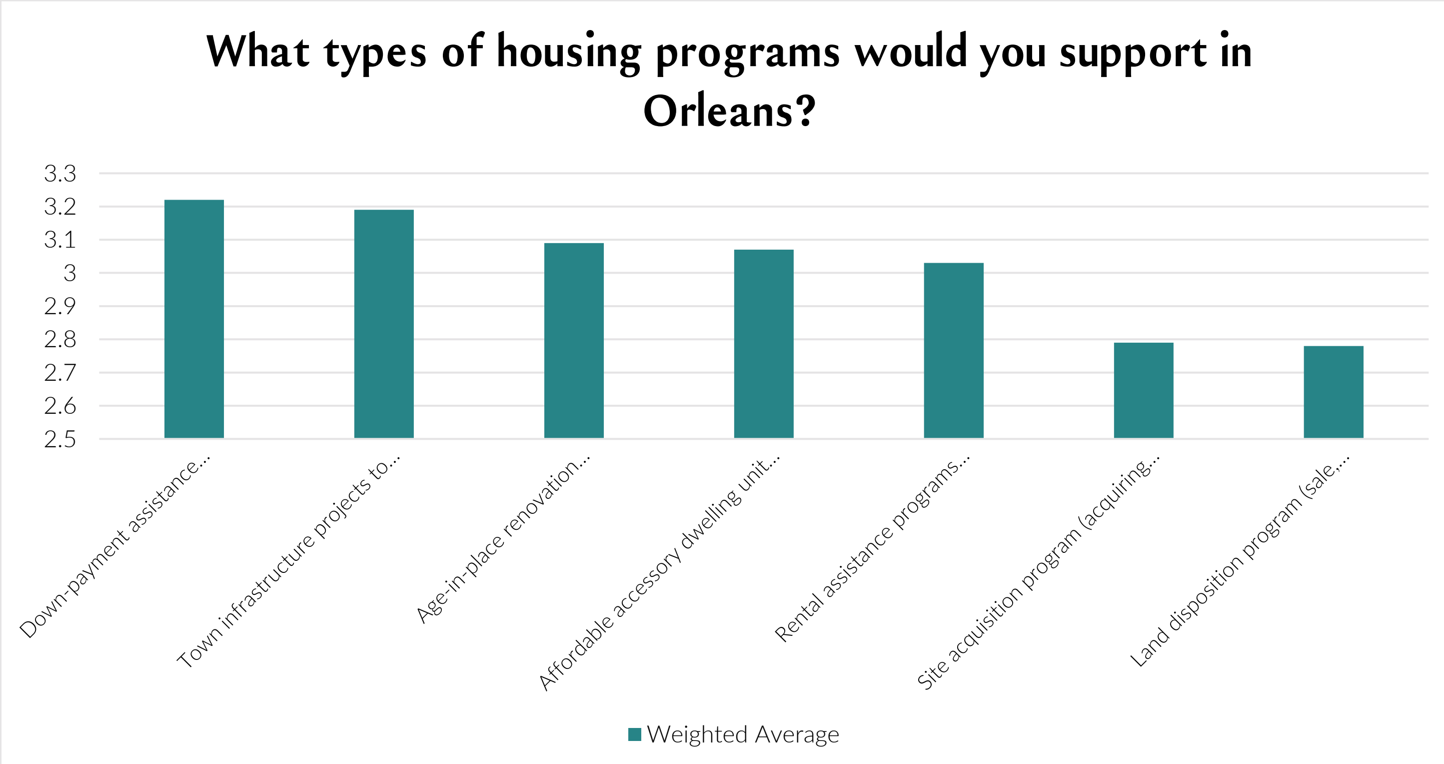
> ***When asked how important it would be to stay in Orleans and their current home as they age, Orleans residents showed a slight preference for the Town (86 percent importance) over their current home (81 percent)***



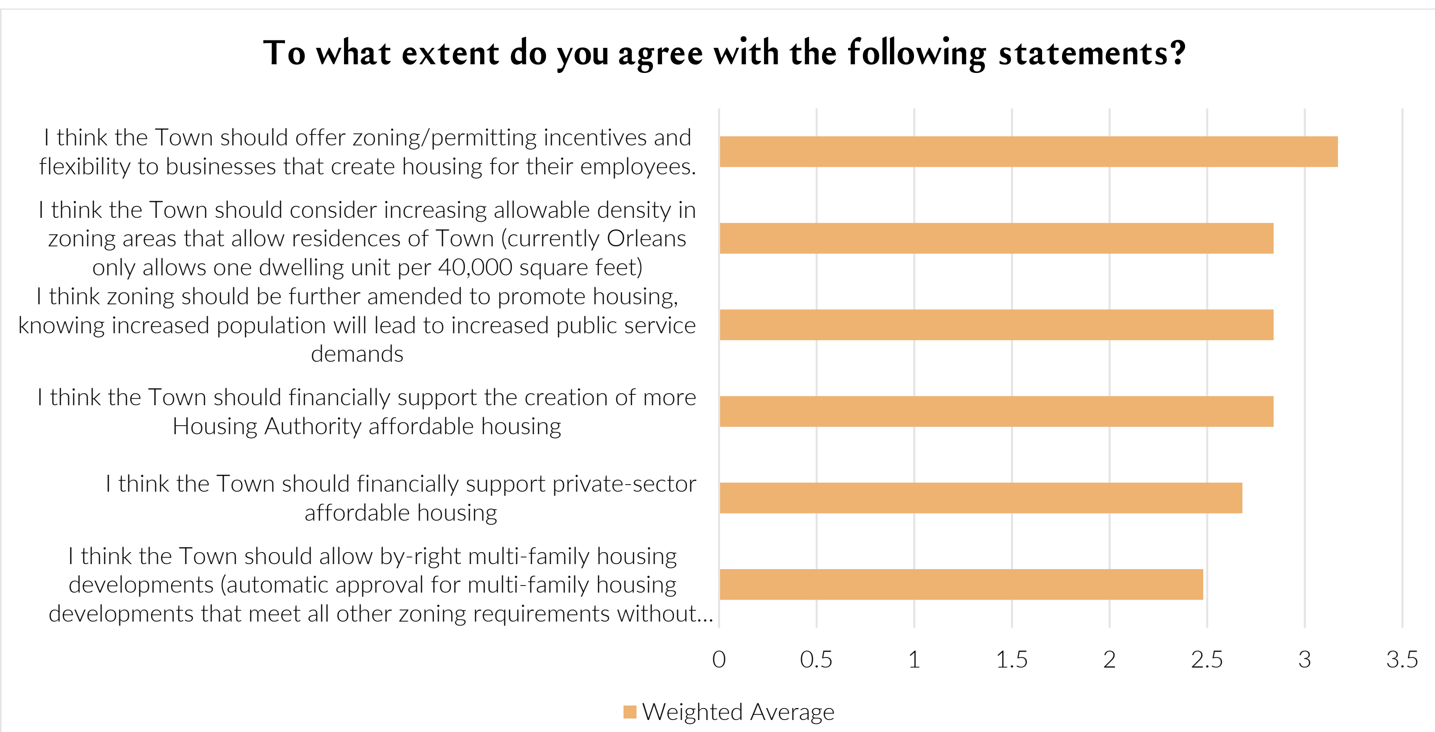
Potential Housing Initiatives

> ***When asked what types of housing options they would like to see, a main priority for respondents was more year-round ownership and rental housing, as well as moderate-income (81-120 percent AMI) and affordable housing (80 percent or lower AMI).***





When asked about potential housing programs, most respondents were in support of down-payment assistance or buy down programs and town infrastructure projects to support housing, such as a public water/sewer expansion project. The third and fourth most supported housing program was an age-in-place home renovation assistance program to help extend independent living and an affordable ADU program to provide incentives or assistance with creating an ADU.



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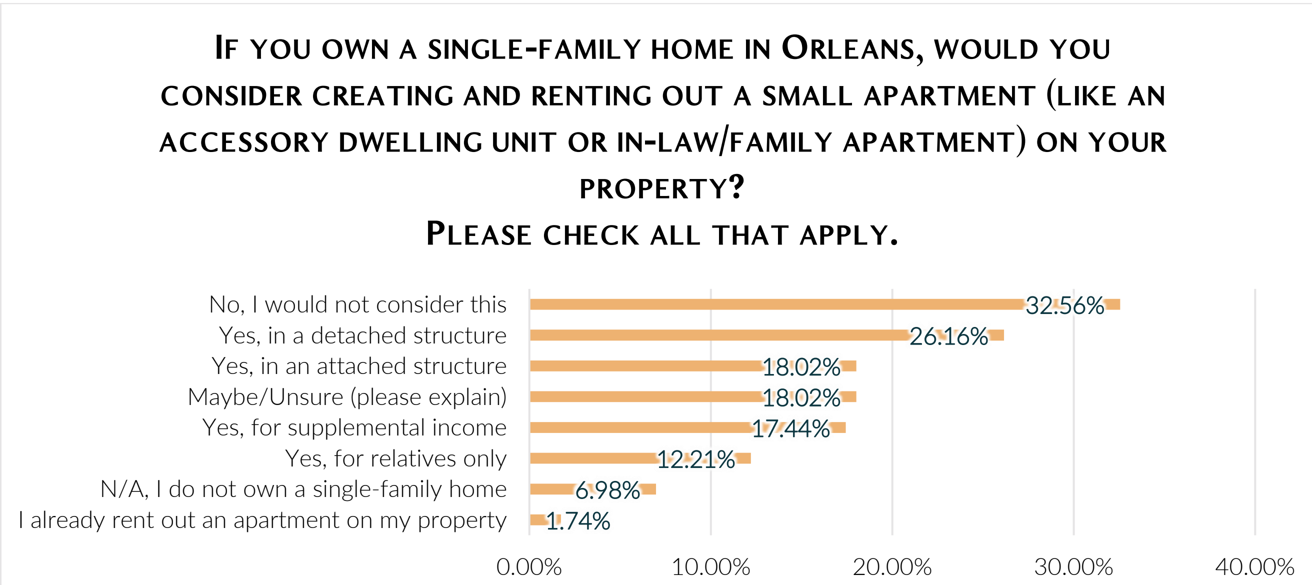
Most respondents selected agreed with the statement "I think the Town should offer zoning/permitting incentives and flexibility to businesses that create housing for their employees". The second most agreed with statement was a three-way tie between creating additional affordable housing through the Housing Authority, amending the zoning to promote housing, and that the town should consider increasing allowable density in residence zoning areas.

Overall, this shows respondents are interested in updating the zoning to be more flexible to promote housing and allow density, as well as interest in creating additional affordable housing units.

ADUs

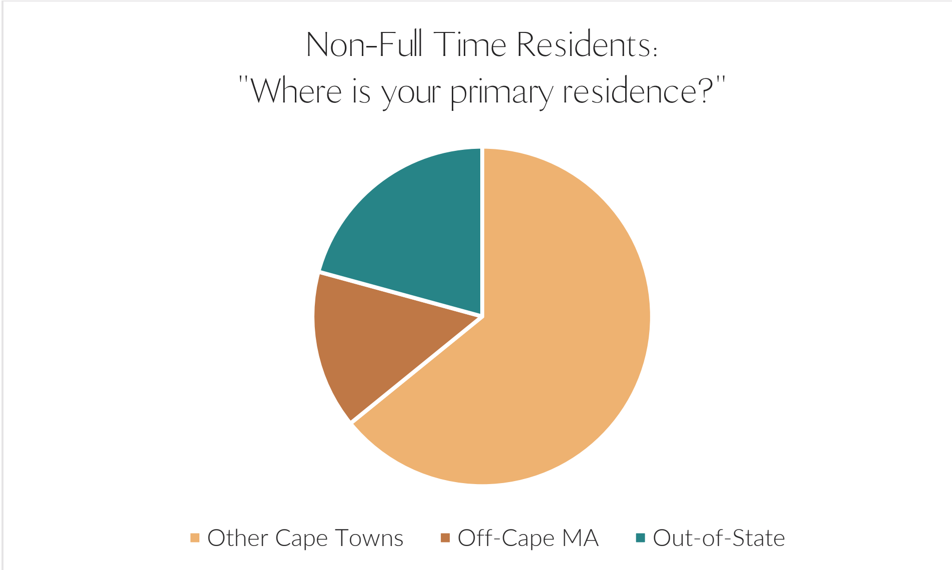
A common solution to housing needs is to create accessory dwelling units (ADUs) on single-family lots to increase housing stock. These apartments are often smaller and therefore can be rented out at a more affordable rate.



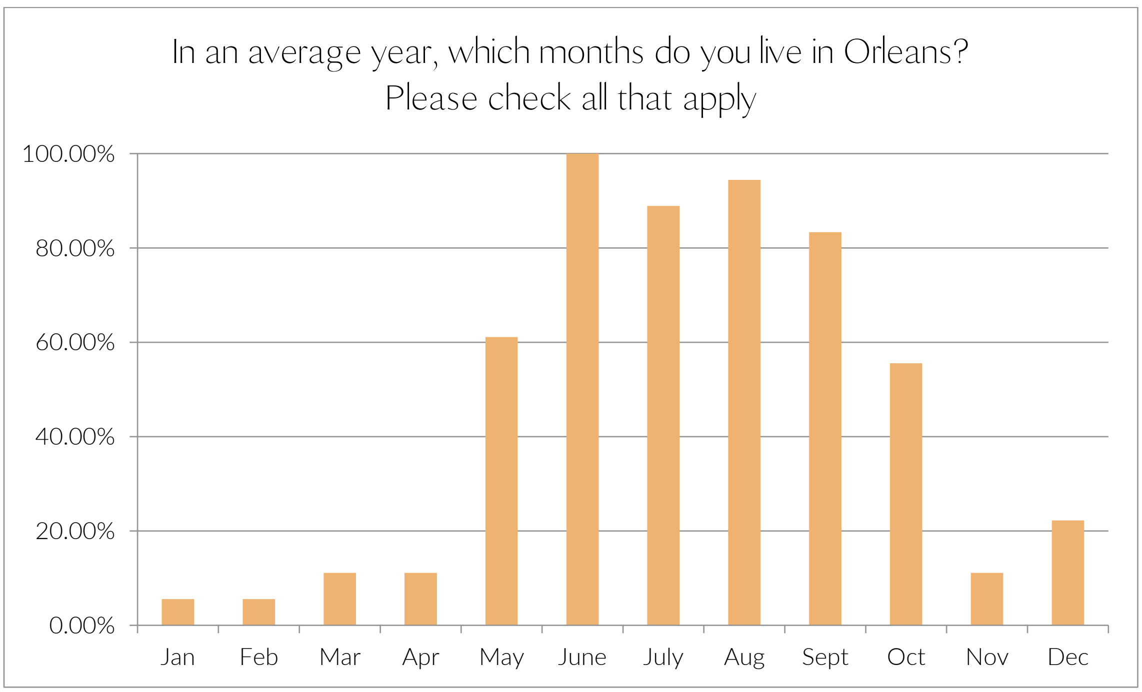
Roughly 26 percent of residents indicated that they may be interested in creating a detached ADU and 18 percent said they may be interested in creating an attached ADU. 18 percent felt unsure about creating an ADU on their property, citing zoning restrictions, their property not being large enough, and building costs as barriers to moving forward with creating an ADU on their property.

Non-Full Time Residents

> ***Non-full time resident respondents were most likely to live in another Cape Cod town (34 respondents) or out-of-state (11 respondents).***



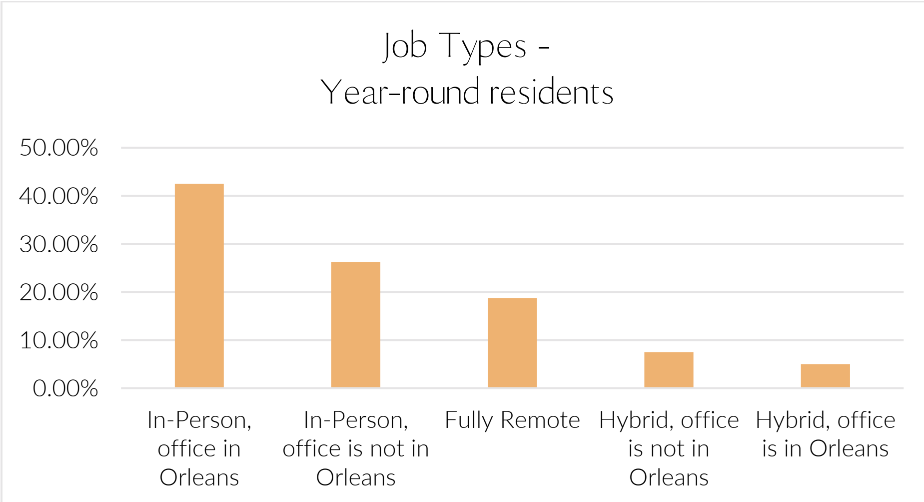
Non-full time resident respondents were most likely to live in Orleans between June and September.



Working in Orleans

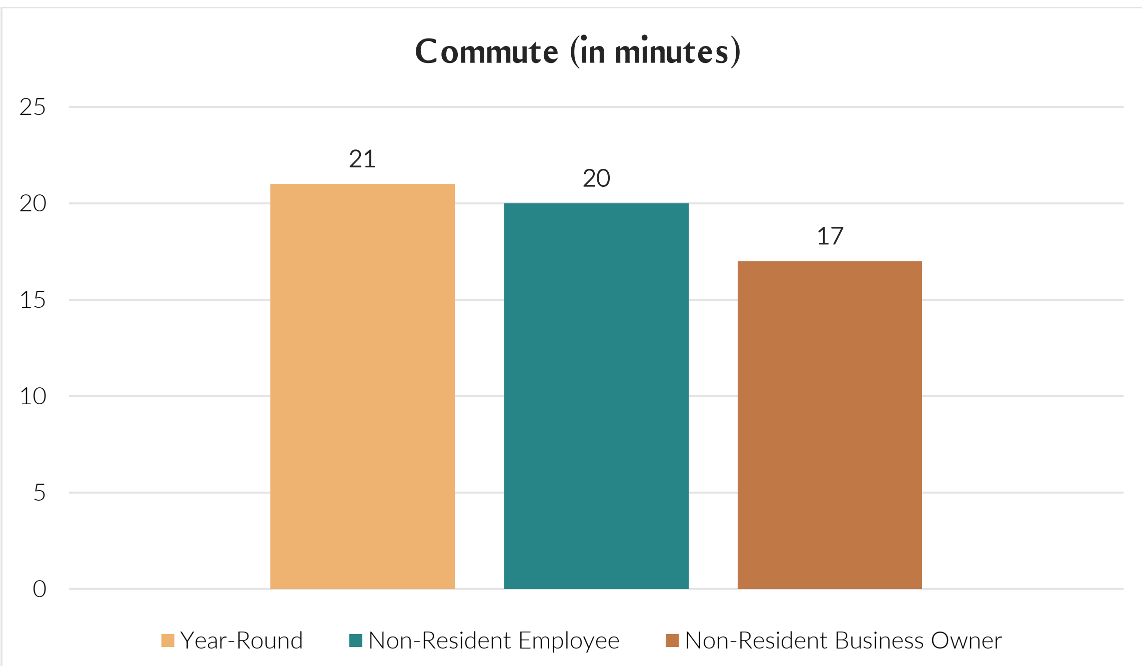
Job Types - Year-Round Survey Respondents

90 percent of employers who responded stated their business was in-person, with about the remaining ten percent of employers stating they were a hybrid or fully remote workplace.



Most year-round Orleans respondents work fully in-person, with 42.5 percent working in an office in Orleans.

Commute



The average commute (in minutes) for year-round survey respondents who work in person or hybrid is about 21 minutes. The average commute for Non-Resident Employee and Non-Resident Business Owner is about 20 minutes and 17 minutes respectively.[4]

> ***Year-round Orleans residents who work fully remote or hybrid were asked where they do their remote work, and every respondent responded that they work from their home.***

[4] This summary includes Non-Resident Employee data, however only 1 Non-Resident Employee completed this survey fully and there fore these numbers are not statistically significant. This is true for all Non-Resident Employee responses, unless otherwise noted.

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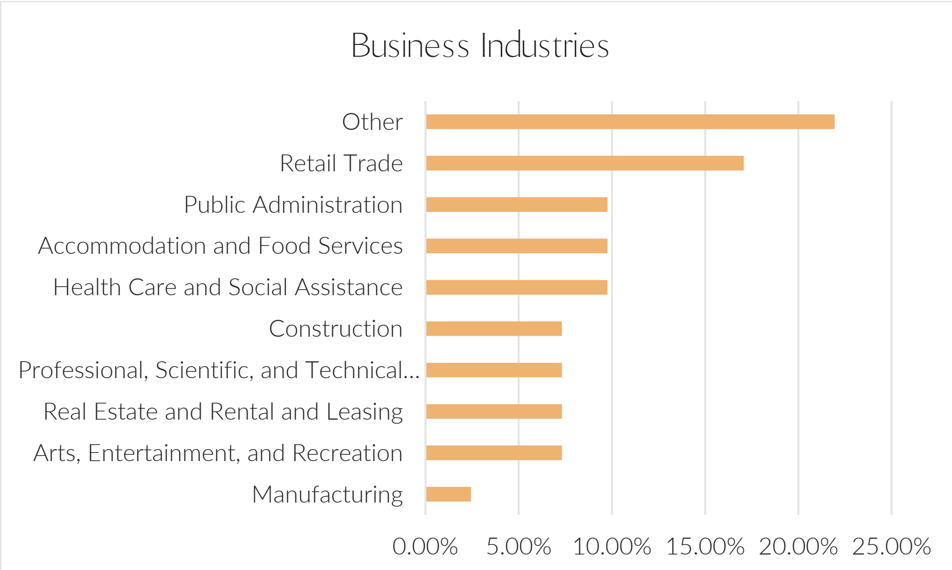
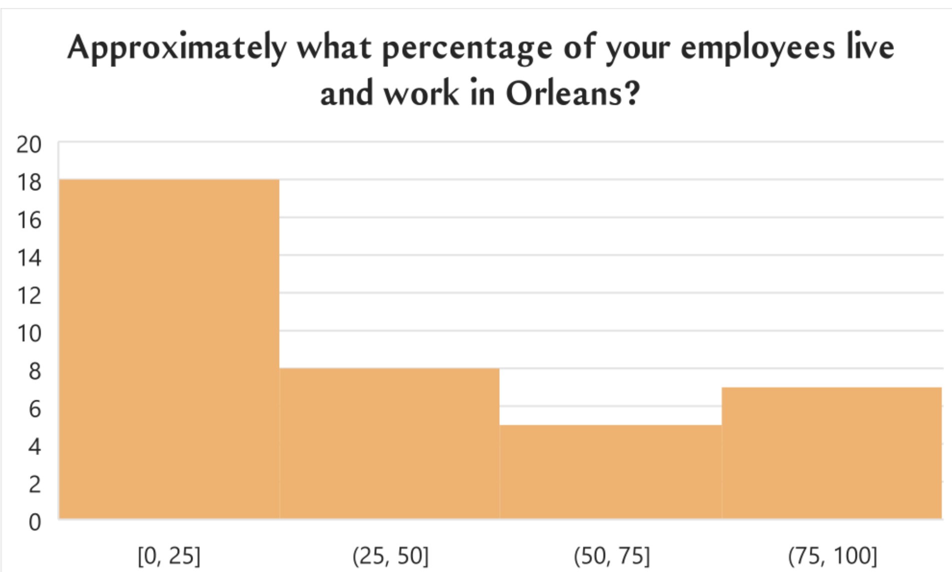
Business Industry



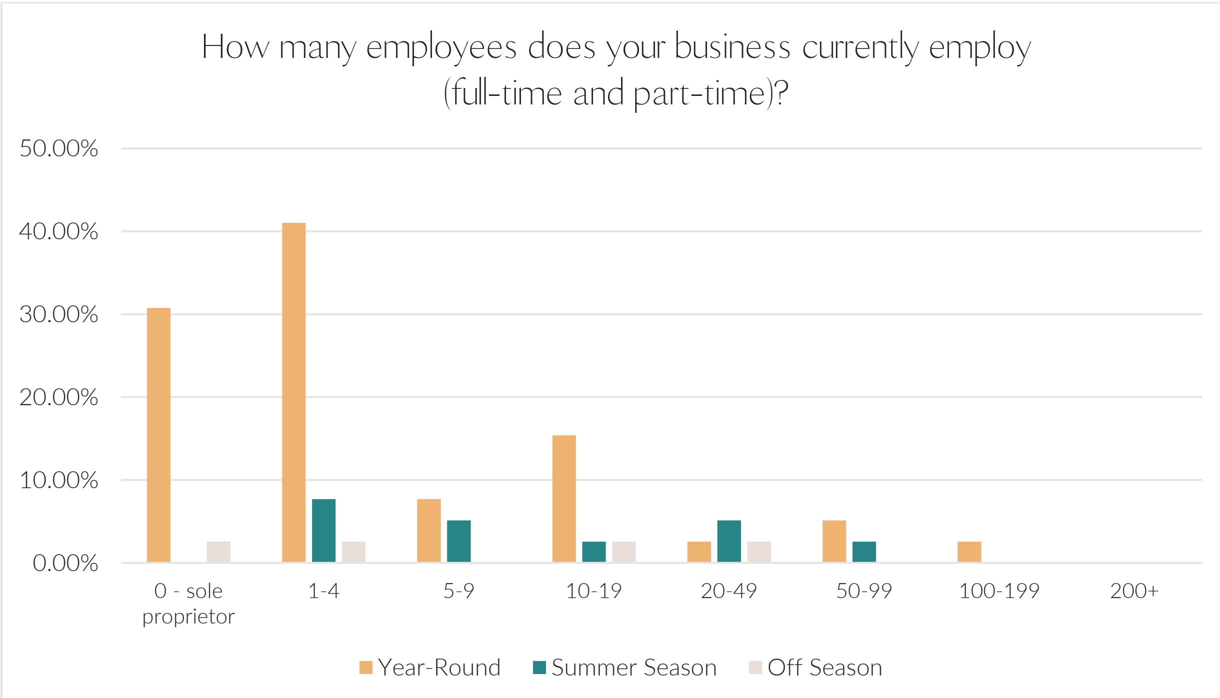
Retail trade was the most popular defined industry (17 percent). 22 percent of respondents selected other, indicating they do not work in one of the top 18 industries identified by the Massachusetts Department of Labor popular industries.[5]

Staffing Capacity



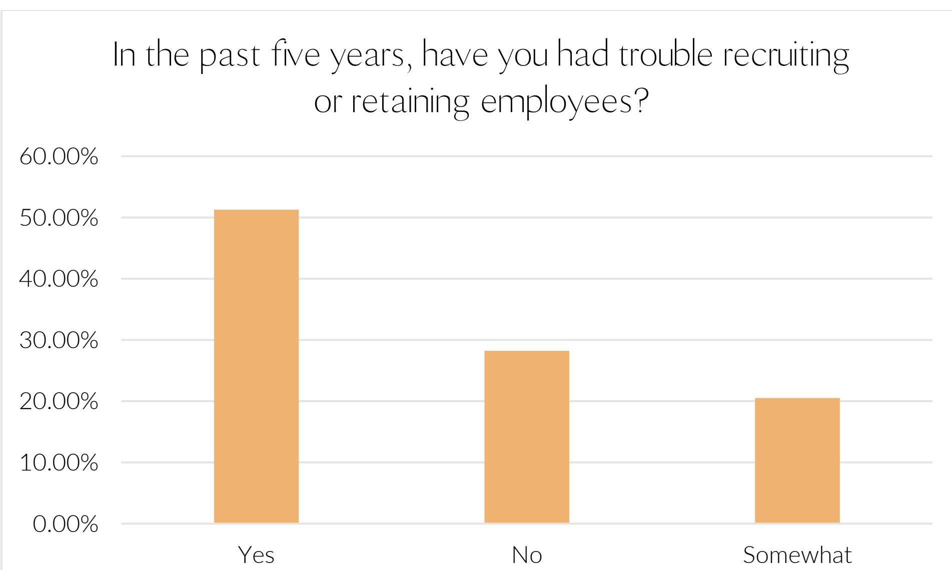
Most employers who responded to this question responded that only between zero and twenty-five percent of their employees lived in Orleans.

[5] Some options included in the survey received zero responses and are not included in this chart. The full list of industries can be found in the Appendix.



Orleans has a range of business sizes, with year-round businesses reporting at most one to four employees per year.

> ***30.5 percent of businesses that operate only during the summer-season report needing at least one to twenty-five or more additional employees to operate at full capacity.***



51 percent of employers who responded to this survey reported having trouble recruiting or retaining employees in the past five years, with 21 percent reporting somewhat having trouble recruiting or retaining employees.

> ***Seven of the thirty employers who responded to this question reported not having employee recruitment or retention issues due to housing availability or affordability. The remaining 23 respondents indicated their businesses experience impacts to employee recruitment and retention because of housing availability and affordability.***

Challenges

When asked "What do you think are the most pressing housing challenges in Orleans, even if you have not personally experienced them?", 68.84 percent of survey respondents selected 'Lack of year-round rental options' as the most pressing housing issue. The second most pressing issue, with 67.39 percent of survey respondents selecting it, was 'Lack of workforce housing (81 to 120 percent of the Area Median Income)'. The third most pressing issue selected by survey respondents, at 56 percent, was 'Lack of affordable housing options (reserved for households making <80 percent of the Area Median Income). Please see the appendix for the complete list of responses to this question.

Opportunities

When asked, "What locations in town do you think would be strategic locations for housing development (either reuse of existing structures for housing or new development?", the most common responses suggested developing at recently acquired locations such as the Cape Code 5 building and the old Governor Prence motel, along with the underground mall and other businesses that are now vacant. Respondents were interested in seeing development along already sewered areas and emphasized the importance of building up when possible. Specifically, respondents were interested in utilizing space on top of businesses, especially in the downtown area, or reusing existing buildings since there is not much land available to build on. Several respondents also named the old Department of Public Works property as another opportunity for development as well as near or in the plazas that house TJ Maxx and Staples.

When asked, "What are the biggest opportunities for housing in Orleans?" the most common responses included support for more development projects like Cape Cod 5 and Governor Prence, suggestions for incentivizing accessory-dwelling units (ADUs) and tiny homes, redevelopment of downtown to create housing over existing businesses, and limiting the number of short-term rentals through permitting or incentivizing those who rent their property year-round.

Lingering Thoughts

To conclude the survey, participants were asked "Is there anything else you'd like to share about housing in Orleans that you do not believe was covered in this survey?". Here, participants shared additional ideas for solutions as well as challenges they have observed. Sentiments included calling for both amending zoning to support the creation of more housing, as well as the preservation of the natural elements Orleans has to offer. Additional sentiments reiterated the urgency of the housing issues in Orleans and emphasizing the need for workforce housing, as well as affordable rental and ownership housing opportunities.