

To: Betsy Riley, Alachua County; Katie Greene, Alane Humrich, and Belina Meador, Community Weatherization Coalition; Julie Emminger and Janae Johnson, Rebuilding Together North Central Florida

From: Stafen Samarripas and Alexander Jarrah, ACEEE

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Date: November 6, 2024

Re: Alachua County Renter and Landlord Survey Methodology and Analysis Memo

Methodology

Alachua County, Community Weatherization Coalition (CWC), and Rebuilding Together North Central Florida (NCF) partnered with the American Council for an Energy-Efficient Economy (ACEEE) to conduct online surveys of renters and landlords in Alachua County, FL. The renter survey was designed to better understand the housing challenges that renter households across the county face. The landlord survey was designed to understand landlord concerns about operating their businesses and perceptions of current and future energy efficiency programs. A total of 162 complete responses were collected from renters and 38 complete responses were collected from landlords between August 22, 2024 and October 15, 2024.

ACEEE created a draft version of the survey by drawing on survey questions and findings from several other surveys that have asked renters about their housing and energy conditions. These include the Energy Information Administration's [Residential Energy Consumption Survey](#) as well as the Census Bureau's [American Community Survey](#), [Household Pulse Survey](#), and [American Housing Survey](#). The survey went through several periods of review and revision by ACEEE staff, Alachua County Government, CWC, and Rebuilding Together NCF. The survey was distributed online using [Alchemer](#).

Survey Representativeness of Alachua County

The renter survey was mostly representative of Alachua County demographics, but there are some exceptions. The survey received more Black or African American respondents than expected, with almost 40% of respondents identifying as such compared to an expected 20% of respondents.¹ Both single-family attached and detached homes were overrepresented in the survey, combining for a total of about 36% of respondents (expected to be 19%). Based on [previous research](#), we would expect more variation in the responses of non-Hispanic white renters and renters of color. This lack of significant differences between the groups may be due to the small sample size of the survey (162 responses). Respondents in and outside of the City of Gainesville were comparable to Census Bureau data. Eighty-one percent of respondents listed zip codes within the City of Gainesville (expected to be 76%). Only 19% listed zip codes that were within Alachua County but outside of Gainesville (expected to be 24%). Notably, the survey did not capture the experiences of many higher income renters. Based on Census Bureau data, we would have expected about two-fifths of respondents to report incomes of \$48,000 or greater. Instead, a little less than one-fifth reported incomes of \$48,000 or greater.

¹ We used American Community Survey 2023 1-year estimates to compare survey results in Alachua County data. For more information, see data.census.gov.

Landlords that responded to the survey mostly rent in the City of Gainesville: 77% of the units were within Gainesville and 22% were outside of the city. This aligns closely with the shares of renters in and outside of Gainesville. These rental units are primarily two-bedroom units (34%), followed by one-bedroom units (24%) and three-bedroom units (16%). The breakdown of bedrooms is comparable to figures reported by the Census Bureau's American Community Survey.² Responding landlords indicated that they primarily rent market rate (unsubsidized) units (67%) followed by market rate units with housing voucher residents (21%). Sixty-eight percent of property owners reported that they rent one-family attached homes, followed by 2- to 4-unit properties (34%) and 5- to 9-unit properties (26%).

Notable Findings from Renter Survey

Renters are responsible for many utility bills. Nearly all renters pay for their electricity (98%), one-third pay a natural gas bill, most pay a water bill (80%), about half pay for sewer bills (48%), and about one-third pay for solid waste pickup (recycling, compost, or trash; 35%).³ About three-quarters of surveyed Alachua County renters said that they struggled to keep up with utility bills at some point over the past year. Thirty percent of renters struggled to pay energy bills in 3 out of the past 12 months. More than one-quarter of renters stated they struggled to pay energy bills 7 or more months of the previous year. A substantial share of renters indicated they borrowed money from friends or family (35%) or kept the home at an uncomfortable or unhealthy temperature (26%) to pay for their energy bills. Thirty-eight percent of renters also reported that they have had a utility disconnected for nonpayment at some point in their past.

While not representative of Alachua renters at all income level, the survey provides a close examination of low and middle-income renters. These renters' recent financial limitations and challenges are likely hindering their ability to keep up with energy bills. Nearly 75% of surveyed renters reported experiencing financial problems of some kind at some point over the past year. The most common were household expenses increasing (61%), total debt increasing (44%), and losing a source of income (34%). Almost half (44%) indicated that they reduced expenses on other necessities to help pay for their energy bills.

Energy-inefficient homes were also likely contributing to renters' struggles to keep up with their energy bills. Sixty percent of renters indicated that their landlords had not completed any weatherization work during the time they have lived in their current home. About one-quarter said that their landlords had weather stripped doors and windows. However, a much smaller number reported that their landlords had conducted more intensive weatherization work such as replacing doors and windows or replacing or upgrading insulation. Further, renters reported distressing home conditions including pest-related issues (35%), moldy smells (23%), stuffy air (20%), dustiness (20%), and their home being too humid (15%). These were the highest reported conditions, and they may indicate a lack of weatherization, water leaking, and/or poor ventilation in units.

The challenges experienced by renters were not distributed equally across all groups. To identify cases where certain groups of renters have a notably higher or lower prevalence of certain conditions, we

² The American Community Survey reports that two-bedroom units make up 43% of Alachua County's renter-occupied units, followed by one-bedroom units (29%) and three-bedroom units (16%).

³ Responsibility for solid waste pick up ranges widely, with those renters making more than \$24,000 per year, those residing in single-family homes, and those identifying as non-Hispanic white reporting having to pay for this pickup at considerably higher rates than those renters with the lowest incomes, those living in properties with 2-9 units, and renters of color.

examined survey crosstabs of several subsets of renters to find where the reported levels of a certain condition were 10% greater or lower than the average rates reported by all survey respondents. We highlight several findings from this analysis below.

Income: As stated earlier, this survey did not have significant responses from higher income earners in Alachua County. As a result, we organized the data by the lowest-income renters (those making less than \$23,989 per year) and low- and middle-income renters (those making \$23,989 or greater per year) due to the limited sample size of the data. The results reveal that the lowest income renters are struggling the most with energy bills, as evidenced by 37% reporting that they struggled with these bills more than 6 months of last year. At the same time, the results show that low- and middle-income renters are more likely than those with the lowest incomes to be only struggling with one to three months of energy bills over the past year. Low- and middle-income households were much less likely to report more than 6 months of energy bill struggles.

This all being said, low- and middle-income households were still more likely than those with the lowest incomes to report that they experienced increases in both total debt and household expenses. These households were also more likely to report electricity utility shutoffs, potentially because fewer of these households are eligible for assistance programs to help offset increasing expenses.

Building type: Single-family rentals appear to be less likely to be weatherized and well-ventilated. Renters of these homes were more likely to report the following issues: moldy smells, homes being too hot, no cooling or inadequate cooling, and pest-related issues. Poorly weatherized and ventilated homes may be threatening energy security in these households. Renters of single-family homes were much more likely than those in 2- to 9-unit properties to report that they took out a loan, borrowed money from friends or family, kept the home at an unhealthy or uncomfortable temperature, closed off part of the home to heating or cooling, or paid only part of an energy bill to keep up with energy costs over the past year.

Notable Findings from Landlord Survey

Most surveyed landlords (62%) are considering raising rents in the next year. Of these landlords, about one-third indicated they are considering rent increases of less than 5%. Another 27% indicated contemplating rent increases between 5% to 10%. Only 1 of the 38 landlords indicated they were considering rent increases between 11% to 15%. Reasons for why landlords are considering rent increases vary. The most cited reasons for these increases were increases to property taxes (53%) and increases to insurance costs (50%). Increases in operating costs (26%) and maintenance costs (24%) were also common answers. Energy efficiency may be helpful in bringing down operating and maintenance costs for landlords, helping to mitigate the need for rent increases.

Most landlords reported making some sort of energy efficiency upgrades to a unit in the past five years.⁴ Almost three-quarters of landlords upgraded a major appliance (dishwasher, refrigerator, dryer or washing machine). Two-thirds of landlords upgraded air conditioning and/or space heating equipment in this time

⁴ Only 21% of respondents reported receiving an independently administered energy audit. We could not verify whether the energy efficiency upgrades property owners reported making independent of an energy audit were actually energy-saving improvements.

frame. Half of landlords weather-stripped doors and windows. Half of landlords also responded that they had replaced water heating equipment.

About one-third of landlords indicated they had made improvements to the building envelope, including insulation or air sealing (37%), window or door replacements (34%), or window shades/blinds (32%). This is higher than the percentage of renters who reported that their landlords had conducted weatherization work in their units. There are two potential reasons for this. First, these upgrades are benefiting higher income renters which were not proportionately captured in the renter survey. The other possibility is that the differences in tenure accounts for the different reporting figures. In other words, renters have not lived in their homes long enough to coincide with time periods where landlords are upgrading the units.

Property owners overwhelmingly self-financed past energy efficiency upgrades using business or personal funds (89%). However, we asked owners for their thoughts on participating in future energy efficiency programs. Of the types of programs listed, 53% stated they would consider a 0% interest loan or grant up to \$15,000 with a 7-year affordability requirement to finance energy efficiency upgrades, 45% stated they would consider a 0% interest loan up to \$15,000 that would be paid back over ten years, and 42% stated they would consider a matching grant up to 50% of a project's cost.

Concerning the Alachua County Energy Efficiency Program (ACEEP), landlords were asked about their likelihood in participating in the program. Only 18% of respondents claimed they were likely or very likely to participate in the program and about 37% said they were unlikely or very unlikely. The remainder were not sure. Three landlords indicated that their properties were within City of Gainesville and thus ineligible for participation. Landlords were also asked what they found to be the most appealing program elements. The offered energy efficiency upgrades were the most appealing at 54%, followed by location prerequisite that location is not in a flood zone (44%) and the county facilitating upgrades by finding and paying for contractors on behalf of the landlord (40%).⁵

Conclusion

Renter survey results suggests that many renters are struggling to pay energy bills in the face of compounding financial challenges. The effect was most pronounced for low- and middle-income renters that reported increases in household expenses, total debts, and utility shutoffs for nonpayment. At the same time, landlord survey results reveal that most landlords are considering rent increases in the next year, which may contribute to the financial pressure these renter households are facing.

The renter survey results also revealed that many renters of single-family housing are living in unhealthy or uncomfortable conditions (i.e., moldy smells, units being too hot, inadequate cooling, and pest-related issues). These conditions can be signs of a lack of weatherization, poor ventilation, and/or water leaks. However, this reveals a potential opportunity for weatherization and energy efficiency programs targeting this building type.

The renter and landlord surveys revealed diverging accounts of weatherization and energy efficiency work conducted in rental units. Most renters indicated that their landlords had not weatherized or upgraded the unit, while most landlords indicated that they had. This suggests that either the weatherization and/or

⁵ These percentages include those that responded to the program elements as either Very Appealing or Appealing.

energy efficiency upgrades are benefitting higher income renters (which the renter survey did not capture) or differences in the duration of renter tenure is leading to different experiences.

Lastly, only 18% of respondents who had not participated in ACEEP indicated they were likely or very likely to participate. Three of the thirty-eight landlords indicated that they could not participate in the program because their units were within the City of Gainesville and thus ineligible.