

STUDY REPORT

SR 328 (2015)

New House Owners' Satisfaction Survey 2014

MD Curtis



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Preface

This is the fourth in a series of reports on our New House Owners' Satisfaction Survey. The data was obtained through surveying new house owners on the performance of their builder. The purpose of the Survey is to aid work done on building industry performance measures.

Acknowledgments

This work was funded by the Building Research Levy. We would like to thank all of the new house owners who filled in the survey form and returned it to BRANZ.

Note

This report is intended for a number of audiences, including designers, new house builders and those looking to build a new home. It will also be useful to Government in evaluating some of the challenges and opportunities facing the residential construction industry. Particularly in light of the Christchurch rebuild and the surge in demand for housing in Auckland.

New House Owners' Satisfaction Survey 2014

BRANZ Study Report SR 328

MD Curtis

Abstract

This report presents the results of the fourth New House Owners' Satisfaction Survey. The survey looks at how new house owners rate their builder and how satisfied they are with the builder's performance.

The survey covers a sample of New Zealand's housing consents. It excludes consents where the owner built their own house, the house was a spec-build, or the house was built by a family member.

Results highlight the continued struggle for new house owners in Canterbury. High workloads and new owners forced into building by the earthquakes have made for a tough environment for the industry. However, there is an expectation from owners that these builders need to find the time to follow up adequately after occupancy.

This survey saw a widening gap between performance and client expectations of the new house building industry. New house owners rated their builder lower on all of our key measures than they had a year previously. There was also a decrease in the proportion of respondents that would recommend their builder and an increase in the proportion that would speak critically.

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1. EXECUTIVE SUMMARY

The main findings of the report are:

- Overall, the industry is still performing well at delivering houses that new house owners are happy with. 88% of respondents were satisfied with the overall quality of their new home.
- New house owners expect better follow up from their builders after occupancy.
- There was a high proportion of bespoke or modified house plans. This was partly due to owner preference and partly dictated by the shape or slope of sections. This is preventing builders from achieving economies of scale through repetition of builds and uptake of prefabrication.
- The proportion of respondents that had disputes with their builder over the final cost increased by 2.2 percentage points this year (to 17.3%). Price conscious new owners were more likely (than average) to have a dispute over the final cost.
- Call back rates were also up on last year's survey. 87.5% of respondents stated that they had to call back trades to repair defects. The trades that needed to be called back most often were plumbers and electricians.
- Those who had built before scored their builder higher than those who had not built before on all of our measures. This indicates that the industry is not adequately informing new clients of what to expect during the process.
- Average scores across our measures were down by about 3.5% from last year.
- The Canterbury region continued to score poorly compared to the rest of New Zealand. The measures related to post-occupancy performance of the builder were particularly poor.

2. INTRODUCTION

The New House Owners' Satisfaction Survey has been running annually since 2011. It is used as a measure of quality of output and to monitor trends. It aims to find out from the owner of the new house how they thought their builder performed and how they view their completed house.

For the purposes of this survey, the term 'builder' refers to all people involved in the build process. This includes any office staff within the building company, the project manager, any sub-contractors employed by the builder, as well as anyone else involved in the build process.

3. METHOD

This is the fourth survey of new house owners. It is a short postal survey to the owner identified in consent information. An incentive is offered (a lotto ticket or book voucher) for the return of each survey form.

This report presents the findings of the New House Owners' Satisfaction Survey 2014.

A sample of new house owners was identified from consents taken out between April 2013 and March 2014. This period was used to largely represent houses that were completed in the 2014 calendar year.

Consents were removed where the builder and owner's names were the same, the builder had the same surname as the owner, and builders who were also listed as owners.

The survey sample consisted of the following 31 territorial authorities;

| | | | |
|------------------|-------------------|-----------------------|-------------|
| Auckland | Christchurch | Dunedin | Franklin |
| Far North | Gisborne | Hutt City | Hamilton |
| Invercargill | Kapiti | Manukau | Marlborough |
| Napier | New Plymouth | North Shore | Porirua |
| Palmerston North | Queenstown | Rodney | Southland |
| Tauranga | Thames-Coromandel | Tasman | Waikato |
| Waipa | Wellington | Western Bay of Plenty | Whangarei |
| Waitakere | | | |

2975 surveys were sent out for the new house owners' satisfaction survey this year. BRANZ received 650 responses which have been used for the analysis presented in this report.

4. RESULTS

The key findings are presented in the series of charts and comments that follow.

4.1 Overall Satisfaction

The following two charts show the satisfaction levels and ratings of new house owners towards the twelve measures that BRANZ used. A five-point scale was used ranging from very satisfied/very good to very dissatisfied/very poor.

New home owners were happiest with:

- The overall quality of their new home
- The service provided by their builder during the buying process, and
- The standard of finish of their new home.

These results are not unusual (and not particularly surprising). In general, BRANZ has found that new house owners are happy with the quality of their finished house. Therefore, measures such as 'the overall quality of their new home' and 'the standard of finish of their new home' score highly.

88% of respondents reported being **at least** fairly satisfied with the overall quality of their home. This was the aspect with the highest level of satisfaction achieved in this year's survey. This is down from 91% in the 2013 survey, where overall quality also had the highest level of satisfaction achieved.

New home owners were least happy with:

- The fixing of defects after first occupancy
- The level of communication from their builder, and
- The service provided by their builder after they moved in.

28% of respondents rated their builder's fixing of defects after first occupancy as fairly poor or worse. This is slightly worse than the result for 2013.

These results show that overall the industry is still performing well in delivering a house that the new home owner is happy with. However, follow up after handover still needs to be improved.

Figure 1. Satisfaction levels

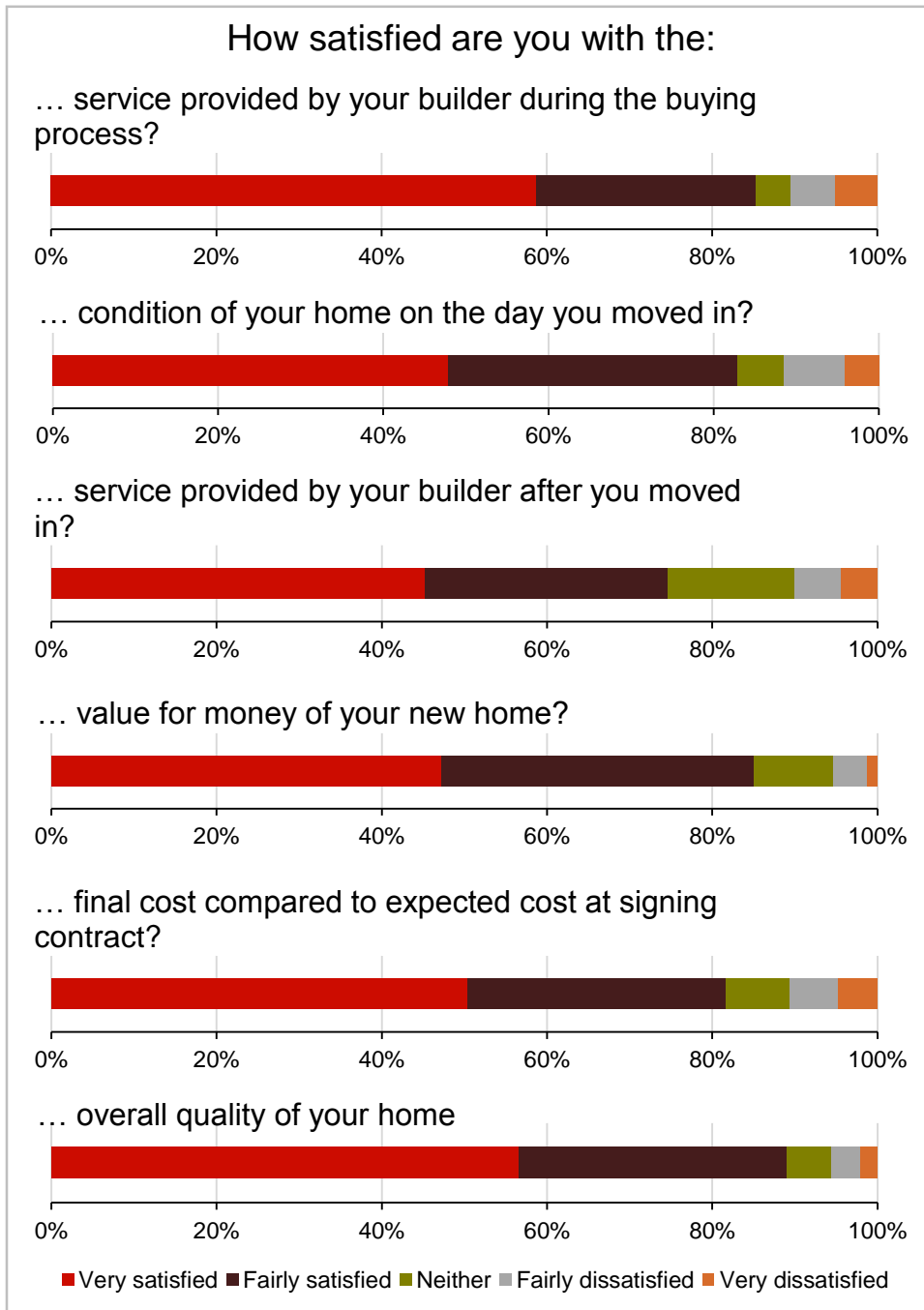
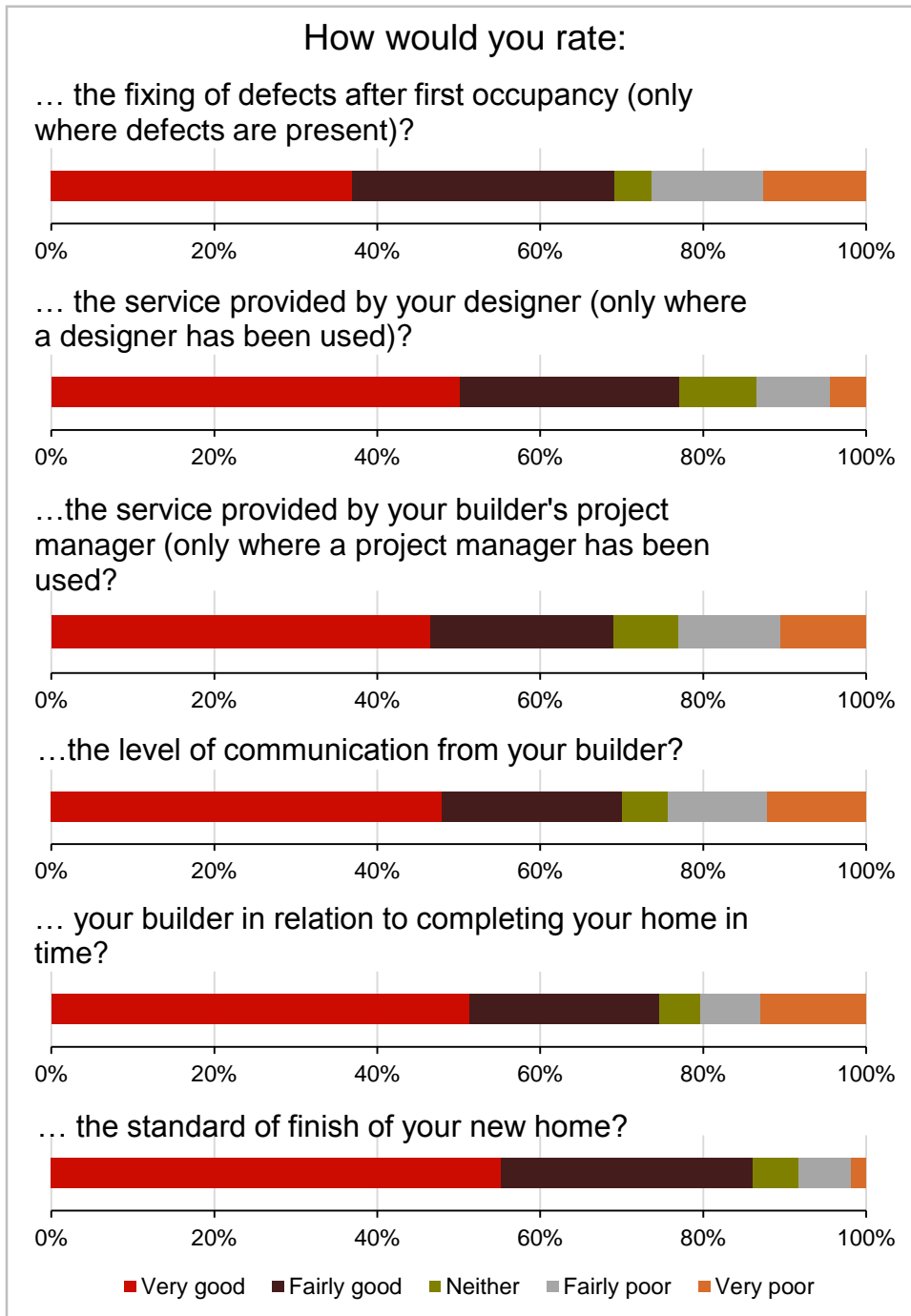


Figure 2. Ratings



4.2 Input into House Design

The most common type of input into the design of the house was 'select design from builder's standard plans with some changes'. This was selected by just under 55% of respondents. The next most common type of input was 'one-off design by an architect/architectural designer with major/total owner input'. This category includes those owners who designed their house themselves.

Those owners that chose a one-off design with major/total owner input were happiest with the performance of their builder. However, it does not appear that owners with greater input into the design of their house were happier than those with less input. The average scores are presented in Table 1 below and detailed scores are in the appendix. The scores are an average across the twelve measures detailed in section 4.1.

Figure 3. Type of input into house design

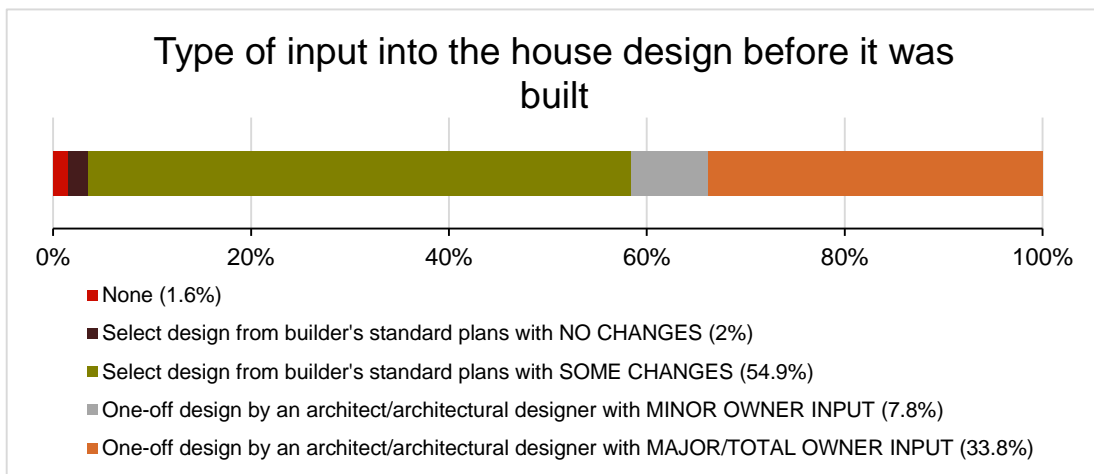
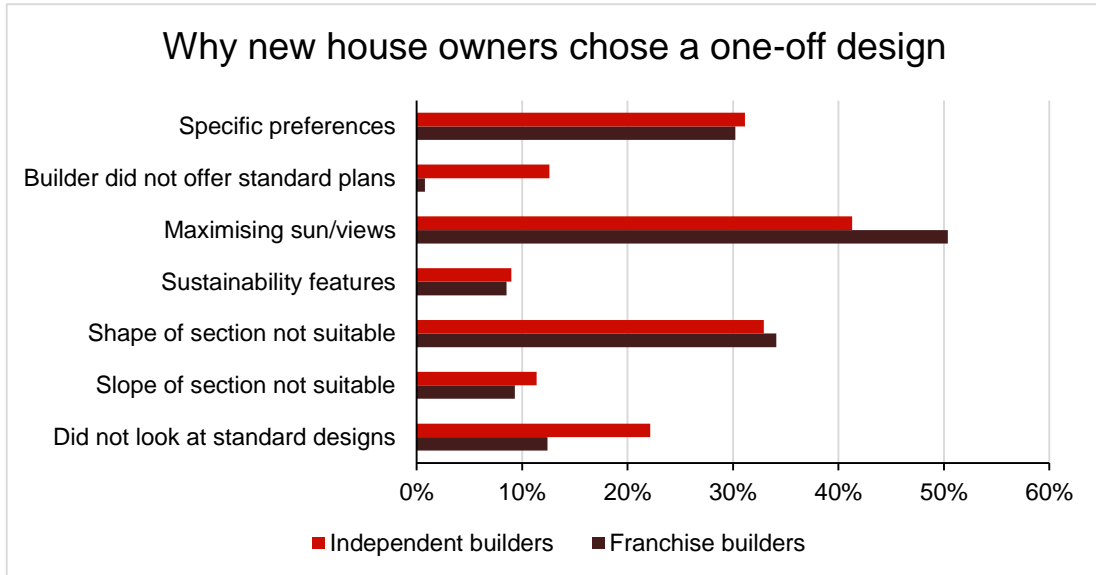


Table 1. Average satisfaction score by input into house design

| Average satisfaction score by input into house design New Homeowners' Satisfaction Survey 2014 | |
|--|---------------|
| | Average score |
| Select design from the builder's standard plans with NO CHANGES | 4.10 |
| Select design from the builder's standard plans with SOME CHANGES BY OWNER | 4.00 |
| One-off design by an architect/architectural designer with MINOR OWNER INPUT | 3.73 |
| One-off design by an architect/architectural designer with MAJOR/TOTAL OWNER INPUT | 4.15 |
| 1= very dissatisfied/poor, 2= fairly dissatisfied/poor, 3= neither, 4= fairly satisfied/good, 5= very satisfied/good | |

Those owners that chose a one-off design were asked why they selected a one-off design instead of a standard design. The most common reason for choosing a one-off design was to maximise the sun or views. Many owners owned a section that was not suitable for standard plans due to the shape or slope of the section.

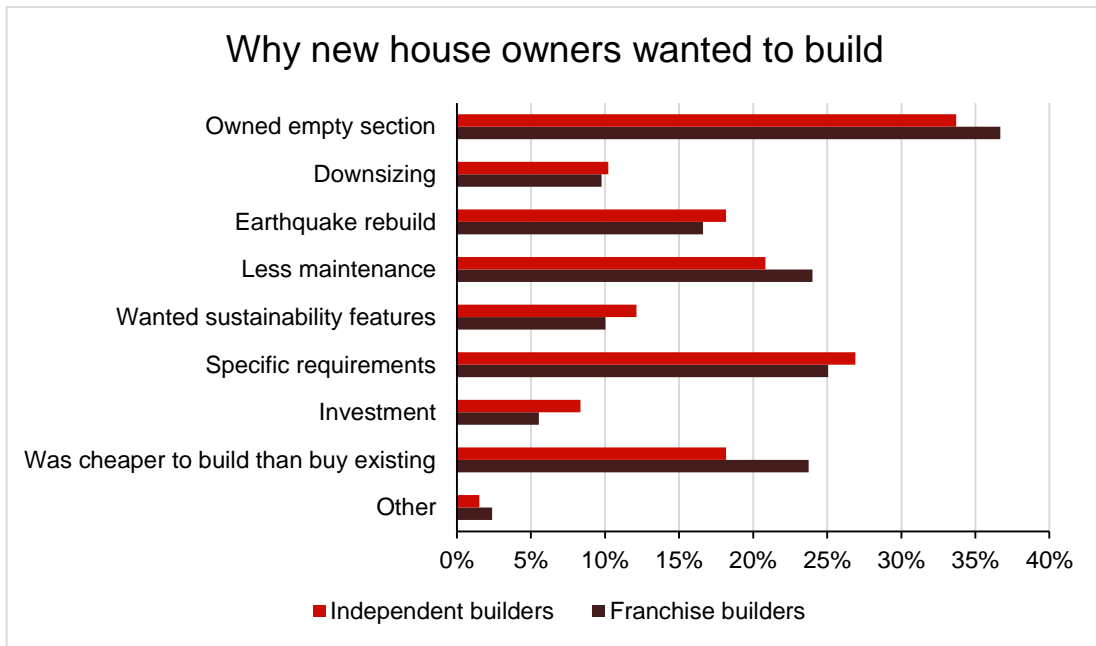
Figure 4. Why new house owners chose a one-off design



Note: Percentages add up to more than 100% as respondents were able to select more than one option.

The Christchurch rebuild is still a common reason for new house owners building. Just under 20% of respondents identified this as being a reason for building. The most common reason for building was owning an empty section. Other common reasons were having specific requirements, it was cheaper to build than buy an existing house, or less maintenance.

Figure 5. Why new house owners wanted to build



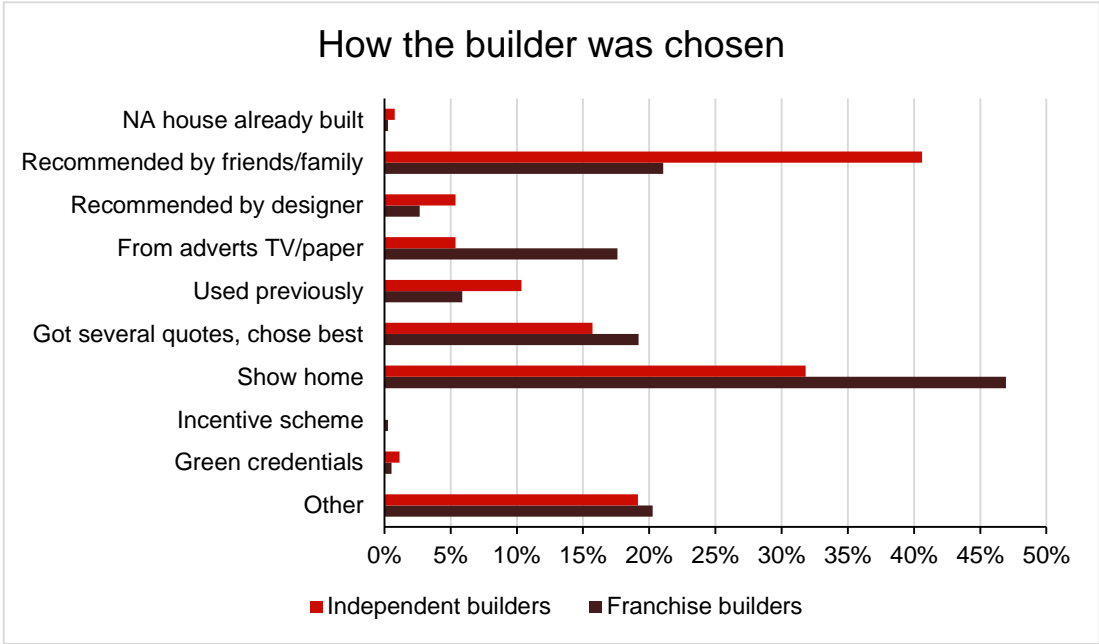
Note: Percentages add up to more than 100% as respondents were able to select more than one option.

4.3 How the Builder was Chosen

The most common reason for choosing a builder was the quality of their show home. Almost 50% of franchise builders obtained their clients in this way compared to just over 30% for independent builders. Independent builders relied far more on recommendations. New house owners often received recommendations from their friends and/or family.

“Other” was largely made up of new house owners in Christchurch who did not have many options. They often found that their insurance company required that they used a specific builder (or that they choose from a list of approved builders).

Figure 6. How builder was chosen



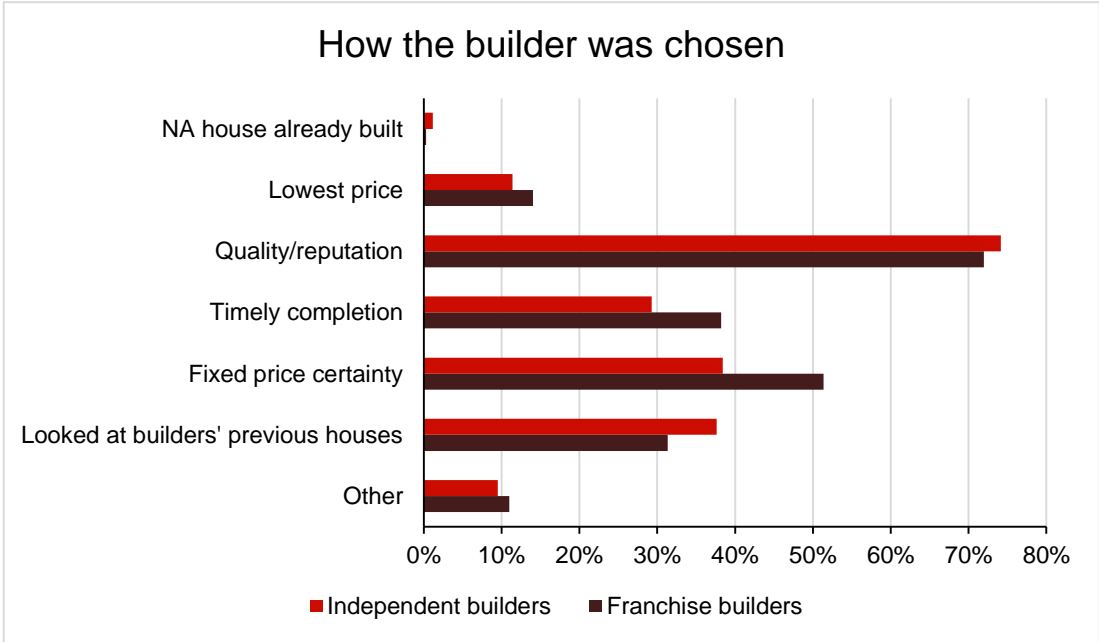
Note: Percentages add up to more than 100% as respondents were able to select more than one option.

4.4 Important Features in Choosing a Builder

The most important feature in choosing a builder is the builder's quality/reputation. 50% of respondents who built with a franchise builder also stated that fixed price certainty was important. This was slightly higher than for independent builders.

New house owners that wanted a timely completion were more likely to choose a franchise builder than an independent builder. This was also the case for the lowest price.

Figure 7. Important features in choosing a builder

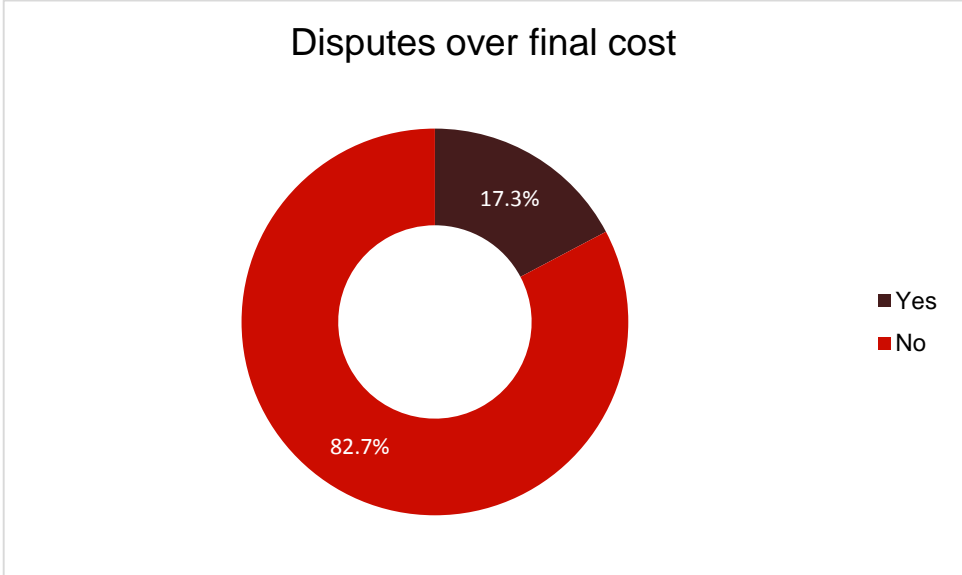


Note: Percentages add up to more than 100% as respondents were able to select more than one option.

4.5 Disputes over Final Cost

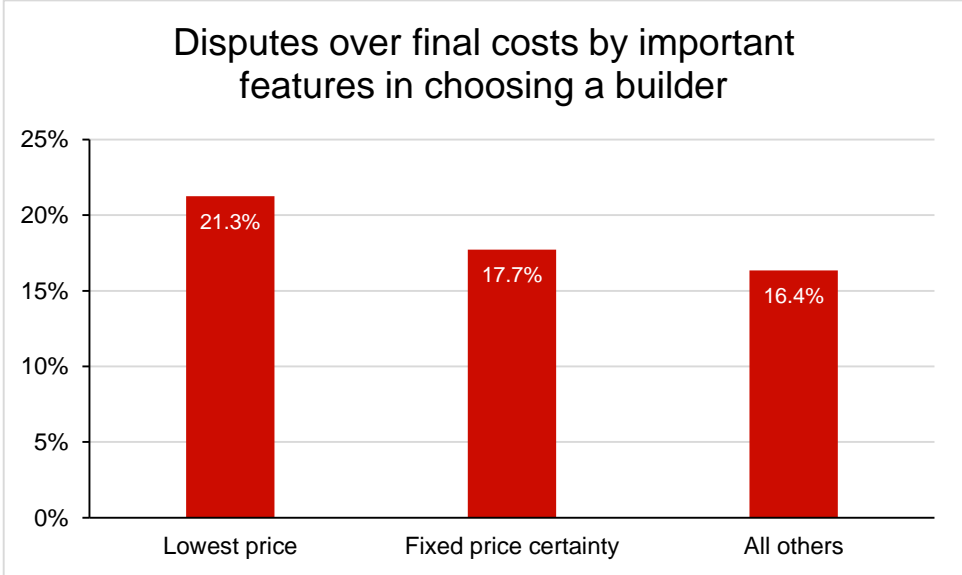
17.3% of respondents had a dispute with their builder over the final cost. This was up slightly from last year's survey results.

Figure 8. Disputes over final cost



New home owners were more likely to have a dispute with their builder over final costs if they had chosen their builder due to being the 'lowest price' or for 'fixed price certainty'. This is as to be expected as these two categories of new house owners are most likely to be significantly concerned about the final price of their house.

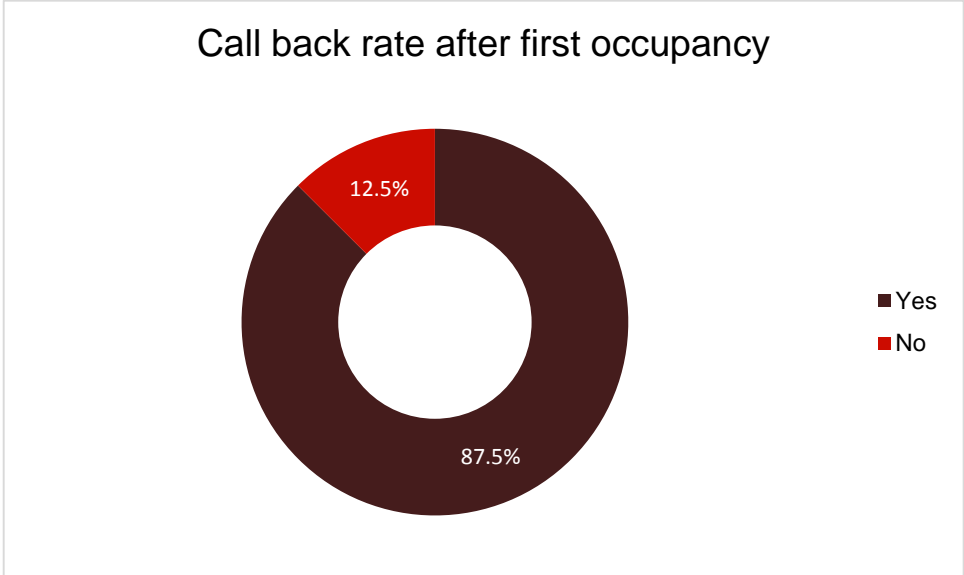
Figure 9. Disputes over final costs by important features choosing a builder



4.6 Call Backs

There has been a further increase over 2013 figures in the proportion of respondents who have had to call back their builder in this survey. 87.5% of respondents stated that they had to call back their builder after first occupancy to repair defects. This was up from about 73% in 2013, and 68% in 2012.

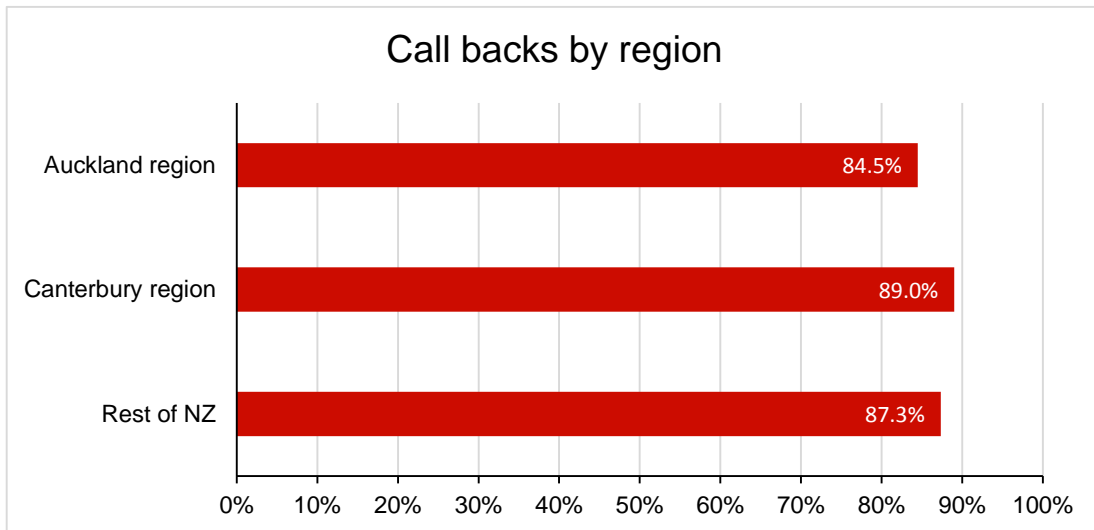
Figure 10. Call backs



The major reason for this increase is the change in the call back rate outside of Auckland and Canterbury. In last year's survey, the 'rest of New Zealand' category had a call back rate of about 65%. This has increased to 87.3% in the latest survey. The Auckland region saw a slight improvement in the call back rate whereas the Canterbury region worsened slightly.

Workloads in the 'rest of New Zealand' have increased by about 15% (in terms of number of new residential buildings) which may explain why the call back rate has increased. However, workloads in the Auckland region have increased by 40% and the call back rate decreased.

Figure 11. Call backs by region



The majority of respondents stated that they had some expectation of defects in their new home. 10% of respondents that had defects in their new home stated that they expected no defects. This is up slightly from last year's survey.

Figure 12. Defects relative to house owner expectation

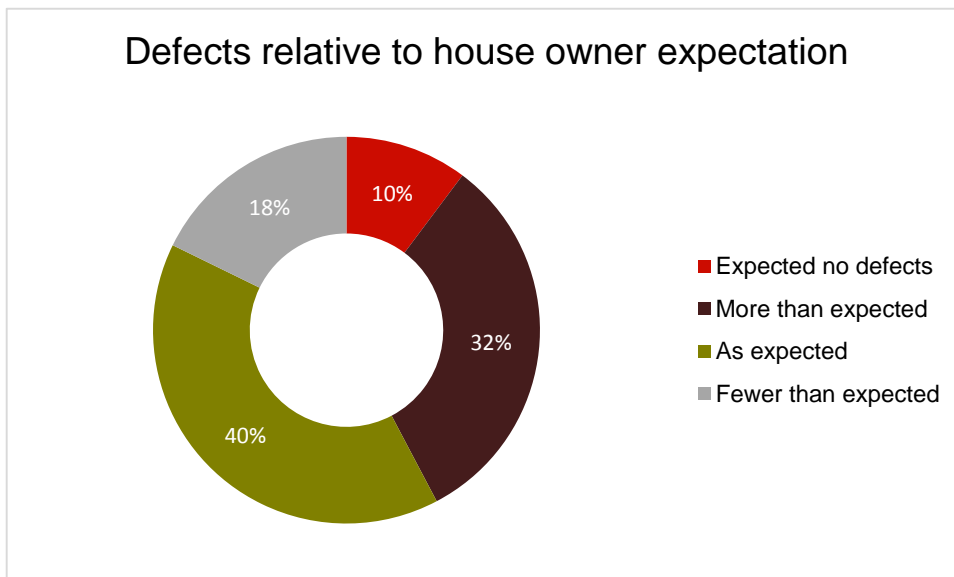
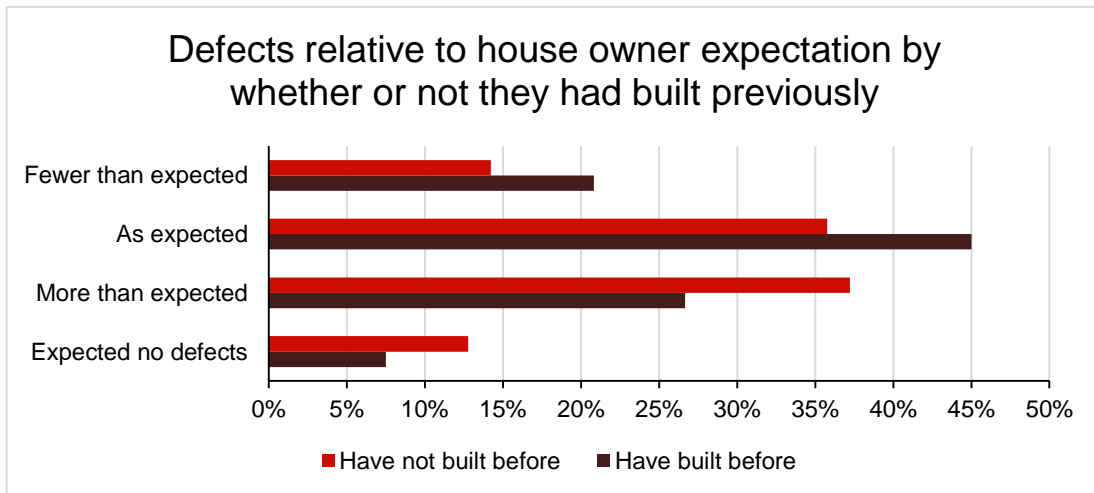


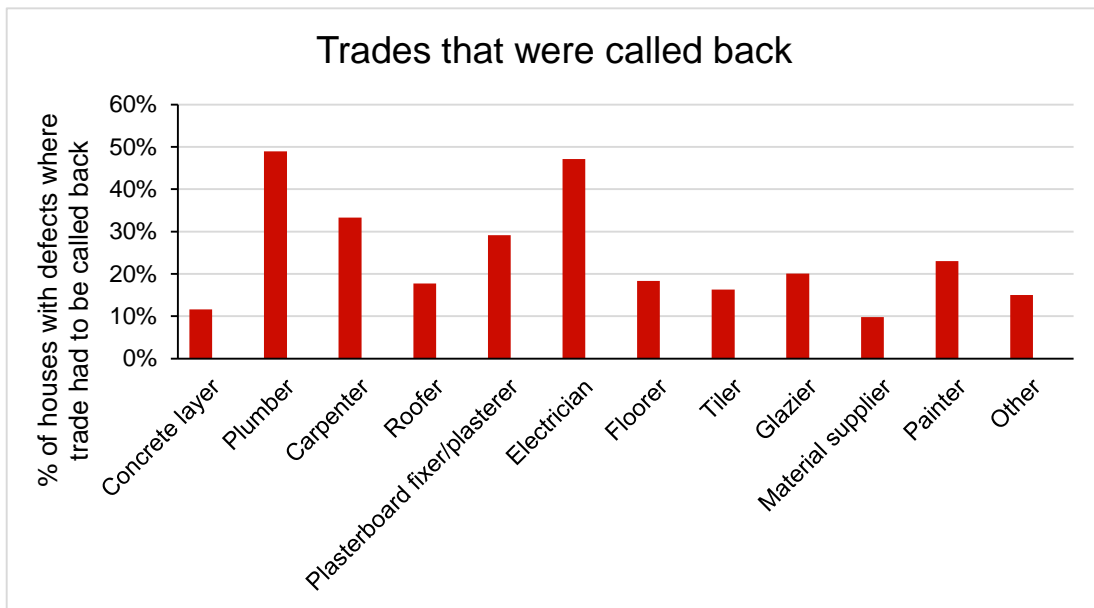
Figure 13 shows how having previous experience of building a house affects the expectation of defects. About 7.5% of respondents who had built before expected no defects compared to 13% of those who had not built previously. First time new house owners also had a lower proportion of responses for both 'fewer defects than expected' and 'as expected'. This indicates that first time new build clients perhaps do not understand the complexities and risks of the new build process. Or those clients that have built before better understand what is likely to be delivered at handover.

Figure 13. Defects relative to previous experience building



A final question in this section asked which trades needed to be called back. The most common trades to be called back were plumbers and electricians, each called back just under 50% of the time where defects were present.

Figure 14. Trades that were called back



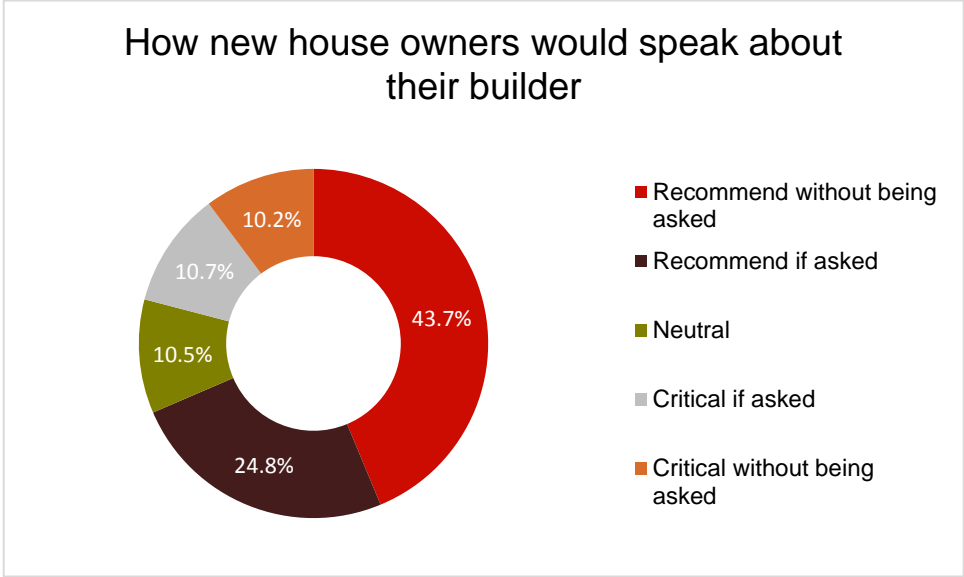
Note: Percentages add up to more than 100% as respondents were able to select more than one option.

¹ The percentage of houses with defects where the painter had to be called back is likely slightly under-estimated. Painters were not provided as an option on the survey and therefore the respondent had to identify the painter under the 'other' category. In some cases, the respondent may not have stated that the painter had to be called back.

4.7 How New House Owners Would Speak about Their House Builder

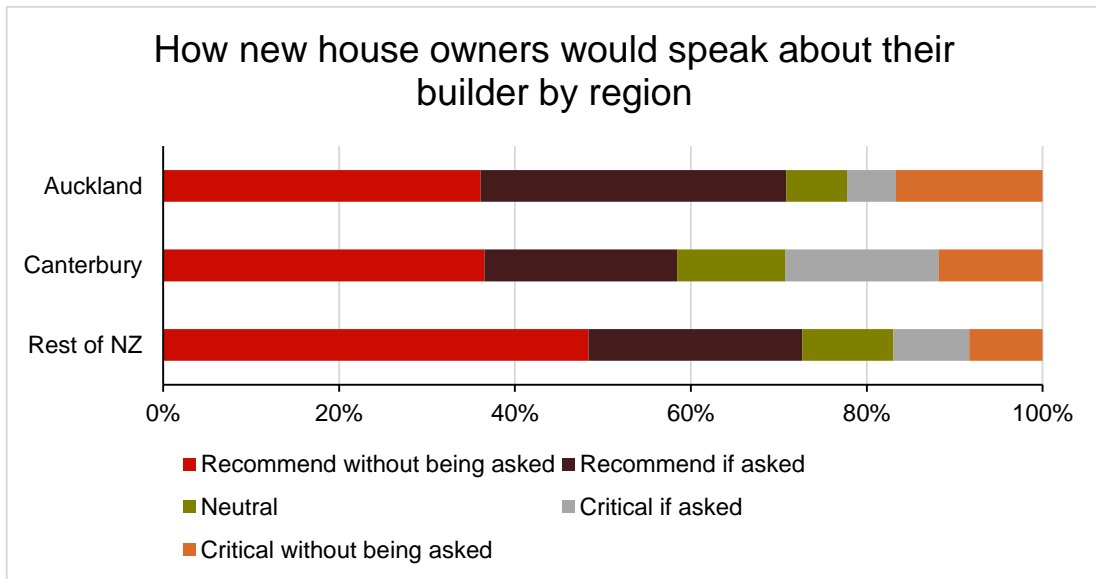
The majority of respondents to our new house owners' satisfaction survey would recommend their builder. 68.5% of respondents would recommend their builder. This is down from 72% in the 2013 survey, and 80% in 2012. The proportion of respondents who would be critical of their builder has increased from 18% last year to just under 21% this year.

Figure 15. How new owners would speak about their house builder



Canterbury builders were less likely to be recommended than their counterparts in Auckland and the rest of New Zealand. Just under 60% of respondents stated that they would recommend their builder in Canterbury, compared to over 70% in both Auckland and the rest of New Zealand. Canterbury also had about 30% of respondents that would speak critically about their builder. The comparable figure was 22% in Auckland and just 17% in the rest of New Zealand.

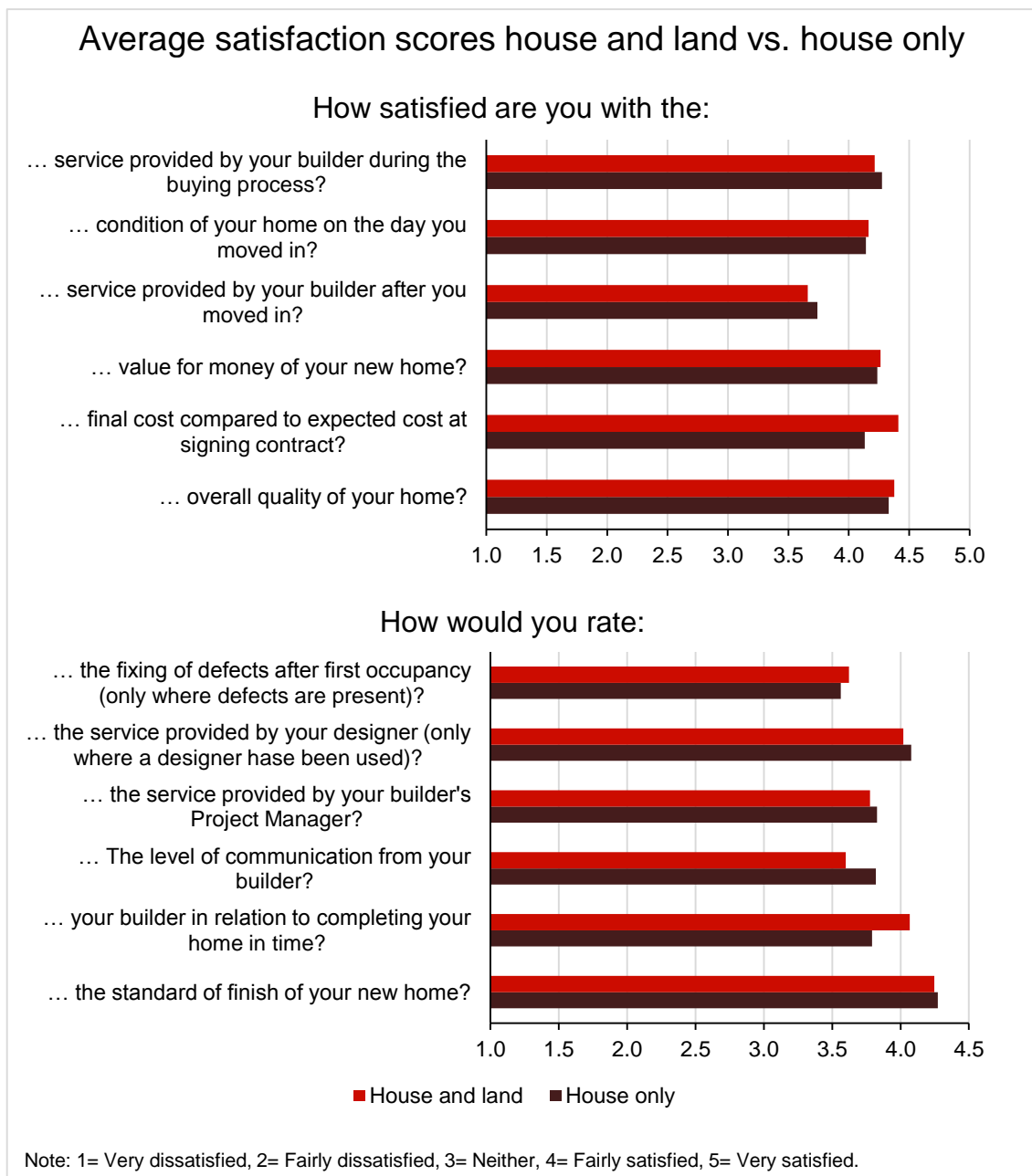
Figure 16. How new owners would speak about their builder by region



4.8 House and Land vs. House Only

Figure 17 shows the difference in average scores between new house owners who built a house only and those who had a house and land package. The largest differences appear to be in the 'final cost compared to expected cost at signing contract' and 'your builder in relation to completing your home in time' measures. On these measures, those with a house and land package rated their builder higher than those who had a house only.

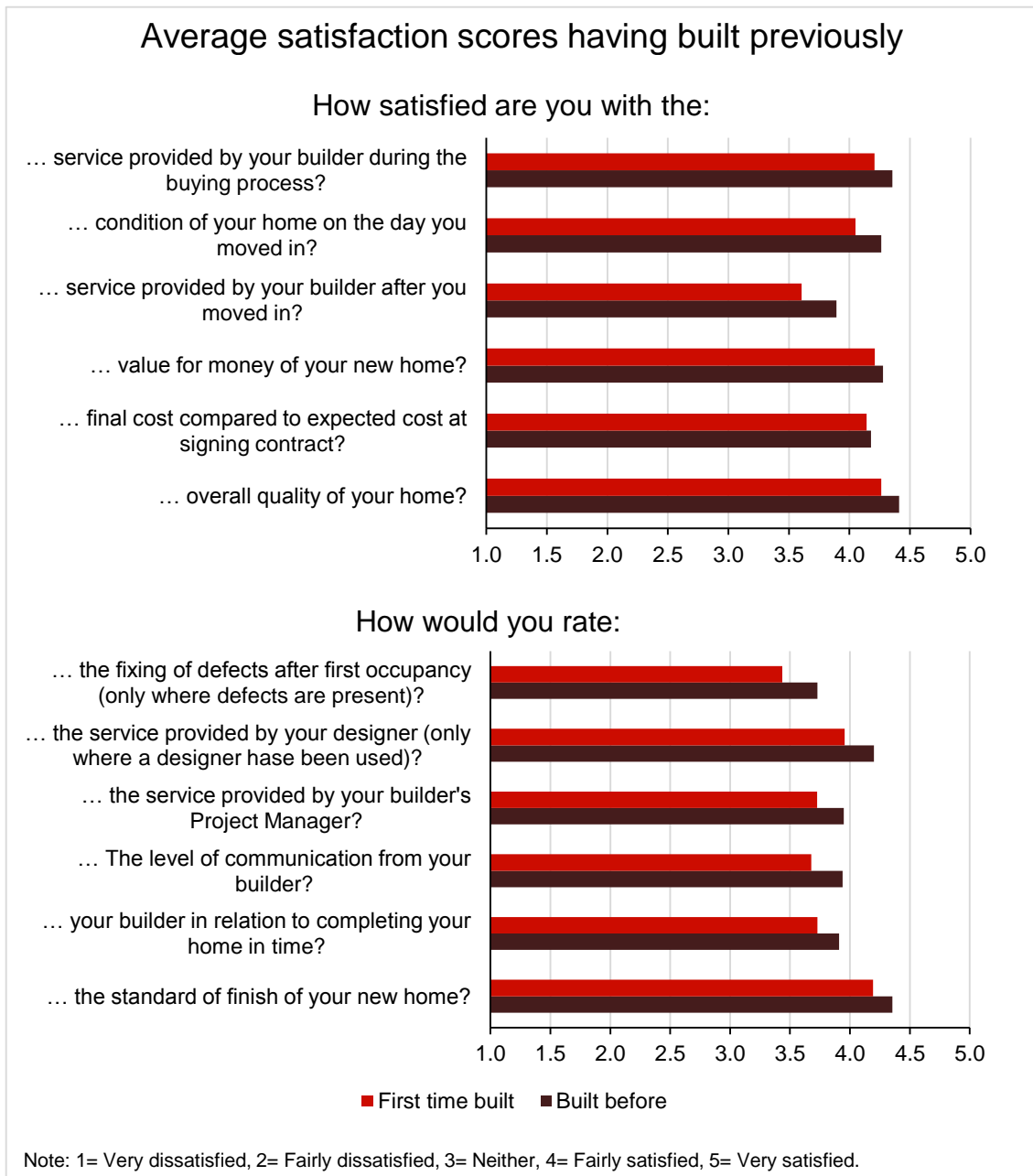
Figure 17. Average scores house and land vs. house only



4.9 Whether or Not the House Owner Has Built Previously

Those new house owners that had built previously scored their builder higher than those that had not built previously on every measure. The differences are particularly prevalent on the post-occupancy measures where perhaps through different expectations, those who had built before rated their builder significantly higher than those who had not.

Figure 18. Average satisfaction scores having built previously

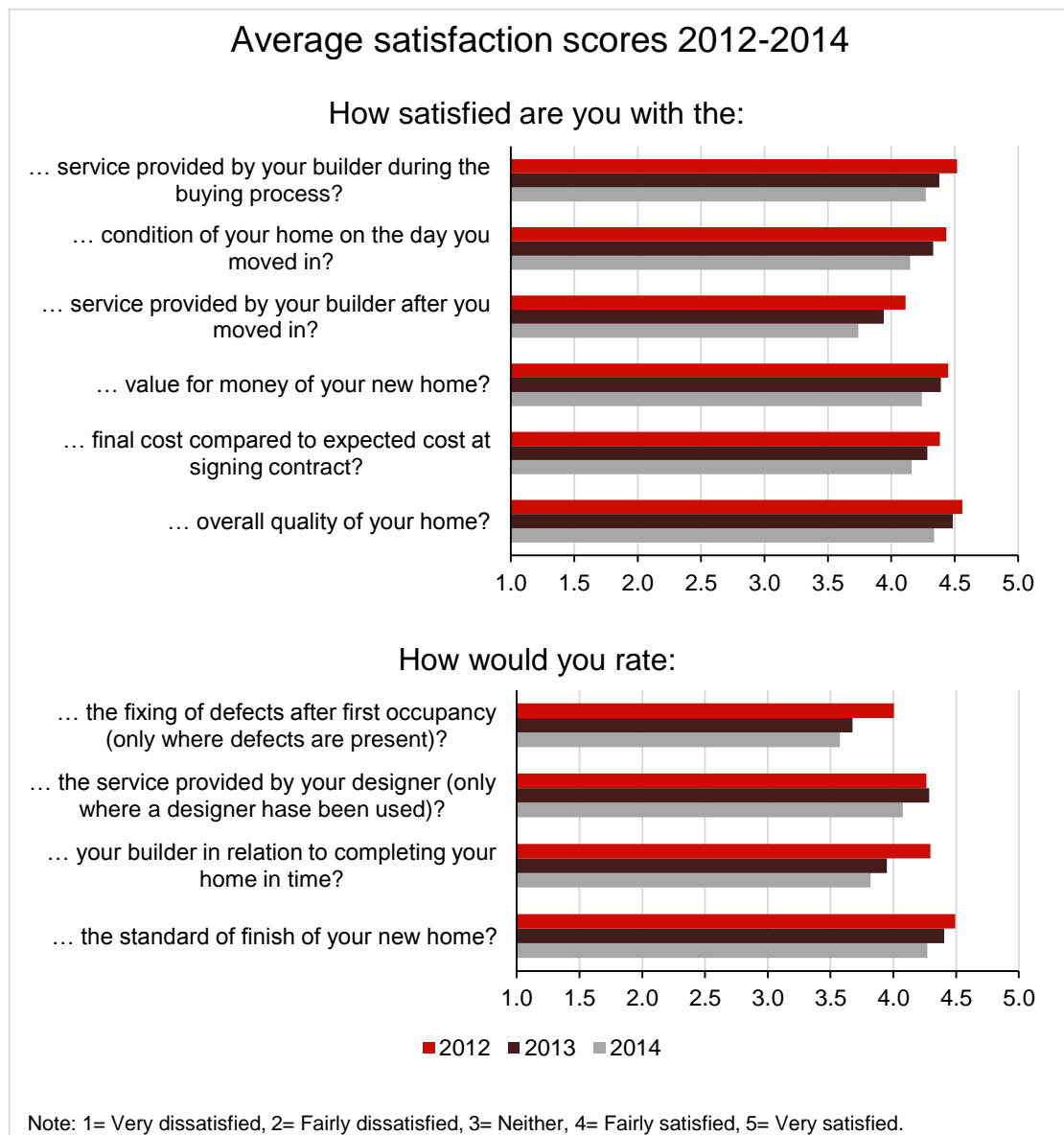


4.10 Changes since 2012

It is particularly concerning that the average satisfaction scores are continuing to decline. Scores are down in 2014 on average by about 3.5% from last year. Only measures that have been recorded over the last three years have been shown below. The average scores of all measures decreased in 2014.

Both 'the service provided by your designer' and 'the service provided by your builder after you moved in' measures fell in this survey by about 5%. These were the two largest decreases in this year's survey.

Figure 19. Average scores 2012-2014

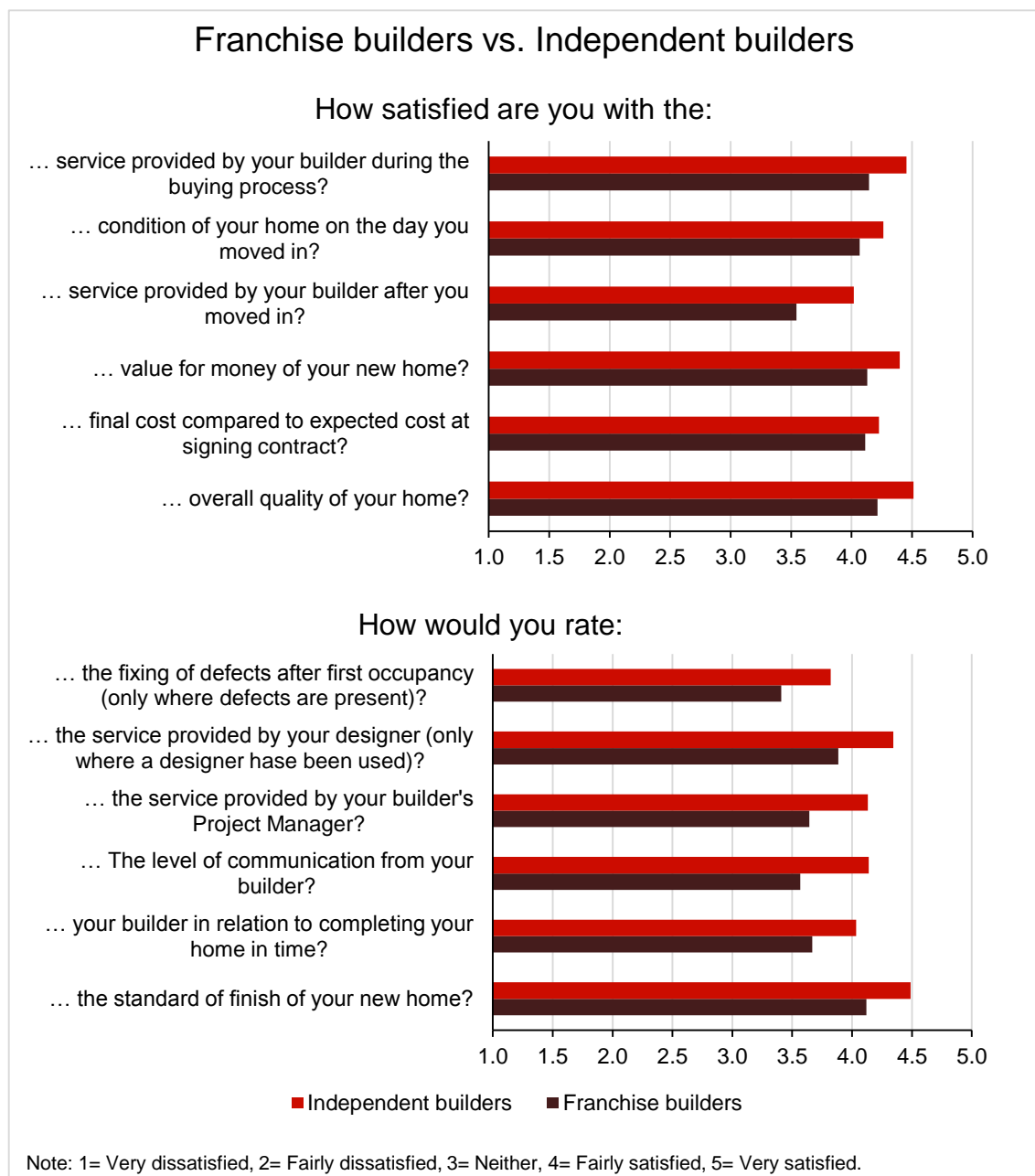


4.11 Franchise vs. Independent Builders

Independent builders outperformed franchise builders again this year. Survey respondents rated them better across all of the measures. The differences are particularly prevalent in the 'level of communication from your builder', 'service provided by your builder's project manager' and 'service provided by your builder after you moved in' measures.

This may be due to the difference in workloads between franchise builders and independent builders. As the next section shows, smaller builders outperform large scale builders.

Figure 20. Average scores franchise vs. independent builders



4.12 Highest Scoring Large-Scale Builders

The survey allows an analysis by building company, building group or franchise. This section analyses the highest scoring large-scale builders. To provide robust results, we limit our analysis of individual firms to those with a sufficiently large sample size to provide meaningful results.² This analysis is to encourage and acknowledge building excellence by highlighting where businesses are already meeting or exceeding client expectations.

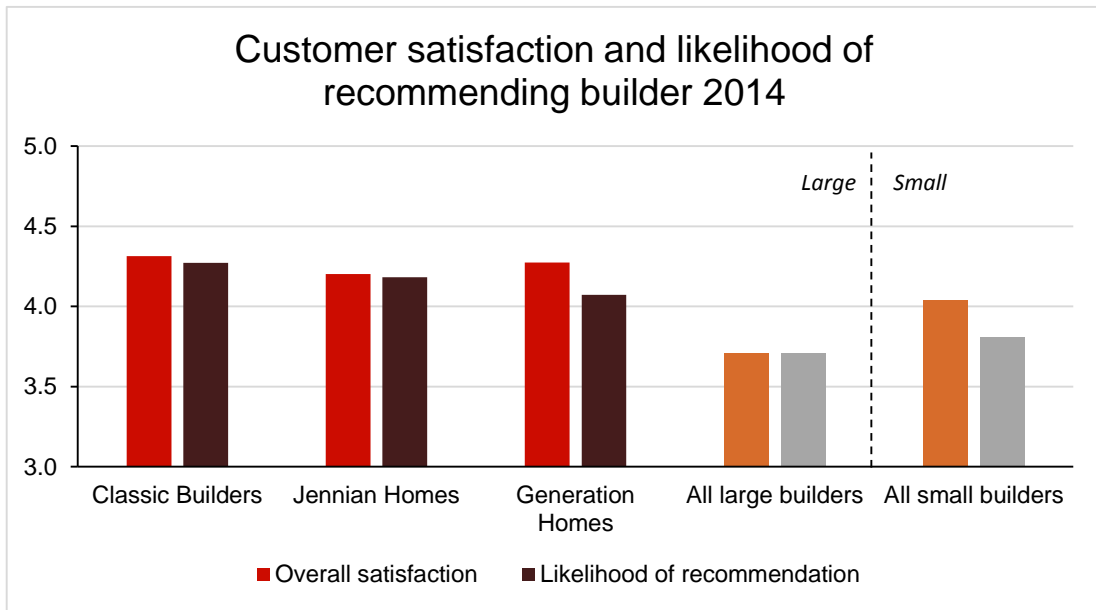
In this survey, Classic Builders once again scored the best results among large-scale builders. The firm achieved the best result across the twelve measures used to determine the overall satisfaction score. They were also the most likely to be recommended (see Figure 21 on the next page).

Jennian Homes (including Milestone Homes) came in second place. They were the second most likely to be recommended and had the third highest overall satisfaction score of large-scale builders. In third place was Generation Homes. They achieved a slightly higher overall satisfaction score than Jennian Homes, but were less likely to be recommended.

The 'all large builders' measure indicates that results for the large-scale builders were generally well below that of smaller builders. The three top performing large-scale builders significantly outperformed the average for large-scale builders. Smaller-scale builders generally achieved good results and on average outperformed their large-scale counterparts.

² Note that BRANZ does not endorse these builders. In addition, these are aggregated totals across franchise groups, and satisfaction levels may vary across different branch offices within these building groups and franchises. The results do not indicate that the builder was 'voted' the best builder (no voting took place). They indicate that respondents to our survey were generally satisfied with the performance of their builder and would recommend their builder. Spec-builds are excluded, so builders who predominantly spec-build may not be represented.

Figure 21. Top-scoring large builders 2014

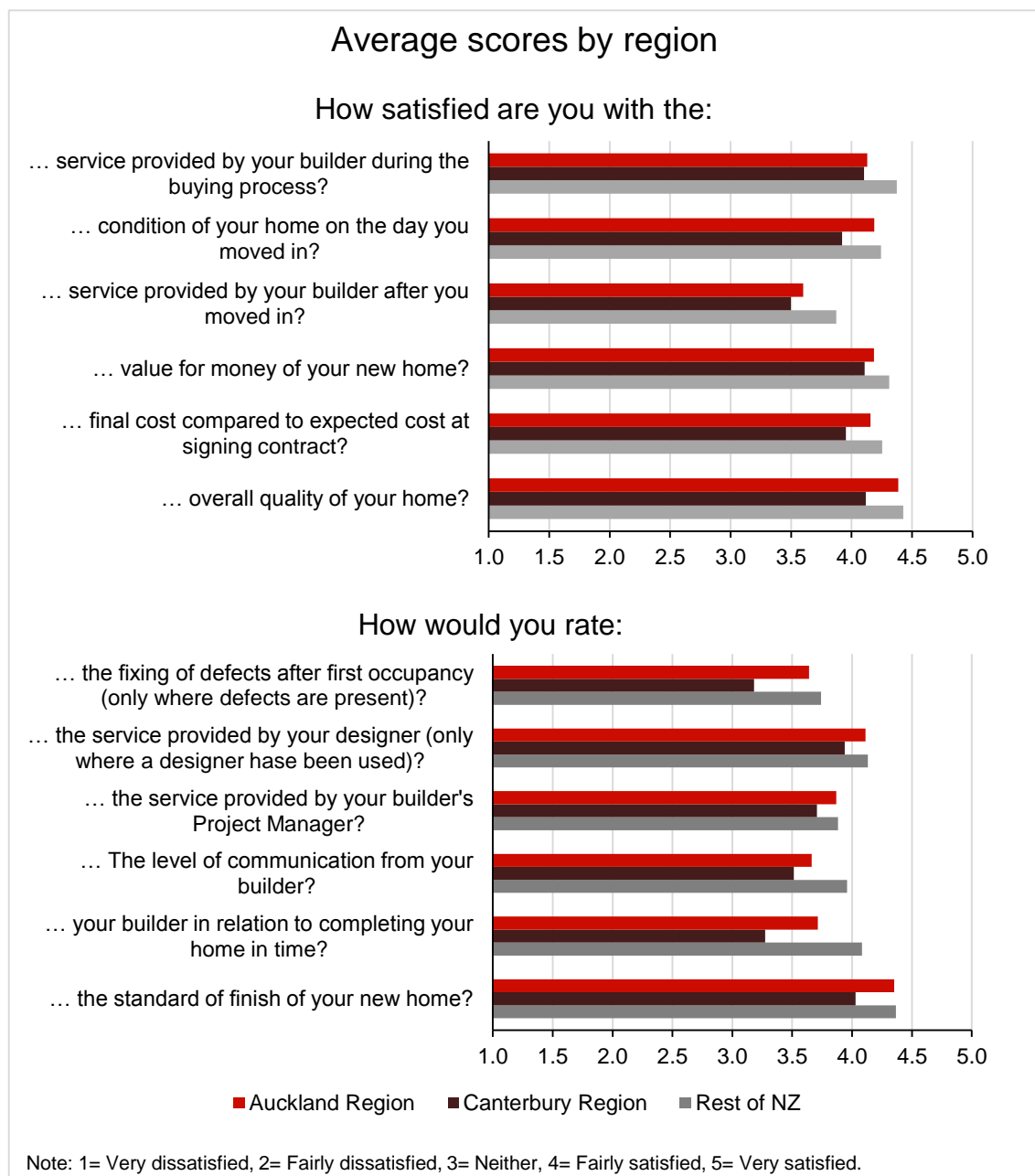


4.13 Regional Breakdown

Figure 22 shows how the Auckland and Canterbury regions compared to the rest of New Zealand. Auckland compares more favourably to the rest of New Zealand than in the previous survey. However, some measures are still well below those for the rest of New Zealand.

Canterbury scored lower than both the Auckland region and the rest of New Zealand across every measure. Measures relating to post-occupancy were particularly disappointing where the Canterbury region scored significantly lower than the other regions. This is likely due to the elevated workloads in Canterbury post-earthquake.

Figure 22. Average scores by region



5. CONCLUSIONS

The results presented in this report show that overall, builders are meeting the expectations of their clients. Their performance has worsened slightly from last year's survey, which is of some concern.

Builders should also note that it is the lasting impression that they leave on the new build client that affects the likelihood of recommendation and repeat business. Measures such as 'the fixing of defects after first occupancy' and 'service provided by your builder after moved in' consistently score poorly.

Those builders that are building in Canterbury need to be aware that they are building for clients who have been forced to build due to the earthquakes. These clients are likely under a lot of stress and had perhaps not anticipated building a house in their lifetime. These clients may need to be managed differently to other clients who have thought about building and are willingly entering the process.

Potential new house owners should be aware of the results for follow up service and the call back rate. It is worth talking to potential builders about what procedures they have in place for the fixing of defects and follow up after you have moved in. They should ask the builder for their specific policy on fixing defects in writing and be wary of builders with no clear policy.

Potential new house owners should also try to determine how potential builders are dealing with their current workloads. Ask about whether they will be able to complete on time and be back for the fixing of defects.

6. APPENDIX

Table 2. Average satisfaction rating by input into house design

| Average satisfaction rating by input into house design New Homeowners' Satisfaction Survey 2014 | | | | | | |
|--|---|---|--|---------------------------------------|---|-----------------------------------|
| | ... service provided by your builder during the buying process? | ... condition of your home on the day you moved in? | ... service provided by your builder after you moved in? | ... value for money of your new home? | ... final cost compared to expected cost at signing contract? | ... overall quality of your home? |
| Select design from the builder's standard plans with NO CHANGES | 4.25 | 4.23 | 4.00 | 4.46 | 4.46 | 4.08 |
| Select design from the builder's standard plans with SOME CHANGES BY OWNER | 4.28 | 4.14 | 3.66 | 4.22 | 4.17 | 4.28 |
| One-off design by an architect/architectural designer with MAJOR/TOTAL OWNER INPUT | 4.36 | 4.19 | 3.93 | 4.28 | 4.20 | 4.47 |
| One-off design by an architect/architectural designer with MINOR OWNER INPUT | 3.89 | 3.96 | 3.38 | 4.08 | 3.96 | 4.20 |

1= very dissatisfied, 2= fairly dissatisfied, 3= neither, 4= fairly satisfied, 5= very satisfied

25

Table 3. Average rating by input into house design

| Average rating by input into house design New Homeowners' Satisfaction Survey 2014 | | | | | | |
|---|--|--|---|---|---|--|
| | ... the fixing of defects after first occupancy? | ... the service provided by your designer? | ... the service provided by your builder's project manager? | ... the level of communication from your builder? | ... your builder in relation to completing your home in time? | ... the standard of finish of your new home? |
| Select design from the builder's standard plans with NO CHANGES | 3.29 | 3.83 | 3.63 | 3.70 | 3.67 | 4.00 |
| Select design from the builder's standard plans with SOME CHANGES BY OWNER | 3.56 | 4.20 | 4.23 | 3.69 | 3.77 | 4.08 |
| One-off design by an architect/architectural designer with MAJOR/TOTAL OWNER INPUT | 3.48 | 4.03 | 3.73 | 3.78 | 3.84 | 4.25 |
| One-off design by an architect/architectural designer with MINOR OWNER INPUT | 3.81 | 4.20 | 4.05 | 3.94 | 3.94 | 4.38 |

1= very dissatisfied, 2= fairly dissatisfied, 3= neither, 4= fairly satisfied, 5= very satisfied

NEW HOUSE OWNERS' SATISFACTION SURVEY

All responses are added together and no individual is identified in reports produced by BRANZ.

1. Was your builder part of a franchise? Yes / No IF YES, which franchise? _____

2. Was your house a house and land package or house only? House and land / House only (circle one)

3. Have you built a house before? Yes / No IF YES, how many? _____

4. Satisfaction: How satisfied are you with the:

| | Very Satisfied | Fairly satisfied | Neither | Fairly dissatisfied | Very dissatisfied |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Service provided by your builder during the buying process? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Condition of your home on the day you moved in? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Service provided by your builder after you moved in? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Value for money of your new home? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Final cost compared to expected cost at signing contract? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Overall quality of your home? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

5. Rating: How would you rate:

| | Very good | Fairly good | Neither | Fairly poor | Very poor |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| The fixing of defects after first occupancy? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| The service provided by your builder's designer? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| The service provided by your builder's Project Manager? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| The level of communication from your builder? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Your builder in relation to completing your home in time? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| The standard of finish of your new home? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

6. Did you have input into the house design before it was built? Yes / No (circle one)

If Yes, what type of input from the options below (tick one)

Select design from the builder's **standard plans** with **NO CHANGES**

Select design from the builder's **standard plans** with **SOME CHANGES BY OWNER**

One-off design by an architect/architectural designer with **MAJOR/TOTAL OWNER INPUT**

One-off design by an architect/architectural designer with **MINOR OWNER INPUT**

7. If you selected a one-off design, why did you not select a standard design?

Did not look at standard designs Slope of section not suitable Shape of section not suitable

Sustainability features Maximising sun/views Builder did not offer standard plans

Specific preference not catered to by standard designs _____
(specify)

8. Why did you want to build rather than buy an existing house?

Was cheaper to build than buy existing Investment Specific requirements not catered to by existing houses

Wanted sustainability features Less maintenance Earthquake rebuild Downsizing

Owned empty section

9. How did you choose the builder? (please tick all that apply)

Not applicable Recommended Recommended From adverts Used Got several quotes, chose Show Incentive Green Other

House already built by friends/family by designer on TV/paper previously best (how many quotes?) home Scheme Credentials (state) _____

10. What features were important in choosing a builder? (please tick all that apply)

Not applicable Lowest Quality/ Timely Fixed Price Looked at builders Other

House already built Price Reputation Completion Certainty previous houses (state) _____

11. Were there any disputes with the builder over final costs? Yes / No (circle one)

If yes, what was the dispute about? _____

12. Did you call back the builder to repair defects after first occupancy? Yes / No (Circle one)

If Yes which trades needed to be called back? Concrete layer Plumber Carpenter Roofer

Plasterboard fixer/plasterer Electrician Floorer Tiler Glazier

Material supplier Other (specify) _____

Was the number of defects: Expected no defects More than expected As expected Less than expected

13. Which of these comes closest to describing how you would speak about your housebuilder?

Recommend without Recommend Neutral Critical Critical without

being asked if asked if asked being asked

14. Do you have any general comments on the overall performance of your builder?

Thank you. Please fold this form and freepost it in the return envelope

May-14