



Secondary Suites Survey Research

Prepared for the City of Calgary
December 2009 | Revised January 2011

CITY  SPACES

Planning | Project Management | Applied Research



CITY OF CALGARY SECONDARY SUITES

- SUMMARY OF SURVEY RESEARCH

INTRODUCTION

This report has been prepared by CitySpaces Consulting as part of the outreach and consultation work undertaken for the City of Calgary in 2009 and 2010. The report presents the key findings from a survey, undertaken in October and early November 2009, regarding secondary suites and the Secondary Suites Grant Pilot Program.

The survey was designed by the Mustel Group, in consultation with CitySpaces Consulting and staff from the City of Calgary. The Mustel Group is a full-service market research company that has provided services to public and private sector clients across North America, Europe and Asia since 1980.

The primary purposes of the survey were to seek a greater understanding of Calgarian's attitudes about secondary suites and to gauge residents' awareness and interest in the Grant Pilot Program.

METHODOLOGY & LIMITATIONS

The survey was deployed in two ways – through a random telephone survey and online via the City of Calgary's website.

Random Telephone Survey

The random telephone survey included 501 random interviews. The Mustel Group used a random probability sampling method conducted by telephone. The 500-person sample size provided results that are accurate within 4.4 percentage points (+/-) at the 95% confidence level or 19 times out of 20 if repeated.

The telephone survey was designed to be representative of Calgarians at the time that the survey was conducted. The results are therefore representative of the population by gender, age (adults over the age of 18) and geographic distribution (across each of the four city quadrants).

There were over 6,000 calls attempted, approximately two thirds were based on published land line telephone numbers and one third from random digit generated cellphone numbers. Of those numbers that were found to be valid, approximately three quarters were listed phone numbers and one quarter were cellphone numbers. The response rate, defined as willing respondents divided by eligible numbers, was 18 percent overall (21 percent for listed numbers and 9 percent for cell numbers).

Web-Access Survey

A link to an open-access web survey was posted on the City of Calgary website during the months of October and November, 2009. During this period, the City and consultants hosted a series of three public open houses at community centres in different parts of the city. Many of the open house participants were directed to the



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City's website to complete the online survey. In total, there were 229 online surveys completed.

The results of this online survey are not considered to be statistically representative of Calgarians as a whole because it was not undertaken using a random probability data collection method. Individuals who respond to self-select surveys tend to have stronger opinions (strongly positive or strongly negative) than average residents. As such, more weight should be given to the random telephone survey (where the results are statistically valid and representative) than those of the web-access survey.

KEY FINDINGS

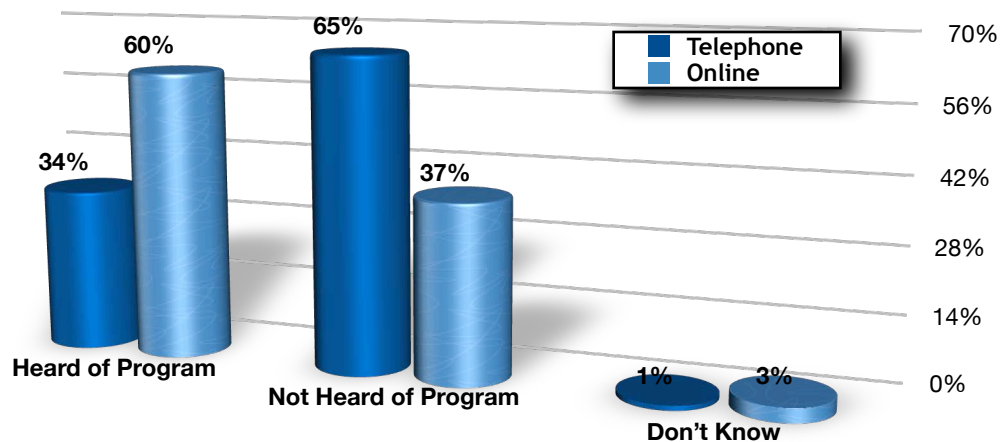
In the following section, a summary of the key survey results are presented in a series of charts with explanatory text. The appendix to this report includes a series of tables that show the responses to the principal questions of the survey. Results are given for both the random telephone and online-access surveys.

It is important to keep in mind that the results of the telephone survey are achieved through a random sampling process, whereas the online survey is self-selected. Statistically, the random telephone survey is representative of Calgary's population at the time that the survey was conducted (Fall 2009), while the online access survey was self-selected and is not considered to be representative of the City's population. However, for presentation purposes, the findings from both surveys have been presented together.

1. **Program Awareness.** More than one-third of telephone respondents had heard of the Grant Pilot Program (34 percent). However, only a small proportion (9 percent) had made direct inquiries, looked at information in brochures or on the City's website or called the 3-1-1 information line. Comparatively, among online respondents, 60 percent had heard of the program and 36 percent had sought out more information. This greater level of awareness among online respondents may be the result of open house attendance, website visits and promotion of the online survey by staff at public meetings.



Figure 1: Level of Program Awareness



2. **Development of New Secondary Suites (with regulations).** Among telephone respondents, 30 percent were strongly in support, while 4 percent were strongly opposed. Responses were more polarized among online respondents with 60 percent strongly in support and 10 percent strongly opposed. Overall, from the telephone survey, 84 percent indicated support; from the online survey, the figure was 77 percent.

Fig. 2a: Level of Support for New Suites (Telephone)

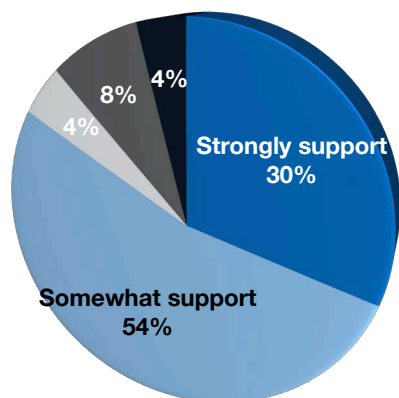
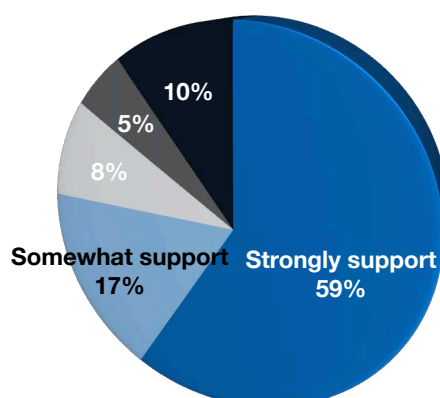


Fig. 2b: Level of Support for New Suites (Online)



● Strongly support ● Somewhat support ● No opinion/depends
● Somewhat oppose ● Strongly opposed

3. **Legalization of Existing Secondary Suites (with regulations).**

Generally, there was a high level of support for legalization of existing suites — 85 percent of telephone respondents indicated support, while 10 percent opposed. Among online respondents, 74 percent were supportive and 20 percent opposed.

Fig. 3a: Level of Support for Legalization (Telephone)

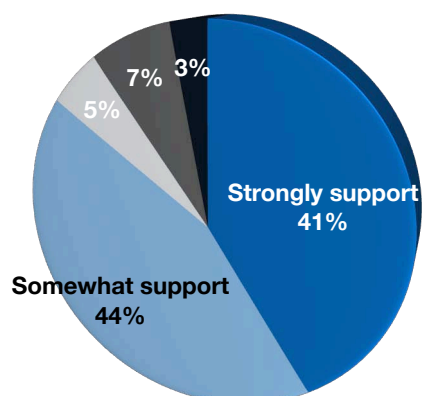
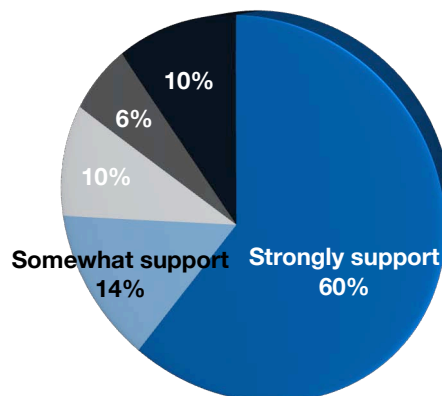


Fig. 3b: Level of Support for Legalization (Online)



● Strongly support ● Somewhat support ● No opinion/depends
● Somewhat oppose ● Strongly opposed



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4. **Secondary Suites in Your Own Neighbourhood (with regulations).** With regard to having secondary suites in respondents' own neighbourhoods, the response patterns remained similar to the two previous topics. Among telephone respondents, 32 percent were strongly in support and 44 percent were somewhat in support (76 percent combined). Nine percent were strongly opposed with another 12 percent somewhat opposed (21 percent combined). Turning to the results of the online survey, 70 percent indicated they were somewhat or strongly in support.

Fig. 4a: Level of Support for Suites in Own Neighbourhood (Telephone)

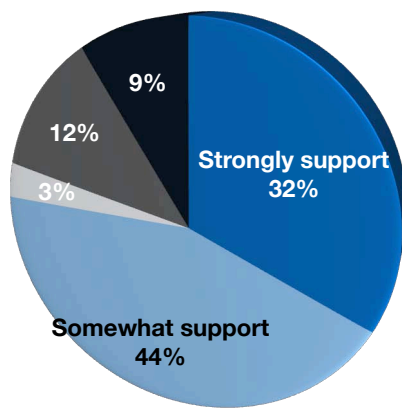
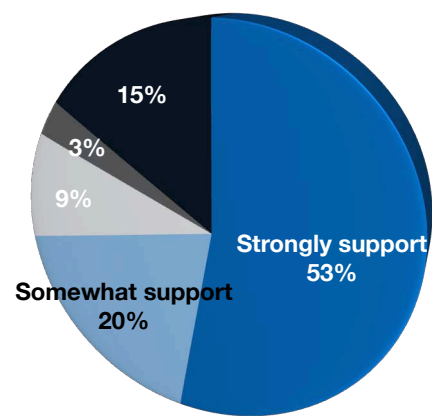


Fig. 4b: Level of Support for Suites in Own Neighbourhood (Online)

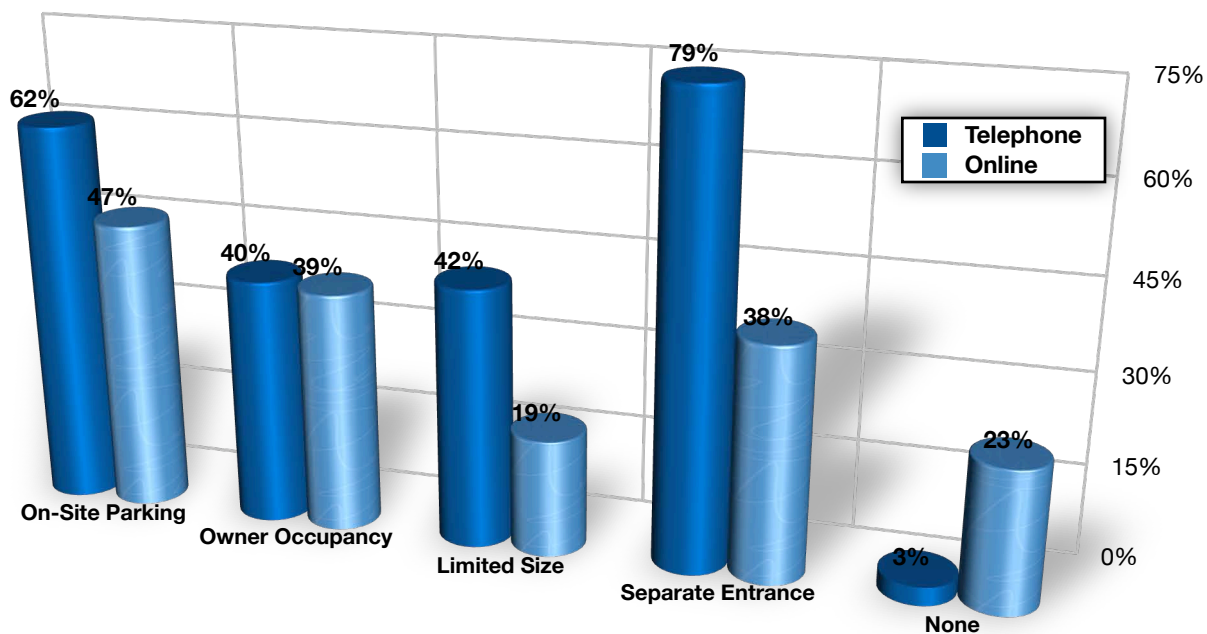


● Strongly support ● Somewhat support ● Depends/ No opinion
● Somewhat oppose ● Strongly opposed



5. **Importance of Conditions or Regulations.** When queried about the importance of certain conditions, telephone respondents were more likely to favour putting in place “more conditions”, such as the “requirement to have a separate entrance”, “on-site parking”, and “restriction of size of the suite”. The one category where responses were similar was the condition of owner occupancy, where the owner is required to live in the house.

Figure 5: Level of Importance of Various Conditions



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6. **Acceptability of Types of Secondary Suites.** Overall, there was a higher level of acceptance of various types of suites by online survey participants relative to telephone survey participants. Among both respondent groups, suites contained within a house (basement, main floor, upper floor) were more acceptable than suites outside a house (above a garage, garden-level).

Figure 6a: Acceptability of Different Types of Secondary Suites (Telephone)

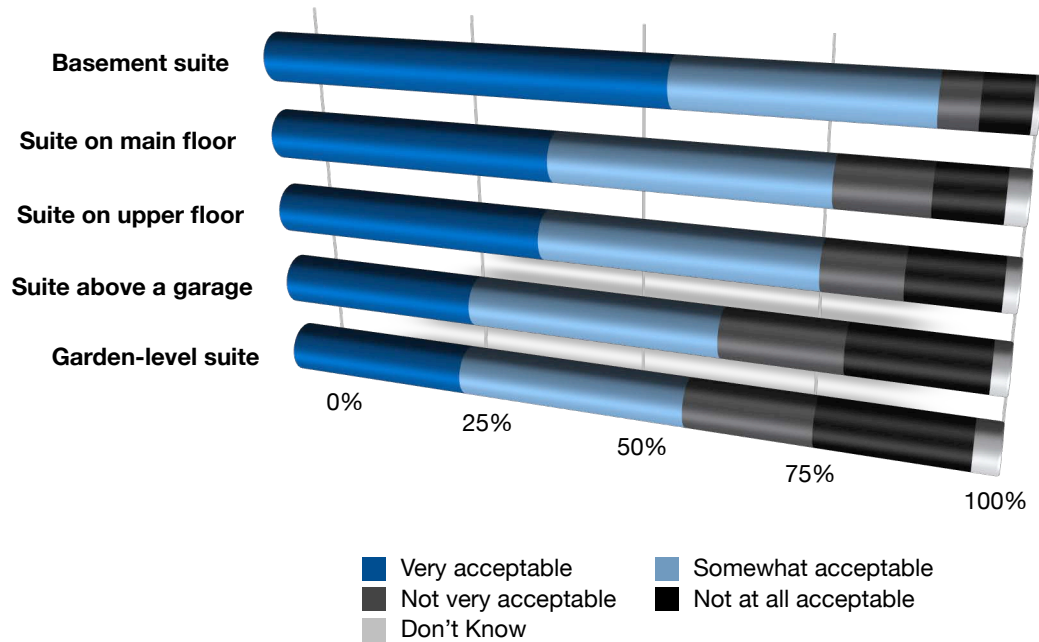
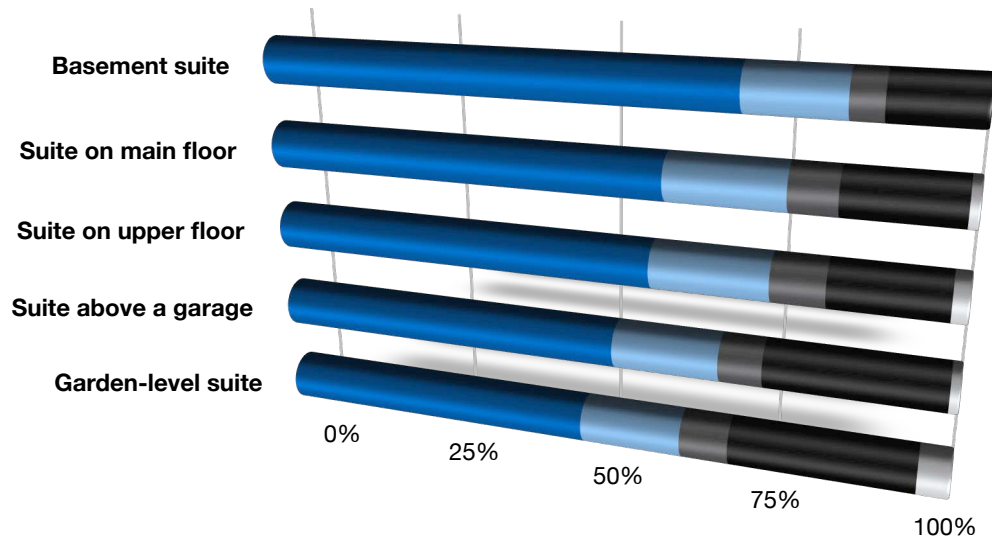
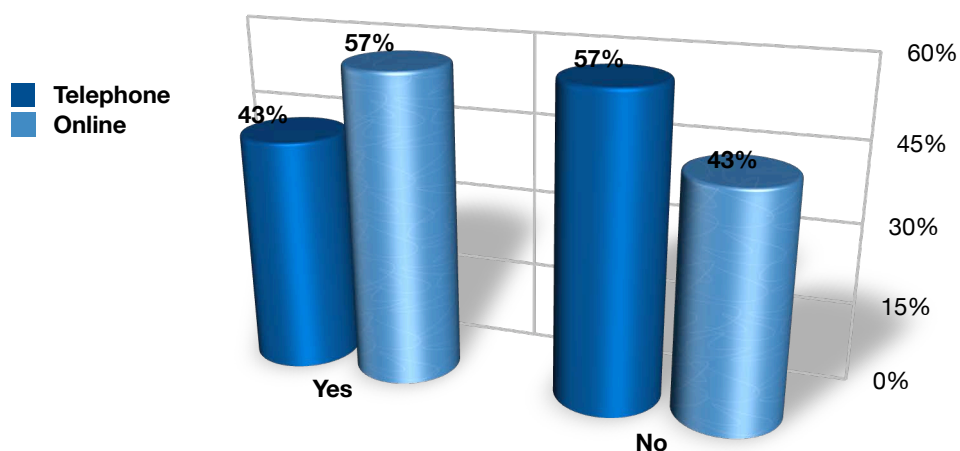


Figure 6b: Acceptability of Different Types of Secondary Suites (Online)



7. **Ever Lived in a Secondary Suite?** A large number of respondents from both telephone and online surveys reported having lived in a secondary suite. Among residents who *currently* live in a secondary suite, the main reason given was “affordable rent”. Closeness to work, school and access to a yard were also noted as being important.

Figure 7: Respondents Who Have Lived in a Suite

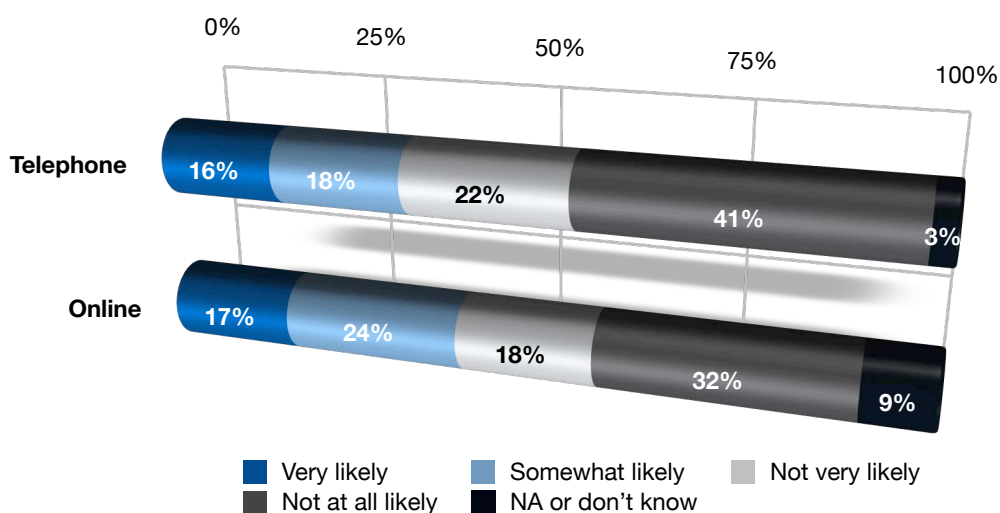


8. **Likelihood of considering building a new suite or upgrading a suite to take advantage of the Grant Program?** Among telephone respondents, 34 percent indicated they would consider the program. The percentage of online respondents was somewhat higher – 41 percent.



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Figure 8: Likelihood of Implementing a Suite



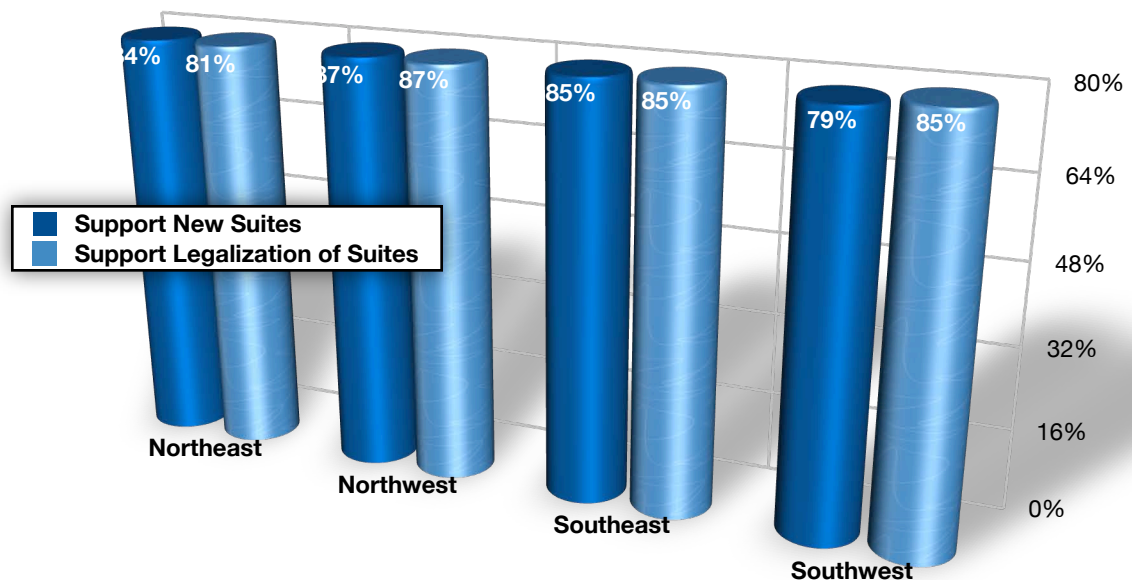
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Differences by Geography

The telephone survey results were examined according to the area of residence of the respondents, based on their postal code. For the purposes of this analysis, Calgary was divided into four quadrants – Northeast, Northwest, Southeast, and Southwest. The results of this analysis by geographic areas are presented for information purposes. However, the sub area sample sizes are too small to generate 95% confidence level and the differences were not found to be statistically significant.

- **Informed about Program.** Across the four quadrants, there was a varied level of awareness of the Program, ranging from as high as 45 percent in the Northeast to as low as 26 percent in the Southwest.
- **Development of New Suites & Legalization of Existing Suites (With Regulations).** Figure 9 shows that, among survey respondents, there was a high level of support for secondary suites across all four quadrants in the City of Calgary. The variations were too small to be significantly different.

Figure 9: Support for Suites by Geographic Quadrant



- **Housing with Suites on Own Block.** In all the areas, a small proportion of respondents said that more than half the houses on their block had secondary suites. The responses ranged from as high as 18 percent to as low as 5 percent.
- **Likelihood of Considering Building a New Suite or Upgrading a Suite to Take Advantage of the Grant Program.** In the Northeast, 43 percent of respondents indicated they would be likely to consider putting in a secondary suite in order to take advantage of the Grant Program. In the Northwest and Southwest, 31 percent indicated they would consider the opportunity, as did 32 percent in the Southeast. Again, these results are not significantly different.

Differences by Tenure

The telephone survey results were examined according to whether the respondent was an owner or a tenant. The following factors are noted:

- There was little difference between renters and owners in support for the greater development of new secondary suites (89 percent vs. 82 percent). Similarly, in relation to the legalization of existing suites, the level of acceptance was not significantly different (83 percent vs. 82 percent).
- Seventy-four percent of owners and 84 percent of renters would support having secondary suites in their own neighbourhood, subject to regulations.
- Among home owners, 28 percent indicated they would consider building a new suite or upgrading a suite to take advantage of the City's Grant Program.

Differences by Age

The telephone survey results were examined according to the age of the respondents. Three age groups were chosen – those between the ages of 18 and 35, between 35 and 54, and 55 or greater. The following factors are noted:

- There was a lower level of support for the greater development of new secondary suites in respondents age 55+ (79 percent) in contrast to those less than 35 years and those between 35 and 54 (86 and 85 percent respectively). These results are statistically different to a confidence level of 90%.
- There was little difference in relation to the legalization of existing suites, ranging from 83 percent to 86 percent among the respondents across the three age groups.
- When examining responses regarding supporting suites in their own neighbourhoods (subject to regulations), 80 percent of the youngest group indicated support, 77 percent among those between the ages of 35 and 54, and 71 percent among the oldest group.
- Among those in the youngest group, 47 percent indicated they would consider building a new suite or upgrading a suite to take advantage of the City's Grant Program. The percentage drops off to 30 percent in the age group 35 to 54 and 20 percent in the group age 55+.



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APPENDIX

City of Calgary Secondary Suite Surveys – Tables

Have you heard of the City of Calgary's Secondary Suites Grant Pilot Program?

Answer	Telephone	Online
Yes	60%	34%
No	37%	65%
Don't Know	3%	1%

If you have heard of Calgary's Grant Pilot Program, have you inquired or looked at any information about this program in brochures or on the City website or via the City's 3-1-1 phone number?

Answer	Telephone	Online
Yes	9%	36%
No	91%	63%
Don't Know	0%	1%

Thinking of newly built secondary suites ... To what extent do you support or oppose greater development of new secondary suites in Calgary, subject to regulations?

Answer	Telephone	Online
Strongly in support	30%	59%
Somewhat in support	54%	17%
Somewhat opposed	8%	5%
Strongly opposed	4%	10%
Depends	0.4%	8%
No opinion	4%	0.4%
Total	100%	100%

And to what extent do you support or oppose legalization of existing secondary suites in Calgary, subject to regulations?

Answer	Telephone	Online
Strongly in support	41%	60%
Somewhat in support	44%	14%
Somewhat opposed	7%	6%
Strongly opposed	3%	10%
Depends	0.4%	10%
No opinion	5%	0%
Total	100%	100%

Thinking of both new and upgraded secondary suites ... Would you support or oppose having secondary suites in your own neighbourhood, subject to regulations?

Answer	Telephone	Online
Strongly in support	32%	53%
Somewhat in support	44%	20%
Somewhat opposed	12%	3%
Strongly opposed	9%	15%
Depends	0%	8%
No opinion	3%	0%
Total	100%	100%

Which, if any, of the following conditions or regulations do you consider important for City approval of secondary suites?

Answer	Telephone	Online
On-site parking (off the street)	62%	47%
Owner lives in the house	40%	39%
Restriction of size of the suite	42%	19%
Requirement to have separate entrance	79%	38%
Any other conditions	41%	21%
None / No conditions necessary	3%	23%

Secondary suites can be built in a number of ways -- as part of the house or detached from it. Which, if any, of the following would you find acceptable in your neighbourhood?

Telephone Survey N = 501					
Question	Very acceptable	Somewhat acceptable	Not very acceptable	Not at all acceptable	Don't Know
Basement suite	57%	32%	5%	6%	1%
Suite on the main floor of a house	41%	37%	12%	8%	3%
Suite on an upper floor of a house	40%	37%	10%	11%	2%
Detached suite above a garage	29%	35%	16%	18%	2%
Detached garden-level suite	27%	33%	17%	20%	3%

Online Survey N = 229					
Question	Very acceptable	Somewhat acceptable	Not very acceptable	Not at all acceptable	Don't Know
Basement suite	70%	14%	4%	12%	0%
Suite on the main floor of a house	60%	17%	7%	16%	1%
Suite on an upper floor of a house	58%	17%	7%	16%	2%
Detached suite above a garage	53%	15%	6%	24%	1%
Detached garden-level suite	48%	15%	7%	26%	4%

What type of dwelling do you live in?

Answer	Telephone	Online
Single, detached house	72%	83%
Duplex	4%	8%
Townhouse	5%	3%
Apartment or condo	17%	5%
Other (specify)	2%	0%
Total	100%	100%

Do you own or rent your current home?

Answer	Telephone	Online
Own	78%	91%
Rent	21%	8%
Rather not say	1%	1%
Total	100%	100%

Have you ever lived in a secondary suite?

Answer	Telephone	Online
Yes	43%	57%
No	57%	43%
Rather not say	0.2%	0.4%
Total	100%	100%

Do you currently live in a house with a secondary suite?

Answer	Telephone	Online
Yes	78%	91%
No	21%	8%
Rather not say	1%	1%
Total	100%	100%

If you currently live in a secondary suite, why did you choose to live in a secondary suite?

Answer	Telephone	Online
Affordable rent	94%	100%
Close to work	24%	45%
Close to school	8%	18%
Close to family	0%	0%
Access to a yard	6%	36%

If you currently are a landlord of a secondary suite, why did you choose to rent it?

Answer	Telephone	Online
Provide housing for a family member	26%	37%
Extra income	68%	63%
Safety	0%	21%
Other	0%	37%

In your opinion, what types of people do you think would be most likely to live in a suite?

Answer	Telephone	Online
Young people	35%	88%
Students	40%	75%
Low Income	29%	0%
Single people	8%	0%
Family / relatives	8%	45%
Immigrants/ new to city	10%	0%
Seniors/ retired	7%	31%
Other	7%	18%

If you are a home owner or are considering purchasing a home... How likely are you to consider building a new suite or upgrading a suite to take advantage of the City of Calgary's Secondary Suites Grant Pilot Program?

Answer	Telephone	Online
Very likely	16%	17%
Somewhat likely	18%	24%
Not very likely	22%	18%
Not at all likely	41%	32%
Not a homeowner and not considering purchasing a home	2%	6%
Don't know	1%	3%
Total	100%	100%

Differences by Geography – Telephone Survey N = 501

The following provides a breakdown of the key results of the telephone survey by responses from people in each of the four Calgary quadrants. The survey respondents were screened to ensure that the sample was representative of the population's geographic distribution across the four quadrants.

In which of the following quadrants of Calgary do you live?

Answer	%
Northeast	16%
Northwest	31%
Southeast	25%
Southwest	29%
Total	100%

Have you heard of the City of Calgary's Secondary Suites Grant Program?

Answer	Yes	No	Don't Know
Northeast	45%	55%	0%
Northwest	34%	66%	0%
Southeast	36%	64%	0%
Southwest	26%	71%	3%

If you have heard of the City's program, have you inquired about the program? in brochures on the City's website or via the City's 3-1-1 phone number?

Answer	Yes	No
Northeast	16%	84%
Northwest	7%	93%
Southeast	5%	95%
Southwest	7%	93%

Thinking of newly built secondary suites... To what extent do you support or oppose greater development of new secondary suites in Calgary, subject to regulations?

Answer	Support	Oppose	Depends/Don't Know
Northeast	84%	14%	2%
Northwest	87%	10%	3%
Southeast	85%	11%	4%
Southwest	79%	15%	6%

And to what extent do you support or oppose legalization of existing secondary suites in Calgary, subject to regulations?

Answer	Support	Oppose	Depends/Don't Know
Northeast	81%	14%	4%
Northwest	86%	10%	4%
Southeast	85%	9%	6%
Southwest	85%	9%	5%

Thinking of both new and upgraded secondary suites ... Would you support or oppose having secondary suites in your own neighbourhood, subject to regulations?

Answer	Support	Oppose	Don't Know
Northeast	83%	17%	0%
Northwest	82%	17%	1%
Southeast	77%	21%	2%
Southwest	66%	26%	7%

As far as you know, would you say that your block has secondary suites in more than half the houses, less than half or none / don't know?

Answer	More than half the houses	Less than half the houses	Don't Know
Northeast	18%	51%	31%
Northwest	6%	37%	57%
Southeast	7%	35%	58%
Southwest	5%	29%	66%

If you are a home owner or are considering purchasing a home ... How likely are you to consider building a new suite or upgrading a suite to take advantage of the City of Calgary's Secondary Suites Grant Pilot Program?

Answer	Likely	Unlikely	N/A/ Don't Know
Northeast	43%	52%	5%
Northwest	31%	67%	2%
Southeast	32%	66%	2%
Southwest	31%	66%	3%

Differences by Tenure – Telephone Survey N = 501

The following provides a breakdown of selected results of the telephone survey by responses from people in each of the four Calgary quadrants.

Thinking of newly built secondary suites... To what extent do you support or oppose greater development of new secondary suites in Calgary, subject to regulations?

Answer	Owner	Renter
Support	82%	89%
Oppose	14%	7%
Don't Know	4%	5%
Total	100%	100%

And to what extent do you support or oppose legalization of existing secondary suites in Calgary, subject to regulations?

Answer	Owner	Renter
Support	85%	84%
Oppose	11%	8%
Don't Know	4%	8%
Total	100%	100%

Thinking of both new and upgraded secondary suites ... Would you support or oppose having secondary suites in your own neighbourhood, subject to regulations?

Answer	Owner	Renter
Support	74%	84%
Oppose	23%	12%
Don't Know	3%	4%
Total	100%	100%

If you are a home owner or are considering purchasing a home... How likely are you to consider building a new suite or upgrading a suite to take advantage of the City of Calgary's Secondary Suites Grant Pilot Program?

Answer	Owner	Renter
Very Likely	13%	26%
Likely	15%	25%
Other	72%	49%
Total	100%	100%

Differences by Age – Telephone Survey N = 501

The following provides a breakdown of selected results of the telephone survey by responses from people in each of three age groups.

Thinking of newly built secondary suites... To what extent do you support or oppose greater development of new secondary suites in Calgary, subject to regulations?

Answer	18-34	35-54	55+
Support	86%	85%	79%
Oppose	11%	12%	16%
Don't Know	3%	4%	6%
Total	100%	100%	100%

And to what extent do you support or oppose legalization of existing secondary suites in Calgary, subject to regulations?

Answer	18-34	35-54	55+
Support	87%	85%	82%
Oppose	6%	12%	13%
Don't Know	6%	3%	5%
Total	100%	100%	100%

Thinking of both new and upgraded secondary suites ... Would you support or oppose having secondary suites in your own neighbourhood, subject to regulations?

Answer	18-34	35-54	55+
Support	80%	76%	70%
Oppose	15%	21%	27%
Don't Know	5%	2%	2%
Total	100%	100%	100%

If you are a home owner or are considering purchasing a home... How likely are you to consider building a new suite or upgrading a suite to take advantage of the City of Calgary's Secondary Suites Grant Pilot Program?

Answer	18-34	35-54	55+
Very Likely	21%	15%	8%
Likely	26%	14%	12%
Other	53%	71%	80%
Total	100%	100%	100%