

New House Owners' Satisfaction Survey 2017

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Preface

This is the seventh in a series of reports on the New House Owners' Satisfaction Survey. The data that makes up this report was obtained through surveying new house owners on the performance of their builder. The purpose of the survey is to add a quality measure to other work on building industry performance.

This report is intended for several 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.

Acknowledgements

The Building Research Levy funded this work.

The authors would like to acknowledge Riaan Labuschagne and Patrick O'Neill (Global Research) for their contribution to this project.

The project would not be possible without those new house owners who took the time to fill in our survey form. We would like to thank all of those people who filled in the survey form and returned it to BRANZ.



New House Owners' Satisfaction Survey 2017

BRANZ Study Report SR395

Authors

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Reference

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Abstract

This report presents the results of the seventh annual 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 spec builds (a house built without a specific committed buyer) and houses built by family members.

Results show that house owners' satisfaction with their builders has fallen in 2017. The percentage of respondents that rated their builder as satisfactory has eased to 62%, from 67% in 2016. Owners are rating their builder highly on their ability to deliver a quality home with a good standard of finish. However, there remains room for improvement in the service provided after handover, particularly around the fixing of defects. Disputes over cost remain prevalent.

Overall, 85% of respondents reported having to call back their builder to fix defects after first occupancy. Most respondents were not surprised by the number of defects in their new home, indicating that builders are doing well to communicate the challenges of building a new home to their clients.

Keywords

New houses, builder performance, franchises, independent builders, defects, designers, input into house design, builder, contract, dispute costs, call-backs, satisfaction.



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Executive summary

The main findings of this report are as follows:

- Overall satisfaction scores decreased in 2017, with 62% rating their builder as fairly or very satisfactory, down from 67% in 2016. This shows that the industry's standard of service is slipping.
- Owners were happiest with the overall quality of their home and the standard of finish. This shows that the industry is still performing well at delivering houses that the client is happy with.
- Owners were least happy with the fixing of defects after first occupancy, communication from the builder and service after moving in. Service after moving in continues to be an area for improvement for the industry.
- Over 33% of respondents chose their builder based on the best of several quotes received and 28% due to the quality of the show home. Recommendation from friends or family was also important, used by 25% of owners. Most respondents stated that an important feature in choosing their builder was their quality/reputation. However, 37% of respondents opted for a builder that offered a fixed price.
- Most respondents had a written contract with their builder. However, 9% of those respondents who used an independent builder did not have a written contract.
- About 18% of respondents had a dispute with their builder over the final cost, up by 5 percentage points from 2016. Disputes were slightly more common for those without a written contract or for those who selected their builder due to fixed price certainty or the lowest price.
- The call-back rate has grown to 85% in this survey. The most frequently called back trade was the painter, followed by the plumber and electrician.



1. Introduction

The BRANZ New House Owners' Satisfaction Survey has been running annually since 2011. The survey was developed in response to a lack of measures of quality of output from the industry. It allows us to monitor trends in the quality of output for the new residential building industry.

The New House Owners' Satisfaction Survey aims to find out from the owner of the new house how they thought their builder performed and how they perceived the quality of their completed house. The survey also monitors the proportion of owners that had to call back their builder, how likely the owner is to recommend their builder and the important considerations in choosing their builder.

New owners are informed in the letter accompanying the survey form how we define the term 'builder' for this survey. For the purpose of the survey and results presented within this report, the term 'builder' refers to all people involved in the build process. This includes (but is not limited to) any office staff within the building company, the project manager and any subcontractors. This allows us to survey owners about the whole build process, from their dealings with their builder during the buying process to the fixing of defects after first occupancy.



2. Methodology

The methodology for the BRANZ New House Owners' Satisfaction Survey has remained largely the same over the 7 years that the survey has been running. This allows us to compare results across the survey, benchmark performance and comment on changes over time. The survey has historically been distributed through a brief postal survey. However, for the first time in 2017, a subset of survey sample instead received a postcard invite to complete the survey online. In return for completion of the survey, postal survey recipients were offered the incentive of a Lotto ticket or a book voucher. The recipients of the online survey were placed in the draw to win one of several Prezzy Cards.

A sample of 3,900 new house owners was identified from consents taken out between April 2016 and March 2017. This period was selected to largely represent houses that were completed in the 2017 calendar year, assuming that a house typically takes 9–10 months from consent to completion. The sample focuses on detached housing, although some multi-unit dwellings were included.

Consents were removed where:

- the builder was spec building (a house built without a specific committed buyer)
- the builder and owner shared a last name
- the builder was also listed as an owner.

The survey sample consisted of the following territorial authorities:

Auckland	Christchurch	Dunedin	Far North
Gisborne	Hamilton	Hutt City	Invercargill
Kapiti	Marlborough	Napier	New Plymouth
Palmerston North	Porirua	Queenstown Lakes	Rotorua
Tasman	Tauranga	Thames-Coromandel	Waikato
Waimakariri	Waipa	Wellington	Western Bay of Plenty
Whangarei			

BRANZ received 652 returned and completed surveys (a 16% response rate), which have been used for the analysis represented in this report. A large number of surveys were unable to be delivered due to the house still being incomplete, a change in street name and/or number or the build not progressing past consent stage. The actual response rate from those surveys that were able to be delivered is likely to be much higher.

The large number of responses means that changes in average scores are highly likely to represent changes in overall industry performance. However, this cannot be guaranteed.



3. Results

This section presents the results of the BRANZ New House Owners' Satisfaction Survey 2017.

There are typically several questions in the survey that allow us to get an idea of the composition of the respondents and how that changes over time:

- Did the respondent use a franchise or independent builder?
- Has the respondent built previously?
- Did the respondent purchase a house only or a house and land package?

All of these aspects have been shown in previous surveys to have an influence on the satisfaction levels and likelihood of recommending the builder.

How many respondents used franchise builders?

About 57% of respondents used franchise builders this year (Figure 1). This was down by 5 percentage points from last year's survey. As the survey excludes spec building, it is possible that there has been a shift to spec building by franchise builders.

The most commonly used franchise builders in this survey were G J Gardner Homes, Jennian Homes and Signature Homes. This differs somewhat from other 'top house builder' sources such as BCI¹ because spec builds and multi-unit dwellings are not targeted in this survey.

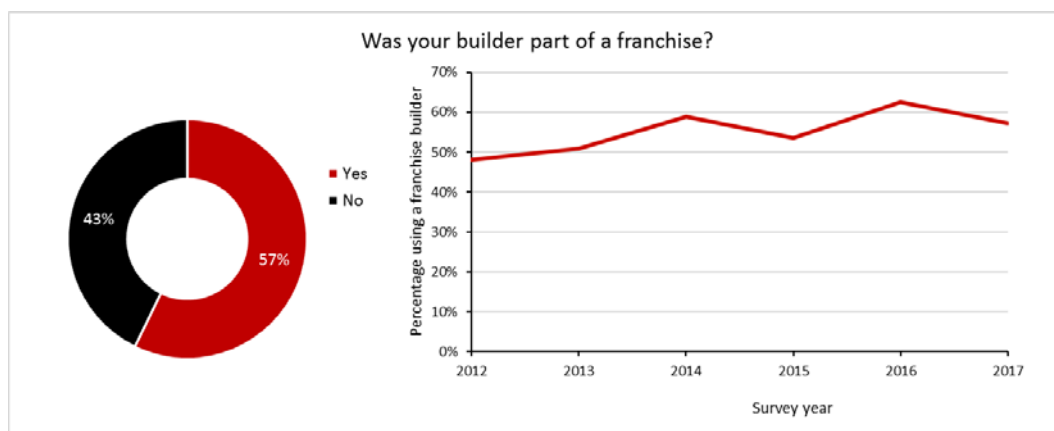


Figure 1. Percentage using a franchise builder.

How many respondents had built previously?

The majority of respondents were first-time builders in this survey (Figure 2). This was a slight decrease in the percentage of owners that had built previously from the last survey.

The percentage of respondents that had built previously has continued to decrease over the course of the survey, meaning that there has been an increase in first-time builders.

¹ www.nzherald.co.nz/business/news/article.cfm?c_id=3&objectid=11913169

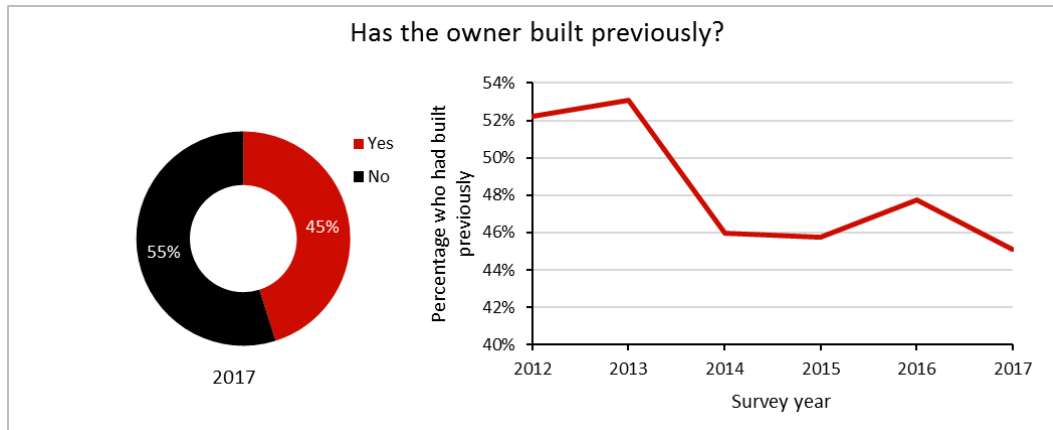


Figure 2. Percentage that had built previously.

Those respondents that chose a house and land package are generally less happy with the performance of their builder than those who bought a house only. House and land packages have become more prevalent in our survey sample over the last 2 years (Figure 3). Just under one-fifth of respondents chose a house and land package in this year's survey.

It is worth noting that the house and land package group only contains those who were involved in the new build from the consent stage. Those clients who chose a house and land package after the consent was issued (i.e. a spec build) are deliberately excluded from our survey sample in order to capture the end-to-end building process.

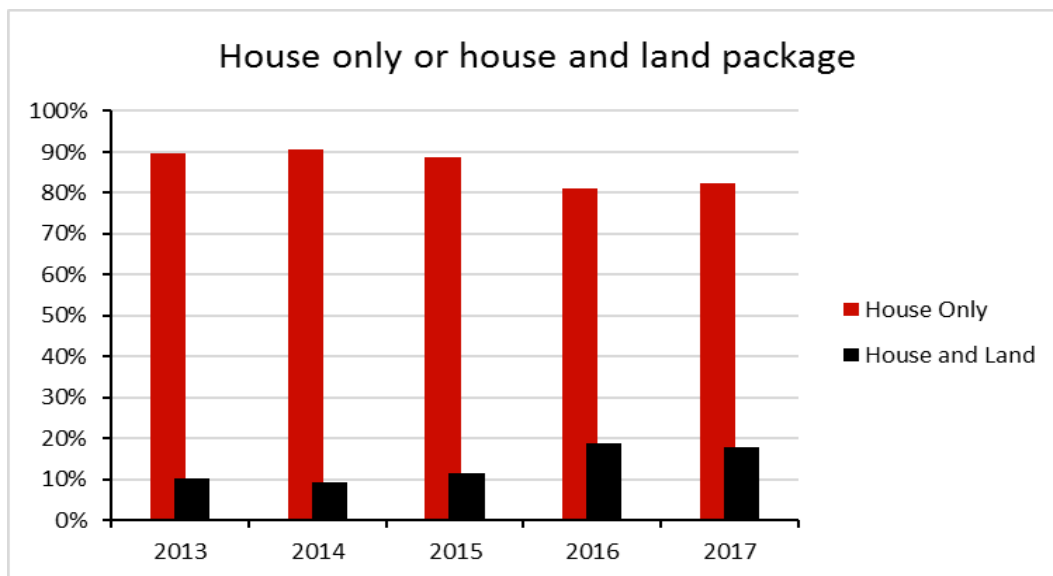


Figure 3. House package.

Did the owner have a written contract with their builder?

Since 2015, having a written contract with your builder has been a requirement for all work that will cost more than \$30,000.² Overall, 95% of respondents reported having a written contract with their builder.

² www.building.govt.nz/projects-and-consents/why-contracts-are-valuable



Those who used an independent builder were more likely to forego a written contract than those who used a franchise builder. Only 91% of respondents that used an independent builder had a written contract compared to 98% of franchise builders.

Value of the build

Very few respondents spent less than \$250,000 on their build. These houses tended to be smaller, with many falling into the 100–120 m² range. They tended to be built by owners that were building for the first time, and all were house-only contracts. The majority of respondents that bought a house and land package spent \$400,001–600,000 on their new build (Table 1). Those houses that were part of a house and land package were slightly larger (averaging 201 m²) than their house-only counterparts (averaging 195 m²).

Table 1. New-build value.

New-build value	Number of responses	Percentage
Under \$250,000	30	6%
\$250,001–400,000	203	39%
\$400,001–600,000	193	38%
\$600,000+	88	17%

The majority of respondents with contracts in the \$250,001–400,000 range utilised franchise builders (Figure 4). On the other hand, respondents with contracts in the \$400,001–600,000 and \$600,000+ value ranges were more likely to utilise independent builders.

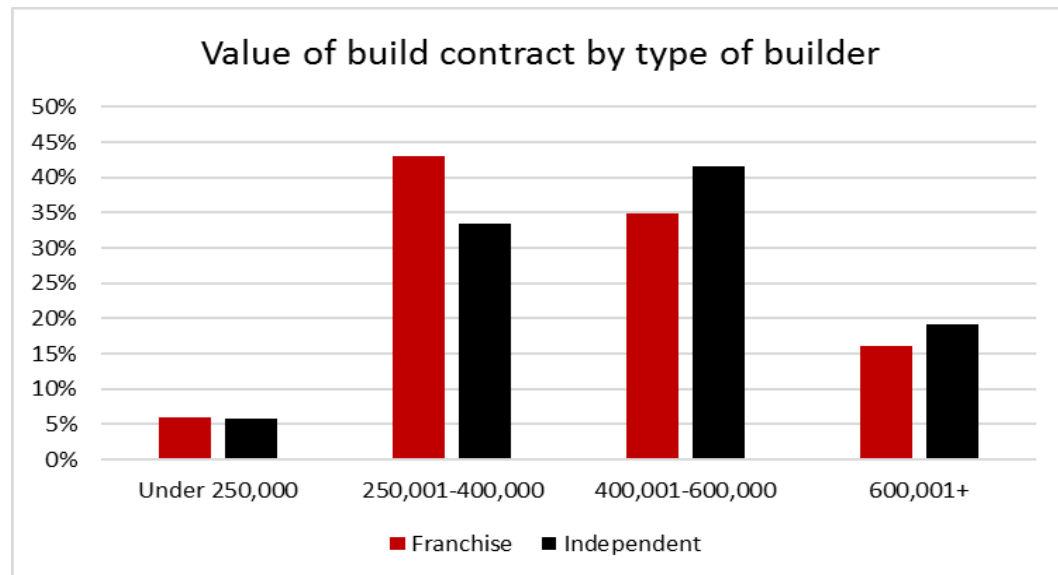


Figure 4. Value of build contract by type of builder.

3.1 Overall satisfaction

Average satisfaction scores have decreased in 2017 following two consecutive increases (Figure 5). Most respondents did rate their builder very highly, with 62% of respondents rating their builder on average between 4 (fairly satisfied/good) and 5 (very satisfied/good). Just 15% of respondents scored their builder on average less than 3, an increase of 2 percentage points from the previous survey.

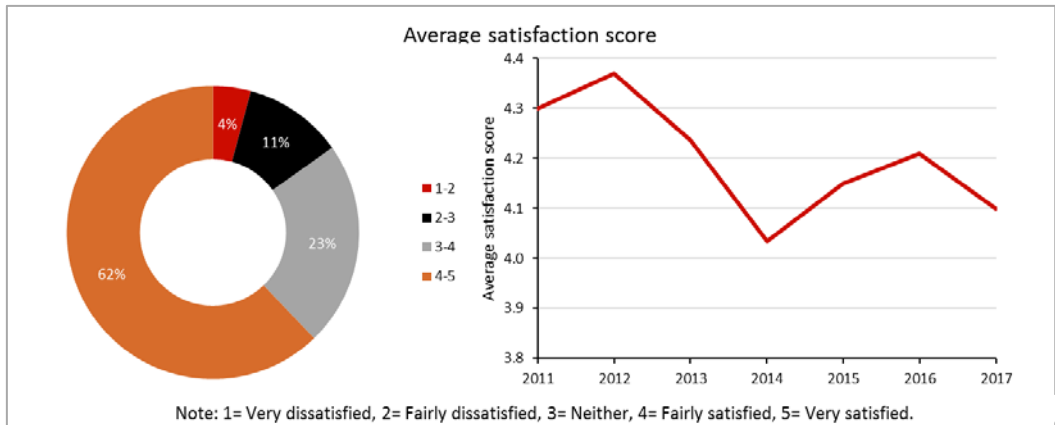


Figure 5. Average satisfaction score.

New house owners were happiest with (Figure 6 and Figure 7):

- the overall quality of their home
- the standard of finish of their new home.

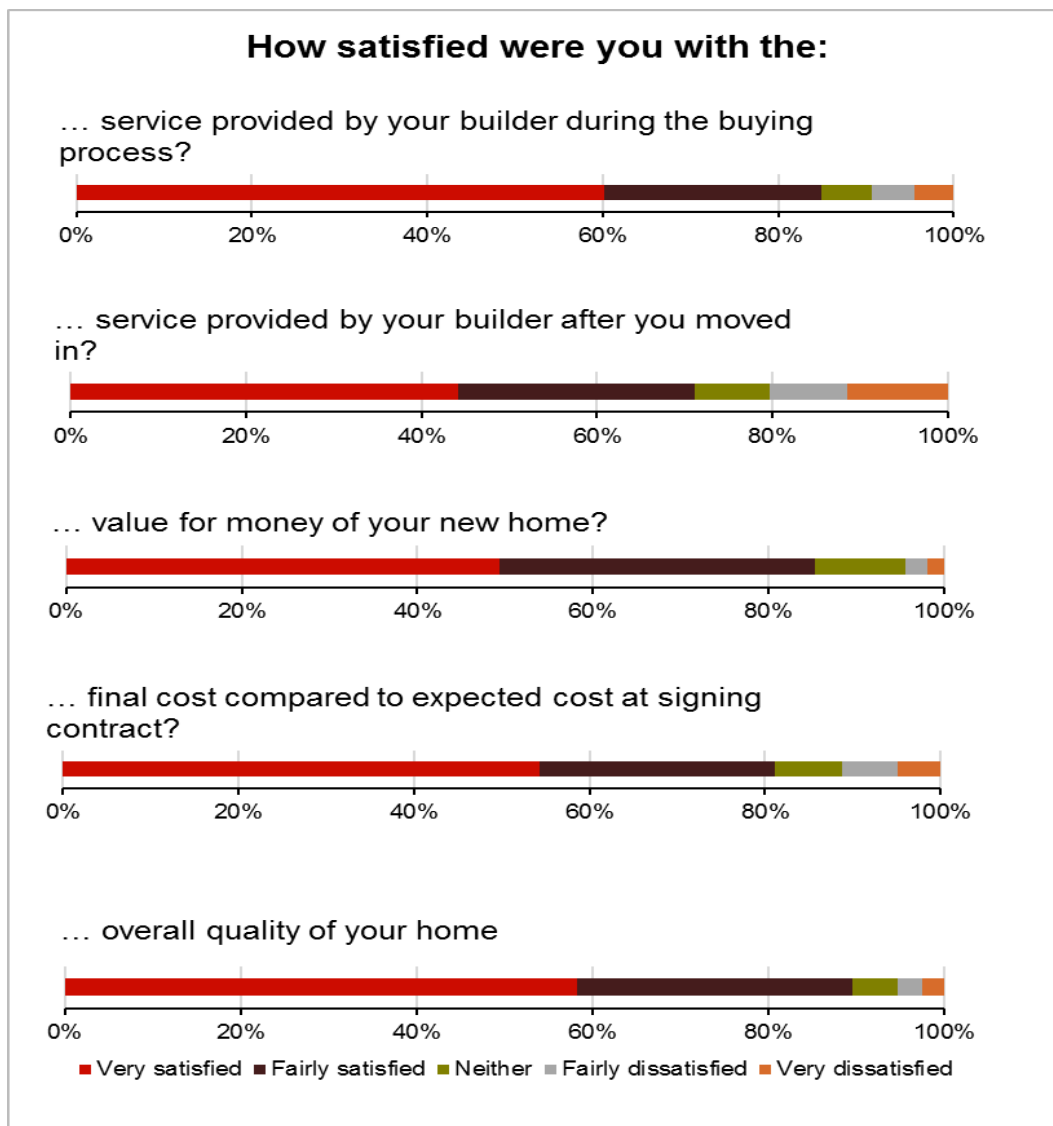


Figure 6. Satisfaction levels.

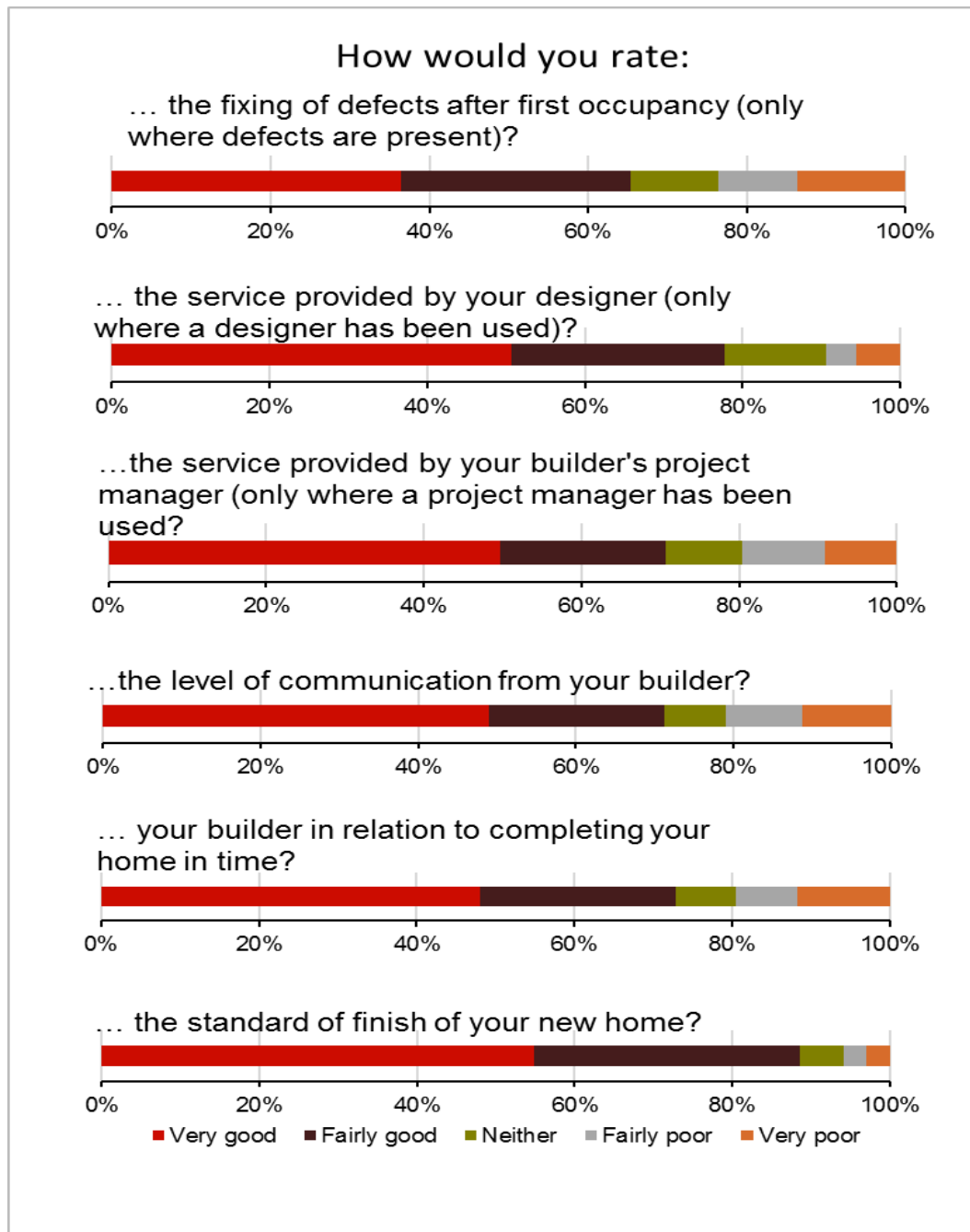


Figure 7. Ratings.

They were least happy with:

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

The results are similar to previous surveys. However, the drop in satisfaction from 2016 reflects poorly on the industry and will continue to be closely monitored in future surveys. Despite the slip in service, the industry is performing well at delivering a house the client is happy with. Just 5.3% of respondents were dissatisfied with the overall quality of their home, and 5.8% were dissatisfied with the standard of finish.



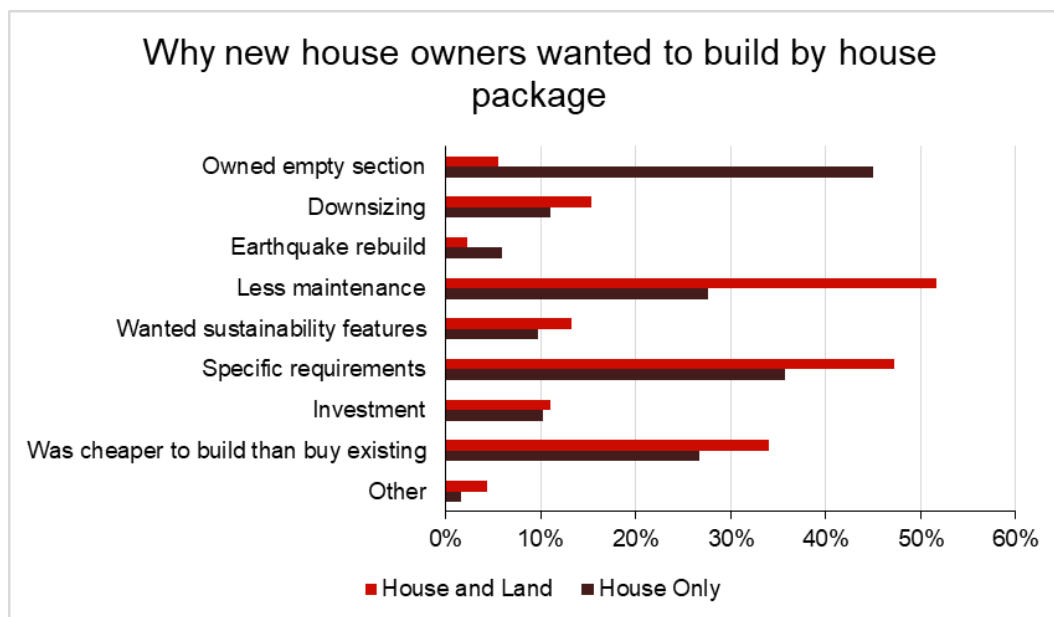
However, the industry is still not doing enough to follow up after handover. The three criteria where clients were least happy can all be attributed to how busy the industry is currently. It remains a challenge for the industry to improve their follow-up after handover as their workloads increase.

3.2 Why respondents chose to build rather than buy an existing house

The most common reasons for respondents choosing to build rather than buy an existing house were (Figure 8):

- they owned an empty section
- new houses require less maintenance
- they had specific requirements that were not catered to by the existing stock
- it was felt to be cheaper to build rather than buy an existing house.

Those owners that chose a house and land package were most likely to state they wanted to build because it would mean less maintenance or that it would best meet their specific requirements. Owners that chose a house-only contract reported owning an empty section as the main reason they wanted to build.



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

Figure 8. Why respondents wanted to build.

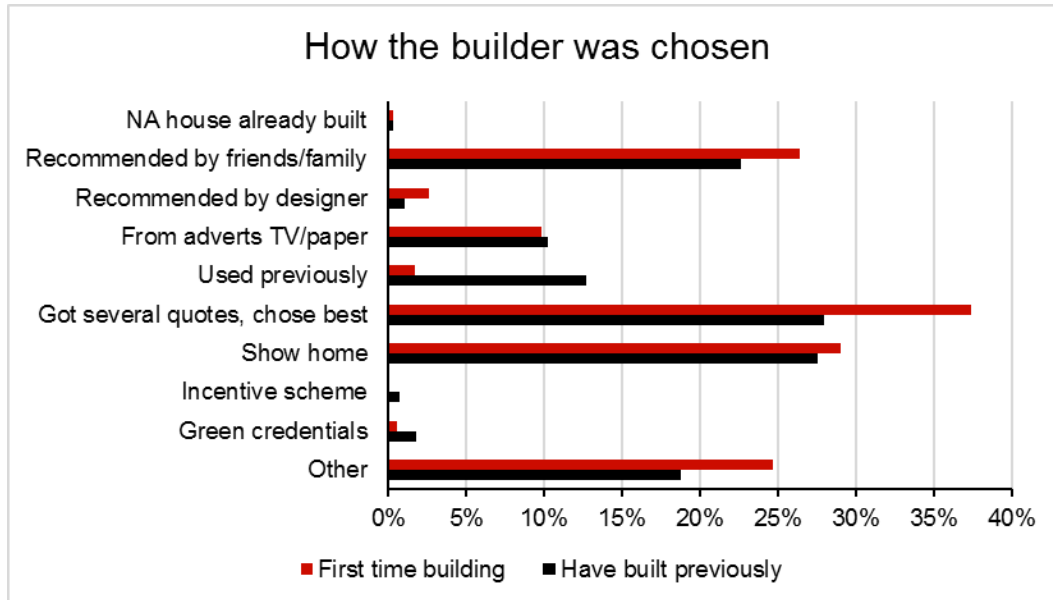
3.3 How builders were chosen

Similar methods for choosing a builder were employed by both first-time house builders and those who had built previously (Figure 9). A recommendation from friends or family was used by 26% of first-time builders and 23% of those that had built previously. Obtaining several quotes and choosing the best was more common amongst first-time builders (37%) than those that had built previously (28%). Choosing a builder based on their show home was employed by 29% and 28% respectively. Recommendations from friends and/or family was the second-most common reason for choosing a builder overall. Those who were building for the first



time were more likely to rely on a recommendation than those who had built previously.

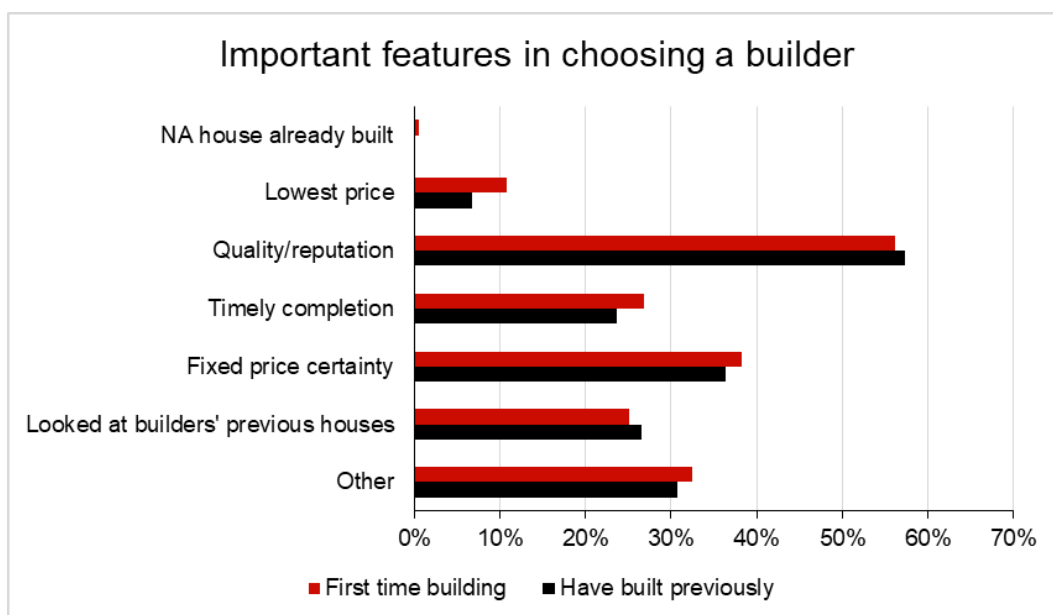
The 'Other' category is largely made up of owners that were building due to the Canterbury earthquake and whose builder was facilitated through their insurance company.



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

Figure 9. How the builder was chosen.

The majority of respondents stated that the quality/reputation of their builder was the most important feature in choosing their builder (Figure 10). Fixed price certainty was the next most commonly selected feature, with over two-thirds of respondents opting for a builder that offered a fixed price. Just one-tenth of respondents stated that their builder offering the lowest price was an important feature.



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

Figure 10. Important features in choosing builder.



3.4 How new house owners would speak about their house builder

The majority of respondents to this year's survey would speak positively about their builder (Figure 11). About 70% of respondents would recommend their builder, the majority of which would do so without being asked. Just under 21% of respondents would speak critically about their builder, with a number of these accompanied by highly critical comments. Negative comments were typically focused on the areas of deficiencies in service and communication and disputes over cost and scope. Since 2016, there has been a slight increase in the proportion of respondents that would speak critically of their builder and a slight decrease in those that would recommend their builder.

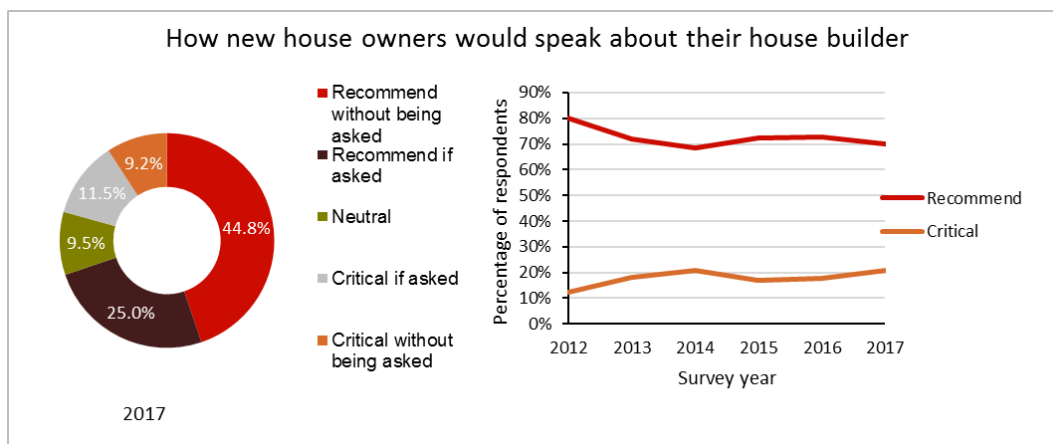


Figure 11. How respondents would speak about their builder.

3.5 Disputes over final cost

About 18% of respondents had a dispute with their builder over the final cost (Figure 12). This was up from 13% in 2016.

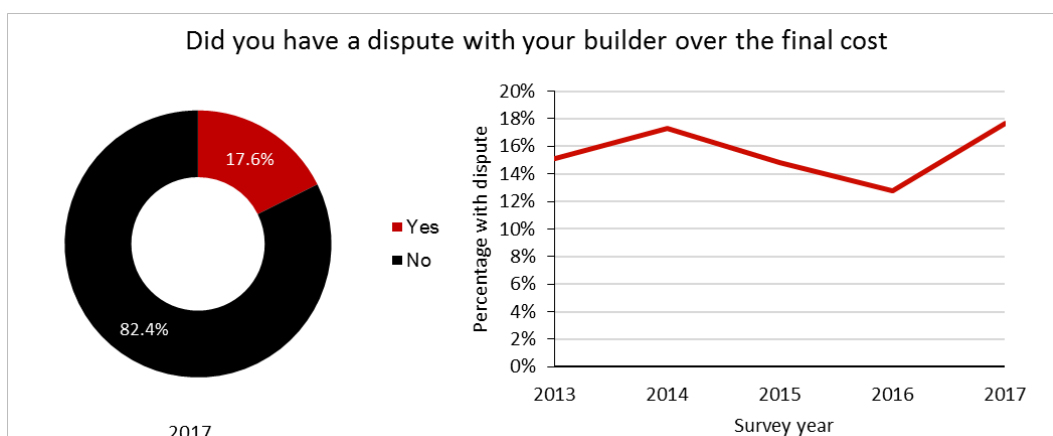


Figure 12. Disputes over final cost.

These disputes tended to focus on:

- charges for variations
- penalties for not meeting completion dates



- items going beyond the prime cost (PC) sum, particularly with unrealistically low PC sums
- incorrect materials/products used
- additional charges for items believed to be included in the contract.

The growing number of cost disputes highlights the importance of both parties being familiar with the contract and understanding it, as this helps to set appropriate expectations early in the process.

Disputes over final cost were more common for those who selected their builder for fixed price certainty or the lowest price than for other reasons (Figure 13).

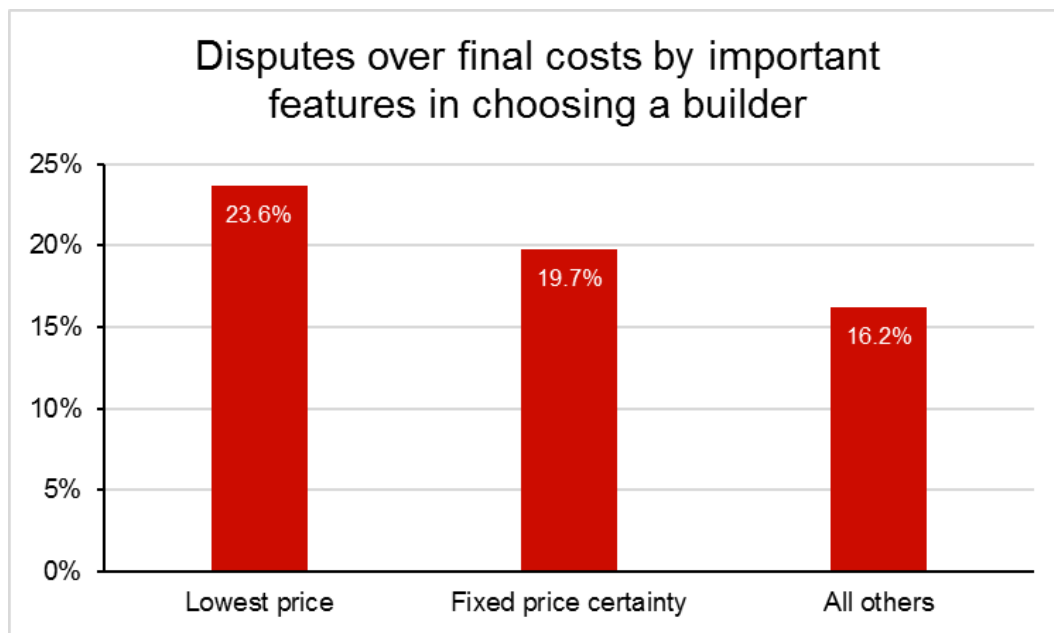


Figure 13. Disputes by important features in choosing builder.

Disputes over the final cost were similarly prevalent across all values of build (Figure 14). This is in contrast to previous years surveys, which found disputes were more common in lower-value builds.

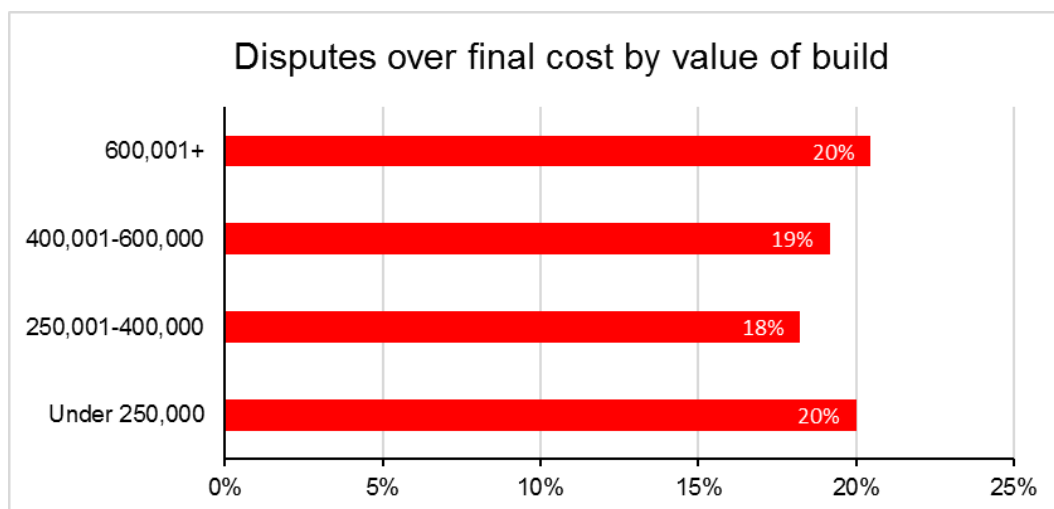


Figure 14. Disputes over final cost by value of build.



3.6 Call-backs

There has been a slight increase in the proportion of respondents that had to call back their builder in 2017, bucking a downward trend since 2014 (Figure 15).

In 2017, 85% of respondents called back their build to fix defects after first occupancy, well above the low of 68% in 2012.

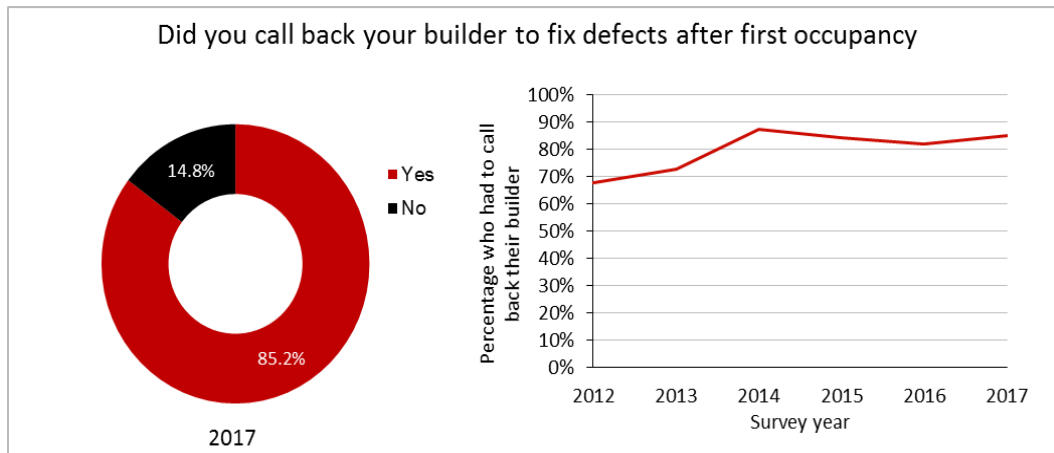


Figure 15. Call-backs.

At 82.5%, the proportion of respondents from the Auckland region that had to call their builder has remained steady since 2016 (Figure 16).

However, the proportion of respondents calling back their builder has increased everywhere else in 2017.

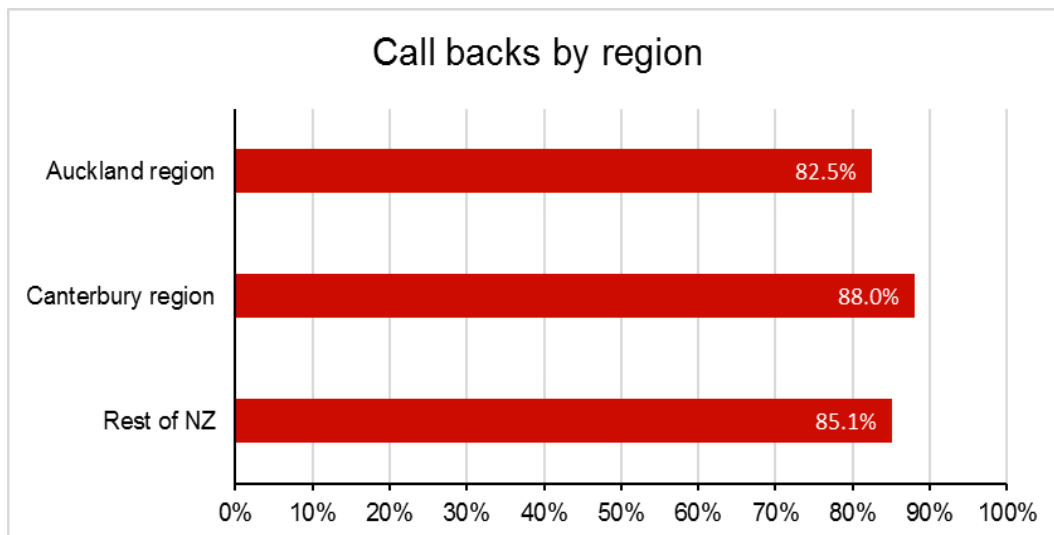


Figure 16. Call-backs by region.

The most frequently called back trades were the painter and the plumber (Figure 17).

The painter was called back by over half of respondents, although this may be to repair damage caused by other subcontractors. The electrician was also frequently called back, with about 35% of respondents having to do so.

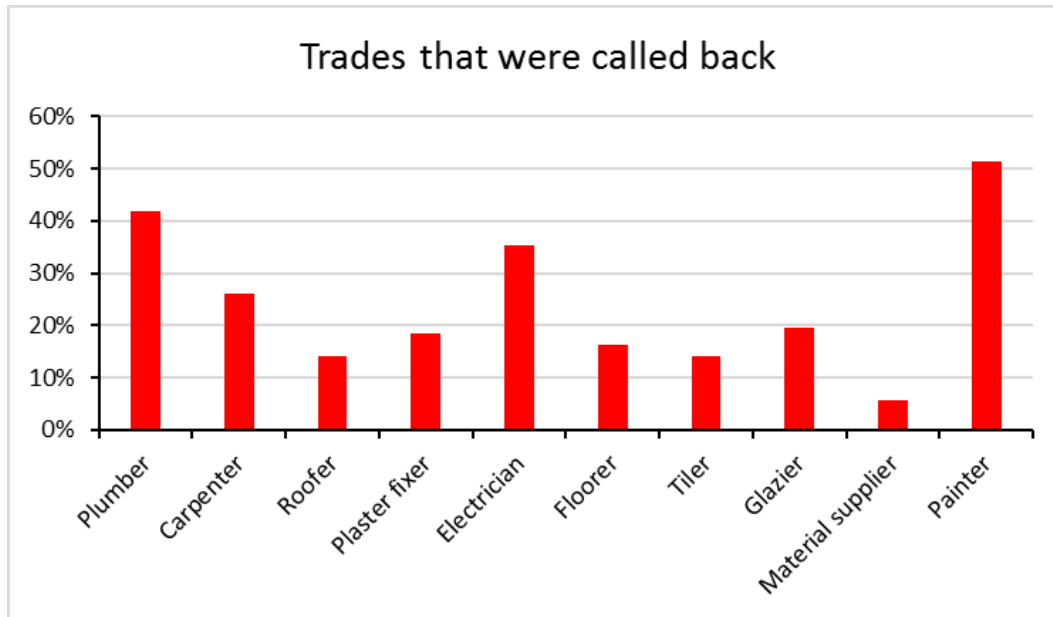


Figure 17. Trades that were called back.

The majority of owners were not surprised by the number of defects that occurred in their new build (Figure 18). Nearly a fifth of respondents stated that they had fewer defects than expected, and a further 37% stated that the number of defects was as expected. Just 8% of respondents stated that they expected no defects. The final one-third of respondents stated that they had more defects than expected.

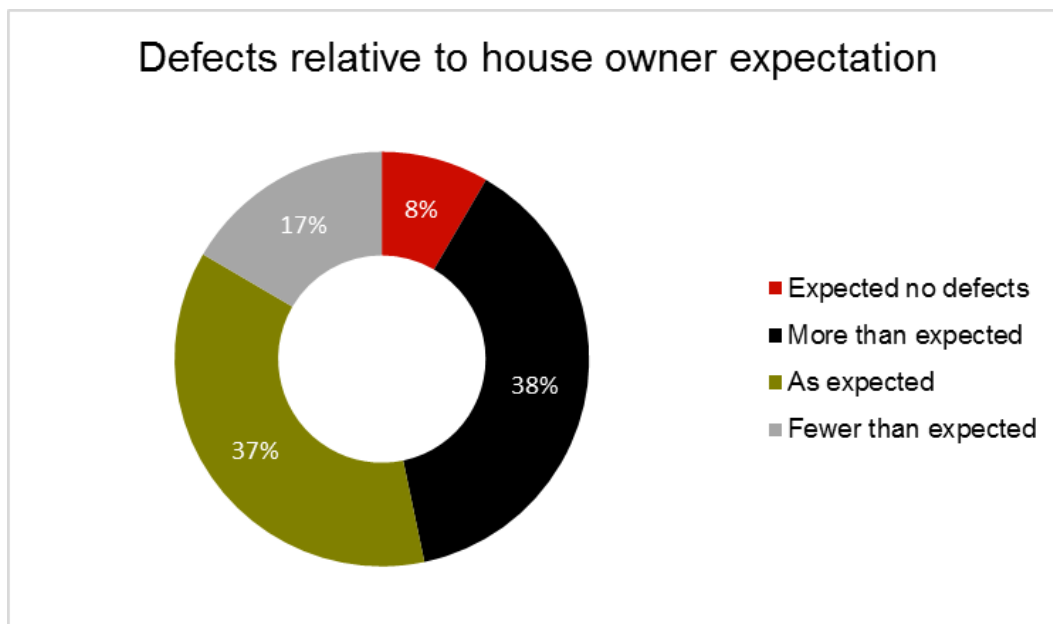


Figure 18. Defects relative to expectations.



3.7 Comparison by whether or not the owner had built previously

Those who had built previously were happier with their build than those who were building for the first time (Figure 19).

Those who had built previously scored their builder much higher on the level of communication from their builder, the service provided by their builder after moving in and the fixing of defects after moving in.

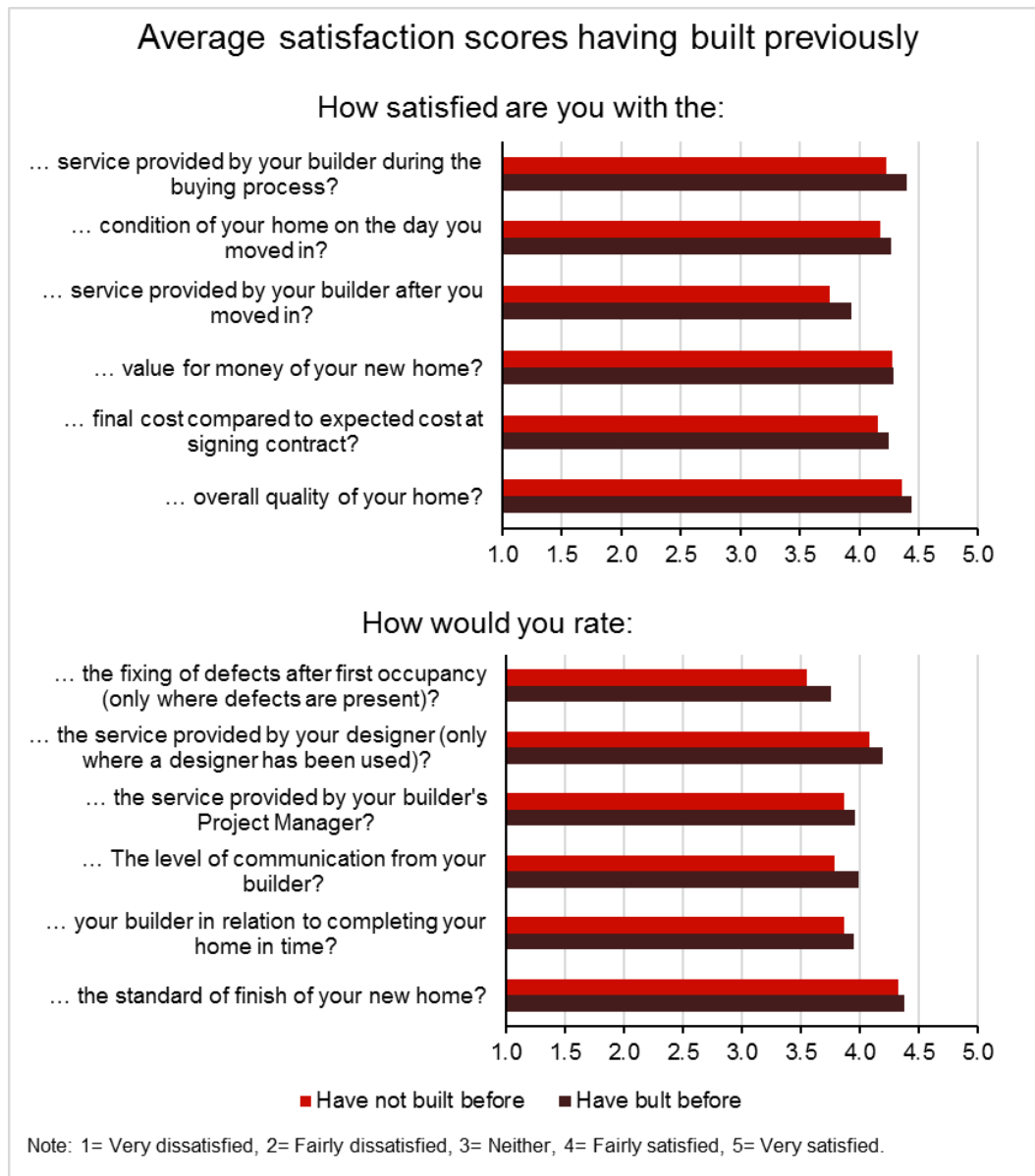


Figure 19. Average satisfaction scores by having built previously.



3.8 Comparison between franchise and independent builders

Independent builders outscored franchise builders across almost every measure in the 2017 survey (Figure 20).

Franchise builders marginally outscored independent builders in final cost compared to expected cost at signing contract.

Higher scores for independent builders were particularly prevalent in the measures of:

- service provided by the builder after moving in
- level of communication from the builder
- fixing of defects after first occupancy.

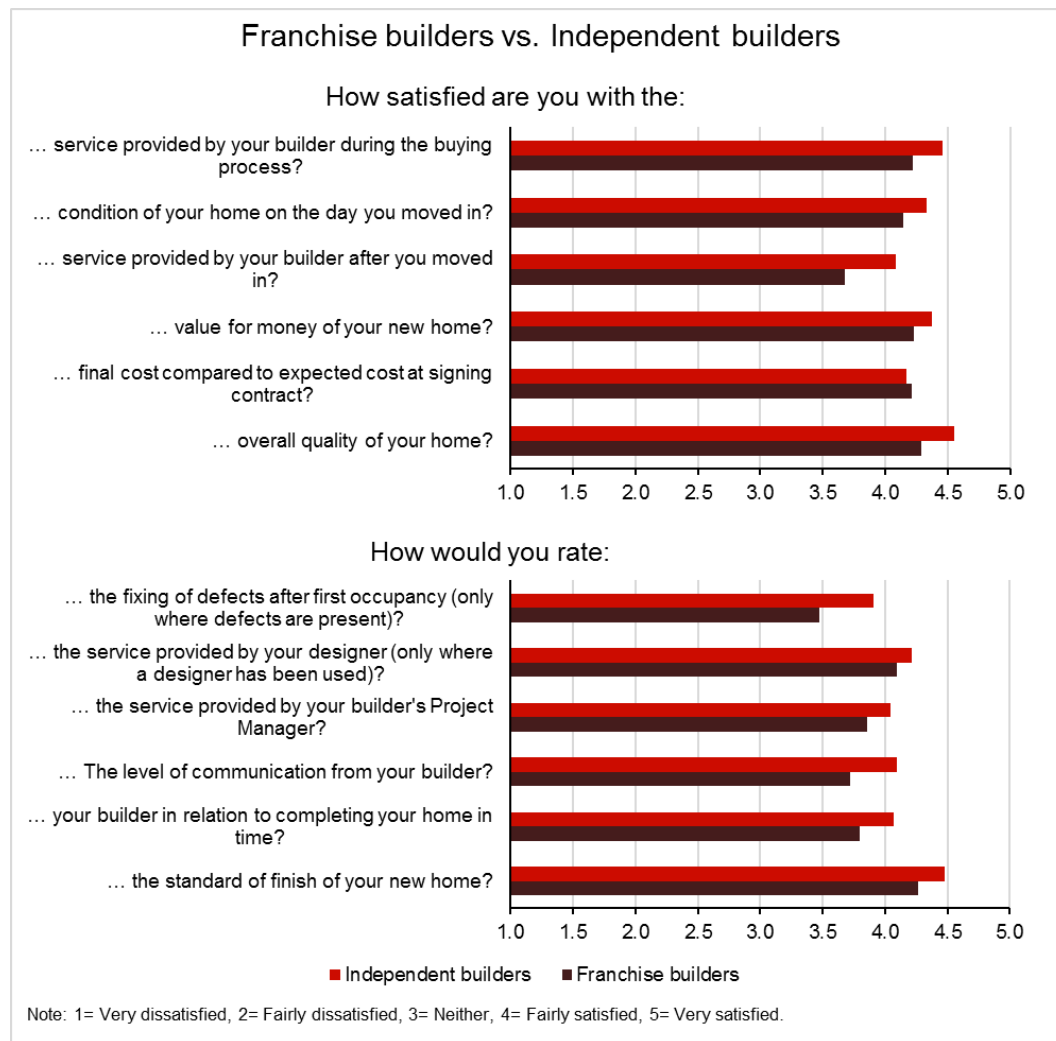


Figure 20. Average scores for franchise and independent builders.



3.9 Comparison by housing package

Previous surveys have consistently found that those who chose a house-only packaged were generally happier with their new build than those who chose a house and land package. This is borne out in the 2017 with higher average satisfaction scores across every area (Figure 21). The largest difference was with the fixing of defects after occupancy, with house-only package owners rating their service much higher.

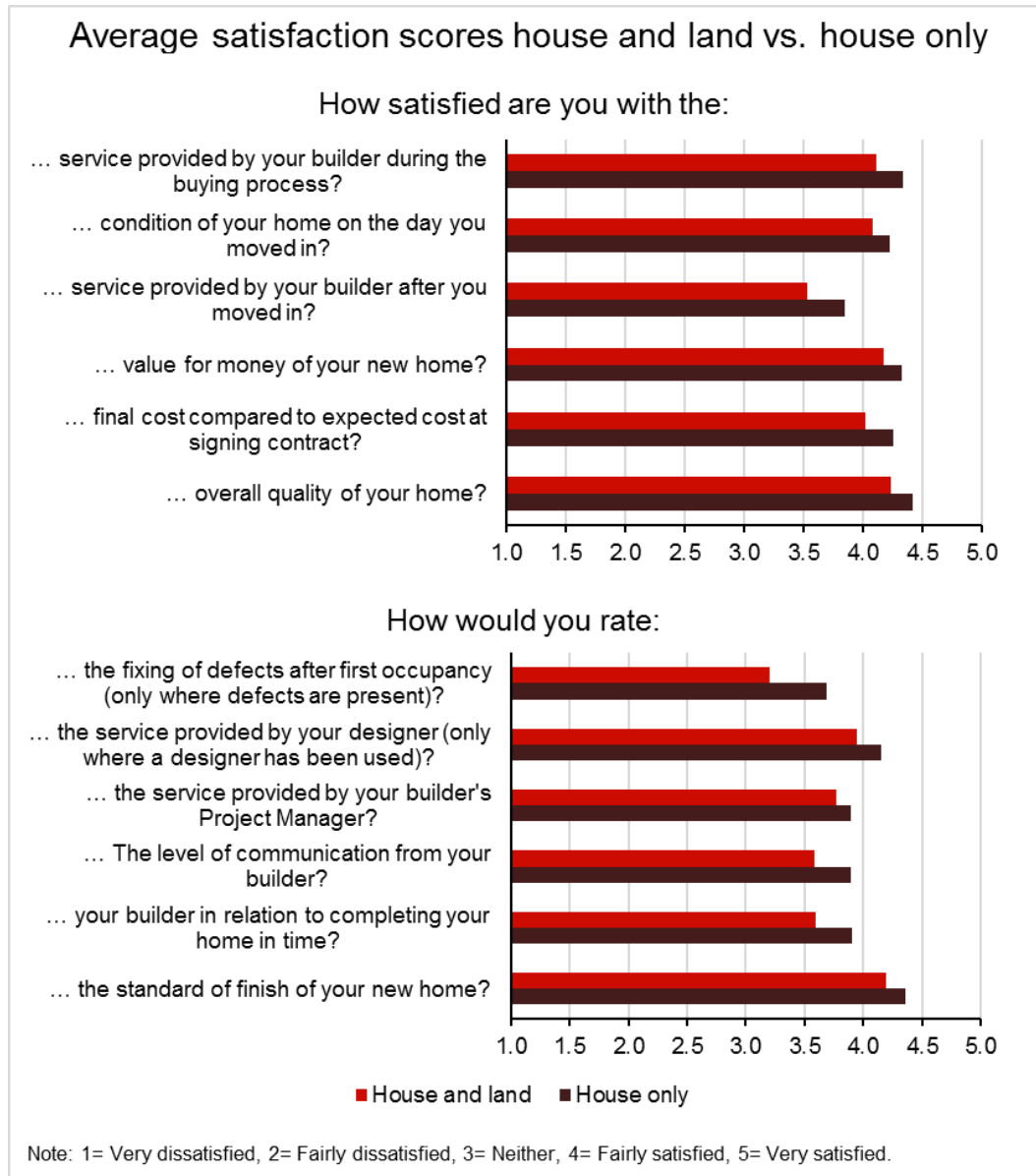


Figure 21. Average scores for house and land package versus house only.



3.10 Changes since 2014

Average scores have eased across the board in 2017, reverting towards 2015 levels following a peak in 2016 (Figure 22).

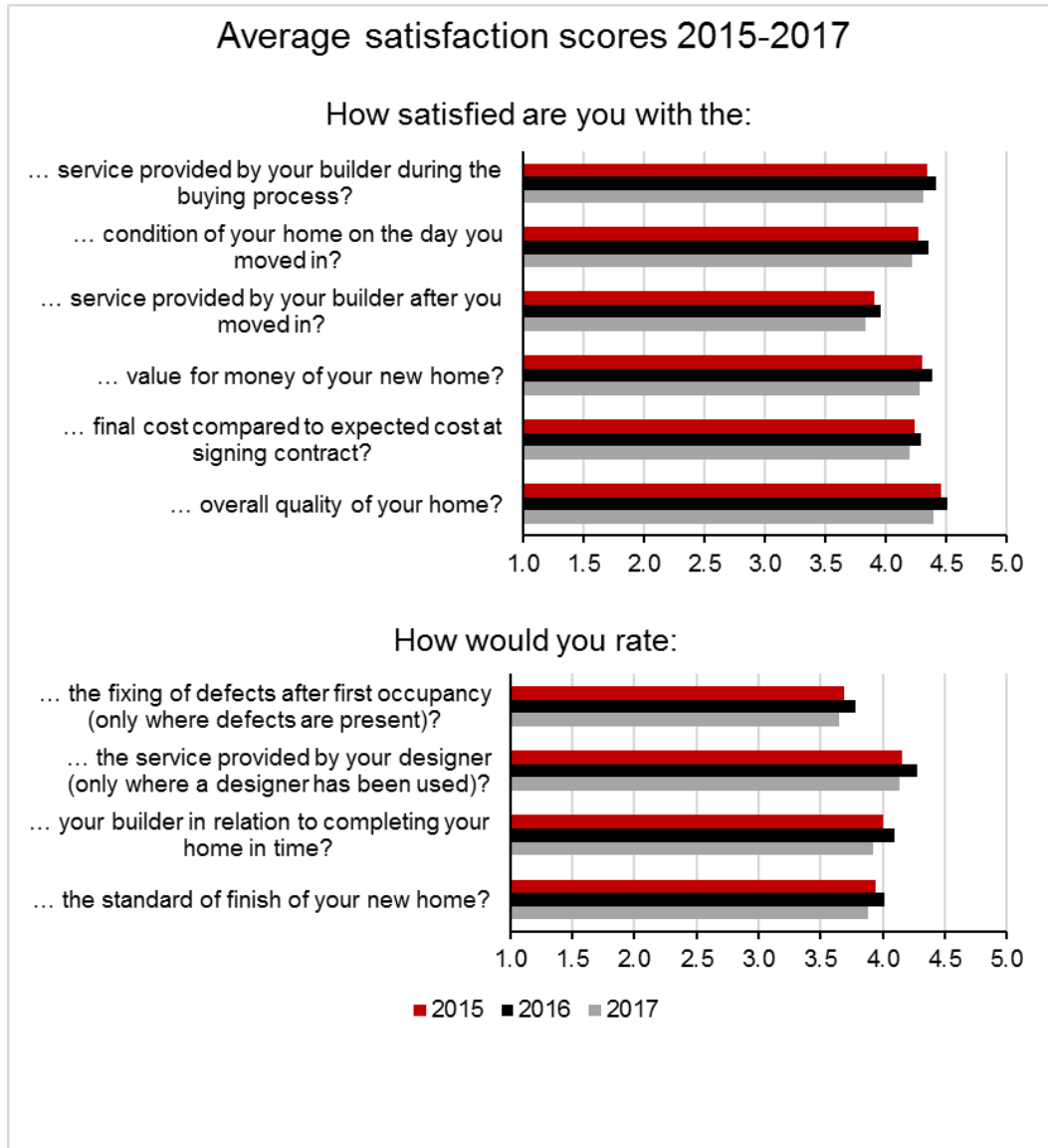


Figure 22. Average scores 2015–2017.



4. Conclusion

The new-build housing industry has experienced a slight decrease in house owner satisfaction in 2017. Average satisfaction has decreased to below 2015 and 2016 levels across all measures. While the majority of clients would recommend their builder, a small but not insignificant number of house owners are critical of their builder.

There continues to be a wide range of experiences for new house owners, as while 62% were satisfied with their builder, 15% were dissatisfied. Owners that have built a house before tended to have a better building experience, which suggests that there may be a role for builders in setting client expectations. As the industry is facing an increasing number of first-time builders, this will continue to weigh on satisfaction levels if expectations are not managed.

The survey continues to identify that some new-build housing work is taking place without a contract, despite becoming a legal requirement in 2015. This is typically being undertaken by independent builders. Having a written contract increased the chances of a dispute with the builder over the final cost in this survey.

Clients still cite that their builder's quality/reputation is the most important feature in choosing their builder. The clients seem to judge this based on the quality of the show home or recommendations from their friends and/or family. Builders need to be aware of the importance of their show home. It not only provides a chance for the builder to showcase their work, but it also sets expectations for the client. It is therefore important for the builder to communicate with the client about where differences may occur and reasons for the difference.



Appendix A

Regional response numbers

Response rates were consistent across the regions (Table 2). Northland had the highest response rate, with 23% of surveys returned, although the Northland region had a relatively small share of new builds. Auckland had the lowest response rate of 9%.

Table 2. Responses by region.

Region	Number of responses	Response rate
Northland	65	23%
Auckland	59	9%
Central North Island	245	18%
Wellington	64	19%
Christchurch	84	14%
Rest of South Island	123	19%
	Total: 640	Average: 17%

Sustainability features

A further question not reported in the main results was around what features were incorporated into the house. This data is an input into BRANZ work around measuring our sustainability progress.³

The most commonly incorporated feature was higher than Code insulation, with 27% of respondents stating that their house included additional insulation (Figure 23). Rainwater tanks were installed in 22% of new homes, although this is helped by it being a council requirement in some areas.

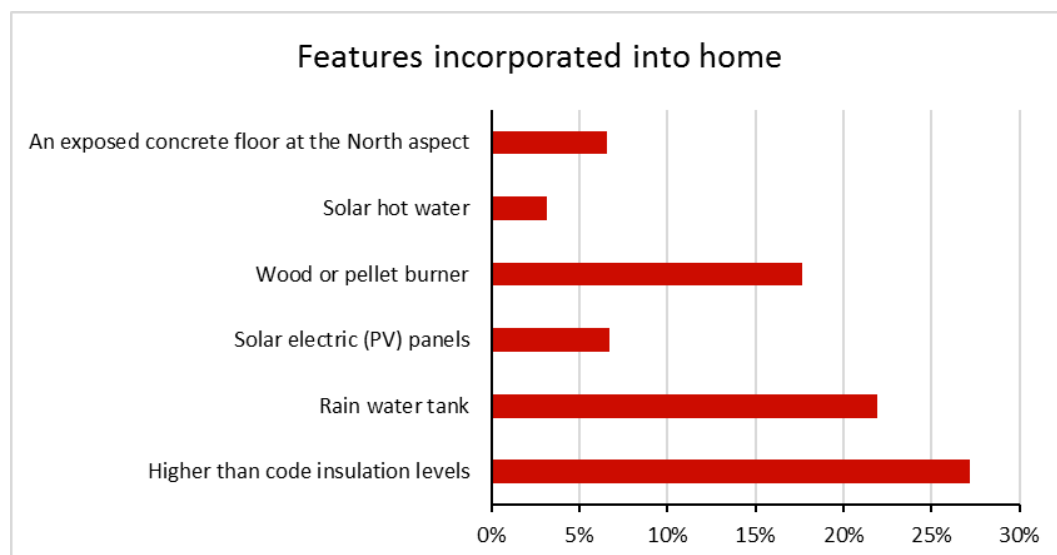


Figure 23. Features incorporated into home.

³ See Jaques, R. (2015). *Measuring our sustainability progress: Benchmarking New Zealand's new detached residential housing stock*. BRANZ Study Report SR342. Judgeford, New Zealand: BRANZ Ltd.



Survey form

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"/> no defects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The service provided by your designer? <input type="checkbox"/> no designer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The service provided by your Project Manager? <input type="checkbox"/> no PM	<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. 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 ☐

Maximising sun/views ☐ Sustainability features ☐ Drew own plans ☐

Builder did not offer standard plans ☐ Specific preference not catered to by standard designs _____ (specify)

7. 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 ☐

Less maintenance ☐ Wanted sustainability features ☐ Earthquake rebuild ☐ Downsizing ☐

Owned empty section ☐

8. 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)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. 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)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

If yes, what was the dispute about? _____

11. Did you have a written contract with your building contractor? Yes / No (circle one)

12. What was the value of your build? (please tick one)

Under \$250,000 ☐ \$250,001-\$400,000 ☐ \$400,001-\$600,000 ☐ \$600,001+ ☐

13. Were any of these features incorporated into your house? (please tick all that apply)

Higher than code insulation levels ☐ Rain water tank ☐ Solar electric (PV) panels ☐

Wood or pellet burner ☐ Solar hot water ☐ An exposed concrete floor at the North aspect ☐

14. 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 ☐ Painter ☐ Other (specify) _____

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

15. 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
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16. 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

Jul-16