UP-SCALE HOUSING, RESIDENTIAL MOBILITY,

AND URBAN GROWTH:

A Case Study in the Ottawa Region

by

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A thesis submitted to the
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in partial fulfilment of
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Gentlemen, its spring...

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CHAPTER ONE

1.0 MAKING THE DECISION

1.1 An Introduction

It has been claimed that the average house buyer spends less than forty minutes examining a house before buying it (Long, 1985:12). A resident in Orleans recently boasted he spent fifteen minutes before deciding to spend nearly \$233,000 on a new house. Another proudly claimed she spent \$172,000 on a house on impulse after seeing the open layout it offered in the kitchen and family room. This all seems rather uncharacteristic of a nation of 'coupon-clippers', 'self-serve' gas addicts and 'do-it-yourselfers' who try to stretch every dollar to the maximum.

What motivations are important in the decision to buy, and the decision to move? Are there factors other than those related directly to the house itself which are of more importance in the decision-making process? Why did the household decide to look for a new dwelling in the first place and, why did they choose one house and location rather than another? What sort of 'homework' does the typical buyer do before making his or her choice and can that time be quantified?

The reason(s) why households decide to relocate have been studied by geographers, economists, sociologists, and psychologists. Housing

related studies at the macro (typically national) level have been followed by micro (local) level studies of the behaviour of the individual consumers and producers who are an essential part of the actual 'on-ground' workings of the housing allocation process (Bourne, 1981). It is at this micro level that the models and studies become more specific and, of necessity, take into consideration a wide variety of factors sometimes considered inconsequential to those studying macro-level concerns (Bennett, 1972; Brown and Moore, 1970; Coons and Glaze, 1961; Leslie and Richardson, 1961; Ley, 1983; Michelson, 1977; Simmons, 1974; Wilkinson and Merry, 1965).

A plethora of factors, either directly or indirectly, account for the decision to migrate. Movement may be intra- or inter-urban in nature and influenced by such considerations as income, family life cycle, prestige, job status, age, dwelling unit and neighbourhood characteristics, perceived and actual needs or wants, and so forth. Why do these households make the choices they do? Further understanding of the decision-making process must come from the level of the individual household for it is here that the basic decisions originate and it is here that this study was targeted.

The purpose of this research is to establish the reasons for buying 'up-scale' houses in a specific site. The goal of the work is to determine the reasons and motives behind why people move to another area, and the criteria they use to select the new site, whether they be in terms of dwelling or neighbourhood specific features. This is not a test of a general hypothesis, but rather is an empirical study of 'what' house buyers have done under specific conditions, 'why' they did what they did, and it presents the results in a format useful to both people

in the housing industry and academia.

In addition to [1] establishing a demographic profile of a typical 'up-scale', detached single-family house buyer in the area, this research investigates the buyer's actions, perceptions, desires, and future intentions, some of which are of immediate interest to those constructing dwellings in the study area. It also includes [2], a ranking of reasons for choosing to live in the study area, [3] dwelling and/or environmental features desired by the purchaser, [4] perceived disadvantages to owning as opposed to renting, [5] initial source(s) of information on both the housing project and the builder, [6] time spent in the search for suitable accommodations, [7] intentions regarding future house purchases, [8] what residents think will happen to house prices in the study area over the next five years, [9] factors which would cause the respondent to once again enter the market as a potential buyer, [10] housing area from which the respondent has recently moved, and [11] builder-specific characteristics related to marketing, reputation, quality and service,

Knowledge of the activities of the basic individual decision-making unit (the household) provides input for those who deal directly or indirectly with the housing consumer, including builders, urban and transportation planners, retailers, community service groups, political decision-makers and educators, among others. Findings from this study may confirm what members of the building community already feel intuitively to be true as they attempt to match the dreams and real needs of the consumer with a physical object - the house. Builders may also benefit from knowing how members of this sub-market heard of the builder and his product, thus allowing him to target better his marketing dollars.

1.2 Population and Urban Growth

Since the 1800's Canadians have congregated in urban settlements. As Census data show, two distinct patterns have emerged whereby we, as a nation, have both a higher fraction of our total population living in urban settlements and an increasing number of those citizens choosing urban centres of more than 30,000 as time passes. With the 1976 Census, however, came findings to upset the once widely held belief that it was not unreasonable, given the trends over recent decades, that by the end of the century over ninety percent of Canadians would be urban dwellers (Divic, 1981:13). The 1976 Census found a slowing in the rate of population growth together with a decrease in the general rate of urbanization. By 1976, 76% of the Canadian population was urbanised in comparison to 54% and 75% in 1941 and 1971 respectively. These rates must, of course, be viewed as a function of natural birth rate stabilization (between 1.6 and 1.9 children per woman), domestic migration, and federal policies governing immigration. Demographic analysts now favour a stable projection which parallels the conditions of 1976 with a 76/24 urban/rural split (Divic, 1981:14). It is suggested, therefore, that the once strong rural to urban movement is nearing the cessation level and population is now being affected by a redistribution process among areas of various sizes and economic potentials, a process varying as a result of individual migrants' motives and satisfactions.

Contemporaneous with the urbanization of rural dwellers during the 60's and 70's was the outward movement of city dwellers into the 'extended city', into the 'fringe' areas which, for many, offered the best of both worlds - space, lower house prices and an air of country

living in an environment complete with door-to-door mail delivery, easy access to city amenities, and a well developed institutional infrastructure.

The post World War II period saw a growing desire among buyers for houses larger than the typical 1,000 square foot 'wartime' dwellings. One and one half and two storey houses of 1,400 to 1,600 square feet on lots with fifty to sixty foot frontage became the norm. With an increase in disposable income housing nearing two thousand square feet of living space was in vogue although cost, strongly correlated to size, soon got ahead of what young families could afford (Humphries, 1985). With the declining ability to afford the large, expensive detached houses, came two popular alternatives: the condominium and living farther from the city core. Condominium living meant [1] lower prices for accommodations than could be supported by conventional housing practices and [2] less upkeep and worry, the result of which was more time to devote to the maintenance of a busy life style. Space and privacy were readily provided in the rural areas skirting the urban fringe, and this second alternative grew in popularity, in part, as a result of expanding automobile ownership.

In the late 1970's, for whatever reason, condominiums were being viewed by potential buyers as undesirable and the building industry adjusted accordingly. Economics and ingenuity went hand in hand as the one time 40' x 25' house was turned ninety degrees on its lot to achieve the 25' x 40' house allowing the use of smaller frontages, increased profit potentials for builders, and a more affordable house for those wishing to dwell within the city. Today, narrower lots contain houses from 'small lot singles' or 'starter houses' to the large, 'up-scale'

units in which this research is most interested.

1.2.1 Life at the Fringe

Housing consumers today are willing to travel great distances, often to the rural-urban fringe and beyond, to obtain the desired accommodations. Increased competition for the limited number of building lots close to the city has meant that developers and builders also seek to operate in the periphery. Availability of serviced land, accessibility to the city, and, of late, generally more favourable interest rates are promoting rapid expansion of the fringe areas of many Canadian cities (Snell, 1985).

The fringe is the interface between urban and rural landscapes, responding to the outward growth of the city. However, due to its transitory nature it is difficult to delineate clearly its boundaries. In addition to any original residents who may live there, it is populated by people who have examined and evaluated the merits of both their old and new areas and have been motivated to make a locational decision. These decisions and motivations are the 'raison d'être' for the fringe area according to Bourne (1971:63) who outlines its notable characteristics:

- Age distribution positively skewed with greater proportion in Younger age groups,
- proportion of married residents higher than adjacent areas,
- fertility ratio higher than urban place but lower than surrounding rural area,
- household size larger on average but smaller than those in surrounding rural area,
- residents exhibit lower educational level than residents of the urban place itself but higher than surrounding area,
- retail centres patronized by residents tend to be in urban area itself,
- low degree of community and social participation,
- incomplete network of utility services.

Despite what critics would claim, (that urban sprawl into the rural/agricultural lands does little more than rape the precious hinterland and leave unsightly black-top ribbons to be used by the polluting automobiles parked next to one brown brick house after another, as developers mirror subdivision after subdivision in contrived friendliness) there is a degree of social benefit attributable to outward urban growth. While those with higher incomes are busy using their superior purchasing power to acquire lower density housing, at the expense of increased commuting distance to work (Berridge, 1971:52) their actions release current dwellings for purchase by someone of a lower income or housing demand level. This holds true, of course, only if the area being vacated is not being simultaneously up-graded (ie. gentrified) to furnish inner-city up-scale units.

Via this upward (residential) mobility and the process of new construction, housing demand is withdrawn from some areas, typically near the inner city, in favour of settings which are more desirable, in part, due to location, cost or accessibility. The spatial patterning of available mortgage financing may also be affected, as undesirable neighbourhoods are 'red lined' or judged to be areas of unacceptable investment risks. This bears consideration for it can be a powerful detrimental or limiting factor in the house-buying process, often being associated with zones of racial or ethnic housing. The dynamic process of demand withdrawal, from areas of housing stock perceived as failing to satisfy the resident's current housing needs, and subsequent reinstatement of that demand elsewhere results in above average-price rises in the new or growth area, and depressed house prices in the undesirable area (Adams, 1984:519).

But, chacun a son gout. The process is known as 'filtering' and refers to any change in the relative position of a housing unit or household in the inventory or matrix of housing units in an area (Bourne, 1981:149). In response to the occupancy of new housing units, the resultant vacancies are filled by mobile households active in the 'move-up' market. Their vacancies, in turn, are made available for occupancy by yet another group 'moving up'. These vacancies filter from high value ranks down through the housing inventory bringing with them a reverse movement of households upwards through the inventory.

Spatially, residents from the areas being vacated migrate farther outward and with each subsequent stage of construction and development they move farther away from the city core. As city growth occurs, the general trend towards continued movement away from the centre of the city implies vacancies inboard to the city core (See Figure 1.1). For whatever reason, as one neighbourhood or zone becomes 'the' area to move to, others become the area to move from. These then become the 'moved up from' areas and the 'moved up to' areas. Naturally, some will join the market directly by moving from outside the local area.

Integral to the notion of filtering in the housing market as a whole is the idea of sub-markets with, as the previous discussion has suggested, each area of relatively homogeneous housing stock somewhat dependent upon the others. The mapping of these sub-markets is difficult, highly variable and is a function of the type of market one has in mind (Bourne, 1981:74). One way to begin the process is to consider price which, via design, takes into account type, style, size, location, interior and exterior attributes, etc.

Modified from D. Michael Ray 1985.
NOTE 'Schematic Representation Only'

GROWTH WITH TIME

1950's to 1980's

C.K. Waddington September 15, 1986

FIGURE 1.1

The mapping of sub-markets implies the drawing of boundaries and the establishment of zones within which houses are relatively homogeneous. Within these zones it is generally possible for a household to substitute one dwelling unit for another without otherwise significantly altering its behaviour pattern. The mention of these zones and boundaries quite often speaks not only of the housing contained therein but also of its inhabitants (Taylor, 1982:292). The names Rodeo Drive, Beverly Hills, Park Avenue, Rosedale, Forest Hill, Westmount, Rockcliffe, Harlem, Watts and Lowertown bring with them the social characteristics of their residents: income, race, occupation etc. Where we live, therefore, illuminates who we are. It has been claimed (Adams, 1984:519) that luxury housing acts as a weapon of exclusion and helps to maintain a social boundary by demanding an enormous fee for admission.

What does the future hold for housing in general across Canada? An increase in the number of middle-aged households is expected to bring pressure for the increased production of single family dwellings while demand for other types of housing will decline. Most significant pressure is expected to be from those in the mid-thirties to mid-fifties whose numbers are expected to increase in both absolutely and relative importance. Augmenting this trend will be increasing numbers and proportions of elderly households who will probably be demanding a much different kind of housing than the younger age group. Smaller, more affordable housing units will continue to be sought. The changing population mix with its blend of demands should create a variety of new opportunities for innovatory and creative housing.

1.3 An Ottawa Example

This thesis takes it as given that sub-markets exist in the greater Ottawa market and looks in depth at one of these sub-markets in the eastern fringe area at Orleans. As determined on the basis of price, the study considers housing costing in excess of \$160,000 per detached, single-family dwelling unit. The reasons for choosing \$160,000 will be discussed in Chapter 3.

Drawing upon Ottawa as an example, one can map the housing projects as the city continues its spread in deltaic fashion into the surrounding agricultural lands beyond the fringe, although even the degree of urban expansion in this city pales by comparison with many Southern Ontario markets. As of April, 1986 there were approximately 52 projects in the Ottawa area involving active single family construction and the list expands to over sixty if condominiums and townhouse projects are considered. While the southern area of Ottawa received roughly 14% of the single family construction activity, Ottawa West and East received the bulk at 44% and 42% respectively (Corporate Staff Realty, 1986b).

Orleans is a small but rapidly growing urban satellite community (Figure 1.2) of Ottawa comprising an estimated 1986 population of 50,817 persons (Table 1.1). A large number of its residents commute to Ottawa for both employment (largely a government work force) and goods and services. Similar to many other communities in close proximity to large urban centres, Orleans has felt the impact of population growth by natural means, but has also been more highly influenced by decentralization (redistribution) of population from the central city and inward movement from the surrounding territory.

OTTAWA - ORLEANS

C. K. Waddington

September 15th, 1986

FIGURE 1.2

Until the mid-seventies Orleans was a predominantly francophone Police Village housing only a few hundred households. In 1968 the Orleans area underwent amalgamation of its Township school areas into both the Carleton Public and Carleton Roman Catholic School Boards (Meldrum, 1986). On January 1st, 1974, status as a Police Village was dissolved under the provisions of the Ottawa-Carleton Act making way for modern-day Orleans. Today the name 'Orleans' refers to a planning district under the jurisdiction of the City of Gloucester. To some it is nothing more than a neighbourhood although for many the ingrained sense of an 'Orleans' identity dies hard. A large proportion of the people prefer to say they live in 'Orleans' rather than admit to being from the City of Gloucester.

As Figure 1.3 illustrates, the area generally perceived by local residents as 'Orleans' straddles the east boundary of Gloucester to take in the north west corner of Cumberland Township. The governing of Orleans is split between the City of Gloucester, to the west of Champlain Boulevard, and the Township of Cumberland, to the East. Orleans, therefore, represents more of a perceptual construct than a legal entity with rigidly designated locational parameters. It is perhaps 'the' unifying element attempting to tie together Gloucester - a sprawling city without a recognized central core - and the neighbouring rural township.

Within the regional framework of Ottawa-Carleton, Orleans is known as the East Urban Community, a terminological kinship it shares with Kanata (the West Urban Community) and Barrhaven (the South Urban Community). Under an Ontario Municipal Board decision in October of 1978, the East Urban Community was designated for a final population of

75,000. Regional Official Plan Amendment No. 17 augmented this number by a further ten thousand with additional increases in population to be based upon the availability of adequate transportation and piped services (Cumberland, 1983:7).

St. Joseph Boulevard, in the Gloucester portion, referred to as the 'Berlin Wall' by city planners (Humphries, 1985), separates north Orleans, which experienced development approximately ten to fifteen years ago, from south Orleans which is currently developing under the auspices of approximately twenty-five builders and developers. This early development helped spur population growth in the Gloucester portion of Orleans between 1976 (5,991) and 1986 (28,010) by 368%, 306% in Cumberland whose population over the same period rose from 5,614 to an estimated 22,807 persons. Tables 1.1, 1.2 and 1.3 provide further statistics for the area.

Table 1.1 Cumberland/Gloucester Population Mix in Orleans

	CUMBERLAND		GLOUCESTER		Total
	#	%	#	%	
1976	5,614	48.4	5,991	51.6	11,605
1977	5,238				
1978	6,195				
1979	7,607				
1980	8,286				
1981	9,021	37.7	14,876	62.3	23,897
1982	11,415	40.4	16,854	59.6	28,269
1983	15,140	45.3	18,294	54.7	33,434
1984	17,190	41.5	24,249	58.5	41,439
1985	20,513	42.6	27,677	57.4	48,190
1986	22,807*	44.9*	28,010+	55.1+	50,817

* - projected

+ - at end March, 1986

Sources: City of Gloucester Planning Department, June 1986

Township of Cumberland Planning Department, June 1986

Table 1.2 Local Populations

	CUMBERLAND			GLOUCESTER			OTTAWA++
	Urban	Total	%	Orleans	Total	%	
1976	5,614	12,377	45.4	5,991	56,516	10.6	305,975
1977	5,238						306,009
1978	6,195						301,317
1979	7,607						300,678
1980	8,286						301,567
1981	9,021			14,876	72,859	20.4	303,530
1982	11,415			16,854	75,215	22.4	303,144
1983	15,140			18,294	77,394	23.6	304,392
1984	17,190			24,249	85,701	28.3	304,927
1985	20,513	25,500	80.4	27,677	91,417	30.3	304,448
1986	22,807	29,860*	76.4*	28,010+	92,053+	30.4+	

* - projected

+ - at end March, 1986

++ - Min. of Revenue, Assessment Dept. via Rob McCogan, City of Ottawa

Sources: City of Gloucester Planning Department, June 1986

Township of Cumberland Planning Department, June 1986

City of Ottawa Planning Department, June 1986

Family or average household size has been on the decrease. The following are values for Canada, as a whole, and the Ottawa-Hull area:

Table 1.3 Average Household Size

	1921	1951	1961	1971	1976	1981	1986	1991
Canada	5.3	4.5	3.9	3.5	3.2			
Ottawa-Hull					3.1	2.7	2.5	2.4
Cumberland							3.7	
Gloucester							3.2	

Sources: City of Gloucester Planning Department, June 1986
 Township of Cumberland Planning Department, June 1986
 City of Ottawa Planning Department, June 1986
 Ray, D. M. 1976. Canadian Urban Trends, Ottawa:
 Ministry of State for Urban Affairs
 Statistics Canada 1986, Ottawa.

Table 1.4 % of Population - Urban: Ontario and Canada, 1851-1981
 (See also Figure 1.4)

YEAR	CANADA	ONTARIO
1851	13.1	14.0
1861	15.8	18.5
1871	18.3	20.6
1881	23.3	27.1
1891	29.8	35.0
1901	34.9	40.3
1911	41.8	49.5
1921	47.4	58.8
1931	52.5	63.1
1941	55.7	67.5
1951	62.4*	72.5
1961	69.7*	77.3
1971	76.1*	82.4
1976	72.4*	81.2
1981	75.7*	81.7

* - Includes Newfoundland

Source: Ray, D. M. 1976. Canadian Urban Trends, Ottawa:
 Ministry of State for Urban Affairs
 Statistics Canada 1986, Ottawa.

1.3.1 The Study Site - Cumberland Township

This study was conducted within the Urban Section of Cumberland Township, east of the Tenth Line, south of St. Joseph Boulevard (Regional Road 34) on a 600 hectare development site known, in part, as

Sources:

D.M. Ray, 1976. Canadian Urban Trends, Ottawa: Ministry of State for Urban Affairs,
and Statistics Canada, 1986, Ottawa.

PERCENTAGE
POPULATION

URBAN: 1851-1986

C.K. Waddington

September 15, 1986

FIGURE 1.4

Fallingbrook. Situated on the top of a 150 foot high escarpment, the site, once valued for agricultural reasons, offers many residents a view of downtown Ottawa-Hull, the Gatineau Hills, and the many towns and villages bordering the Quebec shore of the Ottawa River. Conservation land, extending down the ridge to St. Joseph Boulevard, forms the northern boundary of the area. Mature hardwoods can be found throughout this northern limit and along the creek which, together with small ponds, forms part of the local stormwater management system.

Integral with the plan for a central community facility core will be a planned community of six adjacent neighbourhoods. In an effort to create a social and perceptual identity, such as has existed in 'old Orleans', each neighbourhood will embrace only between 80 and 175 hectares. At present, the neighbourhoods of Fallingbrook, to the north, and Pine Ridge, to the south-east, are under construction. Further development of neighbourhoods will be scheduled at such time as the required transportation and piped services become available and demand, by builders, for serviced lots increases. In general, development will occur in a north-west to south-east direction providing full development "only with the assurance from the Regional Transportation Department that transportation facilities will be able to support the additional residential population (Cumberland, 1983:9).

Three builders are currently constructing single-family houses in Fallingbrook (Figure 1.5); Costain Limited, Sandbury Building Corporation and Urbandale Construction Limited (see below - Table 1.5 - for proportion of units constructed). Of the approximately two hundred houses currently constructed, sixty-one were in the over \$160,000 price range at the time this study began. Responses from decision makers in

these households form the data base on which this paper is based.

Table 1.5 Construction Potential for Single-Family Dwelling Units in Fallingbrook

	1985		1986	1987
	Proposed	Sold	Planned	Planned
Costain	85 (315)	25 (93)	60 (222)	0 (0)
Sandbury	219 (810)	90 (333)	90 (333)	39 (144)
Urbandale	70 (999)	97 (359)	80 (296)	93 (344)
TOTAL	574 (2124)	212 (785)	230 (851)	132 (488)

(Number in brackets represents estimated population based on 3.7 persons per household for Cumberland Township).

In addition Stolp Homes has plans for 290 additional single-family houses with 100 units potentially being ready for 1987.

Source: Planning Dept., Cumberland Township, June 1986

1.3.2 Builders of the Fallingbrook Project

Costain Limited, incorporated under federal charter in 1953, is a publically owned and traded company (Toronto Stock Exchange) which develops land for sale, acquires and develops commercial properties for long term investment, and builds and markets residential properties in Ontario (Toronto, Pickering, Whitby, Kitchener, Kanata, Orleans), Alberta, Arizona, Washington, D.C., and Florida. They have been active in the Ottawa market for more than twenty years building a variety of different sizes and types of housing.

Two house collections are available in the Fallingbrook project. The lower priced selection (eight models in the Forestwood Collection) begins at \$141,900 with an upper price of \$166,900 (Price List #102, 01/86). The 'up-scale' Imperial Design Collection (five models) offers to satisfy buyer demands for houses in the \$191,000 to \$207,000 range (Price List #99, 12/85).

Sandbury Building Corporation, carrying on business as Sandbury Homes, came into existence in July of 1975. During the mid to late seventies Sandbury established itself as a large volume builder of single-family starter houses, semi-detached/link houses and townhouses. More recently emphasis has switched to providing large single-family housing units in planned communities, both in the Toronto and Ottawa markets. Over the last eleven years more than six thousand houses have been constructed in over fifty Ontario communities. A variety of sites are under construction within the Fallingbrook project, including two devoted exclusively to 'up-scale', or 'executive' housing.

Six models ranging from \$167,490 to \$180,490 comprise the Masterpiece Collection. The Fallingbrook Ridge series fall between \$204,990 and \$228,490 and while these are advertised prices only, the first two houses sold for in excess of \$259,000 (All advertised prices based on January 2, 1986 pricing). Available is a model which provides for a third floor loft of seven hundred square feet complete with bath, walk-in closet and private sitting room. By itself, the master bedroom in this house covers almost five hundred square feet excluding walk-in closet and luxury ensuite bath.

Urbandale Realty Corporation Ltd. has been active as a developer, builder and owner of rental communities (Urbandale, 1985) since 1958. The self-contained residential neighbourhood of Urbandale Acres was one of their first planned communities in Ottawa. In 1979 Urbandale Construction Limited was formed and began building houses in the Ottawa area. Development has occurred in Rockcliffe, Manotick, Mooney's Bay, Hunt Club, Amberwood, and more recently in Bridlewood and Fallingbrook. As of November 1985, Urbandale offered houses to Fallingbrook buyers in

three series. The Graduate and Cumberland Series from \$99,900 to \$136,900 provide a lower end complement to the five model Executive Series at \$151,900 through \$179,900. Revised marketing information (23 May, 1986) shows the Executive Series expanded to seven models (\$150,900 to \$179,900).

Costain and Sandbury have maintained the traditional design in their two storey, centre stair-case houses while Urbandale has tended more towards contemporary styling making use of multiple roof lines, split-level floor plans and open concept layouts. Of the three builders, they (Urbandale) are the only one which will allow the purchaser an almost totally free hand in customizing or changing a house to satisfy individual taste and requirements. Slight structural changes, such as extending a room or garage, will be entertained by Costain while Sandbury prefers that purchasers limit their choice to interior items; trim, cupboards, carpets, fixtures, etc.

Even in light of their willingness to 'build to suit', only nine (9) houses met the criteria for this study in the Urbandale portion of Fallingbrook. Costain produced thirteen (13) houses meeting the over \$160,000 criterion with Sandbury selling thirty nine (39) enjoying a 64% share of the 'up-scale' Fallingbrook market.

1.4 What Is A House?

A house is a structure intended for use as a dwelling or residence for one or more persons. While the nature of housing can vary greatly, all houses, irrespective of position in the housing hierarchy, possess certain inherent similarities. Of primary importance, a house provides shelter from the elements for its inhabitant(s). As George Carlin (1984) suggests, a house provides us with a 'place' to put our 'stuff'. This all important 'place' is typically chosen after thought has been given to its location relative to a variety of considerations, not the least of which are place of work, social and community services (schools, churches, hospitals, sports complex), friends and relatives, and entertainment and shopping facilities. And, in addition, there are more controversial aspects of location ranging from proximity to congestion and pollution, people of another race, religion or colour, crime rate and neighbourhood prestige.

For certain discussions a house can be viewed as any other commodity - sugar, washing machines, Cadillacs, or butter - although it must, in all practicality, be viewed in terms of a fixed geographic space, not usually moveable; a commodity which changes ownership relatively infrequently, and something we must have regardless of the cost. There is no substitute such as can be found for other goods, such as butter [margarine] or flour [corn meal].

The terms 'house' and 'home' are often used interchangeably by researchers, builders, marketers, and the general public. This author favours a distinction. A house is the physical structure in mensurable and quantifiable terms but a home has attached to it the connotation of personal relationship and embraces the ideas of family ties, affections,

and memories. The nuances associated with 'home' far outstrip the bounds of this study which will use the term house when referring to the dwelling unit, unless otherwise noted.

1.4.1 A Problem of Terminology

This paper investigates 'up-scale' housing; some clarification of terms is in order. While terms such as 'luxury', 'executive' and 'prestige' are often used to describe the detached, single-family houses being studied, they are industry or 'booster' terms, not particularly useful as actual descriptors. These terms bring with them a variety of images, some taken from the glossy pages of Better Homes and Gardens, others captured on phosphorescent screens linked to Hollywood and beyond.

A problem develops when trying to define this housing sub-market for purely academic use. There does not appear to be a 'generic' term that can be applied. Perhaps the term 'luxury housing' should apply but it does not, by definition, detail the type, character and expanse of floor space so evident in the homes of Fallingbrook. Some choose to refer to the market under examination as the 'move-up' market. To the outsider studying the decision-maker, the action may appear simply as a 'lateral' move; the substitution of one need-satisfying good for another of equal merit or utility within the same sub-market, as broadly defined by a local real estate board, consumer group or other third party. Perhaps the move establishes the occupant(s) in a position which matches more favourably their capital assets and income to current requirements or desires, provides them with the needed incentive to reach selected goals, or affords them a greater degree of flexibility.

If we consider the popular term 'executive' we may well ask just what are executive houses? Are they houses that only executives can buy? Is the criterion a function of their station in the employment hierarchy or is it based upon pecuniary rewards; as in "...he receives an executive salary", therefore he must be an executive. But what is an executive salary? Sales people on building sites in the Orleans area provided the figure of \$50,000 and up as a reasonable estimate. A salesman may well make \$50,000 per year but his job description does not read 'executive'. A twenty year veteran of military service may also command a salary of over \$50,000 but his description will not read 'executive' either.

No two people have the same experiences on which to draw; therefore, no two will have the same understanding of such terms as 'executive', 'luxury', 'prestige', etc. These are vague terms which leave far too much up to the experiences and imagination of the interpreter. What is called for, therefore, is a generic term with a definition which not only is clearly descriptive but which is readily recognizable by those both in the housing industry and the house-buying public; one which does not draw upon the emotional and mental notions envisaged when 'luxury' and 'prestige' preface the word 'house' as is often the case in marketing efforts and the media.

Premised upon a purely monetary notion the term becomes quite transient. If it is to be defined by price alone it must be indexed to selected characteristics of each city (area, region, etc.) or set of sub-markets. There may well be tens of thousands of dollars difference in price between not only cities, but neighbourhoods within cities. The effects of inflation, local economic climate, appreciation, dwelling

age, together with many other factors must also be given constant scrutiny and adjustment. Employing a universally applied dollar figure to define the term would, therefore, be highly impractical.

Attempting to devise an operational term and definition based upon house attributes or characteristics brings with it its own problems. As consumer demands have changed over the years, so have the physical characteristics of the houses which fall into the category of 'up-scale'. The up-scale (luxury) house of the seventies with its split-level floor plan, wide lot and 'flat front' garage style has given way to the 2-storey, centre hall plan on a reduced lot with garage often overpowering the appearance of the house itself due to the garage's 'out front' design (Figure 1.6 and 1.7).

Within the terms of this study, and today's building environment, up-scale houses are 'tract' houses built, in part, upon a stationary assembly line technique with the services of each sub-trade specialist enlisted when the previous stage of construction has been completed. They are, in effect, 'mass produced' or 'mass assembled' and are perhaps best considered as the most expensive (and quite often the most expansive) of the mass-produced tract houses being built in any area, taking into account all subdivisions currently under development in that area. As such, in-fill projects and custom houses have been excluded from study.

Attempting a definition based solely upon 'subdivision' status has its own drawbacks. At what point does an area of house construction change from simply a 'group of new houses' (perhaps a small infill project), which might be found as a Reference Plan deposited in a Land Registry Office for a Registry District, to a full scale 'subdivision'

(typical of large fringe sites) within the parameters set down in the provincial Planning Act (1983)? According to the Ministry of Consumer and Commercial Relations (the provincial body which deals in the registration of Reference Plans, Plans of Survey, Plans of Subdivisions, etc.), there is no minimum number of lots for a subdivision.

The term 'up-scale', by its very nature, implies a ranking or ordering; an ordering which could be based on dollar value, size (keeping in mind that cost can be directly correlated to [size] square footage), number of bathrooms or width of lot (again remember that the size of lot is strongly correlated to not only size but price). 'Up-scale' should, therefore, be defined in terms which more accurately reflect the transient characteristics of the commodity. While being only a cursory comparison, the table below is aimed at placing scalar value to new housing stock.

Table 1.6 Housing Specification Comparison

-----	Down Scale		Mid Scale		Up-Scale ----- ++	
Cost* (\$)	75,000	105,000	125,000	140,000	160,000	280,000
Bathrooms	1	1 1/2	2	3	4	5
Lot Size	30	35	40	45	50	55
Sq. Ft.	1500	2000	2500	3000	3500	4000
Size of Master Br.	300	350	400	450	500	550

* Cost figures have been taken from local newspaper advertisements (June 7, 1986) reflecting offerings of new houses only.

1.4.2 Up-scale Within the Ottawa Context

While many would probably deny it, thousands dream of making the fairy-tale entrance as they glide, jewel encrusted, down the curving oak banistered staircase in the formal entrance foyer to receive guests for cocktails in their cavernous entertainment centres. They are at home in their expensive, expansive house on the city periphery; the rapidly growing periphery populated by such dream merchants as Sandbury, Costain, Valecraft, Urbandale, Monarch and Tartan.

The final cost of a house is determined not only by costs of land and labour but by the quality and quantity of the nearly three thousand components (Long, 1985:10) from which the house is constructed. In addition to structural components in floors, walls and roof sections, one must also include such ingredients as interior trim, floor coverings, windows, doors, and plumbing fixtures to name but a few, together with other elements including sky lights, whirlpool baths, sweeping circular oak stair cases, balconies, french doors, and masonry fireplaces. Lot premiums for selected lots backing on a ridge, conservation area, or overlooking water can also add substantially to the price. For the purposes of this study, up-scale single-family dwellings have been determined to begin at \$160,000. An explanation for this is provided in Chapter 3.

1.4.3 The Market Dictates

The market is dictating large floor plans, four and five bedrooms, master bedrooms with ensuite, solarium or sunspace, and the use of large open foyers including natural wood spiral stair cases (McQuerter, 1985, Whissel, 1986). But, according to one of the local builders, whilst the

FALLINGBROOK community logotype

Quoined Corners

Colonial Grills

Shutters

Bay Window

Double Car Garage

The CONSTANTINE

SANDBURY HOMES logotype

Typical "Up-Scale" Design - exterior

builders are building for the husband, who is often more interested in such things as insulation value and heating systems, they are selling to the wife. This is reflected in the time and effort builders devote to both kitchens and bathrooms, the places where the stereotypical woman is still believed to spend much of her day.

Contemporary is out and traditional style is in (Westin, 1985:9). This carries from exterior appearance through to the interior features where purchasers are tending towards renewed interest in traditional finishings such as robust colonial trim, natural wood finishes throughout and extensive use of oak. Of increased importance also is a strong consumer interest in quality of construction although, as this paper will later show, this view of quality may be quite superficial.

For many of today's buyers looking at their second, third or even fourth house, they want something different, special things which set their house apart from the same model three doors down. In an attempt to capture this, many buyers appear to have fixated on bathrooms and kitchens. These rooms must be large, bright, and populated with the latest in plumbing and culinary technologies. No contemporary bathroom is complete without step-up Roman whirlpool tub and separate shower stall, built-in dressing table, extensive use of windows and ceramic tiles, and skylight. Today's modern kitchen calls for a central food preparation island, built-in microwave oven shelf and desk, the look of natural wood - quite frequently oak, luminous (sunshine) ceiling, pantry, and range hood; all this adjacent to the breakfast solarium or garden room, often with skylight.

"The kitchen has to have a sunshine ceiling (recessed lighting), an adjunct greenhouse, a microwave shelf and a pantry - good heavens, everyone has to have a pantry ... everyone fancies him or herself a gourmet cook. But everyone's working like hell to pay for all this, so no one actually has time to cook anymore".
(Robins, 1985:2)

The 'me' generation is buying houses and they want every imaginable luxury in their Great Canadian House (Robin, 1985:2); but they will not settle for just any house with size and modern appointments. Gone are the days of the sprawling ranch-style bungalow on a large, treed urban lot. Currently, that demand does not exist. As two Ontario builders have claimed: "I can't see a future for it due to the price of land; they require a larger lot (Rivard, 1986)," and "we can build them but we couldn't sell a bungalow today (McQuarter, 1985)." Inherent in the bungalow are increased costs, not the least of which are land and materials. On average, a bungalow requires a lot with sixty feet frontage and this may add well over ten thousand dollars to the price of a finished house. This also increases the quantity, and ultimately the cost, of specific construction materials such as shingles, soffit and fascia material, concrete, roof trusses, and may influence the cost of heating/cooling.

Of the detached single-family dwellings being constructed in Ottawa-Carleton Region sub-divisions most share certain basic physical characteristics irrespective of their cost. Figures 1.6 and 1.7 illustrate a typical detached single-family dwelling and highlight many of the common features found in local new housing.

CHARACTERISTICS TYPICAL OF LOCAL NEW HOUSING.

- two storey
- four bedrooms
- two full bathrooms
- formal dining room
- central hall layout
- formal sitting room
- bright eat-in kitchen
- attached two car garage
- main floor laundry room
- powder room on main floor
- poured concrete basement walls
- family room (often with fireplace)
- bricked front elevation with fixed shutters
- master suite with ensuite (bathroom) and walk-in closet

Some may consider the majority of these features to be luxuries but they are, for many, rapidly finding their way into the category of new Canadian housing 'essentials' and the above list is far from exhaustive. Builders try to combine a blend of functional space and traditional design to meet today's high demand for sophisticated dwellings. Most allow the purchasers to modify the house with a long list of options which personally reflect the purchaser's taste in design and decorating although strict rules usually apply to restrict the choice of exterior colours on brick, siding, trim and shingles. These items are, for the most part, selected by architects and colour consultants who choose them to blend best with the overall design of both the house and the streetscape. This is to prevent such unharmonious choices as white brick with black mortar, green shingles in an otherwise brown shingled neighbourhood, fuchsia or pink door and window trim, etc. This is also a move on the part of the builder who tries to maintain a commitment to responsible planning which includes colour choice and external design while keeping up the 'image' of the neighbourhood and protecting adjacent property values.

OPTIONS TYPICAL OF TODAY'S UP-SCALE HOUSES

-hardwood flooring	-bidet
-enhanced lighting	-wet bar
-finished basement	-full brick
-improved insulation	-skylight(s)
-central vacuum system	-french doors
-high efficiency furnace	-ceramic tile
-roughed-in basement bath	-whirlpool bath
-attached three car garage	-air conditioning
-upgraded carpet or underpad	-third floor loft
-cupboard upgrades to hardwood	

1.5 Why Up-Scale Housing?

Research for this study was motivated by several questions. What type of people are buying these massive, expensive dwellings, and why do they buy them, other than for their obvious utility as a source of shelter? Why are people spending upwards of \$200,000 for shelter and where is this money coming from? Are there important demographic considerations and, if so, what are they? What has been their previous location, tenure type and what are their plans for the future? What are the dynamic factors at work in the market place which have initiated the construction of this particular portion of the urban housing mix?

What has been the catalyst towards such large-sized houses? With the trend towards childless families, fewer children, and one-parent families it would stand to reason that smaller dwelling units would be the norm. Perhaps the cost of certain items, rather than being 'not inexpensive', simply become 'inconsequential' (hydro, taxes, heating, maintenance) when weighed against the value and benefits which accrue to the purchaser such as proximity to good schools, friends, a safe 'escape' distance from the tedium of the daily grind, and various environmental amenities. Is it fair to even consider the question of

goods and services foregone in order to live under such conditions?

Could this perhaps be the result of not only the relatively high income rates being received by today's young professionals, but a resurgence of the 'me' generation, growth in the two, or more, income families, and a more aware house buyer who views the dwelling as an investment; a practical hedge against inflation? Or, are these units being purchased by people in a more advanced stage of the family life cycle? Are these people who have 'done time' in cramped condominiums and run-down row housing while awaiting the day to exit to suburbia where a lawn and a back yard are not unheard of and where younger members are afforded the luxury of 'space' to roam whether it be inside the house or out?

Could it be these houses are seen as an investment; are they simply an entertainment showplace for the 'yuppies' (young urban professional) on their upward climb or is the size legitimized by increasing family size and the need for every family member to have his or her privacy; to have their own 'space'. But just how much private space does any one person need? Some of the units being produced for the Ottawa market exceed 3,500 square feet and of that nearly sixteen percent is devoted solely to the master suite. Lower interest rates, expanded sources of mortgage money, the return of the seven-to-ten year mortgage, and the creative use of investment vehicles by a more investment-literate public has helped encourage sales and bring these houses within reach of more people, including more first-time buyers.

Many cannot resist at least visiting the houses in sub-divisions with such creative names as Sunridge Valley, Crossing Bridge Estates, Emerald Woods, and Fallingbrook. These are no longer just houses, but

rather they are a lifestyle. Builders have been criticized for this approach. Following the construction of a number of houses they (the builder) give the instant community a name and an enticing lifestyle advertisement then sell both the keys to the finished house, and a mortgage, to a buyer; a form of off-the-rack house buying (Long, 1985:10). These, and many other, houses have certainly exceeded their initial raison d'être as a source of shelter and safety for their inhabitants. The idea that people buy houses to bolster their image of self, both at the individual level and as a member of a certain social ranking, is also worth consideration (Cooper, 1976:437).

To address the questions raised above, people must be sorted into definable, albeit sometimes somewhat arbitrary, groups, as well as be studied within their real worlds, the world they 'perceive' to be their reality or their 'society'. These may be defined in spatial terms such as neighbourhoods, buildings, or villages; or in areas of common interest or references as with educational background, social or service clubs, occupation, hobbies, etc.

Behaviour reflects knowledge learned from within the group, and learning brought into the group from outside; interaction with new groups, new people, new ideas. The common denominator is the 'individual' and it is the actions and activities of the individual which manifest themselves in group behaviour. A more honed understanding of human processes which help shape the environment within which they themselves (the participants) are shaped requires that we first understand the forces which inaugurate decision making and behaviour. Within the context of housing, this study looks at a

specific group of actors who took up residence in a new area with specific spatial parameters based on the cost of the single-family dwelling unit.

This paper is divided into five sections with the first chapter providing a brief introduction not only to 'the house' but also to the ideas of urban expansion, and housing construction on the fringe, together with setting the backdrop against which the study took place. Chapter two presents an overview of previous work by migration, motivational, and behavioural researchers and discusses many of the factors believed to lead (or force) households into the process of re-evaluating their current housing position and ultimately choosing among housing alternatives. The methodology applied to the study and a discussion of the survey instrument are found in chapter three along with a review of methodological problems. Analysis of survey data and presentation of study findings appear in chapter four followed by a discussion of its implications to members of the builder community, and others, and some thoughts on future aspects of 'up-scale' housing in chapter five.

CHAPTER TWO

2.0

MIGRATION STUDIES PAST AND PRESENT

'Migration', insofar as it relates to housing, is the process whereby a household exchanges one dwelling/location for another in an attempt to have its needs and desires more appropriately satisfied. If, as Brown and Moore (1970) suggest, the 'place utility' or value of the current location (as a function of the household's expectations) does not satisfy these needs, then the household may opt to seek a new location (Brown & Moore, 1970:201). The underlying reasons behind 'why' households decide to relocate have been studied by geographers, economists, psychologists and sociologists among others.

2.1 Micro- Vs Macro-Scale Studies

Over the years the emphasis of researchers has changed significantly. Early works have been augmented by contemporary behavioural theories drawing upon investigations of perception and motivation of individual consumers and households (Davies, 1976:7). From housing studies at the macro (typically national) level, involving the interaction of housing supply and demand, the focus has narrowed to the micro (local) level. The behaviour of individual consumers and producers was being recognized and considered as part of the actual workings of the housing allocation process 'on-the-ground' (Bourne,

1981:73). It is at this micro-level that the models and studies become much more specific. As Bourne (1981:143) states, micro-economic or behavioural models are "idealized constructs of reality which primarily apply to specific segments of the population with freedom of choice and even then, under severely restrictive assumptions". As such, they serve as only partial explanations.

Any micro-scale study of housing must take into account a plethora of factors many of which are of minor importance at the macro level. These include tenure type, dwelling age and its relative position in the market, quality and price, location of control - whether public or private ownership (Bourne, 1981:73), rate of new construction, income levels and general demographic structure of households, cost of money, land availability or inventory, existing housing stock, marketing and merchandising trends, demand and, of course, consumer motivation. Of prime importance to this micro-scale research study is the determination of factors which influence a household's propensity to migrate and their choice of destination. What choices have they made and why did they make them?

2.2 Approaches By Differing Disciplines

Moore and Golledge (1976:16) note that typical of the 1960's was research being conducted in a variety of disciplines (urban planning, geography, sociology, psychology, anthropology); yet these lines of research were, with few exceptions, quite independent. One finds few cross-references to work in related fields and limited evidence of consciously shared theories and methods among the researchers.

Various members of these disciplines have attempted to determine and explain the reason(s) for individual and group behaviour. Some researchers and writers have concentrated on spatial considerations, others have investigated socio-economic and cultural themes; however, efforts have been made to promote the enhancement of knowledge and "draw together the scattered threads ... and ... unravel the subtle relationships that exist" through inter-disciplinary endeavours (Beaujeu-Garnier, 1976:13).

2.2.1 Geography

According to Yeates (1968:1), geography can be viewed as "a science concerned with the rational development, and testing, of theories that explain and predict the spatial distribution and location of various characteristics on the surface of the earth." As a science it subscribes to laws based not on determinism but on statistical approximations (Haggett in FitzGerald, 1974:7). Bronowski (1968:93) enhances the above by adding that "a society moves under material pressure like a stream of gas; and on the average its individuals obey the pressure, but at any instance, any individual may, like an atom of gas, be moving across or against the stream." Our models, therefore, need not account for all individual decisions but must do so on average.

Prior to the sixties, the geographic literature was punctuated with writings about the spatial components of mobility while paying little attention to perception and the behavioral responses of the individual (Hamelin, 1973:54). Early post-World War II studies considered movement primarily at the national and continental levels. The impetus for this approach may well have been the trend away from the 'land' and the

influx of rural residents into the cities. Urbanization had become a popular academic theme as it became a mass phenomenon. It was having "a unique effect on the city: it creates ever-increasing space needs that continually raise the price of land throughout the urban space" (Lithwick 1970 in Gertler, 1976:53) and while it may have proved timely for developers and speculators, it only served to exacerbate the problem of housing the nation's millions.

During the quantitative revolution of the sixties 'geography' focussed on studies of central place theory, distance-decay functions, and investigation of interaction theory with its library of mathematical formulae based on the gravity model. These models, associated with the movement of people, capital, goods, ideas, etc. (Johnston, 1983:35), lend themselves to estimation and prediction/forecasting particularly in economic and marketing geography.

"Gravity models are currently the most common techniques used ... for tracing the impact of changes ... and testing the consequences of alternative future strategy design."

(Davies, 1976:6).

As researchers in other disciplines were studying perception from psychological, sociological and physiological perspectives, some geographers in the fifties and sixties were examining environmental perception and its link to spatial behaviour. Environmental perception studies included a complex nesting of pre-decision factors linking attitude formation patterns, learning, processes of perception, and evaluation. As Kasperson and Minghi (1969) indicate, the aspect of space, or environment, is a significant element in the composition of human perception and an influencing factor in human choice. Lowenthal

(1967), however, notes that geographers of the mid-1960's were relatively content to subject the environment to investigation while divorcing themselves from those experiencing and structuring the environment (Moore & Golledge, 1976:17)

The environment, whether 'perceived' or 'actual', was viewed by some as being worthy of scientific inquiry, holding that as man's knowledge and awareness of his environment increased, so did its influence upon his actions. The entire 'monistic' surface upon which decisions are based was taken to include an inventory of natural and non-natural, visible and non-visible, geographical, political, economic and sociological elements (Brookfield, 1969:53). Through Lowenthal, we see the 'surface' of influence (surface of the earth) as being shaped by refraction through cultural and personal lenses of custom and fancy for we are the artists rendering reality in accordance with our apperceptions and predilections (Lowenthal, 1961:260). Further contributions in this area can also be found in Lowenthal (1967), Lowenthal and Prince (1965),

Many geographers in the nineteen seventies were operating within the bailiwick of behavioural researchers examining the preferences and attitudes of individuals together with the problems associated with minority demands and tastes (Davies, 1976:17). While this approach was not totally new to 'geography' there was an increase in its popularity within the discipline - a growth in what can be termed 'behavioural geography'.

Effective research on motivation and behaviour was found, by Dawson and Doornkamp, to require consideration of the processes of perception, evaluation, attitude formation and learning which precede decisions and

actions. They point out that the study of man's behavioural processes may best be realized within an inter-disciplinary framework given his nature as a "multi-goaled being who at any one time may pursue a variety of social, economic and political goals, some of which may be incompatible" (Dawson & Doornkamp, 1973:175).

Brookfield (1969:65) claimed the source of the decision-maker's information was essential in the process of achieving his goals and furthered this by questioning not only sources of information but their changeability with time and situation. The concepts of receptiveness and resistance to new sources of information were further considered with particular reference to the relevance of the psychologist's role in interpreting aspects of information, decision and action.

Geographers, believing the secret to further understanding of environmental issues lay within the 'pre-decision' stage, were becoming seriously devoted to the study of environmental perception (Dawson & Doornkamp, 1973:173) and were trending towards multi-disciplinary research. As Beaujeu-Garnier (1976:13) writes, "only a geographer can try to unravel the subtle relationships that exist between features of the landscape and resources exploited by man, by launching resolutely into hitherto unexplored depths of geographical complexity."

While collaboration has its own rewards through an enriched learning environment, not everyone subscribed to the same approach. There were those who felt far too much was being expected from a single discipline resulting in a failure to recognize the true 'core' of geography (Sorre 1967 in Beaujeu-Garnier, 1967:2). Throwing his support behind this belief, Gluckman (1964 in Beaujeu-Garnier, 1967:21) claimed that "all investigations should be restricted to a clearly-defined field

of study, explanations should be sought within this field and not beyond it and interdisciplinary amateurism renounced."

Under the broad 'geography' umbrella, economic geographers and their concerns for production of material goods have played a significant role over the decades in the study, examination, and interpretation of elements within our commercial economy (Applebaum, 1947:245). The modern capitalist system, however, involves not only the production of goods (and services) within an economy, but also the subsequent distribution of them into the hands of consumers. This distribution function is the activity of "satisfying needs and wants through exchange processes" (Kotler & McDougal, 1983:590). It is an integral element of the study of production and must be considered as far more than incidental (Applebaum, 1947:245) in the housing process.

2.2.2 Psychology

Psychologists are quintessentially interested in motivation and behaviour. Maslow (1943) suggested that behaviour is almost always motivated (Bennett, 1972:45) but is usually constrained within the pales of biology (hunger, sleep, thirst), culture, specific situation, and/or psychological needs such as affection, belongingness and self-esteem (Pervin, 1984:196). Maslow's 'Hierarchy of Needs' parallels in some ways the work by Alderfer (1969) and his need-based 'ERG Theory'. For further discussion see Alderfer, 1969; Johns, 1983; and Maslow, 1968, 1971.

Psychologists and geographers both share a common interest in perception although the latter tends to place more emphasis upon the spatial aspects of behaviour. Beck (1967:18) also highlights the theme

of congruent inquiry within geography and psychology which deal, respectively, with the physical and symbolic transactions of man.

2.2.3 Sociology

Throughout the fifties, social research on behaviour and movement was conducted via three broad types of studies: area, household, and motivational. Little if any effort, however, was being made to integrate the often valuable findings of these three types (Rossi, 1955:12). Rossi (1955) attempted to fuse the three study types together not only to synthesize valuable information, but also to produce an outcome which would be of some practical use. Up until that time, the majority of residential mobility data had accrued from 'area' studies, usually based on census tracts. Studies which brought focus to the 'individual household' were less frequently encountered in the literature on mobility (Rossi, 1955:12) although not totally absent. Some studies compared stable and mobile households, according to Rossi (1955:12), disease incidence, residence in specific housing types, and relations with neighbours were found to be significant elements in these studies. As one of the initial sociologists to write on the topic of intra-urban migration, Rossi wrote of spatial mobility in terms of a household's continuing responses to changes in family life-cycle.

"Mobility is the mechanism by which a family's housing is brought into adjustment to its housing needs".

(Rossi, 1955:178)

His framework for analysis, or his 'accounting scheme' as he termed it, presented reasons for moving in terms of pushes - factors pertaining to the decision to leave the former dwelling - and pulls - those reasons

directly related to choice of locations to move to. These were considered in light of three distinct stages in the decision-making process: a) the decision to move, b) new location search, and c) destination choice. (Rossi, 1955:8)

2.2.4 Economics

Economic science has traditionally focussed much of its attention on 'firms' and 'households' in its attempt to model, explain and quantify their behaviour (Jones, 1984:1). In doing so, the demand for housing by households has been seen as a component of consumption theory whereby the household demands and consumes goods and services at a rate in relation to budgetary constraints while attempting to achieve maximum utility from each dollar. In sum, the consumer structures his demand to gain maximum utility in a cost/benefit framework.

Limited attention has been granted to the idea that while 'housing' is a consumed service/good it can also represents a reservoir of savings. In the case of an owner/occupied unit, the asset provides the service which its owner consumes (Jones, 1984:7). An increase in asset value may also result due, in part, to appreciation, inflation or physical change (improvement) to the structure.

2.3 Residential Mobility Determinants - The Motivators

A wide variety of cultural, sociological, economic, and psychological determinants act upon the household, and the individual, to bring about the decision to migrate. Accepting that behaviour is "purposeful rather than random" (Bennett, 1972:18), migration is therefore the result of some systematic motivational factor(s). Rossi points out that residential mobility can be considered to result from

natural growth in our population, shifts resulting from the dissolution or break-up of households, and changes in the composition or direction of the labour force. However, these factors alone are not sufficient to account for the high levels of mobility. Mobility, or the process of household relocation, is seen as being "one of the most important forces underlying changes in urban areas" (Rossi, 1955:2).

In part, Rossi likened the high level of established household mobility to a game of 'musical chairs' where, from time to time, housing is exchanged. The outcome of Rossi's investigations was the 'Mobility Potential Index', based upon background characteristics of households which predisposed them to becoming mobile, together with a 'Complaints Index' concerning eight aspects of the dwelling and neighbourhood. Both indices revealed a high correlation to level of mobility. As a result of his research he was able to predict with great accuracy those households which would move.

"By employing a household's mobility intentions, accurate predictions of moving behaviour can be achieved in about nine out of ten cases".

(Rossi, 1955:112)

Bourne and Gadd (1972) augment Rossi's discussion of immigration and natural increase by considering 'urbanization' as a relevant factor acting to bring about changes in the urban fabric. In addition to the traditional view of population movement from a rural to urban setting, suburbanization is also considered to play an important role.

'Suburbanization' is the process whereby cities reach out into the countryside urbanizing the villages and rural population in the process.

A new population of ex-urbanites are added to the population mix and the upwardly mobile urban peoples migrate through the urban hierarchy into larger centres which coalesce to create even larger metropolitan complexes (Bourne & Gad, 1972:10).

One can look to the micro-level and demographics for partial explanation of these activities. Education, according to Goldstein (1973:110) is one such element which appears positively related to the likelihood of moving. The higher a person's education level, the better their chances of planning future housing consumption, ceteris paribus. His studies also revealed that the longer the head of the household has held his or her current job, the lesser is the likelihood that movement will happen. The thinking here is that housing advantageous to the place of work has probably already been acquired.

Income level together with available asset (equity) value, perhaps through previous house ownership, is an essential consideration. The more affluent a household becomes, the more they may be inclined to buy a more expensive house or pay a higher cost to own rather than rent - renting, therefore, becomes a more undesirable tenure choice (Coons & Glaze, 1963:40). A variety of other factors also warrant consideration.

2.3.1 Residence, Neighbourhood, and Space

Rossi's findings revealed that complaints about space inside the dwelling, about the neighbourhood, and about costs were of particular importance in differentiating mobile and non-mobile (stable) households. The residence proved to be a greater source of discontent than did the neighbourhood with the corollary being that when seeking a new location, it is the features of the dwelling that are of primary importance.

Studies by Moore (1966:29) support this claim; the majority of reasons for moving relate to characteristics of the dwelling unit under consideration rather than any specific spatial features. By nature of the fact that dwellings of similar types are quite typically grouped together in the same general area, a certain degree of spatial constraint must, of necessity, however, be present (Bennett, 1972:24).

Amount of space required, and space available, can become strong considerations but not always as strong as one would think. Contrary to the commonly held belief that 'empty nesters' (older married couples with no children living at home) usually seek smaller dwellings, Miron and Schiff's 1982 study of emerging empty nester households revealed the most commonly stated reason for moving was to secure more living space. Only thirteen percent mentioned a desire for less space (Miron & Schiff, 1982:37). The researchers concluded that within this select market segment, the stereotypical image of the empty-nester was inappropriate and too simplistic. A need for further space also appears as a major factor in a recent study by Zavislake (1982:App. C) who, while studying Torontonians with an average age of 33.5 years, found 25% of respondents randomly sampled favoured 'more room' as their reason for moving.

Boag and Sarkar (1984:4) maintain that space "has consistently been shown to be the prime motivator for household moves". Following, to some degree, from Miron & Schiff (1982), Boag and Sarkar (1984:4) reveal that older people are more lavish users of space while younger families tend to be more overcrowded. Overcrowding then leads to increased levels of housing dissatisfaction (Miron & Schiff, 1981; Morris, et al., 1976). 'Space' does not relate strictly to total amount; it must be in

accord with requirements of the user(s).

Consumers, according to Northrup (1981), desire, not space per se, but rooms large enough to accommodate particular activities and the appropriate furniture. For low income families living in small housing units, 'space' equates to having sufficient bedrooms to afford adequate private or personal space to each family member. Smaller families were found to value most highly space for leisure, cooking and eating, with sleeping space being a secondary consideration (Foote et al, 1980). Once the basic internal space requirements have been met, priority is given to the design and layout of the space in terms of 'quiet', 'work' and 'social' areas with buffer zones usually composed of hallways, multiple levels, or location within the dwelling (Boag & Sarkar, 1984:5). The importance of 'space' in terms of 'rooms', rather than in an absolute sense, was further verified by Kaynak and Stevenson's (1981) Atlantic Canada study and Kaynak and Yavas (1981).

2.3.2 Family Life-Cycle

Rossi (1955:7) also suggested that the family's position in the family life-cycle, together with its attitudes towards 'home' and 'neighbourhood' are extremely useful in predicting its current desires for moving. According to some researchers, the largest proportion of moves are a direct consequence of changing needs associated with changes in family life-cycle (Bennett, 1972:26; Simmons, 1968:627;). The 'cycle', or traditional sequence of family stages from initial formation to eventual death of one spouse, is strongly deterministic of required housing characteristics and activities to satisfy them. Space limitations of a dwelling strongly impinge upon the household's ability

to accommodate changes throughout the life-cycle. The smaller the unit the less flexible it is to the changing needs which arise, for example, as the result of child-birth, or an addition of a live-in relative. Variations in the financial status of the family also play a key role in the process of matching housing units with household features. Life-cycle studies have been conducted by Galster and Hesser (1981) in conjunction with their work on housing satisfaction - noting the importance of not only physical dwelling characteristics but also the 'compositional' nature or the household's personal characteristics including social class attributes.

Certain age groups show a greater propensity to move than others (Simmons, 1968). Of note are young married couples and young businessmen, together with those experiencing abrupt changes in their career path or life-cycle (Simmons 1968 in Mitchell, 1974:3). In addition, Simmons (1974) also found new household formation, rate of economic change as a function of income levels, trends in fertility, marriage, and increases in real income were relevant factors in generating household movement (Simmons, 1974:277). He concluded that there was a need constantly to monitor both the process of household formation and the preference structures of households.

Higher divorce rates can be attributed to the relaxation of Canada's divorce law in 1969. This coupled with a low rate of remarriage may tend to accelerate the formation of both single-person and common-law households thus bringing about a deviation from the 'normal' life-cycle path and the introduction of new housing arrangements. As Miron and Schiff (1982:9) point out, we can expect both fewer young couples to survive 'together' to the latter part of the

cycle and a change in their demand for housing. An increase, however, in the age of first marriage means that younger people may be working longer, saving more, and be in a better position, after marriage, to purchase larger and/or more expensive housing.

The social aspirations of the household were also determined to be of consequence in the decision to move. Building upon Rossi's research to probe the influence of both life-cycle and career patterns, research findings confirm that "upward social mobility far outweighed all other considerations in producing residential mobility" (Leslie & Richardson, 1961:899).

Michelson's (1977) contribution was to introduce the ideas of 'preference' and 'life-cycle dynamics'; a progressive, evolving life-cycle in which the criteria used to evaluate preferences and housing needs change through time. These writings suggest that the decision-makers' behaviour may be one of calculated 'action' rather than a 'reaction' to stress (Bourne, 1981:142).

2.3.3 Stress

The physical environment is a continuous source of stimuli to which people must respond. Stimuli which disrupt or threaten established or desired behavioural patterns have been termed 'stressors' (Brown & Moore, 1970:201). From these stressors a state of 'stress', with varying tolerances (thresholds), can develop depending upon the nature of the threat.

Initially, investigators presumed that stress was the result of changes in relationships between a household's housing needs and the properties or attributes of the housing environment (Wolpert, 1965; Ley,

1983:240). Changes, for example, in the size or aspirations of the household, deterioration of the dwelling unit itself, or a dissatisfaction with the neighbourhood and/or its residents could be considered relevant. Once stress reaches a critical level (the threshold), adjustments are called for. Lowering its aspirations, seeking either to change neighbourhood deterioration or attract improvements, acceptance (tolerance) of the current conditions, restoring the diminished level of satisfaction by physical addition or changes to the dwelling, and relocating the household either in whole or part are but some of the possible options open to the household (Ley, 1983:240; Brown & Moore, 1970:202).

One must not discount the role stress plays in the decision to move; however, not everyone moves because of stress resulting from inadequacies or dissatisfactions with their current dwelling or its surroundings. Economic and spatial factors suffice partly to explain why households move but attention must also be given to other factors such as status, prestige, security, and involuntary moves when pondering the question of household mobility.

2.3.4 Economic vs Non-Economic Factors

Bennett's (1972) research suggests that economically motivated moves, such as the taking of a new job, are of far greater consequence to inter-urban moves than they are to intra-urban moves. Economic considerations and constraints cannot be overlooked as important factors determining the decision to buy. As the literature reveals, people are far more diverse in their motives than purely economic. From a study of home owners in Ohio, Coons and Glaze (1961:87) revealed the following

reasons for house purchases. These reasons can be considered with an eye toward 'why' the household entered the housing search.

Non-Economic and Economic Reasons Related to The Decision To Move.

Non-Economic

wanted a place of our own
we never like to rent
didn't like uncertainty of renting
we had to move
couldn't find suitable rental
freedom to do as we please
inherited the property
family tradition to own
built our own home
wanted a place to decorate
wanted a place with a yard
retired and wanted to settle
wanted permanency
security in owning

Economic

to build up equity
got down payment, never wanted
to rent
rent is a waste of money
cheaper to own
just as cheap to own
good investment
down payment was low
put money in safer place

(More recent work by Skaburskis (1983:43) specified the following)

wanted larger unit
wanted smaller unit
wanted more security when away
wanted better neighbourhood conditions
wanted to be closer to work
wanted to be closer to shops, theatres
dissatisfaction with unit/neighbours
dissatisfaction with landlord
wanted new/different lifestyle
wanted better quality

attractive financing available
wanted less upkeep/maintenance

The essential ingredient, according to Bourne (1981:142), is that household members develop certain anticipations about future moves, that is what they expect to achieve by the move, or the benefits which will accrue to them once a move is complete. He has proposed a three-stage cycle to describe the movement to the ideal housing condition; a condition which results from evolution through experience and changing housing environments. With the expectation of achieving or approximating the 'ideal', households endure conditions in stages 2 and

3, appearing satisfied under conditions which do not readily meet current needs or preferences.

Economic considerations such as those pertaining to mortgage payments or net profit on the sale of a previous dwelling lend themselves to quantification. Non-economic factors, on the other hand, which serve to bring about a change in place of residence are quite often vague and, as such, difficult to quantify. How can one possibly place an unambiguous value on a happy childhood or on neighbourhood safety? Bourne (1981:132) adds the following factors to the list:

Non-Economic

children's future
increased dislike of neighbours
gentrification - forced moves
adventure
lifestyle
safer community
obsolescence

Economic

job commitment
cost of money
unit cost

2.3.4.1 Image, Status and Prestige

Partly as a result of family life-cycle considerations, basic levels of satisfaction and dissatisfaction can derive from the dwelling unit itself. Yet, some households rank neighbourhood and community amenities as the crucial elements which are a function of both the family composition and its financial structure (Wilkinson & Merry, 1965:3). The decision to move can then legitimately be viewed not only in relation to the dwelling, but the individual perceptions of and attitudes towards the physical environment and the image the household has developed both of the existing location, and the proposed destination.

Every person has an image of the world, an image which is shared largely with others of the same culture (English, 1968:204). It is from this image that we derive many of our aspirations. Supplementary is the image the individual holds of him or herself juxtaposed with their 'world image'. Since the image of 'self', can be highly vulnerable and fragile, it (Cooper, 1976:437) routinely demands that it be shielded from perceived reality by envelopment in a familiar, solid, inviolate structure called 'house'. Sociologists have concluded, after studying how contemporary Californians choose their houses, that "many people bought houses to bolster their image of self - both as an individual and as a person in a certain status position in society" (Cooper 1976:437). While often viewed as 'home' of the status symbol, California does not hold a monopoly on this type of image building, enhancing or preserving behaviour.

The many less tangible psycho-social factors (belongingness, self-esteem) influence the perception of the decision-maker. But, despite the outcome of any discussion on the relative merit of status-bolstering neighbourhoods, there is an obvious requirement for any community to provide an appropriate level of infrastructure such as schools, churches, transit, parks and hospitals for its citizens who, not uncommonly, may prefer to live in close proximity to those who are perceived as being 'alike'.

A gap occurring between a household's perception of their status and perception of neighbourhood status is often sufficient to motivate a change in household location. Bennett (1972) discusses these perceptual differences in terms of 'dissonance' (disagreement or incompatibility). Positive dissonance arises as a result of a household's perception of

itself being higher than that of the neighbourhood; negative dissonance is the opposite, while the absence of dissonance is termed 'status satisfaction' (Bennett, 1972:176).

As concluded by Adams (1984:518), we use housing to hold onto our wealth, state who we are [or who we would like to be], build social fences and bridges, join groups, and exclude others from our groups. With improvements in both economic and perceptual outlooks, households often become desirous of the next higher socio-economic plateau or group. The result is often relocation to an area perceived to be more attuned with their social aspirations.

2.3.4.2 Freedom, Privacy, and Security

Homelessness tends to strip a person or family of its place in society (Adams, 1984:517). There is little doubt that in many cases home ownership (freehold tenure) conveys a certain sense of 'status' within the community but house ownership also brings with it a related degree of freedom and security, economic and otherwise. Within the circumstance of housing, the ability to engage in activity without inhibition, to make noise, and to retain control of private property without the real, or perceived, intervention by neighbours constitutes 'freedom' (Harman and Betak, 1974:51). Being free to do with one's dwelling as one chooses emerges as a strong non-economic factor involved in motivating families to move from one tenure choice to another. As Coons and Glaze (1963:86) discovered, the freedom to decorate, remodel, and landscape to personal preference were forces far more powerful than monetary considerations, particularly in households where financial circumstance afforded them the luxury of regarding their house as

something more than mere shelter.

Privacy, while being consistently identified by consumers as an essential housing choice variable (Kaynak and Stevenson, 1974; Boag and Sarkar, 1984), can be viewed in terms of both 'internal' and 'external' orientation. It is a function of isolation from neighbours, and other family members, and is proportional to the size of lot and house size. Two points from the Harman and Betak (1974) study in Hamilton, Ontario, are worth mention. First, respondents emphasized the importance of external (garden and yard space) over that of internal space. Secondly, they viewed the lot as providing both open space and the primary means of maintaining their distance from others. A larger lot better fulfills the privacy criterion but, as these authors point out, does little to relieve contemporary problems of urban growth, reducing urban sprawl and the need for increased densities (Harman and Betak, 1974:52). There is evidence to enhance the belief that the feeling of privacy generated by the available space transcends the actual size of the lot in importance to consumers (Michelson, 1977; Kaynak and Stevenson, 1981; Knight and Menchik, 1974). Street and neighbourhood layout (cul-de-sacs, crescents, parks, playgrounds, limited access thoroughfares, etc.) further the influence upon noise, traffic flow and the sense of privacy and security.

Many feel that only through ownership can they provide a safe and stable environment within which to rear their children. Under this option, the household has more freedom in the choice of schools, churches, community services, and desirable neighbourhood elements which will impinge upon their children's development and well being; assuming, of course, that the household has the requisite economic and non-

economic flexibility to do so. Trade-offs may be necessitated.

"Home provides the safest sanctuary and when it ceases to provide security, it ceases to be home".

(Adams, 1984:516)

In later years of house ownership, as the dwelling unit reaches or nears being owned outright - not encumbered by a mortgage - the family can be better assured shelter without undue pecuniary concerns or constraints. This idea of 'security' can be found in the works of Coons and Glaze (1963) and Muller (1947) as can it be found expressed in terms of security of 'residence' or 'place'. It was found that many renters had a strong sense of 'place insecurity' created, in part, by capricious landlords who might literally 'sell the place from under them'. Beyer (1958:165) Muller (1947:49) and Paxton (1951) present similar findings.

The equity associated with ownership represents the dominant financial asset of the typical family (Adams, 1984:516) and the security of equity and integrity of structure become dominant and ongoing themes in ownership. Real estate, of almost any type, is recognized by experts as an almost 'sure thing' - appreciation with a high degree of protection against inflation. As Will Rogers proclaimed: 'Buy land: they don't make it any more.' Ownership may be simply a stepping stone that allows a household to accumulate equity for the move 'up' the housing [and status] ladder (Coons and Glaze, 1963:36).

2.3.4.3 Man and Woman, The Investors

A purchased dwelling unit, as the end result of specific motivated behaviour, can be seen as both an investment vehicle and a consumed good. Does this then make the purchaser a consumer or an investor? Is the resident-owner not a capitalist holding title to the capital good which he himself consumes? Under this schema the dwelling becomes an investment vehicle because the purchaser seeks a return on the investment dollar. After all, "happiness is a steadily appreciating home" (Rhodes, 1985:68).

Many studies, however, demonstrate non-economic, perhaps even non-rational, purchasing and migration behaviour. Acquiring a dwelling at 'least cost', as research would indicate (Coons and Glaze, 1963:16; Cooper, 1976; Leslie & Richardson, 1961; Zavislake, 1982), is quite often a secondary consideration to the direct satisfaction of more immediate non-economic wants and desires.

2.3.4.4 Income

Income has been found to be strongly linked to both the amount of capital a household can normally expect to amass and to the quantity of housing demanded by a household, given its manageable monthly payment limit (Coons & Glaze, 1963:25). The latter is true of course whether the search will end in the decision to 'buy' or 'rent'. Results by Quigley (1978:39) further underscore the influence of income, coupled with demographic characteristics, in the choice of a particular housing unit. In an exploration of the inter-relationship between income and other economic variables, Steele (1979) discusses the actual decision-making as a three stage process whereby participants first decide

whether or not to head separate households; secondly, whether they should rent or buy, and thirdly what the answer to question two will cost (Kirkland, 1985:5).

Those with strong 'buying' behaviour, soon find that, by design, most formal or institutional financing vehicles are premised upon at least some degree of owner/buyer equity. The decision to 'search' and ultimately the decision to 'buy' are inexorably linked to income and prior ownership of some type of equity base whether it be a house, bonds, stocks, etc. Satisfaction of housing demand is, therefore, contingent, in part, upon the existence of 'liquid' capital as a downpayment.

What constitutes income? Researchers in the field of housing have not standardized on one definition for the term 'income'; the same element has been measured in a variety of ways. Central to this notion are questions which concern spousal income being 'transitory' as opposed to 'permanent' income; the merit of including non-spousal incomes, which are typically small, in the calculation of total household income (Miron, 1984:3.7); and non-family households where temporary 'live-ins' or others may be contributing a portion of total income (Kirkland, 1985). In other cases, self-employed householders may subscribe to practices whereby portions of income are cloaked in entrepreneurial or business ventures to achieve maximum tax advantage. And, what of fluctuating incomes, retirement payments, periods of unusually high capital gains, inheritances etc?

Recent research (Jones, 1984) stresses the necessity to understand both 'income' and 'wealth' factors when making debt/equity financing decisions. Introduced into the discussion of 'tenure choice' are the

components of housing demand and the housing finance issue which, as Jones (1984:1) claims cannot be fully understood if one fails to include the household's endowment of non-human 'wealth' and 'portfolio' objectives; elements which should certainly be integral to the decision framework given the magnitude of these assets with respect to the total assets of typical households. Based upon the assumption that accumulated wealth and portfolio optimization represent primary factors in determining tenure choice, it then becomes an important ingredient in the migration and buying decision mix, particularly for first-time buyers.

The value of liquid and fixed capital held by a household influences both the dwelling price and the behaviour characteristics of the 'search' for a new dwelling; the larger the downpayment, the more expensive the sought after dwelling can be, and the faster the mortgage can be paid (Coons and Glaze 1963:24).

Total family income, alone, should not be over-stressed for it fails to take into consideration such factors as level of overall indebtedness, changes in income, current level of assets and future liquidation of assets, inheritances, gifts, etc. Similarly, measures of 'ability-to-afford', including 'source of funds', 'expected income', 'permanent income' and 'augmented income', in the case of return on owners equity, have been proposed by Miron (1984: 3.17).

2.3.4.5 Price/Cost

Coons and Glaze (1963:40) found that with increased household affluence renting often becomes unsuitable and there is an increased willingness to pay a higher price for 'ownership' of the dwelling unit.

Throughout the search, locations outside the reasonably acceptable economic limit of the household will be eliminated. Price acts to delineate and narrow the search more so than it does to motivate a household into mobilizing (Bennett, 1972:56). Recent research (Clayton 1984:16) in Toronto indicates a strong shift to smaller housing, a reflection of the (economic) costs of ownership in recent years. Clayton claims the most critical variable in the affordability equation over the 1984-1991 period will be 'cost of money'. The average Toronto family under study, living in an average-priced house, surrendered 26.5% of its income to mortgage payments. This represents a decrease of about 10% from the high of 1981-1982 but is still above the 18-20% of the early 1970's.

Typically, larger houses of higher quality or with more features and space cost more not only to acquire but to clean, heat and maintain (Miron, 1984:1.9). The degree to which a household is willing to trade-off desirable or necessary attributes (size, location, degree of luxury, fixtures, etc.) impinges upon the final cost of the dwelling. Analysts would seem to agree upon the type of costs involved. Included are depreciation, maintenance costs (fuel, water, electricity), and transfer costs; the costs resulting from the sale or liquidation of real property (Miron, 1984:2.5). The cumulative total has been estimated at 7% of the selling price by McFadyen and Hobart (1978:167).

Migrating house owners are faced with a much more complicated and costly relocation process than are renters. Acknowledging the many financial considerations, Bourne (1981:82) offers the following as important considerations within the house-buying process: rent vs price, downpayment or deposit, credit availability, cost of borrowing,

transaction costs, costs to modify unit to desired standard, together with agents costs, legal fees, discriminatory charges by vendor and lending institution. Northrup (1981:3) found that a very high proportion (over 80%) of respondents were, in fact, well informed on not only the obvious costs of principal and interest, but taxes, energy costs, and the many hidden costs. According to the Ottawa-Carleton Law Society fee schedule (Lynch, 1986), legal fees involved in the transfer of a house valued at \$200,000 can eat up \$1,700 or more.

Concerns of affluence and prestige influence not only desirability of a dwelling, but the value of the land and the type of dwelling present. Sagalyn and Sternlieb (1973:46), and Berry and Smith (1972), document the link between socio-economic status and housing costs. Increased lot sizes frequently escalate total costs because of the widely held belief that larger lots, of necessity, require larger, and more expensive, houses in order to make them marketable. Costs associated with subdivision or development lots have risen dramatically over the past few years and are affected by 1) price of raw land, 2) density of land-use, and 3) cost of improvement. The result has been an increase in land prices in proportion to the cost of a new house (Sagalyn and Sternlieb 1973:28).

Industry research (Westin, 1985) points to a shift from quantity to quality; purchasers are ready and willing to pay a higher price for a superior grade of finish. Popular items include french glass doors, trimmed archways, carpet upgrades, cornices, skylights, whirlpool Roman tubs and extensive use of hardwood which can add from \$5,000 to \$60,000 to the cost of the house. The budget-minded buyers tend to refrain from the glitter and cosmetic features, favouring the pragmatic approach by

restricting themselves to decks, patio doors and carpet upgrades (Westin, 1985:10).

Regardless of the price, movement to a new, or different, dwelling can cost not only in a monetary sense, but also in a psychic sense as Goldstein (1973:110) points out. Psychic costs associated with uprooting and disrupting friendships, while being hard to quantify, are reduced if there are no children or if they are very young.

2.3.5 Voluntary vs Involuntary Moves

The reasons prompting a move can be both voluntary and involuntary although a clear distinction between the two is often difficult to establish. For example, eviction or destruction of a previous dwelling could be considered reason for a forced move, but moves may be forced by other, less emphatic circumstances such as family or household break-up, a new family member, long-distance job transfers, etc.

When a disparity exists, between the collective needs of the household and surrounding environmental characteristics, there is said to exist a low 'place utility', a condition which, if sufficiently powerful, can disrupt the behaviour pattern of the household and require adjustment, quite often taking the form of a move. Embodied within this discussion on 'place utility' by Brown and Moore (1970:201) was the idea that people had the freedom to decide whether or not to move. This is true to a degree but one must also admit evidence by Rossi (1955) whose research into household behaviour revealed that thirty-nine (39%) percent of respondents were 'forced' into moving due either to circumstances over which they had no control (severe income loss, destruction of dwelling by fire) or as a result of reasons unrelated to

moving (Rossi, 1955:135). Later research by Backler (1974:42) reveals that it is upper income people who enjoy the luxury of being able to make the majority of voluntary moves. The most common reason given for moving under voluntary circumstances was dissatisfaction with amount of space offered by the previous dwelling unit, a claim supported by many other researchers (Boag and Sarkar, 1984; Miron and Schiff, 1982; Moore, 1966; Rossi, 1955:9; Zavislake, 1982).

2.4 Decision-Making Process

Once the decision to move has been made, decision makers typically begin a search for locations of possible housing satisfaction. The avenues selected will of course vary as a function of both the individuals and the type of housing sought. Searching and evaluating continues until either a new dwelling and location have been chosen or the household resigns itself to remain at the present location and makes adjustments 'in situ', whereupon the search is abandoned.

2.4.1 Search

The primary objective of the search is to gather information on the location, characteristics and attributes of possible housing alternatives. Sources of information available to the prospective buyer are both 'formal' and 'informal' encompassing mass media presentations, friends and relatives, realty agents, directional, billboard and other types of signage and advertising by builders and developers both on-site and elsewhere.

Obviously certain areas or neighbourhoods which do not fulfill the environmental and locational prerequisites of the household will be eliminated from active consideration before the search proper begins.

As the search matures and more accurate or timely information is collected and digested by the searcher, it is not unusual for the search to be revised or even abandoned (Brown & Moore, 1970:208).

A household's current knowledge can be considered 'micro' in the sense that it knows what features are desired in and at a new dwelling. The many channels followed to acquire further knowledge are biased with respect to not only 'what' they convey but 'who' they reach. But, as Brown & Moore (1970:207) further discuss, knowledge can also be 'macro' in scope and include at least some awareness of neighbourhoods or city sectors even if data on the individual dwellings within them are scarce or non-existent.

Locational decisions are frequently made within the context of a familiar environment and both day-to-day activity and information received from other sources assist in the creation of this awareness environment. Analysis of data collected by FitzGerald (1974:70) on household migration habits supports this line of thinking. He found that approximately 75% of households made moves within a 5 kilometre distance, with only 25% venturing outside this rather restricted awareness environment. Bourne (1981:139) and Wolpert (1965b) have addressed similar concerns through such terms as 'aspiration regions', 'behaviour paths', 'search space' and 'awareness space', the space within which the search for information on possible new dwellings occurs. Earlier studies of space perception, and the unique meaning personally associated with space have been conducted from a spatial-phenomenological focus by writers in the fields of existentialism and psychiatry such as Bingwanger (1947), Minkowski (1939) and Straus (1963).

While the sector located between 'house' and 'work' cannot be excluded as an important influence, it is uncertain what part 'distance to work' actually plays in the search and selection criteria. Hempel and Tucker (1979), and Izadpanah and Var (1978) maintain that it represents an extremely important consideration as does 'distance to school'. Foote et al (1960) and Michelson (1977) are in accord insofar as it relates to new families without children and families with young children. Freiden and Bible (1982) counter the claims after finding distance to work only weakly significant in the decision process.

2.4.2 Information

Just as elements of the gravity model can be applied to movement of people, goods and capital, so too does it have application to the flow of stimuli and house-hunting information. The presence of reliable and timely information is fundamental to the decision-maker if he or she is to make a sound choice. However, the movement or diffusion of information and ideas is believed to be spatially biased in its spread, by frictions of distance, (Bennett, 1972:46; Johnston, 1983:35) and from this developed the general idea that as people become more distant from the source of information the likelihood of that information reaching the person decreases, or, at least, the more time it would take eventually to reach them.

Given that the largest single type of identifiable household in Canada comprises husband and wife families, this greatly increases, for many, the odds of exposure to, and contact with, information sources. Kirkland (1985:28) estimated these families to be 5.5 million in number or two out of every three households in 1981.

House buyers are often anything but well informed, and can be far from rational - the classical economic man. Buying a house is an extremely emotional event for many and it is difficult to remove the emotional aspect from the house-buying process. Merchandisers and builders are well aware of this fact.

"House merchandising is the selling of dreams and promises as well as four brick walls."

(Rae, 1985:73)

Work by Pred (1967 in Bennett, 1972:46) indicates that the informal flow of information tends to be through groups of people sharing the same social status, typically defined as a function of occupation. Dodd, in his 1950 research suggests that the inherent flaw in the efficacy of the informal information flow is its informational bias as a function of sex, age, education, intelligence, income, occupation, politics, marital status, religious and other affiliations (Dodd, 1950:482 in Bennett, 1972:46).

It is one thing to realize that the sources of information covary with life cycle of the individual but a more immediate concern, according to Brookfield (1969:65) was to question how the sources of information are changing. Berelson and Steiner (1964:482) found people of a lower social status to have a more restricted range of contact with people (in terms of number, social rank and geographic area) than higher ranked persons. The flow of information, or lack of same, to certain people appears therefore to put them at a rather distinct disadvantage.

Notwithstanding differences in social status and the amount of information present, the recipient must still grapple with the task of

gauging the degree of truth associated with the information and try, where possible, to determine the impact of information which may have been concealed or otherwise erroneously imparted (Brookfield, 1969:65).

Similarly, advertisers face cost constraints when it comes to the type and amount of information they can feasibly and rationally provide to consumers. The most salient factors appear to be dwelling 'price' and 'location' which tend to furnish the decision-maker with an implicit indication of quantity and quality associated with the dwelling even if they choose not to view the house (Smith, Clarke & Onaka, 1982:164). Newspapers tend to be the favoured medium by both advertisers and consumers for a variety of reasons including low unit cost, timeliness, ease of comparison with market as a whole, and the fact that this avenue is used both early in the house search and continuously throughout the process (Smith, Clarke & Onaka, 1982:164).

Over forty percent of new and resale buyers sampled by Northrup (1981) claimed to have found their new house as the result of real estate agents, the traditional source for a house. Data provided by realty agents was found by researchers (Smith, Clark & Onaka, 1982) to be biased both in terms of the agent's spatial location, and in relation to perceived personal characteristics (income, professional status) of the prospective buyer. And, while it was also noted that in general the realty agents did not provide the same high quality institutional information as the experts [from community organizations, schools, churches], the agents did "provide the best overall information concerning residential and neighbourhood characteristics" (Smith, Clarke, and Onaka, 1982:162). It was further suggested that making available MLS (Multiple Listing Service) data to the buying public,

albeit in an edited format, would greatly enhance the flow of housing market information.

2.4.3 Evaluation/Decision

Movers are asked to make evaluations and decisions on a wide range of factors; tenure, location, amenities, social services, size and design, price, financing arrangements, economic climate, career and family choices, etc. Bennett (1972:55) postulated that the reasons which surfaced as initial motivators in the decision to 'search' for a new dwelling will strongly resemble the reasons for making the final 'choice'. Backler (1974:62) and Struyk (1976:155) conclude that 'cost' is the most important factor when households compare housing alternatives. The importance of not only relative housing costs, but search costs and moving costs are stressed by Pollakowski (1982:90). Others dispute this in favour of dwelling 'size' (Boag and Sarkar, 1984; Miron and Schiff, 1982); Northrup, 1981). In Rossi's (1955:155) findings, 'cost' came fourth behind space requirements, location, and design features of the unit as the important motivators.

2.5 Summary

There is no one 'right' answer to the question of what motivates a household to search for and choose a new dwelling. The final decision will be one which best teams market-place offerings with the needs and aspirations of the household given the decision-maker's inherent values, prejudices, and limitations.

Literature related to the topics of motivation and residential migration spans many disciplines. A myriad of factors, either directly or indirectly, account for the decision to migrate. The moves may be

intra- or inter-urban in nature and stem from both economic and non-economic considerations.

Demands imposed by family life-cycle, marital status, investment potential, tenure choice, career pattern, age, and income all serve to influence the decision to move. At times, they may act in combination to encumber migration. The reasons for migration are almost as diverse as the households migrating.

While some people have the luxury of being able to opt out of a stressful or unsatisfactory housing environment, others are forced to endure the stress and dissatisfaction. It may prove impossible to match housing needs, aspirations and resources with offerings from the market place. Households must then re-evaluate their position in light of current market characteristics. The only alternative may be no alternative.

Mechanisms serve to separate the 'movers' from 'non-movers' and both groups have much to contribute to the study of motivation and house-buying behaviour. Further understanding of the decision-making process must come from studies similar to those of Northrup (1981) and Zavislake (1982) who investigated at the level of the individual household - the decision-makers. Results should prove beneficial to not only those involved in modification of existing migration and motivation theories, but to those whose responsibility it is to plan and direct development and growth. Results from household studies may also prove to be of practical use to house builders in their search to target better their products or meet buyer demands.

CHAPTER THREE

3.0 Research Design and The Study Area

Existing aggregate-level models, typically based upon census tract or even provincial data, can predict household movement and mobility patterns with a high degree of accuracy but they are not without flaws (Brown and Moore, 1970:200). They lack the ability to describe motives at the level of the individual decision-making unit, the household. These are the motives to which builders and developers must respond if they are to succeed, and they are the motives which this study will address in its consideration of the Fallingbrook area in Orleans. The household is the basic decision-making unit; knowledge of its behaviour is essential to any study of residential mobility.

Understanding of the decision-making process at the household level may prove beneficial not only for those people involved with the modification and use of existing aggregate-level models, but those whose responsibility it is to plan and direct decisions related to development, growth, environmental planning, and the reorganization of both rural and urban areas. The business community may also benefit by incorporating study results into their decision-making process. Where should the next franchised outlet be planned? Will the changing characteristics of the present market mean a change of our product line

in the future? When, and to what? Should serious thought be given to expanding the present facilities or should we consider a move closer to the new subdivision? What will the future of our home-delivery service be?

Information at the household level is not available from official agencies such as Statistics Canada (StatsCan) or Canada Mortgage and Housing Corporation (CMHC). It was necessary, therefore, to gather primary data by a survey of residents in a new single-family, upscale housing neighbourhood. Typically, data from census and other published sources are far too aggregated to provide useful information related to individual household behaviour. Both StatsCan and CMHC, however, do provide extensive data on such topics as dwelling starts by province and region; construction expenditures by province and region; public funds authorized under the National Housing Act; mortgage loans; and new house price indexes. These aggregate data, while important in terms of analyzing general patterns of spatial behaviour among broadly defined socio-economic groups within broadly defined social space, cannot provide information on the socio-economic factors which may influence the individual household's decision-making (Bennett, 1972:158).

The principal means of collecting information was a questionnaire (Appendix 1). The data collected included reasons for leaving previous address, search and purchase criteria, potential destination choices, and perceptions of neighbourhoods and dwellings, both past and present. This chapter contains a discussion on questionnaire design, the interview process, problems, and an introduction to the method of analysis.

3.1 Site Specifics and Housing Characteristics of Fallingbrook

At the time this study was initiated, the east end of the Ottawa area was experiencing Ottawa-Carleton's most rapid growth in housing stock with the majority of activity concentrated in the Orleans area. Orleans, therefore, became the target of the search for a suitable study site given that it would provide the largest inventory of recent purchasers and locations from which to draw. Research was focused upon single-family upscale housing, also described by such terms as 'executive homes', 'prestige houses', and 'luxury housing'. Price was used as the principal determining criterion for the sub-market, because price is a unifying comparative measure, as Zavislake (1982:14) points out, which implicitly includes other factors such as design, size, location, land cost and amenities.

Members of the local real estate community claimed that the average new house price was between \$130,000 and \$150,000. The Real Estate Board of Ottawa-Carleton (1985a:18) provided the following figures for the area which acted as a basic guideline with which to define more narrowly the 'upper' sub-market. All figures are based upon sales through the Multiple Listing Service (MLS) of the Ottawa-Carleton Board and may include new units.

Average residential house prices for year as at December 1984

<u>TYPE</u>	<u>PRICE</u>
2-storey	124,967.00
Split Level	125,300.00
Total Residential	109,301.00*

*(Includes bungalow, double. duplex, link single, mobile home, row unit, semi-bungalow, semi-detached, split level, 2 storey, 3 storey, and summer home; excludes condominiums)

With the specific product (up-scale, single-family dwellings) chosen and a preliminary price level established, it became important to determine not only a manageable study site offering upper-priced houses, but a practical method of investigation. Background research began with a number of field trips to approximately fifty model houses and building sites to establish price ranges and product offerings by the dozens of builders in the Ottawa area. These were supplemented by attendance at local 'home shows' where several local builders displayed their housing offerings. Findings supported the claim that the greatest concentration of new house construction activity was in fact occurring in the (East Urban Community) Orleans area where over one dozen builders were active (Table 3.1). After discussions with builder's representatives and sales people on-site, product information and pricing was used to determine the highest priced offerings by each builder.

Table 3.1 Partial List of Builders Active in the
East Urban Community

Bellevance Bros.
 Costain Ltd.
 Danny Homes
 Douglas Macdonald Development Corp. - Macdonald Homes
 Great Gulf Homes
 Greenvale Homes Superior Builders
 Minto Construction Limited
 Monarch Homes Ltd.
 J. Perez Masterbuilders
 Regional Builders
 Sandbury Building Corporation
 Sigma Construction
 Tartan Homes Ltd.
 Timberlay Developments Ltd.
 Urbandale Construction Ltd.
 Valecraft Homes Ltd.
 Winbro
 Woodfield Homes Inc.
 Woodlea Homes Inc.

At this point six builders remained to be considered as producers of upper-price housing. The relative price proximity of these six builders is shown in Table 3.2. Great Gulf and Regional Builders were deleted from active consideration (Figure 3.1) because their highest priced models had advertised prices lower than the lowest priced models by the other four builders (Costain, Sandbury, Tartan and Urbandale).

Table 3.2 Builder, Range and Location

<u>BUILDER</u>	<u>\$\$ RANGE \$\$</u>	<u>LOCATION / SERIES</u>
Great Gulf	\$138,990 - \$154,990	Woodhaven in Pineridge
Regional	141,900 - 158,000	Orleans Gardens - Estate Series
Tartan	159,900 - 184,900	Regency Gardens - Heritage 2020
Sandbury	163,990 - 236,990	Masterpiece & Fallingbrook Ridge
Urbandale	164,900 - 179,500	Executive Series
Costain	185,000 - 206,000	Imperial Design Collection

(See graphic representation in Figure 3.1)

The remaining four builders were then considered with regard to their spatial proximity. Costain, Sandbury and Urbandale were clustered within the Fallingbrook community of Cumberland Township while Tartan's Heritage 2020 Series were located two kilometres to the west, nearer the Gloucester-Cumberland boundary. Tartan was eliminated due to its distance from the area of housing concentration and study efforts were focussed on what appeared to be a neatly manageable group of recent house buyers in Fallingbrook, 'a truly distinctive residential community' as the locational signage declares. The starting price for houses in the study was set at \$160,000.

Some builders have the tendency to blend their largest and most expensive offerings with those of lesser value and size. This frequently allows the best advantage to be taken of various lot sizes,

BUILDER - PRICE MATRIX

C.K. Waddington
 Source: Builder's Price Lists and Advertising Brochures, October 1985.

FIGURE 3.1

and may help create a more integrated community look. Other builders may respond to periods of slow sales by spatially inter-weaving houses of various price ranges depending upon supply and demand dynamics at the time. This practice brings with it the threat of detracting from the sense of easily defineable class nurtured by housing which is consistent in price range or perceived status.

For purposes of mailing the letter of introduction (Appendix 2), it became necessary to determine the mailing address of all houses meeting the price selection criterion of the study. Completed and occupied houses were compared with sketches and site plans provided by the builder's sales people and, in total, addresses were produced for sixty-one possible households. The intermixing of models and price ranges proved to be a problem when attempting to determine mailing addresses for houses in the Urbandale sector where the Executive, Cumberland, and Graduate Series houses form a mixed streetscape. The fact that Urbandale allows major structural and appearance changes (more in line with custom building) to its models compounded the problem of determining which houses met the price criterion. Costain and Sandbury do not customize houses to the same degree as Urbandale; therefore choosing street addresses was a simple case of determining which advertising brochure matched which house on the street then verifying its price from the published price lists. Other houses on-site were in various stages of completion and would not be occupied in time for this study.

3.2 Data Gathering

The purpose of the survey was to gather information detailing the residents' decision-making behaviour. It was felt that being able to talk directly with householders would reveal important aspects of consumer behaviour which the questionnaire (Appendix #1) may have failed to address or which the respondent felt was inconsequential. Every effort, therefore, was made to interview the respondents personally, rather than relying upon the drop-off and mail-back approach. If it appeared, for whatever reason, that the householder was about to refuse to participate they (the householder) were asked if the questionnaire could be left, together with a stamped, self-addressed envelope, in the hopes that they would accept and complete it at a more opportune time. Perhaps the other member of the decision-making team would be more sympathetic to the cause and urge participation! In some cases the questionnaire was left and picked up at a later time, while still others responded by being interviewed via telephone. A total of 121 possible respondents were housed in the community of Fallingbrook (Table 3.3 below). Table 4.14 summarizes the success rates using the four methods of questionnaire completion.

Table 3.3	<u>Total Possible Respondents</u>	
Costain	13 households x 2 respondents =	26
Sandbury	39 households x 2 respondents =	78
Urbandale	8 households x 2 respondents =	16
Other	1 household x 2 respondents =	2 *
	---	---
	61	122 = 121 **
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* One of Urbandale's lots was sold to the owner of another building company. Purchaser designed and constructed his own house within the Urbandale portion of Fallingbrook.

** Adjusted to reflect deceased spouse

Major decisions are frequently based on a collective approach within the household. Many households are not patterned upon the traditional family unit and even those families which might be designated 'nuclear' may frequently find it difficult to assign any one person as the 'head' (Bennett, 1972:165). Thus arose the question of 'who' should actually respond to the questionnaire. Previous experience with interviewing suggested that quite often both husband and wife (or decision makers) want to participate and have their comments recorded by the interviewer. It is not uncommon for these couples to have quite different viewpoints or motivations and both may well furnish valid and valuable responses. Not only would it have been self-defeating as far as determining motivations and perceptions to refuse this often unsolicited input from a household member, but would have appeared extremely rude, particularly while in their home. It reflects poorly upon both the interviewer and the sponsoring institution, and does much to create antagonism which can impede completion of the questionnaire. There were a limited number of respondents within the study area and therefore it was felt that, if there were no objections on the part of the householders, both 'decision-makers' would be asked to complete a questionnaire. This would serve to increase the universe size and perhaps increase the range of responses.

As was expected, problems did arise during the course of the interviewing procedure; however, none of the respondents terminated an interview. The interviewer was required on occasion to modify quickly the approach to the respondent in order to retain a favourable interviewing climate. A discussion of the problems encountered is presented within Section 3.2.2 of this chapter.

3.2.1 The Questionnaire

Methods of interviewing ride a continuum from the informal, totally non-directed, to the highly structured, formal approach. Informal, open-ended questions do not restrict the respondents in their range of answers nor do they make suggestions as to the expected content of the response (Ray, 1985). Formal interviewing with a limited number of possible responses is best suited if aggregation of responses is to occur during analysis. This brings with it the necessity of minimizing possible answers to each question, keeping response categories mutually exclusive, and placing constraints on the wording (Sheskin, 1985). Required also with the formal interviewing method is a necessity for a clear conceptual focus; it is of limited use for exploratory interviewing where discrete answers have not already been anticipated by the researcher.

The obvious problem with the structured method is that it presupposes the researcher has complete knowledge of the range of all possible responses. One of the reasons for conducting this research was to discover the factors which came to bear on the decision to migrate; therefore it was considered inappropriate to consider a rigid, closed-ended question or 'schedule' structure. A three-part questionnaire was developed using a range of question types (Appendix 1). The aim was to create questions which would not threaten or antagonise the respondent in any way. In addition, care was taken to devise questions which were as neutral in wording as possible.

An inverse relationship is believed to exist between the length of a questionnaire and the number of subjects who will respond (Sheskin, 1985:3); consequently every effort was made to keep the questionnaire,

and the questions, as brief as possible. Even so the questionnaire had four pages with an average completion time of twenty-five minutes. From a paper by Skaburskis (1984) came a preliminary list of anticipated responses which proved helpful in designing the initial questionnaire for this study. Skaburskis was commissioned in 1983 by CMHC to conduct a study of factors influencing market demand and mortgage insurance risk. Some of his findings are presented in Appendix 3.

The questionnaire began with an identification of the sponsor and purpose followed by a claim that all data would be held confidential by the researcher; the individual homeowner (respondent) would remain completely anonymous in any published data. Neither the respondent's name nor address appeared on the completed questionnaire.

A decision to move can be traced to at least one motivator or catalyst and the initial questions attempted to determine what these factors were by asking the respondent(s) to state the reason why they left their previous address and re-entered the market as potential buyers.

The household's mobility history throughout its stay in the Ottawa-Carleton region was also probed together with duration of residency at each locale, the housing type (single, semi-detached, condominium, apartment, etc.) and tenure. This information could permit the tracing of shifts in socio-economic status (the climb) as manifested in changes of housing type and tenure, given the relative homogeneity of housing areas within the Ottawa region (Ray, 1985) and could be used by vendors who wish better to target their advertising dollars. If a pattern of predominant movement could be established, it may prove useful for planners seeking to develop policies and strategies on the location of

new housing and social developments (e.g. schools, community centres, daycare facilities). Important implications may also exist for not only the developers and builders who will work within these locations and guidelines, but transportation and public utility suppliers, social service co-ordinators, marketers, retailers, and vendors of goods and services, to either new market segments or an existing but highly mobile public. A large portion of loyal customers changing location could pose locational and logistical concerns for the merchants in addition to problems of service, advertising, customer loyalty, price and, of paramount importance, profit.

The question of 'housing type sought' (and why?) was posed next in an attempt to gather data on (changing) aspirations and the perceived utility of the various types of housing available. Had respondents claimed they were seeking anything other than a single family dwelling, the question (page 3) 'Why did you buy a single-family dwelling rather than another type?' may have provided further insight into the buying decision. However, as it was, respondents overwhelmingly sought detached singles.

Part 2 of the questionnaire was designed to focus on perception and buying habits and contained the bulk of the questions. Respondents were asked to indicate how they heard about Fallingbrook and to describe the image they had developed of the area before they had seen it for the first time; what had they expected to find based upon information gathered up to that point? For some of the early purchasers this question posed a problem. With Fallingbrook being a new or fresh site, builders following a pre-selling strategy, and models not yet having

been constructed, purchasers were buying from an architect's sketch. There was minimal word-of-mouth advertising to assist potential purchasers in developing an image of what to expect, and print media advertising was limited. Fallingbrook was a muddy field populated not by up-scale housing but by back-hoes and construction shacks. Many claimed they had never thought about an image although, when probed, the idea of Fallingbrook's natural beauty complete with view from the ridge and treed conservation area quite frequently surfaced. If an image had been developed, respondents were asked whether it had changed and if so, 'how' and 'why'?

Housing of similar size and with comparable options and equipment could be had in other areas so why did people choose to move to Fallingbrook? Was it a site specific or dwelling specific reason(s)? The question 'what were your main reasons for moving to Fallingbrook?' served, in part, as a check, albeit a simple one, on the validity of the response to the first question which asked why they left their previous address and entered the search for a new dwelling.

Following from the question of how the respondent heard about Fallingbrook came the question of how they had heard about the builder from whom they had bought. The question was intended to investigate further the dissemination of housing information, whether it be via formal or informal avenues. Inquiries were also made into the marketing efforts and reputation of the builder.

Aspects related to the features of the dwelling unit itself were explored. After sounding out why a move had occurred and why settlement in Fallingbrook followed, it was important to determine which dwelling-specific attributes would come to light as having first caught the

respondent's attention (What was the first thing that struck you about these houses?). Associated with this, purchasers were asked to list the upgrade options they purchased and why they had been chosen. Was it strictly for pragmatic/utilitarian reasons as in the case of acquiring more durable flooring or were there more emotional reasons for the choice?

For no easily definable reason, this researcher believed there was at least some degree of 'impulse' to the purchase of a dwelling. In order to determine just how much, or how little, time people spent in their search, they were asked to state the duration of their quest before finally buying. These were some of the most interesting findings (see Chapter 4).

Knowing why the respondent bought in Fallingbrook was important and it was also of interest to know where else he or she had considered and why they had not purchased a house at one of these other locations (Where else did you consider and why did you not buy there?). While considering the question of tenure choice (ownership versus rental) respondents were asked if they associated any disadvantages with owning and, if so, were invited to state them. There are certain trade-offs linked to ownership and the question is to determine the degree to which they are important.

Data on the importance of interest rates in the decision to purchase a dwelling which averaged near \$200,000 and the emphasis respondents' placed upon their income were collected through the following questions: Of what importance were interest rates to you in buying this house? How would you describe the way you look at your income when deciding to spend this much money on a house? The wording

of this question caused some confusion in its attempt to determine what link, if any, existed between income and housing choice.

The housing package contains not only the physical dwelling unit, and its inherent quality, but the service of the builder. These aspects were next to be examined with the questions 'Comment on the service and quality associated with the builder?' and 'Please list your sources of satisfaction and dis-satisfaction with the house.' The majority of respondents have been resident in Fallingbrook for about ten months or less and while it may be a bit premature to ask these residents what their next housing choice will be the following questions were posed: What factors would cause you to move from this house? What are your intentions regarding future house purchases?

Section Three's remaining questions relate to basic demographic information including size of household, age, income, education, and marital status. Each question has been divided into a series of mutually exclusive responses. Numbers were intentionally omitted from responses so as not to give the impression that any one answer was more important than any other. The question of total annual household income posed a concern in that if the categories were too broad they would be of little use in analysis and if they were too narrow there would be a strong reluctance on the part of the respondent to answer. They were established at '\$20,000 and under', \$20,000 increments up to \$180,000, and 'over \$180,000'. Only one of the seventy-seven respondents refused to answer the question on income.

3.2.2 Problems

Although every effort was made to provide a clean data set that accurately reflected the thinking of the sampled respondents, there is no guarantee of total reliability and accuracy. There may have been a reluctance on the part of some respondents to be completely candid in their answers. For example, to prevent embarrassment or an admission of prejudice, the respondent may not have wished it known that the reason they moved from their last house was because of a dislike for their 'ethnic' neighbour, or that they fantasized about the glamour and opulence of TV's fairy-tale videos with the Ewings (Dallas) and the Carringtons (Dynasty). 'Perhaps the greatest source of error comes from retrospective rationalisation on the part of the respondent to disguise an unsuccessful move or to hide motivations of which he/she is ashamed' (Bennett, 1972:188). There was also the concern that some may have become somewhat suspicious of the questions if they doubted the end use of the information; Revenue Canada, regional assessment, etc. This may bring with it deliberate falsification. Only four respondents asked if the research was being done for one of the builders. Even a direct question coupled with a series of pre-selected replies could have resulted in the respondent misleading the interviewer, either accidentally or deliberately. Bennett (1972:188) suggests accidental errors can also occur from a misunderstanding of the question, from a memory error on the part of the respondent, or their misguided desire to provide the answer they think the interviewer is seeking.

The thought of not being taken seriously because 'it's only a student doing a project' also surfaced. There was an underlying hope that many of the respondents would have had some familiarity with

graduate research and would be inclined to lend a sympathetic ear. Only one resident flatly refuse to be interviewed but stated that if he was given a questionnaire he might complete it and mail it back. He did not do so.

In an effort to prevent reluctance to participate, and to promote the academic weight of the research, an introductory letter (on Carleton University letterhead) was delivered to all those households selected to participate. Contained within the letter was an introduction by the researcher with a request for assistance in completing the questionnaire, an outline of the study's purpose and sponsor, a statement of confidentiality, and an indication of how long it should take to complete the questionnaire. It was also suggested that the questionnaire could be left at the house and picked up at a later date. Telephone numbers were provided should respondents wish to confirm the academic status of, or speak directly to, the researcher or his advisor (See Appendix 1).

It was important to undertake a preliminary run-through or 'pilot' of a questionnaire, under real-world conditions, in order to test its design, the logistics of the survey procedure, and the efficacy of each question. This is an important stage in the research process as it is here that flaws are likely to surface, giving the researcher an opportunity to make modifications and changes before actually administering the questionnaire to the balance of the study group. There was a limited number (61) of houses in the Fallingbrook community which met the \$160,000+ cost criterion as set out for this study. Based upon this, it was decided that the number of possible respondents was too small to conduct a formal pilot study. The pre-test, therefore,

took the form of an unstructured or free-flow discussion with three residents of the study area in order to capture their feelings and perceptions about the study area, the questionnaire, and the proposed interview process. In one additional case a questionnaire was left with a respondent for completion by the spouse. A similar method was used to solicit comments and criticisms from members of the academic community at Carleton University and from fellow students who had had experience in developing and conducting questionnaires. Comments were useful for developing questions which were as effective and unbiased as possible, and in determining an appropriate questionnaire length.

Portions of the data gathered lent themselves easily to interpretation and manipulation through the software package SPSSx (Statistical Package for Social Scientists - SPSS Inc.) maintained on the Honeywell DPS 8/47 under the CP6 operating system at Carleton University. It was possible to compute summary statistics for numeric variables, and construct frequency distribution tables. The software also contained facilities for a variety of other procedures with resultant output varying from simple data counts to more complex statistical analyses. The "frequencies" facility of SPSSx made it possible to generate tables, bar charts and histograms from the variables in the system file. An initial step in analysis of the data was the examination of the number of times each variable occurred. A "frequency distribution" (tabulation of frequency of occurrence) served not only to summarize data, but also assisted in locating data entry or coding errors within the data set, and in highlighting unusual but correct data which may require special handling (SPSS, 1984:47). Also

possible, in addition to frequency tables, were system-generated bar charts and histograms which give a condensed picture and often make it much easier to find patterns within the data.

Once analysis began it became obvious that new or revised categories were needed in order better to interpret some portions of the data. Through a 'RECODE' facility it was possible to massage and manipulate the data to a variety of new ends. Analysis of data 'by builder' was simplified through the use of the 'SELECT IF' facility of SPSSx. Examination of the distribution of two or more variables was possible by performing 'crosstabulations' on the data. Unfortunately it was not possible to generate high-quality monochrome or colour graphics through SPSSx; therefore, other graphic facilities were required.

3.2.3 Classification and Coding of Replies

A computer program was structured using SPSSx (a survey data analysis package) for analysis of portions of the collected data. It was then subject to modification based on final questionnaire results. The open-ended or narrative responses from the survey were reduced where possible to a series of mutually exclusive categories or variables, the number of which depended largely upon the type and number of responses received for each question. 'Value labels' for categories were also subject to revision based on final results. For example, only when all responses were in was it possible to determine the full range of upgrade options and code them into the program. Other variables, such as sex and marital status were pre-defined given the limited range of responses. Blank answers, or answers which obviously appeared incorrect, were coded into the program as missing values and assigned to

each variable. This step was done to assure that once the statistical reporting parameters were set, statistically relevant information could be generated by SPSSx using a clean data set. If, for example, a question had only two correct responses (SEX, 1-Male, 2-Female), non-conforming responses, such as a '0' or a '9', had to be introduced into the program. The anomalies could result from coding errors, typing errors, the result of transmission line interference encountered while uploading or downloading data files between the computer and the terminal or a host of other reasons.

CHAPTER FOUR

4.0 PATTERNS, TRENDS AND ANALYSIS

4.1 Purchaser Profile

Before discussing 'why' respondents acted in the fashion they did, a preliminary characteristic profile of the average up-scale Fallingbrook buyer will be presented. The most commonly occurring questionnaire responses are given below.

Table 4.1 PURCHASER PROFILE

Modal Age	30-39 years
Marital Status	Married
Education	Post Graduate
Occupation	Professional or Manager/Administrator
Mean Family Size	4
Household Income (Mode)	\$60,000 to \$79,999
Mean Commuting Distance	12.6 miles
Mean Time Spent Looking	5.28 months
Mean Time at Last House	6.28 years

* includes doctors, teachers+, lawyers, accountants

+ all may not possess an undergraduate degree

Fallingbrookers like city life without the hustle and bustle so exclude themselves from the city and commute an average of 12.6 miles. The average Fallingbrook resident is in his or her thirties, has two children, and is well educated. The vast majority are nuclear families with only a couple of extended families present. For purposes of computer coding, junior and senior managers and administrators were treated as separate categories.

When taken in their totality, they account for 35.3 percent while those who chose a professional career in medicine, law, education, etc. account for 33.8 percent of the population. The occupation of the typical Fallingbrooker must, therefore, be split between managers/administrators and professionals. Surprisingly, the managers/administrators were concentrated in private industry rather than government related employment. The typical household is comprised of two wage earners, although 23.5 percent of respondents claimed to be homemakers, domestic engineers and moms. Medical practitioners typically did not have a working spouse whereas teachers usually did: two teachers in the same household was not uncommon.

While 48 percent of the responding population fell into the 30-39 year group and 36 percent were between 40 and 49, only 9 percent were 50 years or over. A further 7 percent were under thirty years old. It was expected that there would be a large proportion of near-retirement aged people in Fallingbrook given the high acquisition cost of the housing; however, such was not the case. Income levels together with purchasing power acquired through accumulated assets are allowing younger people to buy more expensive housing than previously possible. Post graduate training had been acquired by 23 percent of respondents; a further 22 percent had received an undergraduate diploma and in total 56 percent had received at least some university training. A further 17 percent attended or graduated from college making the percentage of residents who took post-secondary education reach 73%.

4.2 Previous Ownership Record

4.2.1 Housing Units Previously Owned

Fallingbrook has not attracted a large proportion of first-time house buyers. An entrance fee averaging \$200,000 tends to act as a strong deterrent; a deterrent which is typically overcome only by an extremely large income or asset base. The community is generally populated by second and third-time buyers (76.3%).

Table 4.2 Housing Units Previously Owned by Respondent

Number	Count	%	Cum %	
0	6	7.9	7.9	1st Time Buyer
1	27	35.5	43.3	2nd Time Buyer
2	31	40.8	84.1	3rd Time Buyer
3	5	6.6	90.7	4th Time Buyer
4	4	5.3	96.1	5th Time Buyer
5	3	3.9	100.0	6th Time Buyer

4.2.2 Location of Previous Dwelling

Statistics gathered during the Fallingbrook Study support the claim made earlier that population will accrue in selected areas more so from redistribution than from natural increase or immigration. As Table 4.3 illustrates, only 7.8% of the population entering Fallingbrook, primarily as a function of job relocation, was from outside the immediate area; population shifting must be seen as a localized readjustment process.

Table 4.3 Previous Dwelling Location

<u>Location</u>	<u>#</u>	<u>Percentage</u>	<u>Total</u>
Convent Glen	10	13.0	13.0
Pineview	9	11.7	24.7
Blackburn Hamlet	8	10.4	35.1
Beacon Hill	5	6.5	41.6
Chatelaine Village	4	5.2	46.8
Hunt Club	4	5.2	52.0
Orleans	4	5.2	57.2
Queenswood Hts.	4	5.2	62.4
Nepean	3	3.9	66.3
Gloucester	3	3.9	70.2
Western Canada	3	3.9	74.1
Quebec (excluding West Quebec)	3	3.9	78.0
Chapel Hill	2	2.6	80.6
Civic Hospital Area	2	2.6	83.2
Hull & Environs (West Quebec)	2	2.6	85.8
Heron Park	2	2.6	88.4
Rockland	2	2.6	91.0
Tunneys Pasture	2	2.6	93.6
Ottawa East	2	2.6	96.2
Carson Grove	1	1.3	97.5
Elmvale Acres	1	1.3	98.8
Ottawa - Misc.	1	1.3	100.0
TOTAL	77		

4.2.3 Type and Duration of Occupancy at Previous Location

Only 10.4% of respondents had moved to Fallingbrook from rental accommodations and of them half had rented only for an interim period between the sale of their previous dwelling and the occupancy of their new house. Of the 89.6% who owned their previous dwelling the largest proportion, as the table below indicates, had owned detached, single family units.

Table 4.4 Housing Type at Previous Location

<u>Type</u>	<u>Percentage</u>
Single	88.0%
Townhouse	6.6
Semi-detached	2.7
Apartment	2.7
TOTAL	100.0

If Fallingbrook residents can be considered typical of other up-scale buyers, 54.5% moved within five years of purchasing their previous house.

Over one third (35.1%) changed residency within three years and, on average, people spent 6.28 years at their last location. Some had also been at their previous locations for a relatively long time.

4.3 The Reasons

A wide variety of cultural, sociological, economic, political and psychological determinants act upon the household, and the individual, to bring about the decision to move. Accepting that this behaviour is purposeful rather than random (Bennett, 1972:18), we can pose the question of what brought about the move.

4.3.1 On Leaving

Why Move?

Unlike one of the questionnaire questions (Appendix 1) in which respondents were asked to rank four (given) reasons for their choice, this early question was posed in an open-ended format: What were your main reasons for moving to Fallingbrook? In descending order of importance, residents favoured the following factors:

Table 4.5 Reason For Leaving Last Location

Reason	%	
Wanted Larger House	29.9	
Investment/Economics	20.8	
Job Related	11.7	-location, opportunity or transfer
Dwelling Specific	10.4	
Neighbourhood Related	9.1*	-either previous or new neighbourhood
Unhappy with Old House	6.5	-size, image, or needs repairs, etc.
Lot Specific	5.2	
Privacy	2.5	
Other (first-time buyer)	3.9	-desire to own rather than rent
TOTAL	100.0%	

* is taken to include: no longer met requirements or expectations of household/decision-maker(s), new neighbourhood better met perceived requirements; unhappy with old area (5.2%), better area for children (2.6%), Misc. (1.3%).

By far the most important single reason mentioned was the size of a Fallingbrook house. As the Purchaser Profile (Table 4.1) shows, the majority of respondents were young couples in their 30's with a young, growing family which, they said, would rapidly make use of the increased space. While the question had not been initially considered when the questionnaire was being developed, nearing the end of the interviewing segment the researcher began to ask respondents the square foot size of their previous dwelling. Based upon sales literature and floor plans for their present house, it was then possible to get a rough estimate of how much living space the move to Fallingbrook had actually netted the household. Fourteen respondents added a total of 15,965 square feet or 1,140 square feet on average, an increase of nearly 60% over their last house. The range was between about 400 and 1,600 square feet. By comparison, an average sized Fallingbrook house, with family of four, allows each member about seven hundred square feet; roughly equivalent to the size of a small post-war bungalow.

Granted, the estimates are crude but a point begs to be raised, and it is that of whether the acknowledged space requirements, as exhibited by members of Fallingbrook, more closely reflect a legitimate need for spatial freedom (provision of uncrowded and healthy surroundings, adequate private or self space, etc.) given the family size (or expected size), or whether it is a perceived or contrived need as a result of peer pressure, social conditioning, advertising, or perhaps outright greed. Few would probably admit to the latter. To some degree there is the belief that the unit will be more marketable, therefore the move closely resembles a purely business transaction. If one is to understand more fully these actions, in-depth interviews allowing for development and analysis of detailed character

profiles together with other psychological and sociological investigations would be required in this area.

When asked what the first thing was that struck them about the houses of Fallingbrook, the response which outnumbered all others was that of size. The desire for a larger house and unhappiness with the previous (old) house are not (necessarily) independent of each other. When considered together with the other dwelling specific reasons given by respondents they represent roughly half (46.8%) of the population; a population which moved for reasons directly related to either the old or new dwelling unit.

4.3.2 On Buying

Fallingbrookers came out 98.7% in support of house ownership rather than renting. Of the seventy-seven people questioned only one rejected ownership in favour of rental tenure. The one dissenting respondent, who gave in to his wife's desires to boast pride of ownership, claimed that after extensive calculation and market analysis, it is a much better financial move to rent and invest one's money in mutual funds.

The data indicate that the main reason for buying in Fallingbrook is quite house specific. When asked to rank four (given) reasons for locating in Fallingbrook by order of relative importance (Location, Investment, Development Characteristics, and House Characteristics) the reason 'house' was chosen by 48% of respondents as their first choice. 'Development characteristics' proved to be of least importance with only 1.4% choosing it first. 'Location' and 'Investment' were ranked first 29.3% and 22.7% respectively. This serves to reinforce the earlier claim that the decision-making process is highly influenced by house-specific factors.

To a large proportion of those interviewed, Fallingbrook is something more than just another housing project. That something is an intangible feeling resulting from its proximity to the obvious features of Mother Nature. Thirty-six percent of all respondents made specific reference to the importance of their house being close to trees, open space, greenery, the brook, a place to hike and skate, fresh air, the country atmosphere, the view from the ridge, etc. In excess of half the residents in Costain houses declared their decision was based, in part, on the natural environment in which the project is situated. Both Sandbury and Urbandale buyers were less nature conscious, claiming 30.2% and 40% respectively that it was an important factor in the decision-making process.

The aspect of nature (parkland, streams, trees, etc.) was not consciously considered as an important concern during the early design and implementation stages of the research. It was surprising to find that such a high proportion of people did mention nature, unprompted by the interviewer. Having cursory knowledge of the nature of the housing stock and socio-economic status of the Fallingbrook neighbourhood of Toronto (Queen Street near Victoria Park in The Beach area) a strong interviewer bias was brought into this study. Prestige and image were expected to be by far the dominant factors involved in a move to Fallingbrook in Orleans. Overall, 42.9% mentioned exclusiveness, prestige or the better class of people they expected to find in Fallingbrook.

Sandbury clients were far more image/prestige conscious than respondents from houses of the other builders. While Costain and Urbandale respondents claimed image-related aspects in 14.3% and 10% of cases respectively, Sandbury can boast a 56.6% attraction by prestige factors. This may well be the result of Sandbury's marketing efforts which were to

concentrate on the theme of a prestigious house purchase following along the carriage trade level (Sandbury, 1984). Despite the inclusion of a photograph of Stornoway (the Opposition Leader's official residence) in a Sandbury advertisement (and the implied comparison), the newspaper portion of the campaign has been weak; attempting to mix large lifestyle type ads (vintage automobiles, unique musical instruments, etc.) with small, budget-sized, bland advertisements in obscure corners of the local daily newspaper. During the Fall of 1985 Sandbury ran 2" x 7" silhouette ads (approaching only 18% the size of competitor ads) which appeared to change the thrust of the campaign away from the carriage trade and more towards the middle income housing segment. Great effort, however, has been made to draw customers through site embellishments such as an entrance canopy and matching flags with design and colour tie-in to all signage including billboard and directional signs, model type signage, hours signs, and parking signs, all of which have been consistently coloured in burgundy, white and gold and prominently display both the Fallingbrook logotype (as etched on the stone entrance gates) and the Sandbury Homes' logotype (Figure 1.7). Five completely decorated and furnished models were on site for viewing; simplified floor plan information and published price structure was available in the sales office.

Costain and Urbandale have not been as creative in their marketing approach although their floor plan brochures and price/specification sheets, available through the sales offices, have been equally as informative and well presented. There has been a degree of consistency with both these builders as far as signage and flags are concerned but, for whatever reason, they did not follow the same overall up-scale path taken by Sandbury. The close proximity to Sandbury houses, and the lack of visual impact made it

quite easy to mistake the Costain sales office and model house row for Sandbury houses. Costain, as one respondent claimed, has been leaching off the drawing power of Sandbury. The dramatic visual difference between an Urbandale house and a house by either of the other builders sets them apart not only in outside appearance, but inside layout potential, and ultimately number of units sold.

What is it about the houses of Fallingbrook which makes them desirable? Sandbury Homes is obviously doing something right for their houses are outselling both Costain and Urbandale in this up-scale housing market. It is not simply a case of having more houses to sell because they do not build a unit until they have a confirmed/accepted purchase agreement. As the statistics indicate (Table 4.5), it was house-specific features, and to a much lesser degree lot characteristics, which proved important in the decision to buy. When asked to indicate the initial housing feature which had the strongest impact on the respondent, the following were provided:

Table 4.6 Element of Housing Stock With Greatest Initial Impact

Feature	Count	%
Space/Size	23	30.8
Layout	20	26.7
Exterior	10	13.3
Construction Quality	6	8.0
Entrance/Foyer/Stairs	6	8.0
Openess	4	5.3
Price	4	5.3
Fireplace	1	1.3
French Doors	1	1.3
Total	75	100.0

Size and space were confirmed by respondents as being of primary initial impact. This serves to augment the findings of Boag and Sarkar (1984:4) that space is a prime motivator in household moves. All three Fallingbrook builders offer housing with approximately the same square footage yet, according to those questioned, Sandbury offered houses with the best layout and use of space; extensive use of open foyers, skylights, and sun spaces (solariums) served to enhance the feeling of spaciousness. Comments indicate that Costain houses are just slightly claustrophobic when compared to Sandbury models. By comparison, the open-concept units from Urbandale are perceived by many as being either too open and untraditional, or simply too fragmented to be desirable.

4.3.3 Why a Detached Single Family Dwelling?

Table 4.7 Reasons for Choosing a Detached Single Family Dwelling

Reason	Percentage
Privacy	37.2%
Freedom	24.4
Required size only available in single	17.9
Investment	16.7
Have always had singles	12.8
Lifestyle dictates	11.5
Do not like other options	7.7
Wanted larger yard	7.7
Pride of ownership	3.8
Better neighbourhood	2.6
Luxury	2.6

Privacy and freedom to do with one's house as one sees fit emerged as the two most important reasons why people chose a single-family dwelling rather than another type (condominium, semi-detached, apartment, etc.). Not only did respondents want the freedom to do with the interior, exterior and grounds of the dwelling what they chose (subject of course to local by-laws and other legal limitations) but they wanted simple pleasures such as being

able to party, play music and entertain without undue fear of offending those around them, not having to match exterior paint scheme to that of neighbours, not having to share the front or back porch, not having to endure pests and rodents from adjoining units, and they wanted the luxury of being alone when desired. For still others, they had never owned anything but a detached single-family dwelling and plainly had no desire to try any other housing type.

4.3.4 New Vs Resale

'I have never bought a resale home. I don't know why - but I've never bought anyone else's shoes either.'

Fallingbrook respondent.

House buyers are faced with not only choices related to neighbourhood, house style, monthly payments, and distance to school and work, but must deal also with the choice between new and used (resale) housing. When respondents were asked why they chose new rather than resale, the remarks ranged from 'didn't want to pay for someone else's profits' to 'price and the new home warranty'; from 'too costly to renovate a used house to suit our tastes' to 'husband won't do maintenance so we needed a house with very little to maintain'. For the most part, however, respondents wanted to make choices; choices in decorating, choices in layout, and choices in features. A tabulation of results follows:

Table 4.8 Reasons for Buying New Rather Than Resale

Reason	Percentage
Opportunity to add personal touches in design/decorating	24.3%
Do not want others' dirt, decorations or problems	19.2
Cost/Price	17.9
Could not find exactly what they wanted in resale	14.1
Wanted newer technologies and designs	7.7
Wanted to start with everything new	7.7
Did not want worries of repair, renovating, etc.	7.7
Constrained by time	2.5
Location of lot	2.5
Existence of New Home Warranty Programme	1.3

Almost one quarter (24.3%) of those responding cited choice and the freedom to select a house built to their personal taste and specifications, subject to the standards of the builder and the degree of latitude he allows the purchaser in making choices. Again, it is possible to see the extent to which the dwelling unit itself plays in the decision-making process. A relatively high proportion (19.2%) also strongly rejected the notion of subjecting themselves to someone else's decorating tastes or a previously lived-in environment and a further 7.7% felt they could not face becoming involved in redecorating, renovating and repairing a resale unit; probably one which had already experienced significant capital appreciation in a relatively mature neighbourhood. Add to these figures the percentage who had the desire and financial resources to start from scratch in a new unit (7.7%) and one finds over one third of the Fallingbrook population eager to avoid any contact with anything used or previously lived in.

Cost was listed by only 17.9% of the Fallingbrook residents as being a consideration in the choice between new and resale. Some felt they were getting the most they could possibly get for the money by buying where and what they did. Many were willing to move further out into the fringe, where lot prices are lower, in order to get either a larger house or one with more

appointments and features than could otherwise be acquired closer to the city. Some held the view that when buying a new house from a builder, they were essentially paying wholesale price for materials, lot and labour with a profit margin added on for the builder. For a buyer to cause the same house to be built without the significant volume discount buying ability of a large builder the cost could well be thousands if not tens of thousands of dollars more expensive. This realization surfaced also as a reason why some respondents chose to buy new rather than build.

4.3.5 Disadvantages to Ownership

Fifty-eight percent of respondents claimed outright that there were no disadvantages to owning a house. Cost in both time and dollars for maintenance and upkeep was the primary problem stated by a further twenty-eight percent. The remaining fourteen percent complained of high taxes (\$3,300 in some cases), the fear that neighbours would drive their property value down, the trials and tribulations of having to deal with the builder, and the problem of relatively low liquidity which comes from having capital tied up in a house. The vast majority recognize that having to cut grass, trim hedges, re-set patio stones, and weed flower beds are integral parts of house ownership and while they are not overly enthusiastic about performing these household chores, they accept them.

4.4 Information Flow - Sources of Information

Flows of information may be either formal or informal. Formal information flow is typically that which involves the paid use of a medium such as radio, television, street or locational signage, subway signs, newspapers, etc. An informal flow is most likely to include friends and relatives, people with whom one works, and casual acquaintances. Both paths

were active in spreading the word about Fallingbrook and the builders found therein. Table 4.9 represents the major channel used by respondents during their search for new housing information.

4.4.1 The Project and The Builder

Respondents were asked to state the sources of information on both the project of Fallingbrook and the builder from whom they bought: Costain, Sandbury or Urbandale.

Table 4.9 Information Flow

Source of Information on Fallingbrook

Newspapers	26%	
Driving/Signage	19	
Friends	17	
Industry Related	15	(involved in some aspect of housing trade)
Previous Projects	11.5	(knew of previous projects by same builder)
Real Estate Agent	7.5	
Area Familiarity	4	

Source of Information on Builder

Previously Owned	23%	(repeat customer)
Friends	17	
Newspaper	15	
Industry Related	14	
Previous Projects	14	
Driving/Signage	13	
Real Estate Agent	4	

Newspapers are the primary source of information on the project of Fallingbrook - as indicated by 26 percent of respondents. Many who purchased in Fallingbrook claimed they had enjoyed driving around new housing areas looking for the offerings by local builders, more as a pastime or hobby than anything else. Nineteen percent learned of Fallingbrook through just such activity while 13 percent learned in this way of the individual builder from whom they bought. Some indicated that they will

continue to frequent new building sites; some looking for 'a great deal', others looking for investment property.

Without figures from other sub-division projects it is impossible to draw a statistical comparison but the relatively high proportion of buyers (14-15%) who are tied to the industry in some way (employee of builder, real estate agent or broker, member of sub-trade, etc.) would indicate that they themselves, or perhaps their spouse, have some strong positive feelings about Fallingbrook - whether it be the atmosphere conducive to raising a family, the quality of product or perhaps the high expectation of monetary gain upon disposal of the house.

Family and friends still form a large part (17%) of the informal flow of information on both project and builder and may actually be considerably higher if it is taken to include those who had industry-related knowledge of either the project or builder. This word-of-mouth advertising is, according to many, still the best form of advertising one can get because it is totally without specific cost to the builder/merchandiser.

Twenty-three percent of purchasers had previously owned a house by the same builder. Almost one quarter of the Fallingbrook population exhibits a relatively strong sense of brand or builder loyalty which, after all, is what the typical merchandiser wants. A repeat customer is no doubt a pat on the back for a builder and reaffirms that they must be doing something right. However, repeat business is often difficult to achieve when only a narrow range of products are offered. There is a high possibility that companies catering more exclusively to the upper end of the market will never see their current customers again. Sandbury Homes, for example, may never offer a product larger than the ones it currently offers. Should owners desire to move up further they must find another builder or move to

some other type of housing such as estate lot construction. Full-line builders such as Minto offer a vast array of product choices and may see the same client many times. An individual or household may begin by renting from Minto and eventually run through their complete product line from starter house to up-scale large-lot single. With over 88% of respondents claiming they are either satisfied or very satisfied with their purchase in Fallingbrook, it might prove interesting to see if this strong sense of loyalty changes when the next round of house buying begins for Fallingbrook residents.

4.4.2 Time Spent Looking

Table 4.10 Time Spent Looking for New Dwelling

Level in Months	Count	%	Cum %
One or Less	33	46.5	46.5
Two	8	11.3	57.7
Three	7	9.9	67.6
Four	1	1.4	69.0
Five	2	2.8	71.8
Six	8	11.3	83.1
Nine	1	1.4	84.5
Twelve	4	5.6	90.1
Eighteen	2	2.8	93.0
Twenty-four	2	2.8	95.8
Thirty	1	1.4	97.2
Thirty-six	2	2.8	100.0
Missing	6		
TOTAL	77		

Detailed breakdown of those claiming to have spent one month or less searching for a new dwelling.

Time	Count
15 Minutes	1
1 Day	1
2 Days	1
Less Than 1 Week	4
1 Week	5
2 Weeks	4
2 1/2 Weeks	2
3 Weeks	1
1 Month	14
TOTAL	33

There is a tendency, albeit slight, towards impulse buying. One would not be surprised at impulse buying of such minor items as books, magazines, candy, snacks, and so on, but we would not expect it with housing. However, if someone has been giving periodic thought to an idea in the back of their mind for days, weeks or months then is presented with the correct blend of opportunity and ability to purchase and they finally jump at the opportunity, does this mean they have bought as the result of an impulse? At what point has the normal process of thought and consideration been overpowered by impulse? Is it a fair question to ask? Of the nine percent who claimed they were not looking for a new house but rather were just browsing or killing time when they bought, how many answered truthfully? How many actually pondered the many points of new house purchase over the previous few months without being aware of it? Hindsight being what it is, it is probably safe to suggest that the question posed to respondents (How long did you spend looking for this house?), lacked an operational definition. One could consider time spent in actually driving about, viewing houses, and talking with sales people once the decision to leave the old dwelling had been made. What of time devoted by those who tour open houses and models purely as a hobby and finally get caught signing on the dotted line? Have they in reality, therefore, spent weeks, months or years looking? The vagueness of the question impinges upon the reliability of the responses. Future research may wish to address this more fully.

4.4.3 Scope of Search

Approximately sixty percent of respondents concentrated their housing search in the east end of Ottawa-Carleton and of those nearly half indicated they looked exclusively in the Fallingbrook area. The indication was that

design and layout were the strongest reasons for rejecting dwellings in other locations. The nearby community of River Ridge offered both a poor choice of remaining lots and houses which were more expensive than comparable houses in Fallingbrook. Lack of flexibility on the part of the builder (Minto) encouraged most respondents who had looked in Chapel Hill to consider buying elsewhere. Others searched in Rothwell Heights, Convent Glen and Beacon Hill but cost proved for many to be the limiting criterion. Both new and used housing was considered by some but with the purchase of a resale house came compromises in size, features, etc. which many were not willing to make. A further twenty percent canvassed all major developments in the region before settling on a house in Fallingbrook. Of the roughly ten percent who expressly mentioned searching in the West end, most had viewed houses by Holitzner. The west end, however, was seen as being too far from downtown Ottawa and other places of daily and weekly interaction such as schools, friends and place of work. Those seeking to be even more removed from the city of Ottawa looked in Stittsville, Manotick, Cumberland Estates and Cornwall but distance played a significant factor in the final choice. A variety of other reasons surfaced including builder's reputation, lack of quality, and nothing being available to suit household needs.

In reply to the question 'Where else did you consider and why did you not buy there?' respondents, for the most part, criticised the remaining two builders in Fallingbrook. The reasons for not buying from one of the other builders were based primarily upon house design/layout, quality, and service. According to a Costain buyer, Sandbury houses are built to be marketed but are impractical for living with their large windows promoting heat loss and large foyers of wasted space. 'With Sandbury you're paying for wasted space...beautiful models but wasted space'. Space, though,

together with design/layout are what the purchaser wants as exhibited by Sandbury's 69% market share. Sandbury also suffered lost purchasers because of its then poor service record. Costain, recognized in Fallingbrook by a 75% repeat customers rate, received claims of 'fantastic' and 'excellent'. For some, service could make or break the deal. Neither Costain nor Urbandale provided the diversity of floor plan and the visual impact which Sandbury has become noted for although both would allow the client to build in personal touches and make substantial structural changes. Of Urbandale's multi-level roof lines, non-traditional exterior styling and open-concept interiors, respondents echoed 'ugly', 'poor layout', 'too cut-up', 'lots are too small', and 'poor location' although many felt that Urbandale was probably a more quality conscious builder. Costain, it was claimed, lacked uniqueness and was acknowledged as being slightly higher in price and less spacious than Sandbury

4.5 Satisfaction and Dissatisfaction

House satisfaction was derived from layout and size, brightness and openness, the kitchen including solarium, family room and master bedroom suite, the ease with which the house could be heated and cooled, and bathrooms. House-related features which were sources of dissatisfaction included quality of carpets and flooring products, interior trimming and finishing, quality of cupboards in kitchen, bathroom and laundry, window and door fit, and the lack of appropriately placed lights and light switches.

Even though the question was specific to the house, respondents consistently answered with complaints about external features such as the lack of door-to-door mail delivery and the deplorable conditions surrounding the green mail delivery boxes. The fact that No Parking signs had been

erected adjacent to them did little to help residents cope with the lack of mail delivery. Lack of speed with which the project was being completed was the second concern residents aired; this resulted in residents being forced to live in a perpetual construction zone and delayed the installation of sod and paved driveways. One respondent claimed, possibly 'tongue in cheek', that her husband cancelled his order for a new Lamborghini because of local road conditions and the amount of airborne dust and dirt.

Table 4.11 Overall Level of Satisfaction

	Costain	Sandbury	Urbandale
Very Satisfied	74%	58%	57%
Satisfied	17	36	43
Neutral	0	0	0
Unsatisfied	0	3	0
Very Unsatisfied	9	3	0

As final tabulated results show, the largest proportion of Very Satisfied customers belong to Costain. While Urbandale holds the highest number of Satisfied or Very Satisfied respondents (100%) they cannot be considered as serious competition to either Costain or Sandbury; Minto's Chapel Hill probably yields the largest degree of competition to Fallingbrook at this time (Whissel, 1986). Urbandale provides the alternative in style or design for those who desire a non-traditional or custom-look dwelling in this up-scale section of the fringe.

Early tabulation of survey results showed that Costain respondents were, with extremely high regularity, proclaiming they liked everything about their new house and that there was nothing with which they were dissatisfied. Throughout the interviewing process it became evident that Sandbury owners were not as pleased; their biggest complaint coming from the lack of quality and service associated with the company and its product. This was in marked contrast to Costain purchasers who, for some unknown

reason, could not find enough good things to say about the Service Department, and the quality of Costain's product. Both builders subscribe to the same building code requirements, share the same building inspector and use sub-trades of similar nature. The drastic difference in responses, therefore, meant something far more important was at issue. There appeared to be a markedly higher perceived level of quality associated with a Costain dwelling yet by construction standards both are comparable.

The feeling was that whereas a Sandbury purchaser takes delivery of a unit which is essentially visually still under construction (paint touch-up, trimming, drywall repairs still being performed, etc.) a Costain purchaser moves in to a unit with clean steps (usually), neat yards, an absence of litter, an absence of painters, trimmers, carpeters, no obvious signs of drywall patches, etc. This is not to say that a Costain house does not go through the same steps before delivery, but these slight imperfections and tell-tale signs are not as obvious and what is not obvious does not have the same potential to become perceived as sloppy workmanship and sub-standard quality which can needlessly aggravate the purchaser, sour his or her attitude toward the builder and soil the builder's integrity. As even one otherwise very unhappy Costain customer claimed, 'at least when you move into a Costain house everything is clean, neat and finished.' The move by Sandbury to change its Pre-Delivery Inspection procedure and provide the purchaser with a visually complete house may go far in destroying the myth that Sandbury's quality is inferior to that of its competition.

A secondary factor which may have influenced the owner's view of Sandbury's quality and service, is the fact that a high proportion of respondents (over thirty percent) claimed they dealt directly with the site supervisor rather than the Service Department. As his trailer is within

sight of almost every house in the sub-division the locals knock on his door on their way to or from work and burden him with their tales of cracked drywall and blotched paint; all the while expecting him to bring them to a speedy solution. The site supervisor's responsibilities are essentially to construct the house then, upon occupancy, all responsibilities are turned over to the Service people who inspect, schedule and monitor post-occupancy work on the unit. Even though purchasers are informed at the time of occupancy that concerns regarding deficiencies and problems should be directed through the Service Department, they refuse to act accordingly. While this approach tends to get some repairs and adjustments done more quickly, it may well mean the solution to other problems are retarded and problems at a later date aggravated. Is this a case of them not wanting to bother service for something simple that the site supervisor could fix in a minute, or do they genuinely not comprehend the policy as outlined? The obvious solution would be to have the supervisor report all requests for service to the Service Department; however, this approach demands that the already busy supervisor take on further responsibilities.

While protecting the confidentiality of the survey respondents, basic findings on quality, service and the perceived lack of same were discussed with the Manager of Sandbury Homes. As a result, Sandbury re-assessed their methods and '...revisions have been made to our pre-occupancy and after-sales service ... many pertinent questions are still in fact being discussed, which will most probably lead so some very positive implementations' (Whissel, 1986).

4.6 Sources of Purchasing Power

While many may try to equate the ability to purchase a dwelling strictly with income, this appears as an artificially isolated variable and as such does not accurately reflect reality. Income does, in a number of cases, represent a primary determinant in the decision to buy or not to buy but it (income) must not be accredited with too high a degree of influence. Ability and/or willingness to pay is a complex blend of past, present and future earning power and other income, existing equity, cost and availability of money, desire to own, family and peer pressure, and many other factors coupled, in many cases, with a high degree of ingenuity, creativity, and nerve.

4.6.1 Importance of Interest Rates

Income, interest rate and the monthly payment schedule are intricately connected through the Gross Debt Service Ratio, a formula which helps establish the optimum amount of total income which a household should designate for payment of principal, interest and taxes on a dwelling. In some cases the ratio acts as a ceiling on the amount of money a mortgagee is willing to grant a mortgagor. A low interest rate can allow for higher payments (a faster pay-off period) or permit the purchase of a more expensive house, given that a smaller percentage of the payments will be going to interest and a larger portion to the principal. Low interest rates also act, as was the case of many Fallingbrook residents, as an incentive to encourage people to become active in the market as potential new house buyers. Similarly, they tend to spur activity in the resale market.

Respondents were asked the question 'Of what importance were interest rates to you in buying this house?' The free description nature of the

question made it difficult to categorize the various responses into just a few distinct classes. Answers should probably have been presented for the respondent to select from. What follows is an attempt at reducing the qualitative response data into four discrete categories.

Table 4.12 Importance of Interest Rates

<u>Degree of Importance</u>	<u>Percentage</u>
No Importance	27%
Mildly Important	15
Moderately Important	31
Very Important	<u>27</u>
TOTAL	100%

Given the nature of the Fallingbrook housing stock it was not surprising to find that the majority of residents (92.2%) had previously owned at least one dwelling unit. In the majority of cases this previous equity was rolled over into the new dwelling serving to reduce the necessity for mortgage money, and with that the importance of interest rates. For some the move was significant, involving a substantial degree of leverage (debt financing) and a pronounced concern for lending rates. One quarter of the population proudly stated interest rates were of no concern to them. A large portion of these respondents own their Fallingbrook house unencumbered by a mortgage.

The general feeling from talking with residents is that the low interest rates offered by the builder or available at the time from other lenders (private and public) were a strong incentive to buy when they did. Many took advantage of financing arranged through the builder although the extent of this financing is unknown. Higher rates could have meant purchasing a smaller house and the right of entrance into a community much less desirable than Fallingbrook, or remaining in their previous house.

4.6.2 Income

Income was crosstabulated with the house selling price to determine if a positive correlation could be found but no significant relationship was evident. Rather than asking the question 'why does it not show a correlation?' one should better ask 'Why should it?' Examining strictly income fails to take into consideration the purchasing power resulting from assets which are independent of income: trust funds; stocks, bonds, and other investment portfolios; investment and income properties, capital gains, lottery winnings, and possibly for some the proceeds from illegal or criminal activities.

Table 4.13a Total Household Income *

<u>Value</u>	<u>Percentage</u>
Under \$20,000	1.3%
\$20,000 to \$39,999	2.7
\$40,000 to \$59,999	18.7
\$60,000 to \$79,999	26.7
\$80,000 to \$99,999	22.6
\$100,000 to \$119,999	10.6
\$120,000 to \$139,999	12.0
\$140,000 to \$159,999	0.0
\$160,000 to \$179,999	2.7
Over \$180,000	2.7
TOTAL	100.0

* In retrospect, when investigating how a household spends its housing dollar, the net after-tax value or disposable income would probably have been of greater importance.

As can be seen (Table 4.11), the modal income class for those interviewed was \$60,000 to \$79,000 of which the majority were public servants, teachers and those involved in sales. A high concentration of teachers is also found between \$80,000 to \$99,999 while, not surprisingly, those in the medical profession tend to be in the \$120,000 to \$139,999 range. Teachers and medical professionals comprised 26% of the Fallingbrook population.

Table 4.13b Occupations of Fallingbrook Residents

<u>Occupation</u>	<u>Percent</u>
Professional	33.8% *
Homemaker (Domestic Engineer)	23.5
Sr. Manager/Administrator	11.8
Sales/Service Clerk	8.8
Entrepreneur	7.4
Other	5.9
Jr. Manager/Administrator	4.4
Retired	2.9
Semi-skilled/Labourer	1.5
TOTAL	100.0

* (includes medical profession, teaching, engineering, accounting, law)

4.6.3 Equity

Equity, according to Funk and Wagnals (1980) is the value (of an asset) remaining in excess of any liability or mortgage. For millions of Canadians their largest piece of equity rests with their house, a tangible good or asset which can be disposed of (sold, traded, etc.) in return for another, quite often of higher value. Existing equity formed the basis for a large proportion of moves into Fallingbrook; most typically in the form of a previous house although it must not be viewed as the only reason which permitted buyers to acquire houses with an average price tag of \$191,146. The ability to carry even a small mortgage depends upon some form of income whether it be earned, granted, or stolen. Young doctors, for example, with minimal equity but extremely high earning power can be as equally well suited to the houses of Fallingbrook as the fourth or fifth time house buyer to whom a substantial degree of equity has accrued. A factor to note, therefore, is that neither income nor equity can be used as a universal determinant in the house-buying process. It is believed that in excess of 13% of respondents do not carry a mortgage on their Fallingbrook house.

4.7 Options and Necessities - or - Needs and Wants

One would expect that for an average price of nearly \$200,000 the finest of materials would be used and all necessities would be provided for. Such is not the case for this group. Seventy-eight percent of respondents felt the standard flooring was inadequate for their needs. A further 43% enhanced the house's natural lighting scheme by the addition of a skylight and 28.6% augmented existing interior (electrical) lighting. Ceramic tile and upgraded cabinets (kitchen, bath or laundry) accounted for 24.7% of upgrades purchased as buyers grappled with the challenge of individualizing clone housing. Twenty-one percent of buyers opted for additional brick, a product they claimed would add both value and warmth to their house. Structural changes to stock house plans are not encouraged by most builders; however, 18.2% of those interviewed had purchased modifications; some as simple as (re)moving an interior door or wall, others more involved such as a kitchen or garage extension. Many (14.3%) who claimed to be handy-men ordered a roughed-in bathroom for the basement which will some day host a hot tub, sauna, exercise room and workshop. Upgrades without immediate visual impact were much less desirable than were the more obvious (carpet, skylight, oak flooring) improvements. Security systems were installed by only 5.2% of the sample, enhanced insulation and high efficiency furnace by 9.1%. Other options playing only minor significance include decking (6.5%), air conditioning (5.2%), whirlpool (3.9%) and microwave shelf (3.9%).

4.8 Crosstabulation of Data

In defence of the earlier claim that income alone must not be over-emphasized in the house-buying process, income and house price were crosstabulated and as was expected, no significant relationship was

discovered. This serves to strengthen the position that the availability of assets independent of income are of far more importance.

Crosstabulation was performed on a variety of other selected variable pairs to determine whether a positive correlation between the two existed; however, none produced significant correlations. Given the often high number of possible response choices coupled with the total number of completed questionnaires (77 of a possible 121) there were typically too many cells in the matrices with expected (theoretical) values of less than 5. A high percentage of cells with this characteristic acts to inflate the chi-square statistic thereby seriously discounting the validity of the test. In an effort to better allow for testing of the available data, it became necessary to shrink the size of the contingency table by expanding the scope of each category to include a wider variety of possible responses. In doing so the specificity of the data begins to diminish as does the total amount of information which can be extracted from the matrix. At the time of questionnaire design, there was no reason to fear that the categories, as selected, would be inappropriate for the data being collected or the analysis to be performed.

A further attempt was made to correlate income with daily commuting distance. The thinking here was that those with higher incomes perceiving Orleans/Fallingbrook as being 'the' place to be would be more inclined to purchase up-scale dwelling units removed from the immediate impact of the city and be prepared to commute the extra distance. Again the results showed no significant relationship. To pursue this one step further, one could consider the high proportion of low income blue collar workers who commute great distances, not by choice but, because for them it is difficult to secure affordable housing nearer the city.

4.9 Interviews and Questionnaires

Every effort was made to design well thought-out questions; some were constructed with a pre-existing idea of anticipated responses, others without. Flaws surfaced both during and after the administration of the questionnaires. This section presents a discussion on the interviewing process, the questionnaire, and their successes and failures.

Initially, a sense of empathy or association was cultivated, or at least attempted, between interviewer and interviewee. This, it was believed, would not only allow the interview to progress smoothly, but would probably yield more valuable results. To be efficient, the interviewer must have a well developed sense of timing, persistence, patience, and a sensitivity to the people and the situation with which he/she is dealing (McCormack, 1985:92). The technique of selling the interviewer first and the questionnaire second is highly successful and has proven itself for this researcher in Fallingbrook.

Many respondents commented that the initial letter of introduction, on Carleton University letterhead, was very effective and worthwhile for introducing the researcher and establishing the academic legitimacy of the study under the auspices of a local university. Some participants commented that they remembered all too well the work involved in their own university career so they were more than willing to provide 'equal time' for this researcher. It is possible that Fallingbrook residents would have been less receptive had it not been for this introduction.

4.9.1 Response RateTable 4.14 Response Rate Data

		#	%
D/D	door-to-door	57	47.2
D/P	drop-off/pick-up	8	6.6
D/M	drop-off/mail	7	5.8
T	telephone	5	4.1
O/S	Outstanding	8	6.6
N/C	No Contact	31	25.6
R	Refusal	5	4.1
	TOTAL	121	100.0%

Door-to-door interviews provided, by far, the highest success rate. It was discovered early in the interviewing process that it was difficult to get purchasers to complete questionnaires for mail-back, or pick-up by the interviewer. In light of this, arrangements were made, where possible, to set a time and place to interview personally the remaining decision-makers.

4.9.2 Unanswered Questions and Questionnaire Criticism

Originally, the respondent was given the questionnaire to complete in the presence of the interviewer. All too quickly it became evident that some had failed to answer all the questions or that they provided only extremely vague responses such as 'good', 'nice', 'important' and 'ok'. As a consequence, the majority of remaining interviews were conducted by the interviewer reading the questions and writing the responses. This also allowed for a more detailed response because the interviewer could further question the respondent when required. Below is a list of questions which were either vaguely responded to or left completely unanswered during the early stages of the interviewing process from drop-off/pick-up or drop-off/mail-back questionnaires.

1. What was the first thing that struck you about these houses?
2. Comment on the reputation of the builder.
3. Comment on their marketing campaign.
4. What do you think will happen to house prices in Fallingbrook during the next five years?
5. What were your main reasons for moving to Fallingbrook?
6. Of what importance were interest rates to you?
7. Do you find any dis-advantages to owning and if so, what are they?
8. Please list sources of satisfaction & dis-satisfaction with the house.
9. Has this image [of Fallingbrook] changed and if so, how and why?

Reasons for the rather low response rate to these questions is purely conjecture. Many may not have understood the questions as they were written and for whatever reason did not wish to ask for clarification in those cases where the interviewer was present. The problem of not reading the question thoroughly may also be partial explanation. Some respondents may have avoided providing (complete) answers to certain questions because they felt a response to a previous or similar question would suffice. The questions dealing with quality, service, the reputation and marketing campaign of the builder could possibly have been viewed as irrelevant to the main thrust of the inquiry or led to the view that the results were for use by the builder, therefore casting some doubt on the true intent and validity of the questionnaire. Responses to the question 'Where else did you consider and why did you not buy there?' were vague perhaps because explicit boundaries were not given to the word 'where'. An improvement would have been to ask for the names of other builders visited, their location, and then the reason(s) for non-purchase.

'What was your image of Fallingbrook before you saw the houses here for the first time?' This question was intended to elicit a response based upon socio-economic lines of thinking; however, many respondents thought in terms of location, distance from work or previous dwelling, or the physical mess and clutter of the construction site. Most units being constructed at that

time were either for use as models or were being built for contractually confirmed purchasers. Residents were often buying from architect's renderings in a site trailer. It was, therefore, not uncommon for there to be a lack of thinking on social and economic aspects of the new area during these early weeks. An improved form of the question might have been 'Comment, in socio-economic terms, on your initial image of Fallingbrook.'

Ranking reasons for locating in Fallingbrook posed a slight problem. Approximately 7% checked off one or more of the four choices without actually giving them a rank. In most cases this flaw was noticed while still at the respondent's house and they were asked to complete the ranking.

Combined household income was the question which, it was believed, would provoke the largest number of no answer responses, yet it did not. Of the 77 completed questionnaires, only one respondent refused to answer this question. His wife, days earlier, had been more than willing to provide a dollar range which was later used when coding the husband's return.

There were many cases where a response gave rise to further questioning on the part of both interviewer and interviewee but none of the 34 questions on the questionnaire stand out as being major problems. In a very few instances further explanation of a question was required and for the most part this was with people whose mother tongue was other than English. As the relatively high response rate indicates, most people were quite receptive to the study. While many viewed it as just another interviewer knocking on the door, some had been favourably awaiting the interviewer's arrival. These proved to be very informative interviews. It was possible to complete the questions in as little as twenty-five minutes although some interviews lasted forty-five to fifty minutes with a few in excess of one hour.

4.10 Fallingbrook and the Future

While considering the factors which impinge upon the decision to leave an old residence and purchase a new one (price, income, rates, location, distance to work, size, closeness to schools, churches, merchants, etc), purchasers must have surely given at least some degree of thought to what the future holds for the new area; an area to which they have just committed roughly two hundred thousand dollars. To try and gather some indication of how respondents viewed the future of this community, they were asked to share their thoughts on Fallingbrook in five years.

After existing for months in a construction site complete with mud, dust, dirt, and noise, many seek solace in knowing that things will not stay this way forever. Most complain but most feel it will be worth the wait, the duration of which depends upon demand for new housing and the builders' continued interest in building on the adjacent lands. Fallingbrook has the potential to become a beautiful area offering a view, for many, of the Gatineau Hills, the Ottawa River, sunsets, and greenery. Nature has made ample provision for quiet walks and skating on the nearby pond. Green space and quiet streets away from the through traffic will provide a much safer environment for playing children than the busy streets the children may have been used to. The largest proportion of new residents in Fallingbrook indicated they will be doing their part to enhance the colour and beauty of the neighbourhood through landscaping to include trees and hedges, patios and pools, fencing and flower and vegetable gardens.

Over ninety percent of respondents thought house prices in Fallingbrook would rise over the next five years but many were reluctant to place either a dollar or percentage value on the increase. Results indicate that on average, residents think, or want to think, that house prices will climb

between three and ten percent - about five percent per year on average which will add about \$10,000 yearly to the average house (\$191,146). No drastic gains are expected, this serving to reinforce the belief that most people did not buy for investment. Fallingbrook can perhaps be viewed as a stable, semi-urban/rural neighbourhood where children can be raised in relative safety and housing investment is protected by nature of its traditional design and quality of construction. Only four respondents claimed they did not expect house prices to rise within the next five years; this would result, it was believed, from the over supply of houses in the area and low inflation. One resident claimed she fully expected to take a loss on her \$260,000 house. Prices, according to her, would drop 5% over the next 4 years.

Orleans, and Fallingbrook, should become much less a bedroom community of Ottawa and more an employment centre in its own right when the Taylor Creek Industrial Park and other employment opportunities develop. Whether it will become another high-tech centre remains to be seen. Fallingbrook's desirability is expected to improve greatly once the community facilities and infra-structure are in place, although, as with many things political, there is some question whether politicians are making as concerted an effort as they could to speed the placement of such facilities. People look forward to not only elementary and secondary school and day-care facilities a short distance away, but retail and service shops, places of worship, parks and recreational facilities, and without doubt, door-to-door mail delivery!

Presently, the area lacks a regional shopping centre. Instead, St. Laurent Shopping Centre, six miles west in Ottawa, attracts a high proportion of the east-end consumer traffic. Fashion retailers from

Canada's largest fashion chain, Dylex (Big Steel, Fairweather, Tip Top Tailors), are present in Place d'Orleans but it is without the primary drawing power that a major anchor store such as Sears, Eatons or The Bay might provide. The proposed expansion by Eatons into the area adjacent to Champlain and St. Joseph Boulevards should provide a substantial boost to the merchandising power of Orleans and improve the image of this eastern satellite of Ottawa.

Long-term residency appears to be in the minds of most Fallingbrook residents. When asked about their future house purchasing intentions, thirty percent said they had no plans of buying again. This may have been an unfair question to ask given that most had just bought, yet thirty-three percent said they would plan a move only when the children were grown or had gone away to school. Most of the children in Fallingbrook are quite young, appearing to be approximately grade threes and fours, which means respondents may not be facing a move for 8 to 12 years.

Of those who indicated a specific future housing preference, condominiums were the choice of seventeen percent while five percent said they would prefer an apartment. Sixteen percent specified that their next move would be downtown. Traditionally condominiums have been in the downtown core area and as such a preference toward 'condos' meant a move downtown. With an increase in condominium construction on the periphery of the city (Atrium in Kanata and Hunt Club for example) it is difficult to say whether this trend will continue. Five percent felt a move up to a larger, more expensive dwelling would be in order, but seventeen percent said they would downscale the size of their dwelling. Thoughts of retirement in a warmer southern climate or the nomadic existence afforded by a motor home accounted for seven percent of respondent's choices. Twelve percent would

prefer to have their next house custom designed and built to their own specifications. See Chapter Five for a further discussion on future purchases and the future of up-scale housing.

Factors, cited by respondents, which would cause them to move from their present house ranged from divorce to winning on a lottery ticket, a change in lifestyle to illness and old age. Fifteen percent implied they were content exactly where they were and had no intentions of ever moving again. By far the most important reasons cited for consideration of a move were children leaving (33%), loss/change of job or job transfer at 31%, discontentment with some aspect of the neighbourhood (neighbours, lack of privacy due to pedestrian traffic through the conservation land, introduction of incompatible housing types or commercial activity) was listed by 11%. Other reasons included problems with the Queensway or dislike for having to commute, the introduction of newer/better house designs, death of a family member, and financial problems. It was surprising to note that only 3% claimed they would be motivated by monetary gain even though 20.8% stated they bought for investment.

Has time changed their outlook and are they willing to see Fallingbrook as a community, an opportunity to build a 'home' and raise a family rather than an opportunity for quick pecuniary reward? Is it safe to say the residents of Fallingbrook are generally content or satisfied with their choice? As a group, they certainly are in no rush to leave. Will they feel the same way in three, five or even ten years? How many will move despite their claim that they are happy to remain forever? What will the turnover of houses be like? One family already has their house up for sale after only four months of occupancy. A follow-up study in a few years, while not within the scope of this research, may produce some interesting results.

CHAPTER FIVE

5.0

SUMMARY

Studies of motivation and migration have been conducted over the decades by geographers, sociologists, psychologists, economists, and many others. Quite often the data they used were aggregated to census tract or provincial levels and while this may be appropriate for some research, a better understanding is derived from inquiry into the needs, desires and actions of the individual decision-maker from which the aggregated data are comprised. The household, therefore, takes on extreme importance in what Bourne (1981) claims is an essential part of the actual 'on-ground' workings of the housing allocation process.

Much early research on behaviour and movement was conducted under three broad study categories of area, household, and motivation with little sign of co-operation or exchange of ideas between researchers of these various schools. Early work by Rossi (1955:12) attempted to integrate the valuable results from these three study types into a product which would serve some practical use. Recent pilot studies and investigations by Zavislake (1982), Northrup (1981) and Skaburskis (1984) also centred at the practical application of findings and have been useful in testing data acquisition methods and furthering the knowledge and understanding of the individual household. To enhance

current knowledge of residential migration, buying and demographics of specific migrants, this researcher has examined an up-scale sub-market in the Ottawa region, a sub-market where house prices range from \$160,000 to \$270,000+/-.

Residential mobility, according to Rossi (1955:184) is often the spatial expression of vertical social mobility. Given that as families rise in social position, they often modify their housing in accord with their new class distinction, the taking up of residency in Fallingbrook is, for many, a sign that they have arrived at yet a higher social class.

5.1 Conclusions

The information and generalities drawn from this study have proven useful to participants in the house building business although their applicability to a wider audience has perhaps been limited due to the product and site specific nature of the approach. This research was an investigation of households and household mobility activity. It examined what the households had done in the very recent past and probed for an indication of future actions. The results initially indicate that useful and relevant data on up-scale buyers, house characteristics and decision-making influences can be gathered through the use of personally administered household questionnaires. The success is lent further support by the fact that aggregated findings have prompted one of the Fallingbrook builders to make major changes to their dwelling unit delivery and service procedures with further changes still being considered. This illustrates the practical importance that academic exercises can have when applied to highlighting issues of concern for

members of the business community.

Studies of a comparable nature, available to the public, are scarce. Zavislake (1982), through his work in Toronto, set out to gather similar data and to develop and test a methodology that could act as a basis for gathering data on buyer characteristics as they specifically related to house characteristics. He also confirms that the questionnaire process has the ability to gather meaningful data. The completed response rate was 55 percent producing zero results from both telephone and mail-back techniques while Fallingbrook residents responded in 64 percent of all cases with telephone and mail-back achieving 4.1 and 5.8 percent success respectively. Similar to the present study, Zavislake discovered the highest proportion of respondents were from a professional/technical background, married, not first-time house buyers, and had an average household size of four persons. As was expected given the price range of the houses under study, the average household income was \$37,800 (1982 \$CDN), much lower than the \$60,000 to \$79,999 typical of Fallingbrook.

The findings of the Fallingbrook study extended the scope of the Toronto work to include respondents in the housing market of another city, while the new house sub-market price range of \$160,000 to \$260,000+/- complements the work of Zavislake who focussed his investigations on the \$90,000 to \$110,000 price range. It is not known to what extent new dwellings were included in the Toronto survey. Both studies conclude that increased size is a very important consideration in the decision-making process.

Many of the respondents from the Toronto sample claimed their primary reason for moving from their previous residence was a desire to

own (29 percent of responses) with twenty-five percent of respondents claiming their previous house was too small. Forty percent of respondents gave location as being the most important reason for moving into their current house. A further thirty percent said size was important while price was the reason given by twenty three percent (Zavislake, 1982:13). Although Zavislake placed more emphasis on the source of funds for the house purchase and specific features of the house, the Fallingbrook questionnaire could quickly be adapted to such use.

Northrup (1981), examined the topics of house buying, decision-making, and the flow of information, through a questionnaire study of 510 consumers who had purchased both new and resale houses in the Ottawa market. She developed and tested a questionnaire emphasizing level of consumer awareness in the decision to purchase a house and concentrated on such factors as aesthetics, location, practicality, structural integrity of the dwelling, and awareness of financial aspects of the purchase. The small rate of return (30.98%) was surprising, claims the author, because the survey was seen as a useful form of expressing legitimate complaints and satisfactions about the services received and the quality of house purchased (Northrup, 1982:2). Reasons for the low rate of return are strictly speculative. Initial reaction is that the mail out/mail back method of questionnaire completion played a major part although this approach brings with it its own set of rules and norms. Recognition as a commercial rather than academic exercise may also have deterred participation. The cost and time involved in personally administering questionnaires in a study the size of Northrup's (sample size 510) would cause the most critical concern;

factors which were of much less importance in both the Fallingbrook and Zavislake studies. As with Zavislake, the extent to which new houses made up the study sample was unknown. Only 53.6% of those polled were in single family dwellings.

Both Northrup and this investigator considered the flow of information with quite different results. It was found that whereas the respondents of Northrup's study made extensive use (41.6%) of real estate agents, the most that Fallingbrook residents used them was 7.5 percent. 'This is probably seen by most people as being the usual and traditional course taken in searching for a home' claims Northrup (1981:3) although with new houses this figure probably falls substantially. Future researchers may wish to focus attention on this difference in source use. Information on the Fallingbrook neighbourhood was derived from newspapers in twenty-six percent of reported cases while twenty-three percent knew of the builders from having previously owned one of their houses. Less than one percent of the people had houses costing more than \$150,000, and beyond the fact that both groups of respondents were in their thirties, the demographic profiles shared little.

By comparison, the Fallingbrook results underscore the claim that no one study should be taken as definitive. Considerable demographic differences do exist between members of the same general housing market in Ottawa. To be of applied use to builders, household studies must be to a high degree product or site specific in order to allow them further understanding of their particular sub-market and the competition which they face within it. As for applicability to more aggregated models, studies such as this serve to refine select portions of their data and

results and perhaps brings anomalies or questions to the surface for future consideration or model modification.

5.2 Future Trends and Study Recommendations

The findings reported within this paper do not cover all the important aspects of mobility and household decision-making. Both the scope of the study and the population interviewed were restricted to one sub-market within the Ottawa area. An essential task of further research should be to test the generalities of these findings by broadening the study coverage to include more representative areas and populations which were, of necessity, excluded from this study. Perhaps a comparison between up-scale Kanata to the west of Ottawa and up-scale Orleans in the east would be in order. Researchers may also wish to test the applicability of the chosen approach and determine whether the interviewing approach and questionnaire will suffer if used in sub-markets with socio-economic status different from that of Fallingbrook; this could straddle lower and even higher status communities and neighbourhoods in both new and resale markets. In addition, other housing markets throughout Canada could be examined and, to add an international aspect to the research, American retirement communities where Canadian populations are high.

Further attention should also be given to determining a fuller understanding of what aspects of size and space were so essential to purchasers. Are additional space requirements better satisfied by larger rooms, more rooms, or rooms which serve a varied function? Is it essential to have rooms which are isolated or integrated into the main traffic-flow paths and to what degree does the size, location and amount

of hall and common linking area play. Another direction of future research may be to elaborate upon the findings which have shown up in this study with more attention paid to statistical examination and manipulation of the data.

5.3 What Does The Future Hold For Up-Scale Residents?

A discussion on the future of up-scale housing brings with it three questions to consider. First, what will today's up-scale purchasers buy next to maintain their plateau in the housing hierarchy? Second, who will be the buyers of the next generation of up-scale housing and what will be the characteristics of that housing? Third, what will happen to Fallingbrook when it is no longer perceived to be at the social apogee?

What will today's up-scale purchaser buy next to maintain their plateau in the housing hierarchy? As respondents indicated, the next phase of their house-buying will be with a move to a smaller unit when the time comes - children grown, retirement, change of lifestyle, etc. Even if these people opt for smaller houses in the city, they have come to expect a certain high standard of (perceived) quality and as such will probably demand at least the same degree in their next dwelling; complete with the ever growing list of standard features. Condominiums with the luxury flair where owners can simply lock the door and walk away knowing the structure and its contents are safe was another alternative expressed by respondents. This blends nicely with the winter house in Florida and summer house in Ontario arrangement to which a high proportion of today's people aspire.

Should residents decide they need something even more spacious or impressive than they already have in the single-family houses of

Fallingbrook, they could opt for a resale, the likes of which would be found in Rockcliffe Park, or they could have one custom built on either an estate lot or as part of an in-fill project. The question of why Fallingbrookers did not opt for the luxury of a custom house was not asked but it was discussed with many of them. Of those who had considered the estate-lot custom housing alternative, cost was the deciding factor. By way of example; to have one of the Fallingbrook builders construct the same house he is building in Fallingbrook on a lot a couple miles farther away from the sub-division was going to add over \$10,000 to the cost of the house and the purchaser would still be required to supply the lot. Distance from essential services such as police, fire protection and public transit was mentioned as another reason for choosing the houses of Fallingbrook rather than the large-lot custom housing found slightly farther out from the city. Few indicated the next step would be a truly custom house.

The affluent will always be able to satisfy their housing requirements and demands. Eventually the Canadian trend-merchants will pick up on the idea of up-scale housing. Just as designers have lent their name to Cadillac, Lincoln, BMW, and executive aircraft, perhaps so too will they become involved in designer houses for Canadian markets. Ralph Lauren (American fashion designer) is currently involved in such activity in the United States. Will the Canadian up-scale housing market soon be invaded by our own Alfred Sung?

Who will be the buyers of the next generation of up-scale housing and what will the characteristics of that housing be? The next generation of up-scale housing will probably be consumed by the 45 to 60 year old group, at or nearing the empty-nest stage in the life-cycle, who

desire something more than the ordinary in their dwelling (Miron and Schiff, 1982:41). This does not appear unreasonable given that the majority of those currently in Fallingbrook are in their thirties with young children and have suggested that they will remain about another ten years. Based upon observation and responses by nearly sixty-five percent of the upscale residents of Fallingbrook, the following blueprint of tomorrow's up-scale housing environment is presented.

Residents of Fallingbrook, while being relatively affluent, are not the idle rich and as such do have certain concerns of a practical nature. Many will opt for smaller, easier to clean and more energy efficient houses. They give up interior space once they discover there is no longer a legitimate need for it but they will probably not give up the vast array of contrived necessities they have come to expect such as extensive natural light and wood, only the most modern of built-in labour-saving kitchen gadgetry, and the latest in bathroom fixtures and accessories to round out the quest for personal luxury and that pampered feeling.

The recent decrease in emphasis on construction of large lot singles, in favour of what was perceived as being a better seller - small lot singles and townhouses - would indicate that perhaps the expansive, expensive option-laden up-scale units are falling from grace. According to one Fallingbrook builder, the up-scale market had reached the saturation point about March or April 1986.

It is further suggested that security systems will continue to grow in popularity and probably become totally integrated with the computerized house which will not only start the morning coffee brewing, pour a morning eye-opener and warm up the car, but plan menus, perform

grocery order processing, pay utility bills and other banking chores, and monitor baby's breathing; all from the convenience of a remote site, probably your own personal portable cellular telephone. It would not be uncommon for a continued emphasis to be placed on personal privacy and the desire to own in order to exercise control over personal space, both inside and outside the dwelling.

What will happen to Fallingbrook when it is no longer perceived to be at the social apogee? The houses of Fallingbrook will inevitably play an important role in the filtering process once the next generation of up-scale dwelling units have been designed, constructed, and occupied. Future demands for existing housing will no doubt influence the local zoning regulations. Through time, as has been the case in so many areas where large houses were once the norm, these houses may be renovated for use as multi-household dwellings; rooming houses, duplexes, triplexes, etc., or they may be preserved as singles. The extent to which they survive the physical test of time remains to be seen. The ultimate use would be to raze all the structures and start again.

For at least the short term the relative exclusivity of Fallingbrook should remain intact as long as it is protected from entry by builders offering products smaller and less prestigious than those currently available. Intrusions by small-lot singles, townhouses or condominiums may lead to the erosion of the area's perceived (and contrived) exclusivity. Furthermore, present builders may feel that their involvement in the project is no longer warranted or deserved and remove their support. This is an issue which must be given serious consideration by the developers of the project and those in control of

local government. Perhaps they will feel that long-term socio-economic integrity is best squandered for shorter-term gains such as an increased population and tax base, or a better mix of upper and lower income housing.

RESEARCH QUESTIONNAIRE

This questionnaire is part of a research project at the Geography Department of Carleton University. The purpose is to look at factors of motivation in the house buying process.

All data will be held confidential by the researcher. Neither your name nor your address appears on this questionnaire. The individual homeowner will remain completely anonymous.

SECTION 1

[] Male

[] Female

WHY DID YOU LEAVE YOUR PREVIOUS ADDRESS AND RE-ENTER THE MARKET AS A POTENTIAL BUYER? _____

PREVIOUS LOCATIONS

(Sandy Hill, The Glebe, etc.)

DURATION

HOUSING TYPE*

_____	_____	_____ O/R
_____	_____	_____ O/R
_____	_____	_____ O/R
_____	_____	_____ O/R
_____	_____	_____ O/R

Own/Rent

If NEW to Ottawa-Carleton, Please list area of last residence.

* (Housing Type: Condominium, apartment, duplex, single-family, etc.)

WHAT HOUSING TYPE WERE YOU LOOKING FOR? _____

WHY? _____

SECTION 2

HOW DID YOU HEAR ABOUT FALLINGBROOK? _____

WHAT WAS YOUR IMAGE OF FALLINGBROOK BEFORE YOU SAW THE HOMES HERE FOR THE FIRST TIME? _____

HOW SATISFIED ARE YOU WITH YOUR HOUSE?

WOULD YOU BUY AGAIN FROM THIS BUILDER?

WHAT IMPROVEMENTS DO YOU PLAN FOR HOUSE OR LOT?

HAS THIS IMAGE CHANGED? IF SO, HOW AND WHY? _____

WHAT WERE YOUR MAIN REASONS FOR MOVING TO FALLINGBROOK? _____

WHO WAS THE BUILDER OF THIS HOUSE? _____

HOW DID YOU HEAR ABOUT THIS BUILDER? _____

COMMENT ON THEIR MARKETING CAMPAIGN. _____

COMMENT ON THE REPUTATION OF THE BUILDER. _____

WHAT WAS THE FIRST THING THAT STRUCK YOU ABOUT THESE HOUSES? _____

WHAT UPGRADE OPTIONS DID YOU PURCHASE AND WHY? _____

HOW LONG DID YOU SPEND LOOKING FOR THIS HOUSE? _____

WHERE ELSE DID YOU CONSIDER AND WHY DID YOU NOT BUY THERE? _____

WHY DID YOU BUY A SINGLE-FAMILY DWELLING RATHER THAN ANOTHER TYPE?

DO YOU PREFER TO OWN OR RENT? WHY? _____

DO YOU FIND ANY DIS-ADVANTAGES TO OWNING AND IF SO, WHAT ARE THEY?

OF WHAT IMPORTANCE WERE INTEREST RATES TO YOU IN BUYING THIS HOUSE?

HOW WOULD YOU DESCRIBE THE WAY YOU LOOK AT YOUR INCOME WHEN DECIDING TO SPEND THIS MUCH MONEY ON A HOUSE? _____

COMMENT ON THE SERVICE & QUALITY ASSOCIATED WITH THE BUILDER?

PLEASE LIST SOURCES OF SATISFACTION & DIS-SATISFACTION WITH THE HOUSE.

_____	/	_____
_____	/	_____
_____	/	_____
_____	/	_____

WHAT FACTORS WOULD CAUSE YOU TO MOVE FROM THIS HOUSE? _____

WHAT ARE YOUR INTENTIONS REGARDING FUTURE HOUSE PURCHASES? _____

WHAT DO YOU THINK WILL HAPPEN TO HOUSE PRICES IN FALLINGBROOK DURING THE NEXT FIVE YEARS? _____

SECTION 3

PLEASE RANK THE FOLLOWING REASONS FOR LOCATING IN FALLINGBROOK BY ORDER OF RELATIVE IMPORTANCE:

- ☐ LOCATION Comments _____
- ☐ INVESTMENT VALUE _____
- ☐ DEVELOPMENT CHARACTERISTICS _____
- ☐ HOUSE CHARACTERISTICS _____
- General Comments _____
- _____

WHAT IS THE SIZE OF YOUR FAMILY/HOUSEHOLD? _____

IF MEMBERS OF YOUR HOUSEHOLD COMMUTE TO WORK, HOW FAR ? _____

AGE

- ☐ UNDER 30
- ☐ 30 - 39
- ☐ 40 - 49
- ☐ 50 - 59
- ☐ 60 - 69
- ☐ OVER 70

COMBINED ANNUAL HOUSEHOLD INCOME

- ☐ UNDER \$20,000
- ☐ \$20,000 TO \$39,999
- ☐ \$40,000 TO \$59,999
- ☐ \$60,000 TO \$79,999
- ☐ \$80,000 TO \$99,999
- ☐ \$100,000 TO \$119,999
- ☐ \$120,000 TO \$139,999
- ☐ \$140,000 TO \$159,999
- ☐ \$160,000 TO \$179,999
- ☐ OVER \$180,000

HIGHEST LEVEL OF EDUCATION ACHIEVED

- ☐ Primary School
- ☐ Secondary School by grade _____
- ☐ Some College
- ☐ Some University
- ☐ College Graduate
- ☐ University Graduate
- ☐ Post Graduate
- ☐ Other _____

MARITAL STATUS

- ☐ Never Married
- ☐ Married
- ☐ Separated
- ☐ Divorced
- ☐ Widowed
- ☐ Other _____
- ☐ Don't Know

Thank you for taking the time to complete this questionnaire. Any further comments you may have would be greatly appreciated.

C.K. Waddington 737-0570

Carleton University
Ottawa, Canada K1S 5B6

5 February 1986

My name is Kent Waddington and I am a graduate student in Geography at Carleton University. As part of my thesis I am researching perception and the reasons for moving/buying into the housing sub-market of Fallingbrook.

I will be in Fallingbrook to give out a questionnaire and talk with residents during February and March. Your responses and comments will be used to help determine buying motives related to the choice of house, the neighbourhood, and the community at large. They may also provide some insight into what the next generation of up-scale housing will be comprised of. I would very much appreciate your help in completing this project. The questionnaire should take only about twenty-five to thirty minutes. If you prefer, I can leave it with you for a couple days and return to pick it up. You may be assured of complete confidentiality.

My graduate status at Carleton University may be verified by calling either the Geography Department (564-2641) or my Thesis Advisor, Dr. David Bennett at 564-2896.

Respectfully

A handwritten signature in blue ink, appearing to read 'K. Waddington'.

C.K. (Kent) Waddington

P.S. If you have any questions I would be very pleased to discuss them with you at either 737-0570 or 564-2611.

Appendix ThreeSkaburskis - Questionnaire Responses**[1] Reason for deciding to leave previous dwelling.**

wanted to own rather than rent
wanted less upkeep and maintenance
wanted larger unit
wanted smaller unit
wanted more security when away
wanted to be closer to work
wanted to be closer to shops, theatre, services
wanted better neighbourhood conditions
could afford better place to live
dissatisfied with previous unit/landlord/tenants.

[2] Reasons for buying the unit they did.

wanted community facilities and amenities
wanted this lifestyle
could not afford anything else
thought location was better
thought better quality of units were to be found here

[3] Identification of specific locational attributes.

near work
near transit
near shops
near downtown
near friends
near schools
near parks
scenic views
life style

[4] Identification of specific unit features.

construction
floor plan
large rooms
scenic views
large patio
room size
laundry
no. of bathrooms
fireplace
unique design
appliances

Skaburskis ...cont'd

[5] Identification of specific project attributes.

appearance
landscaping
financing
adult oriented
recreational facilities
parking
security
prestige
investment
developer reputation

[6] Reasons which would prompt move to new location.

change location
realize increased value (capital gain)
upgrade dwelling quality
buy larger house
buy smaller house
dissatisfied with existing
reduce housing cost
rent an apartment/condo/single family house

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GLOSSARY OF TERMS

ADVERTISING: the paid use of media by a potential seller to communicate persuasive information about its products, services, or organization. (modified from Kotler, p. 587)

AMENITY AREA: that area set aside for recreational and landscaping purposes and shall not include any area occupied by buildings, parking spaces, aisles, lanes and accessory use. (Cumberland Twsp. By-Law 1-84)

APARTMENT: room or suite of rooms used as living quarters. A dwelling unit of a multi-family house. (CMHC, 1982)

APARTMENT BUILDING: a type of multiple dwelling comprising three or more dwelling units with shared entrances and other essential facilities and services and with shared exit facilities above the first storey. (CMHC, 1982)

AREA, Floor: space on any storey of a building between exterior walls and required fire walls, including the space occupied by interior walls and partitions, but not including exits and vertical service spaces that pierce the storey. (CMHC, 1982)

ASPIRATION REGION: the upper and lower limits of a set of housing attributes. (Bourne, 1981:138)

ATRIUM: an enclosed interior court, of one or more levels high, on to which other rooms may open. (CMHC, 1982)

BACHELOR DWELLING UNIT: a unit, with not more than one bedroom, providing therein living, sleeping, eating, food preparation, and sanitary facilities for one or two adults. Other essential facilities and services may be shared with other dwelling units. (CMHC, 1982)

BASEMENT: the lower storey of a building below or partly below ground level.

BEHAVIOUR PATH: the ordering of sources of information. (Bourne, 1981:138)

BRICK VENEER: a facing of brick tied to a woodframe or masonry wall, serving as a wall covering only and carrying no structural loads. (CMHC, 1982)

BUILDER: one who constructs dwellings for sale to home-owners. They may be multiple dwellings as with condominiums and co-operative ventures or predominantly single-detached and semi-detached dwellings on freehold tenure. (CMHC, 1984)

BUILDING SITE: a parcel of land suitable for building, or on which a building is or may be built, including all surrounding land specifically allocated to the building. Also called Plot and lot. (CMHC,1982)

CANADA MORTGAGE AND HOUSING CORPORATION: the agency that administers the National Housing Act on behalf of the federal government. (Citizen, F18, October 1, 1985) Also known as CMHC.

CARRIAGE TRADE: (Carriage Trade Homes) brand name employed by Royal LePage Real Estate Services Ltd. to differentiate select luxury houses from other housing stock; typically costing \$300,000 or more.

COMPLETION: the stage at which all the proposed construction work on a dwelling unit has been performed, although under some circumstances a dwelling may be counted as completed where up to 10 per cent of the proposed work remains to be done. (CMHC,1984)

DUPLEX: one of two dwelling units located one above the other in a building adjoining no other structure. (CMHC,1984)

DURABLE GOODS: tangible goods that normally survive many uses. (Kotler, p. 589)

DWELLING UNIT: a structurally separate set of self-contained living premises with a private entrance from outside the building. Such an entrance must be one that can be used without passing through another separate dwelling unit. (CMHC,1984) One or more rooms used or intended for the domestic use of one or more individuals living as a single housekeeping unit, with cooking, eating, living, sleeping, and sanitary facilities. (CMHC,1982)

FAMILY means one or more persons whether or not related by blood, marriage or adoption, and including domestic servants, gratuitous guests, who live together in one dwelling unit and maintain a common household (Cumberland Twsp. By-Law 1-84). See also 'Household'.

FACADE: the whole exterior side of a building that can be seen at one view; the principal front. (CMHC,1982)

FILTERING: changes in the relative position of dwelling units within the city housing unit hierarchy.

FORECASTING: the art of anticipating what buyers/sellers are likely to do under a given set of conditions. (modified from Kotler, p. 589)

FUNCTIONAL LAND USE CHANGE: process of succession whereby functional uses (eg. residential or retailing) replace each other in the building stock or parcels of land. Process affects a change in the functional pattern of land use city wide. (Davidson, 1981)

GENTRIFICATION: process similar to filtering, except that housing units are filtered "up" to higher or high income persons. Massive rehabilitation is typical of gentrified areas; replaces previous residents; tends to occur in older, central city areas. (Davidson, 1981)

GROSS DEBT SERVICE RATIO (GDS): the percentage of the borrower's gross income that will be used for monthly payments of principal, interest, taxes, half of condominium fees and heating costs. (Citizen, F18, October 1, 1985).

HOUSE: a structure with the intended purpose of use as a dwelling or residence for one or more persons.

HOUSEHOLD: a person or group of persons occupying one dwelling. It usually consists of a family group, with or without lodgers or employees. It may consist of a group of unrelated persons, or two or more families sharing a dwelling or of one person living alone. Every person is a member of some household, and the number of households equals the number of occupied dwellings. (CMHC, 1984)

HOUSING START: the beginning of construction work on a building, usually when the concrete has been poured for the whole of the footing around the structure, or an equivalent stage where a basement will not be part of the structure. (CMHC, 1984)

INCOME ELASTICITY OF DEMAND: proportional change in demand for housing which results from a unit change in the level of real income. (Bourne, 1981:109).

LAND USE SUCCESSION: process begins with a particular land use occupying a given space (building or area of land). An invasion then occurs, with the influx of a foreign land use to an area or the simple invasion of a use in a particular area. A successful invasion will mean that the new land use type will eventually dominate the building or area. It is the product of invasions and involves the transference of uses. (Davidson, 1981)

LINE STRETCHING: the act of lengthening the company's product line beyond its current range. (Kotler, p. 590)

MARKET: the set of all actual and potential buyers of a product or service. (Kotler p. 590)

MARKET DEMAND: refers to the total volume that would be bought by a defined customer group in a defined geographical area in a defined time period in a defined marketing environment under a defined marketing program. (Kotler, p. 590)

MARKET DEVELOPMENT: refers to the company's seeking increased sales by taking its current products into new markets. (Kotler, p. 590)

MARKETING: human activity directed to satisfying needs and wants through exchange processes. (Kotler, p. 590)

MARKETING MIX: the particular blend of controllable marketing variables that the firm uses to achieve its objectives in the target market. (Kotler, p. 591)

MARKET PENETRATION: refers to the company's seeking increased sales for its current products in its current markets through more aggressive marketing effort. (Kotler, p. 591)

MARKET SEGMENTATION: the act of dividing a market into distinct and meaningful groups of buyers who might merit separate products and/or marketing mixes. (Kotler, p. 592)

MIGRATION: movement involving a change in place of residence of substantial duration. (Clarke, 1965:163 in Bennett, 1972)

MORTGAGE: a conditional transfer of property pledged as security for the repayment of a loan. (Funk & Wagnalls, 1980)

MOTIVE: a stimulated need which is sufficiently pressing to direct the person toward the goal of satisfying the need. After the need is satisfied, the person's tension is discharged and he or she returns to a state of equilibrium. (Kotler, p. 592)

NONDURABLE GOODS: tangible goods that normally are consumed in one or a few uses (e.g. toothpaste, soap, coffee). (Kotler, p. 592)

PERCEPTION: process or act of providing order and meaning to the environment through interpretation of sensory messages.

POLICE VILLAGE: village under the jurisdiction of a higher organized body or power (e.g. Municipality) yet still retaining, to a degree, its own decision-making autonomy.

PRICING STRATEGY: the task of defining the rough initial price range and planned price movement through time that the company will use to achieve its marketing objectives in the target market. (Kotler, p. 593)

PRODUCT-DIFFERENTIATED MARKETING: a style of marketing in which the seller produces two or more products designed to look different from each other and from competitors' products. (Kotler, 593)

PRODUCT IMAGE: the particular subjective picture that consumers actually acquire of the product. (Kotler, p. 593)

PRODUCT LINE: a group of products within a product mix that are closely related, either because they function in a similar manner, are sold to the same customer groups, are marketed through the same types of outlets, or fall within the given price ranges. (Kotler, p. 593)

PRODUCT: anything that can be offered to a market for attention, acquisition, use, or consumption that might satisfy a need. It includes physical objects, services, persons, places, organizations and ideas. (Kotler, p. 593)

PRODUCT MIX: the set of all product lines and items that a particular seller offers for sale to buyers. (Kotler, p. 594)

RETAILING: all the activities involved in selling goods or services directly to final consumers for their personal, nonbusiness use. (Kotler, p. 594)

ROW DWELLING: a one family dwelling unit in a row of three or more attached dwellings separated by common or party walls extending from ground to roof. (CMHC, 1984)

SEARCH SPACE: that part of the awareness space defined by boundaries of the aspiration region within which a household actively searches for a new dwelling.

SEASONALLY ADJUSTED AT ANNUAL RATE: is the result of adjusting monthly or quarterly statistics to provide an indication of the annual total which would be achieved if activity in all other months or quarters were at the same level of performance relative to past seasonal patterns. (CMHC, 1984)

SEMI-DETACHED DWELLING: one of two dwellings located side-by-side in a building, adjoining no other structure and separated by a common or party wall extending from ground to roof. (CMHC, 1984)

SINGLE-DETACHED DWELLING: a building containing only one dwelling unit, which is completely separated on all sides from any other dwelling or structure. (CMHC, 1984)

SKYLIGHT: any cover or enclosure placed above a roof opening to provide for the admission of natural light. (CMHC, 1982)

SOLARIUM: an attached greenhouse-like space for general use as living space. (CMHC, 1982) See also 'Atrium'.

TARGET MARKET: a well-defined set of customers whose needs the company plans to satisfy. (Kotler, p. 594)

TARGET MARKETING: the act of selecting one or more of the market segments and developing a positioning and mix strategy for each. (Kotler, p. 594)

TOTAL MARKET POTENTIAL: the maximum amount of sales (in units or dollars) that might be available to all the firms in an industry during a given period under a given level of industry marketing expenditures and given environmental conditions. (Kotler, p. 594)

UP-SCALE HOUSING: those detached, single-family housing units found at the upper end of the price spectrum, within a given set of localized sub-markets and varying in characteristics as purchaser preferences and requirements change over time. Also called 'executive', 'prestige', and 'up-market' housing.

WOOD-FRAME CONSTRUCTION: a type of construction in which the structural parts are of wood or dependent upon a wood frame for support. In codes, if brick or other noncombustible material is applied to exterior walls, the classification of this type of construction is usually unchanged. (CMHC, 1982)