
Homeowner Online ADU Survey

A. Overview of the Online ADU Survey

This draft summary of the online accessory dwelling unit (ADU) survey has been prepared as part of the first phase outreach and research activities on the experience of ADU stakeholders and end-users. The online ADU survey was targeted to homeowners who either have an ADU, or who are interested in building an ADU. It provides feedback for future ADU products and to select participants for follow-up homeowner ADU focus groups. The online ADU survey was completed prior to the focus group meetings to help inform the topics needing additional, more detailed discussion.

The online ADU survey was advertised using a postcard mailed to homeowners with ADUs in San Mateo County, and through Nextdoor and Google Adwords. The survey was conducted between July 12 and August 10, 2017 and a total of 140 responses were received. Of those responses, 70% (98 responses) were from people interested in building an ADU, 19% (27 responses) were from people who bought a property with an ADU, and 11% (15 responses) were from people who either built, or are in the process of building, their ADU. Each of these groups received a unique survey with questions specific to their situation. Survey respondents were from 11 cities and the unincorporated area of San Mateo County, with the highest response rates from South San Francisco (30%), Redwood City (23%), and Daly City (19%).

This summary should be viewed as a companion to other outreach and research materials being prepared during this process, including: (1) survey of jurisdictions within



Postcard Sent to ADU Homeowners

San Mateo County to gather information on jurisdiction standards and fees for ADUs; (2) homeowner focus group meetings; and (3) focus group meetings with architects, designers and builders of ADUs. Key findings from the surveys and focus groups will inform all of the ADU products being prepared during this ADU work effort.

B. Important Takeaways from the Online ADU Survey

- (1) Homeowners Find the Overall Process Very Difficult.** Almost half the respondents described the process as extremely difficult. The part they enjoy the most is the design phase and customizing the unit for their needs and circumstances.
- (2) The Permitting Process is the Most Challenging Aspect.** Homeowners who built an ADU often cite permitting as the worst part of the process. Eleven respondents described it as difficult while only three described the process as easy. More than two thirds of people considering building one believe the permitting process will be a major barrier.
- (3) People Considering Building ADUs Want Easy-To-Use and Better Information.** Three quarters of respondents ranked a manual, website as very useful. Approximately half responded positively to assistance finding a contractor or architect. When asked, "What would be most useful in helping you move from thinking about an ADU to starting the process of building one?" almost all of the answers involved getting more information. Respondents overwhelmingly wrote about wanting help understanding the process, the rules, the costs, etc.
- (4) Challenges with Financing or High Construction Costs Are Issues, but Not Major Ones.** Homeowners did not have trouble get loans and only a small percentage asked for financial assistance.
- (5) Housing Family Member or Additional Income Are the Two Primary Motivators for Building an ADU.** Respondents are most likely to want an ADU for income generation, followed by making space for a family member to move in.

C. Summary of Topics from the Online ADU Survey

Motivation

Respondents are most likely to want an ADU for income generation, followed by making space for a family member to move in. Overall, generating income was the most common reason respondents listed for their ADU (38%), followed by making space for a family member (33%). These trends are consistent among those who bought a property with an ADU, while those who built an ADU or are interested in building an ADU are slightly more likely to want to accommodate a family member than generate income.

Type of ADU

Overall, respondents who bought a property with an ADU, built or want to build an ADU have or want to convert a garage or other existing accessory structure (34%) or have a detached unit custom built to be an ADU (33%). Converted garages are especially common among those who bought, built or are building ADUs — with 48% of those who bought and 40% of those who built or are building having or wanting a converted garage. Those people interested in building an ADU prefer a detached structure custom built to be an ADU (39%), followed by a converted garage or other accessory structure (29%).

Size

Those respondents who bought a property with an ADU typically have ADUs with fewer bedrooms, while those who built an ADU opted for more bedrooms. The bought group has mostly 1-bedroom units (59%), followed by studios (30%). The built group is split equally between studio, 1-bedroom and 2-bedroom units. Units built more recently are, on average, slightly larger.

Permitting

Respondents felt strongly that the permitting process was the biggest challenge. Two-thirds of those who built or are wanting to build an ADU found the overall process extremely difficult (47%) or somewhat difficult (20%), with that group listing the permit process as most difficult aspect (48%). Homeowners interested in building perceived the permit process as the most significant barrier (68%).

Financing

Financing was not a major concern and many people who built ADUs used all cash or a home equity loan to pay for their ADU. Just 28% percent of those interested in building an ADU saw obtaining a loan as one of the most significant barriers, while

only 7% of those who built or who are in the process of building an ADU saw obtaining a loan as a challenge.

In the built group, all cash was the most common form of payment (33%), followed by a home loan (Home Equity Line of Credit — HELOC / Renovation Loan) (27%). The remaining respondents in the built group used a combination of cash, a home loan, and refinance to pay for their ADU.

Experience

Overall, respondents did not see many downsides to having an ADU — separate from the building process — and were most excited about the additional income. More than half of the respondents in the bought group (52%) felt there were no downsides to owning an ADU. All groups listed the additional income as their favorite aspect of their ADU (42%). The most significant concerns among all groups were managing tenants (16%) and maintenance and upkeep (16%).

Useful resources

Respondents were most interested in a comprehensive guide and website with useful information. Overall, respondents listed an easy-to-understand and comprehensive guide throughout the entire process (88%) as most useful, followed by a website with useful information (65%).

Those respondents who built an ADU showed interest in resources as follows:

1. Comprehensive guide (87%)
2. Website with centralized information (67%)
3. Better assistance from government staff (54%) — one respondent wrote in “better-trained government staff.”
4. A list of contractors (53%)
5. A list of architects (40%)
6. Better financing options (20%)

Those respondents who are interested in building an ADU expressed interest as follows:

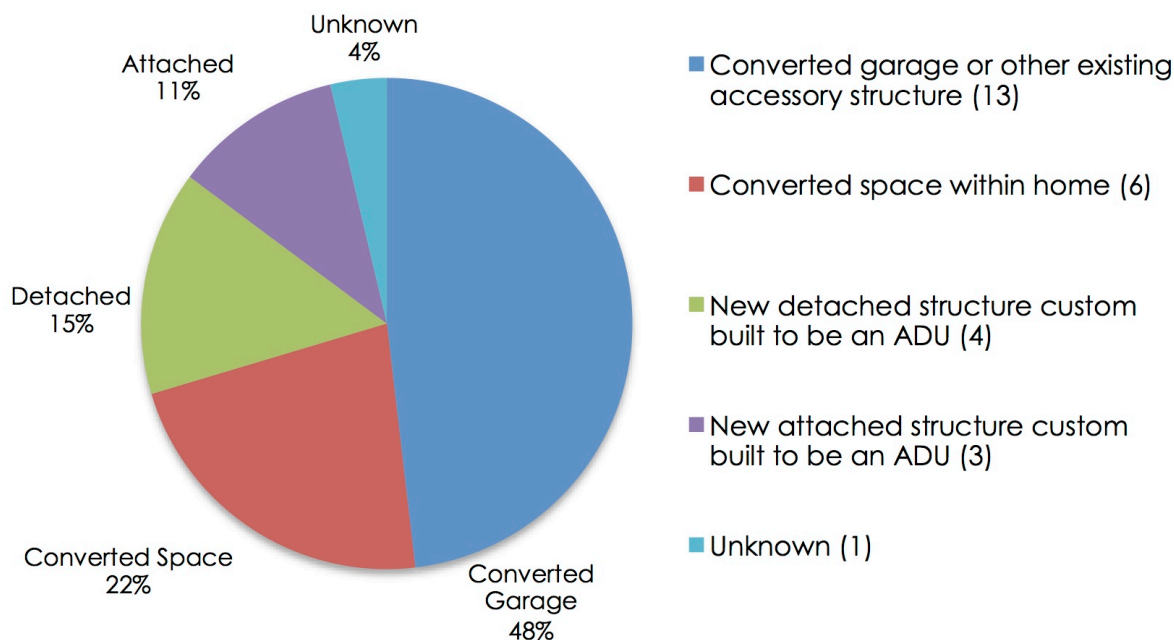
1. Comprehensive guide (88%)
2. Website with centralized information (65%)
3. A list of contractors (66%)
4. A list of architects (55%)
5. Better assistance from government staff (52%)
6. Better financing options (43%)

Respondents also wrote in the following: simple, pre-approved designs; anonymous compliance assistance from planning staff; easier role and regulation from planning staff; just allowing the homeowner to build; and a one stop shop with contractors, architects, banks, and planning staff.

D. Responses From Those Who Bought A Property With An ADU

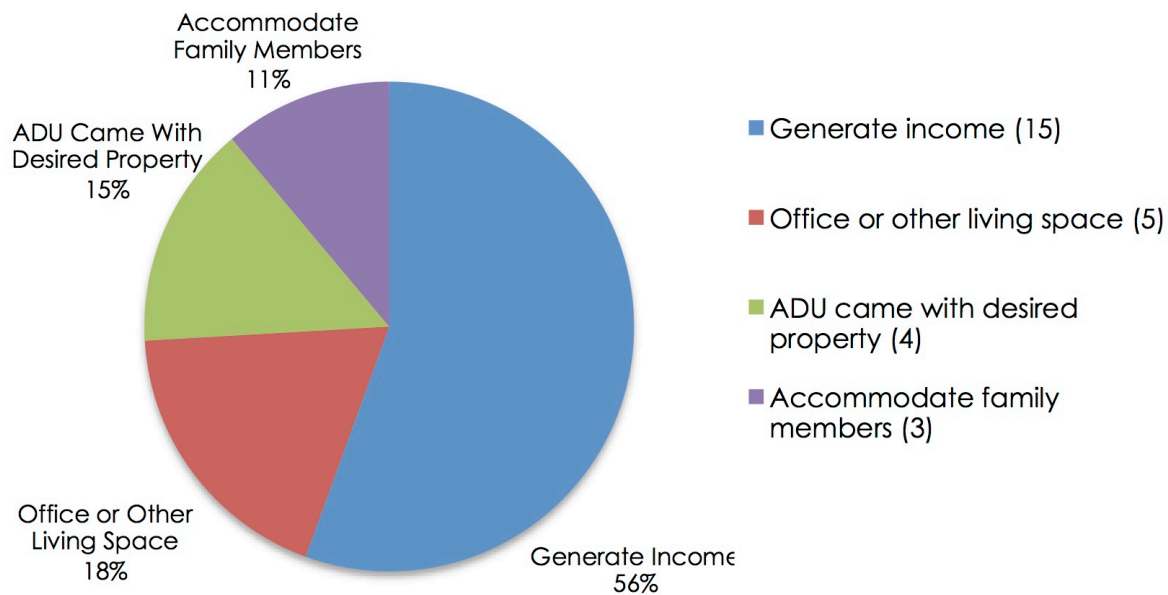
Topic/Question	%	#	Summary
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ADU Type: What type of ADU do you own?

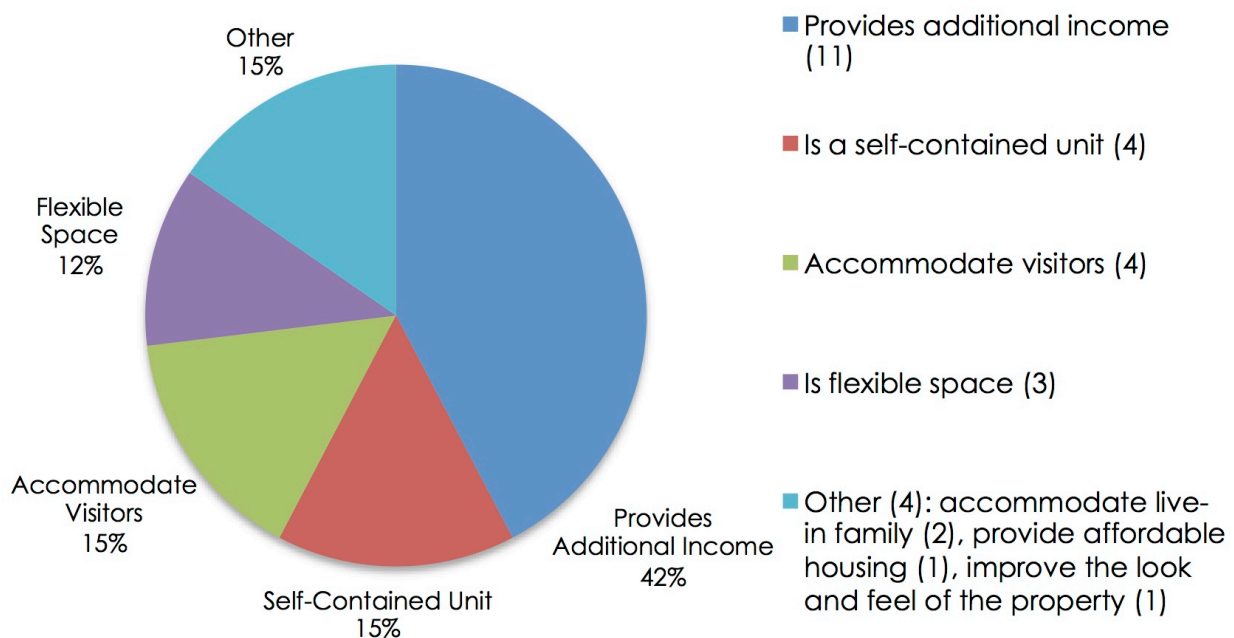


Bedrooms: How many bedrooms are in your ADU?	59%	16	1 bedroom
	30%	8	Studio
	11%	3	2 bedroom

ADU Purchase: Why did you decide to buy a property with an ADU?



Favorite Thing: What is your favorite thing about your ADU?



ADU Importance: When you bought your home, how important to you was it that there was an ADU?	37%	10	Very important
	22%	6	Somewhat important
	22%	6	Not important
	11%	3	Not very important
	7%	2	Neutral

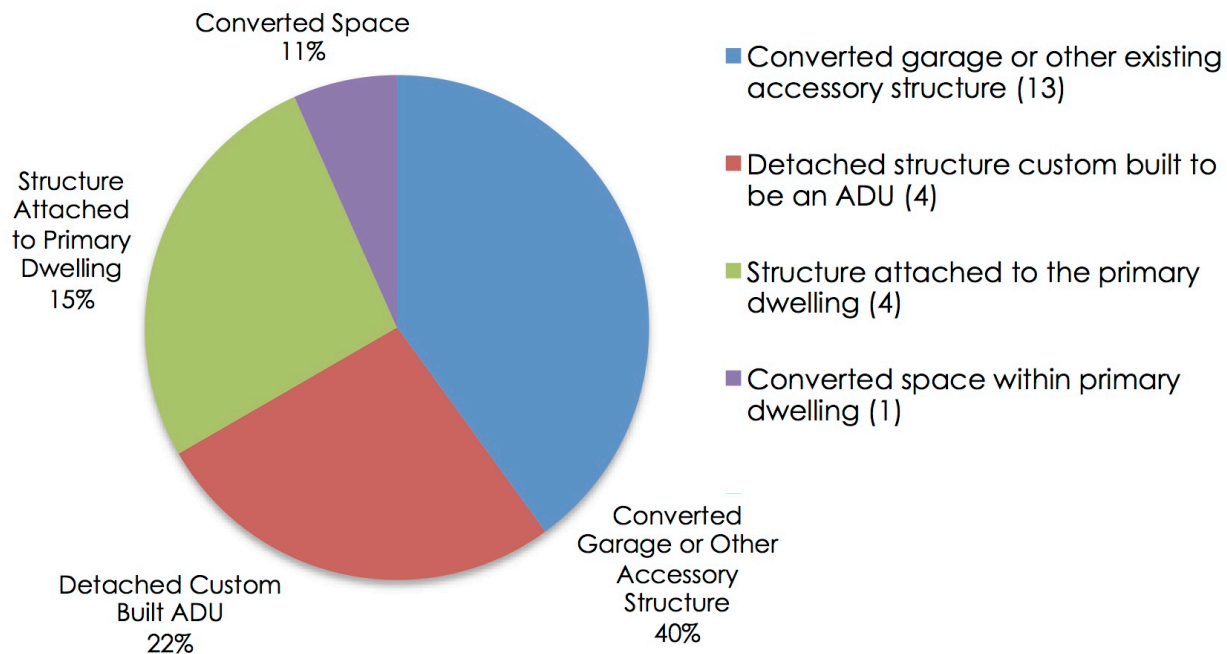
Downsides: Have there been any downsides to owning an ADU?	52%	14	No
	16%	4	Managing tenants
	16%	4	Upkeep and maintenance
	4%	1	Noise
	4%	1	Not insulated / gets cold
	4%	1	Impact on neighbors
	4%	1	Waste of space when not in use

ADU Use: How do you use your ADU?	41%	11	Long term rentals
	22%	6	Family member lives there
	18%	5	Family or friends use it occasionally
	7%	2	Short term rentals
	4%	1	Office or other non-residential use
	4%	1	Guest space and office
	4%	1	Not current in use, but plans to rent out

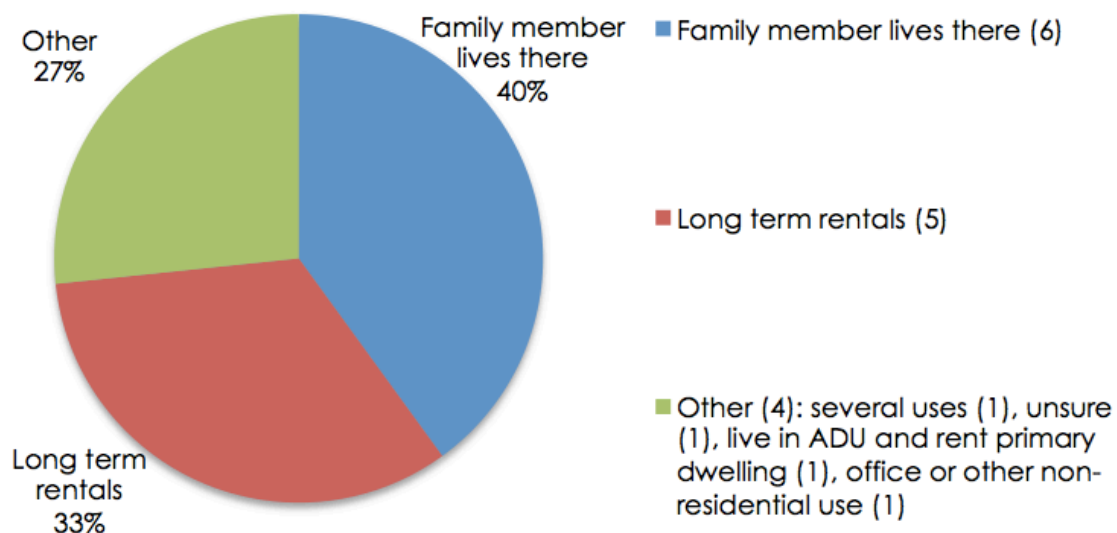
E. Responses From Those Who Built Or Who Are Building An ADU

Topic/Question	%	#	Summary
Build Date: How long ago did you build your ADU?	53%	8	Currently building
	33%	5	4+ years ago
	13%	2	1 year ago or less

ADU Type: What type of ADU do you own?



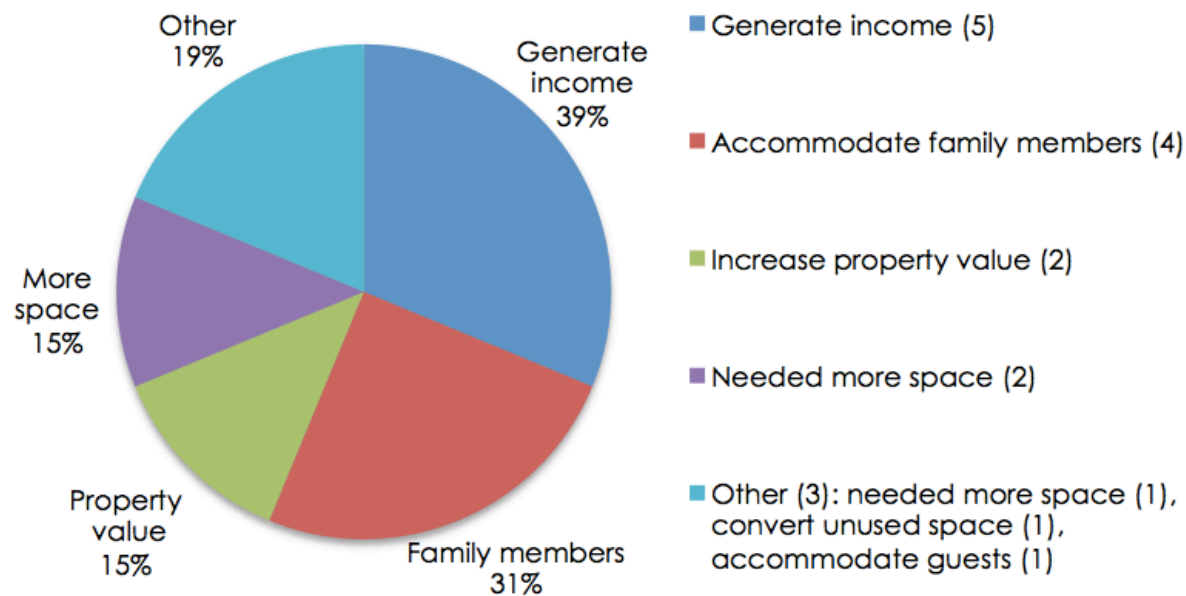
Use: How do you use or plan to use your ADU?



Favorite Thing: What is your favorite thing about your ADU?	42%	6	Provides additional income
	25%	4	Accommodates live-in family
	25%	4	Is flexible / extra space
	8%	1	Is a self-contained unit

Downsides: Have there been any downsides to owning an ADU? (Respondents could list multiple)	38%	6	No
	31%	5	Permitting process
	13%	2	Privacy / noise
	6%	1	Sewer issues
	6%	1	Fear of harassment by city for having an ADU
	6%	1	Finding a contractor to do the work

Why Build: Why did you decide to build an ADU?



Difficulty: How difficult was the overall process of building your ADU?	47%	7	Extremely difficult
	20%	3	Somewhat difficult
	20%	3	Neutral
	13%	2	Somewhat easy
	0%	0	Extremely easy

Best aspects: What were the best parts about the process?	27%	4	End result
	27%	4	Design process
	20%	3	Nothing
	7%	1	Income potential
	7%	1	Ease of working with the city
	7%	1	Contractor and architect
	7%	1	No urgency
Challenges: What were the most challenging parts of the process? (Respondents could list multiple)	48%	10	Permit process
	24%	5	Finding a contractor and/or architect
	10%	2	Plumbing and sewer
	5%	1	Cost
	5%	1	None
	5%	1	Drawings
	5%	1	Time
Finding an Architect: If you used an architect, how difficult was it for you to find an architect to design your ADU?	33%	5	Moderately difficult
	33%	5	Not easy or difficult
	20%	3	n/a
	13%	2	Extremely easy
Finding a Contractor: If you used a contractor, how difficult was it for you to find an architect to design your ADU?	33%	5	Moderately difficult
	33%	5	Not easy or difficult
	20%	3	Extremely difficult
	13%	2	n/a
ADU Approval: How difficult was it for you to get approval of your ADU from your local government?	60%	9	Extremely difficult
	20%	3	Moderately easy
	13%	2	n/a
	7%	1	Moderately difficult
Financing: How did you pay for your ADU? (Respondents could select multiple options)	60%	9	Cash
	53%	8	Home loan
	20%	3	Refinance

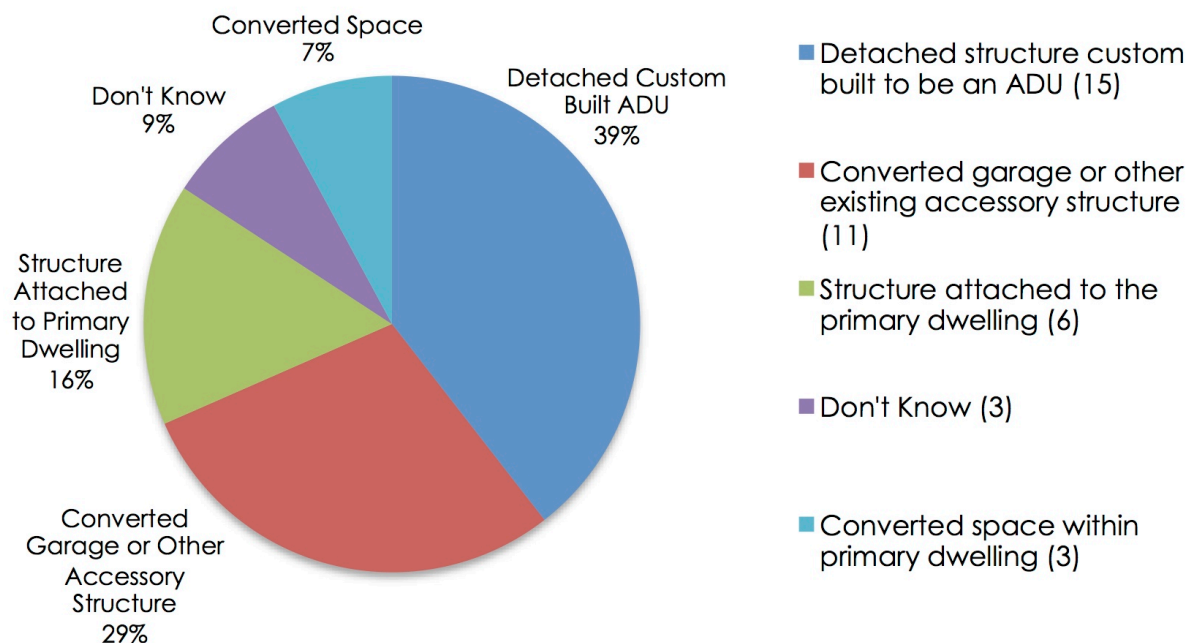
Challenges: Did you experience any of these challenges while building your ADU? (Respondents checked all that apply)	67%	10	Permitting process issues
	67%	10	Took longer than expected
	53%	8	Cost more than expected
	47%	7	Finding contactor, architect or other professionals
	33%	5	Difficulty finding information
	13%	2	Getting utility connections
	13%	2	Poor professional assistance
	7%	1	Obtaining a loan
	7%	1	Appraisal or valuation
	7%	1	Designing your ADU
	7%	1	Resistance from neighbors or the community

Resources: Which of these resources would have significantly improved your experience? (Respondents checked all that apply)	87%	13	Easy-to-understand and comprehensive guide through the entire process
	73%	11	Website with centralized information
	53%	8	Better assistance from government staff
	53%	8	List of contractors that focus on ADUs
	40%	6	List of architects that focus on ADUs
	20%	3	Better financing options
	7%	1	Better trained staff

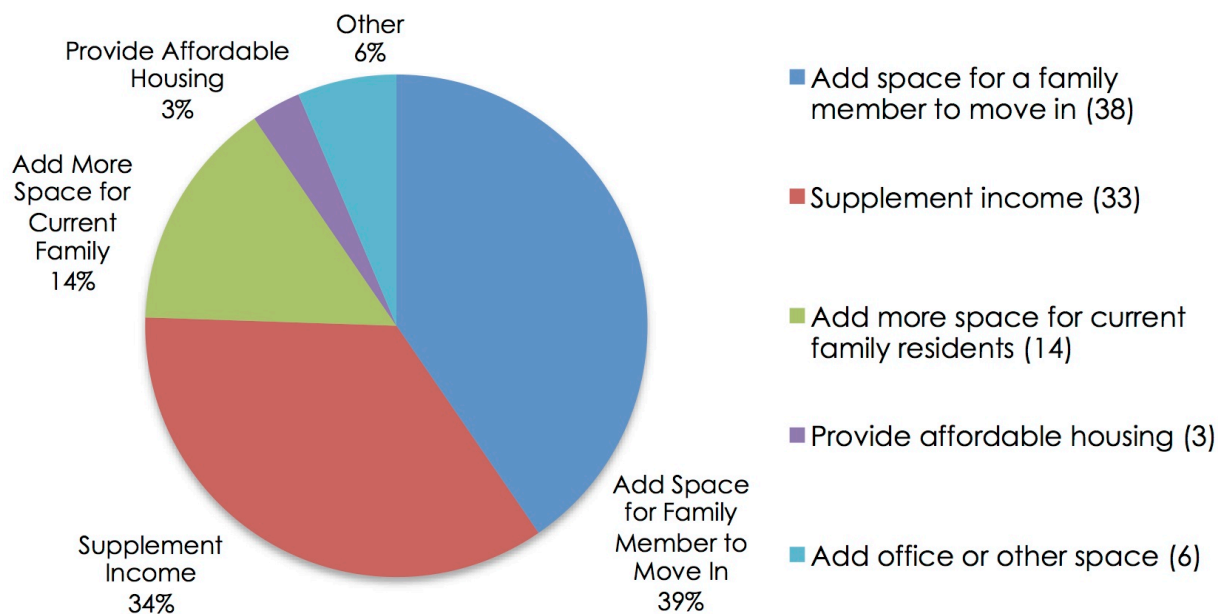
E. Responses From Those Who Are Interested In Building An ADU

Topic/Question	%	#	Summary
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ADU Type: What type of ADU do you expect to build?



Why Build: Why do you want to build an ADU?



Allowed to Build: I am allowed to build an ADU on my property.	43%	42	Strongly agree
	23%	23	Moderately agree
	23%	23	Neither agree nor disagree
	6%	6	Strongly disagree
	4%	4	Moderately disagree

Cost: have a pretty good idea how much it will cost.	32%	30	Moderately agree
	25%	25	Neither agree nor disagree
	18%	18	Strongly agree
	17%	17	Moderately disagree
	8%	8	Strongly disagree

Permission: I understand the steps involved in getting permission to build an ADU.	28%	28	Neither agree nor disagree
	25%	25	Strongly disagree
	21%	21	Moderately disagree
	18%	18	Moderately agree
	8%	8	Strongly agree

Moving Forward: What would be most useful in helping you move from thinking about an ADU to starting the process of building one?	39%	38	Understanding the process and cost
	12%	12	Financing
	12%	12	Permits
	11%	11	Other
	8%	8	Understanding what is allowed
	5%	5	Understanding zoning requirements
	4%	4	Finding a contractor and/or architect
	2%	2	Website
	2%	2	Someone to answer questions
	2%	2	How to legalize existing unit
	2%	2	Class or workshop

Resources: Which of these resources would you like to have as you consider building an ADU? (Respondents checked all that apply)	88%	87	Easy-to-understand and comprehensive guide through the entire process
	64%	64	Website with centralized information
	64%	65	List of contractors that focus on ADUs
	54%	54	List of architects that focus on ADUs
	51%	51	Better assistance from government staff
	43%	43	Better financing options
	1%	1	Simple pre-approved designs
	1%	1	Anonymous compliance program
	1%	1	Allow them to build
	1%	1	One stop shop with all vendors

Barriers: Which of the following do you perceive to be the most significant barriers to building an ADU? (Respondents checked all that apply)	68%	67	Permitting process issues
	45%	44	Finding contactor, architect or other professionals
	42%	41	Difficulty finding information
	28%	27	Obtaining a loan
	28%	27	Designing your ADU
	22%	22	Getting utility connections
	18%	18	Resistance from neighbors or the community
	14%	14	Poor professional assistance
	14%	14	Appraisal or valuation

Interest: How likely are you to build an ADU?	47%	46	Very likely
	38%	37	Likely
	14%	14	Not sure
	1%	1	Unlikely
