



CREB® One Alberta Membership Survey

Draft - For discussion purposes only



Framework

Prepared by Framework Partners Inc. February 2021

Field Dates: January 28, 2021 to February 16, 2021



Definitions

2021 Summary

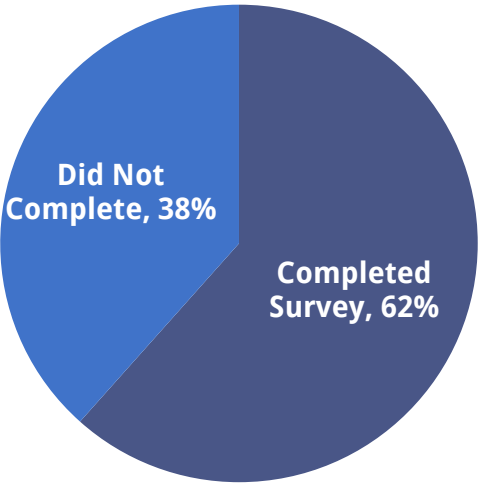
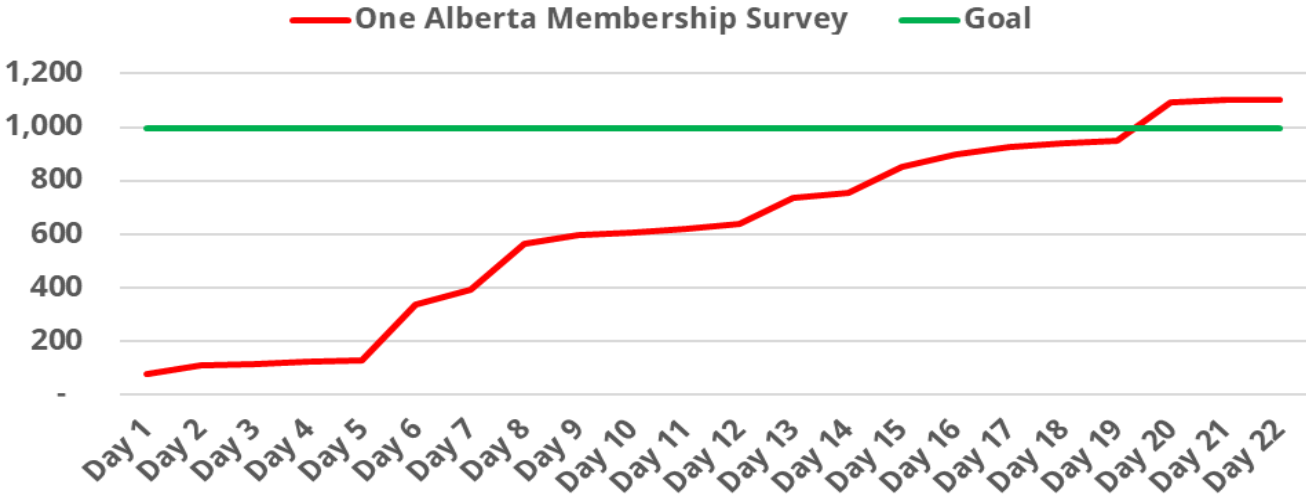
Responses

- 1 **Frequency % (Freq. %):** The percentage of respondents who choose a specific option in a question that allows only one choice. These percentages always sum to 100% for a question. They exclude responses to a question that are not informative (for example "I don't know" and "No Response" counts.)
- 2 **Incidence % (Incid. %):** The percentage of respondents who choose a specific option in a question that allows more than one choice. These percentages almost always sum to more than 100% for a question. They exclude responses to a question that are not informative (again for example "I don't know" and "No Response" counts.)
- 3 **Mean:** The mean is a measure of central tendency. It is the arithmetic average of the set of values, or observations received from a question.
- 4 **Score:** The score is the mean or average of the responses received expressed as a percentage for easier interpretation. The Score is an important measure of all responses received; it demonstrates the overall response average, and includes all respondents. Stated differently, the score is a batting average, or percentage that helps us to better understand the average response. It is important to examine the score as interpreting the average or mean response, when a seven-point Likert scale is used, can be difficult.
- 5 **Top Two:** The percentage of respondents to a question who responded with either a 1 ("Very Important", "Very Satisfied" or "Strongly Agree") or a 2 ("Important", "Satisfied" or "Agree") on a scale of 1 to 7. The Top Two is an indication of strength of opinion; it represents the proportion of respondents who have answered that they have a firm opinion about the stated question.
- 6 **Standard Deviation:** This is a measure of dispersal, in that it shows how much variation or "dispersion" exists from the average (mean, or expected value). A low standard deviation indicates that the data points tend to be very close to the mean; high standard deviation indicates that the data points are spread out over a large range of values. Stated differently, a low standard deviation means that the data is tight, and that most respondents agree.
- 7 **StructSat:** The percentage of respondents, or a segment thereof, who have indicated they are satisfied with current membership structure
- 8 **Agree OAM:** The percentage of respondents, or a segment thereof, who agree with CREB®'s current strategic direction to pursue a One Alberta Membership



Response Rate Summary

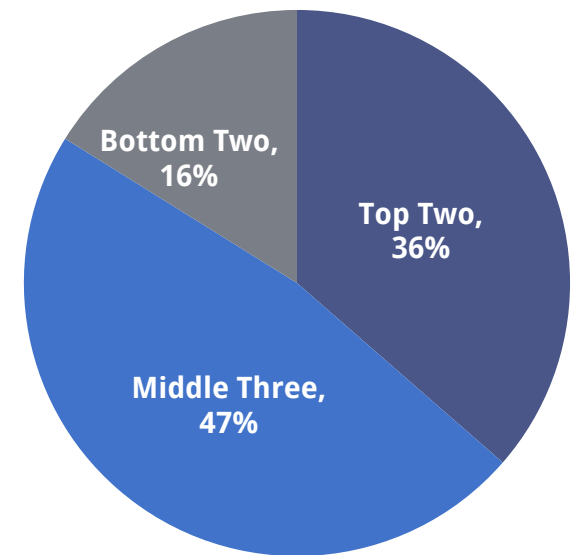
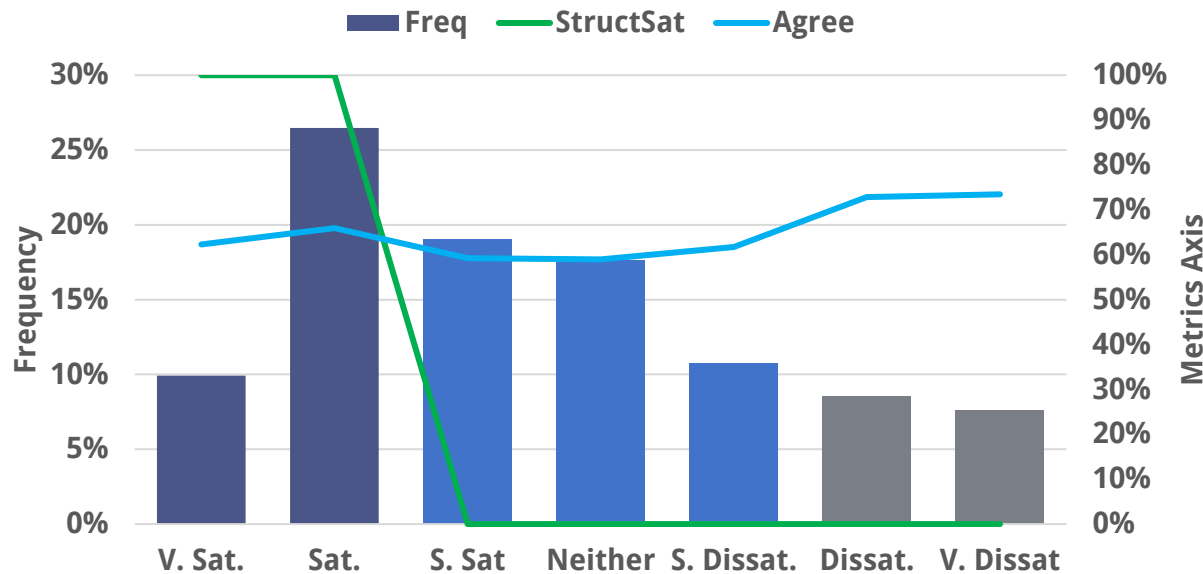
Population	5,772	108%
Do Not Contacts	25	
Unsubscribes	363	
Bounces	15	
Net Population	5,369	100%
Responses	1,104	21%
Completes	680	62%
Responses need for a Maring of Error of +-5% 19 times out of 20	359	
Responses consistent with a MOE of:	2.6%	





Q6. Please indicate how satisfied or dissatisfied you are with the current membership structure where every member of your local board CREB® is also a member of your provincial association AREA and your national association CREA.

2021 Summary					Key Statistics
Responses	Count	Freq	StructSat	Agree	
1 Very satisfied	72	9.9%	100%	62%	Score 58.5%
2 Satisfied	192	26.5%	100%	66%	
3 Somewhat satisfied	138	19.0%	0%	59%	Mean 3.49
4 Neither satisfied nor dissatisfied	128	17.7%	0%	59%	
5 Somewhat dissatisfied	78	10.8%	0%	62%	Standard Dev. 1.74
6 Dissatisfied	62	8.6%	0%	73%	
7 Very dissatisfied	55	7.6%	0%	73%	Correlation StructSat 1.00
8 Don't know / Not applicable	17				
No Response	362				
	1,104	100%			



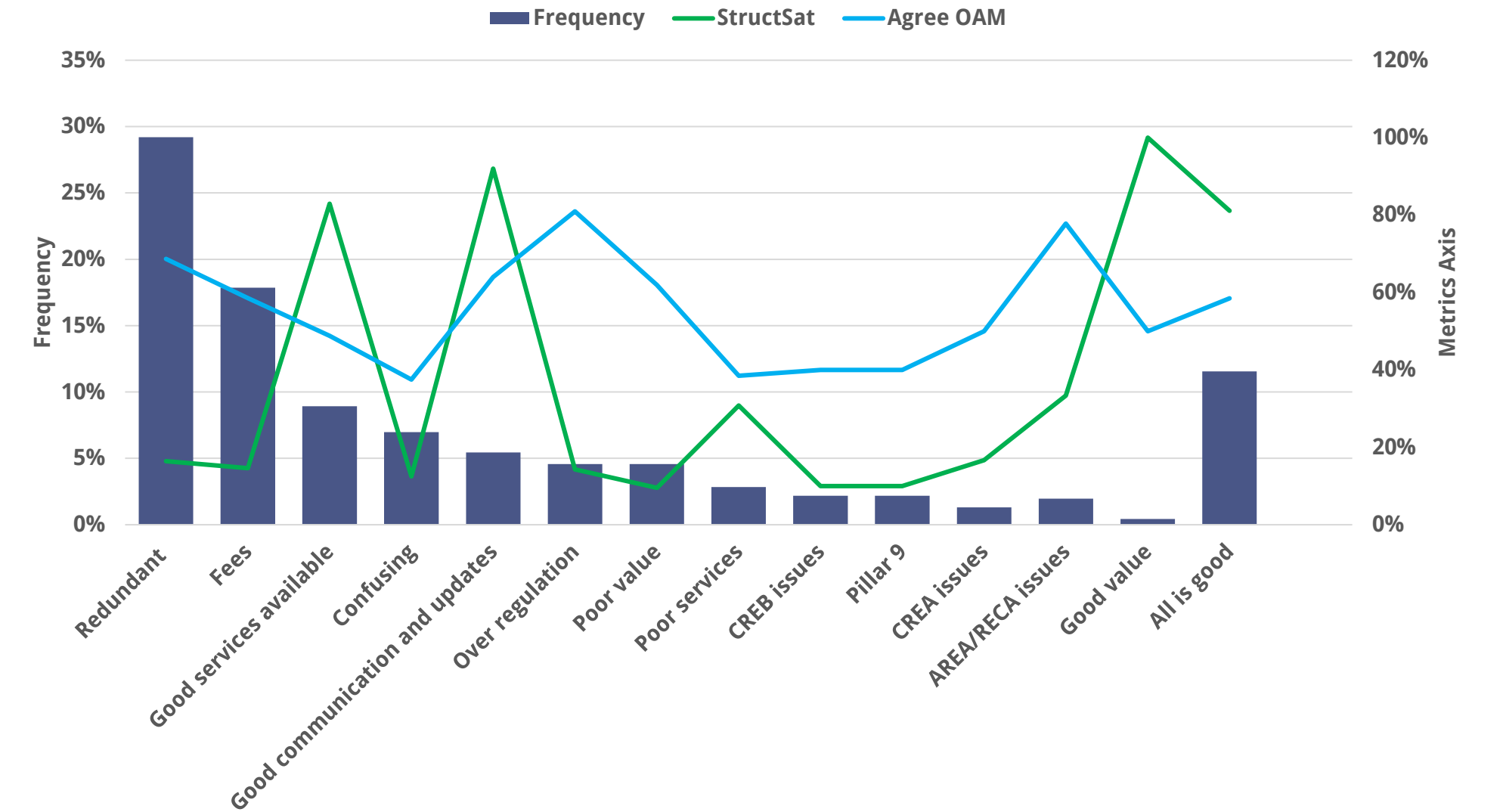


Q7. In the previous question you indicated that you are {{ Q11 }} with the current membership structure. Please use the space provided below to help us better understand your response to the previous question.

2021 Summary				
Responses	Count	Frequency	StructSat	Agree OAM
1 Redundant	134	29.2%	16%	69%
2 Fees	82	17.9%	15%	59%
3 Good services available	41	8.9%	83%	49%
4 Confusing	32	7.0%	13%	38%
5 Good communication and updates	25	5.4%	92%	64%
6 Over regulation	21	4.6%	14%	81%
7 Poor value	21	4.6%	10%	62%
8 Poor services	13	2.8%	31%	38%
9 CREB issues	10	2.2%	10%	40%
10 Pillar 9	10	2.2%	10%	40%
11 CREA issues	6	1.3%	17%	50%
12 AREA/RECA issues	9	2.0%	33%	78%
13 Good value	2	0.4%	100%	50%
14 All is good	53	11.5%	81%	58%
15 Don't know / not applicable	217			
No Response	428			
	1,104	100%		



Q7. In the previous question you indicated that you are {{ Q11 }} with the current membership structure. Please use the space provided below to help us better understand your response to the previous question.

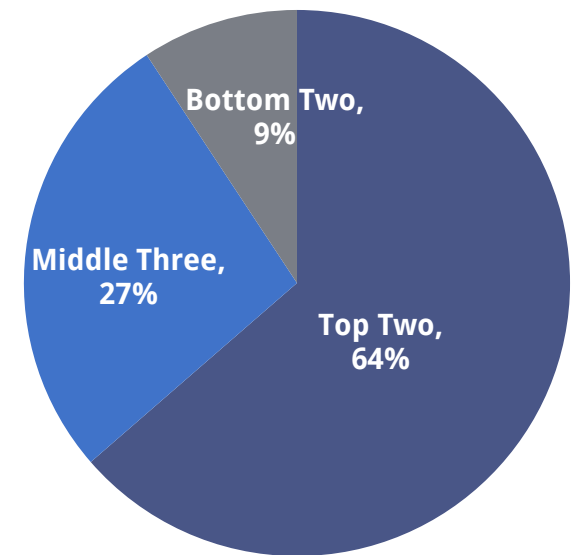
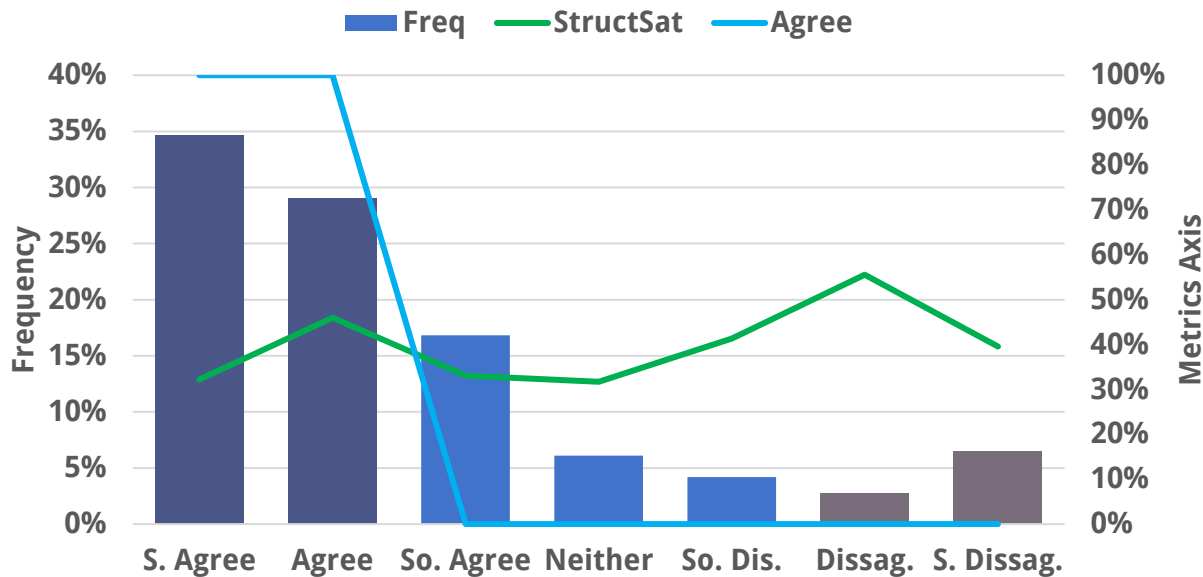


CREB® One Alberta Membership Survey



Q9. Considering the definition of “One Alberta Membership” provided above, please indicate how strongly you agree or disagree with the following statement: I agree with CREB®’s current strategic direction to pursue a One Alberta Membership for each CREB® member.

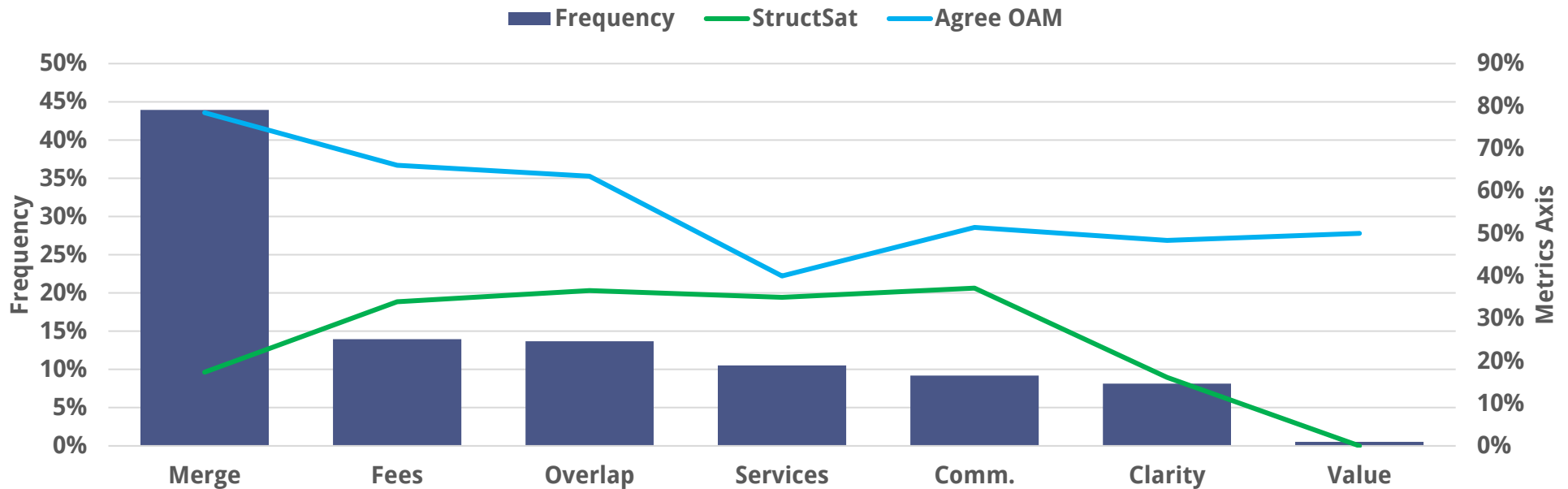
2021 Summary					Key Statistics
Responses	Count	Freq	StructSat	Agree	
1 Strongly agree	239	34.6%	32%	100%	Score 74.9%
2 Agree	200	29.0%	46%	100%	
3 Somewhat agree	116	16.8%	33%	0%	Mean 2.51
4 Neither agree nor disagree	42	6.1%	32%	0%	
5 Somewhat disagree	29	4.2%	41%	0%	Standard Dev. 1.72
6 Disagree	19	2.8%	56%	0%	
7 Strongly disagree	45	6.5%	40%	0%	Correlation StructSat 0.03
8 Don't know / Not applicable	19				
No Response	395				
	1,104	100.0%			





Q8. Please take a moment to consider your two Alberta memberships – local (CREB®) and provincial (AREA®). What do you think can be done to improve the effectiveness of this membership structure? Please use the spaces provided below to provide your responses.

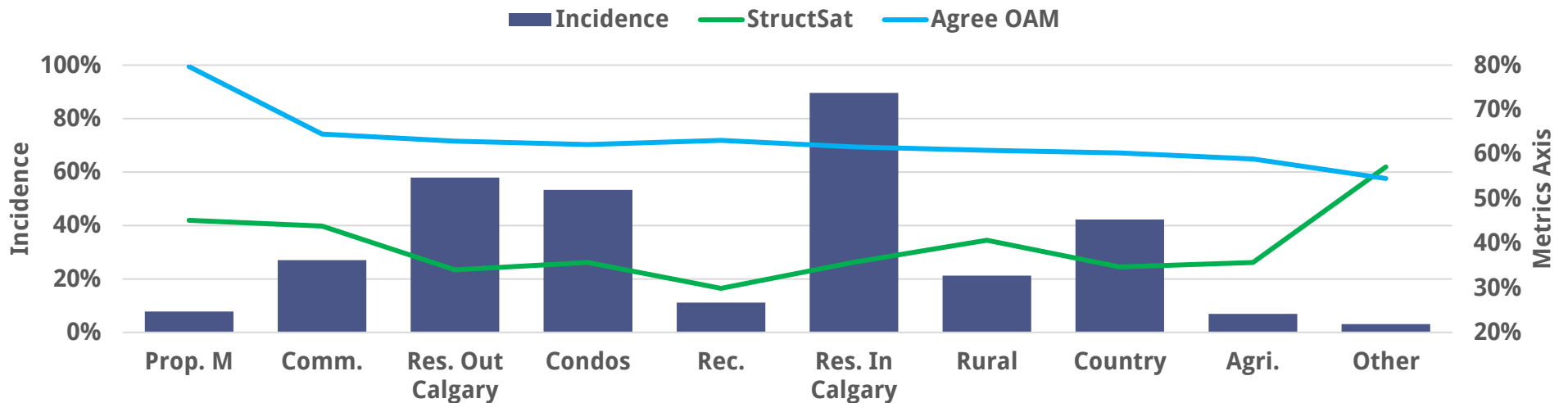
2021 Summary				
Responses	Count	Frequency	StructSat	Agree OAM
1 Merge into one membership	167	43.9%	17%	78%
2 Reduce fees	53	13.9%	34%	66%
3 Reduce overlap	52	13.7%	37%	63%
4 Improve services	40	10.5%	35%	40%
5 Better communication/collaboration	35	9.2%	37%	51%
6 More clarity in roles of each	31	8.2%	16%	48%
7 Better Value	2	0.5%	0%	50%
8 Don't know / not applicable	313			
No Response	411			
	1,104	100%		





Q1. Please indicate your specialty / specialties (check all that apply):

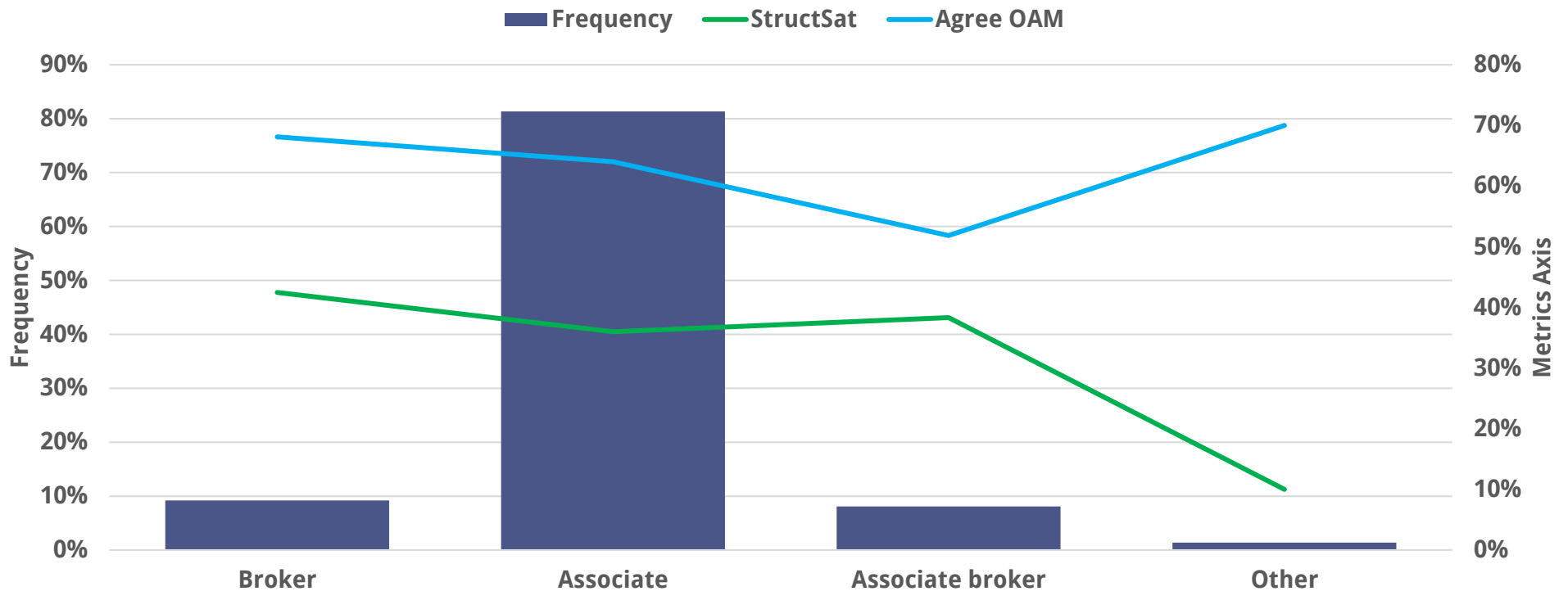
2021 Summary				
Responses	Count	Incidence	StructSat	Agree OAM
1 Property management	78	7.8%	45%	80%
2 Commercial	272	27.1%	44%	65%
3 Residential outside Calgary	582	57.9%	34%	63%
4 Condominiums	536	53.3%	36%	62%
5 Recreational properties	112	11.1%	30%	63%
6 Residential inside Calgary	900	89.6%	36%	62%
7 Rural land	213	21.2%	41%	61%
8 Country Residential	424	42.2%	35%	60%
9 Agri-business	70	7.0%	36%	59%
10 Other (please specify)	31	3.1%	57%	55%
11 I do not know / not applicable	1			
No Response	98			
	1,104			





Q2. Please indicate your position or role at your brokerage:

2021 Summary				
Responses	Count	Frequency	StructSat	Agree OAM
1 Broker	92	9.2%	42%	68%
2 Associate	815	81.3%	36%	64%
3 Associate broker	81	8.1%	38%	52%
4 Other (please specify)	14	1.4%	10%	70%
5 I do not know / not applicable	2			
No Response	100			
	1,104	100%		



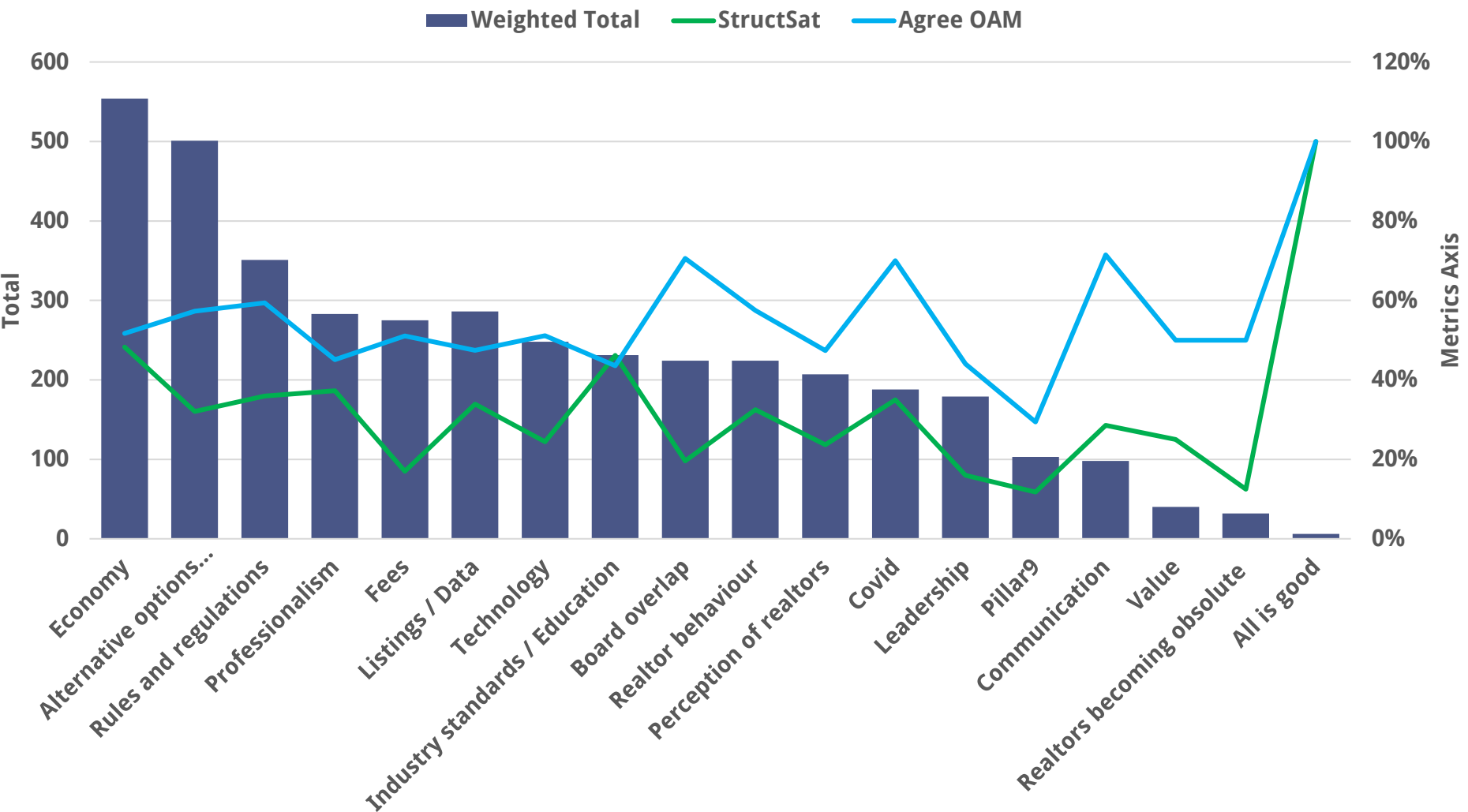


Q4. Please use the spaces provided below to describe what you believe to be the most significant issues facing organized real estate in Alberta.

2021 Summary						
Responses	First Issue	Second Issue	Third Issue	Weighted Total	StructSat	Agree OAM
1 Economy	116	76	54	554	48%	52%
2 Alternative options (online/discount brokerages)	103	78	36	501	32%	57%
3 Rules and regulations	64	56	47	351	36%	59%
4 Professionalism	51	50	30	283	37%	45%
5 Fees	47	46	42	275	17%	51%
6 Listings / Data	59	36	37	286	34%	47%
7 Technology	45	42	29	248	24%	51%
8 Industry standards / Education	39	43	28	231	46%	44%
9 Board overlap	51	29	13	224	20%	71%
10 Realtor behaviour	40	38	28	224	33%	58%
11 Perception of realtors	38	32	29	207	24%	47%
12 Covid	40	26	16	188	35%	70%
13 Leadership	25	35	34	179	16%	44%
14 Pillar9	17	19	14	103	12%	29%
15 Communication	14	21	14	98	29%	71%
16 Value	8	6	4	40	25%	50%
17 Realtors becoming obsolete	8	2	4	32	13%	50%
18 All is good	2	0	0	6	100%	100%
19 Do not know	21	23	40			
No Response	316	446	605			
	1,104	1,104	1,104			



Q4. Please use the spaces provided below to describe what you believe to be the most significant issues facing organized real estate in Alberta.



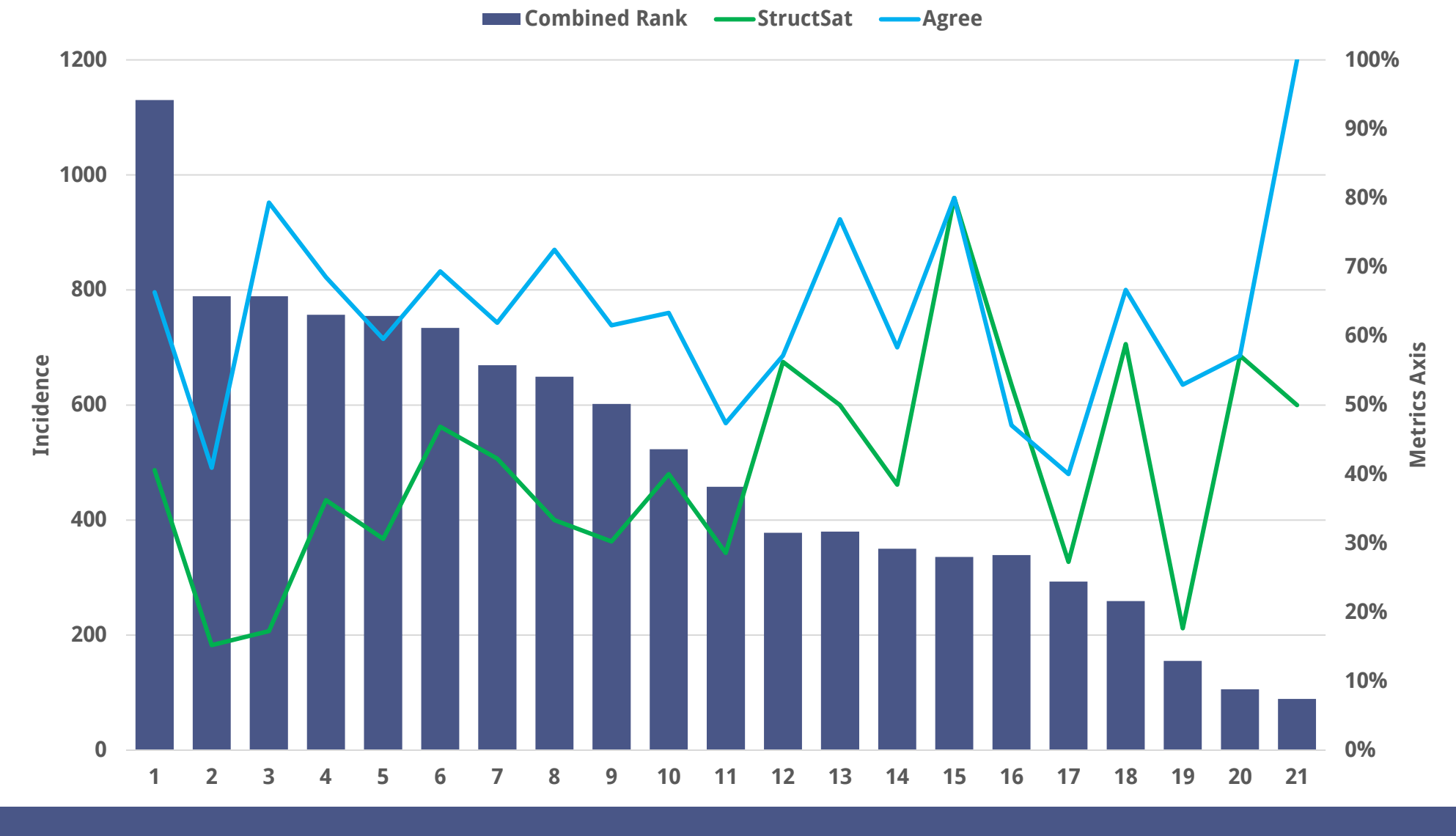


Q5. Below is a series of potential issues facing organized real estate in Alberta. Please take a moment to rank the top five issues from most significant issue to the least significant.

2021 Summary						
Responses	Rank 1	Rank 2	Rank 3	Rank 4	Rank 5	Combined Rank
1 Issue: The economy / downturn / recession	107	84	47	40	38	1130
2 Issue: Rising Costs / cost to belong	48	61	51	53	46	789
3 Issue: Overlap of services between local boards, AREA, and CREA	60	46	61	41	40	789
4 Issue: Economic pressures for REALTORS® / Ability for REALTORS® to earn a living	58	49	48	46	35	757
5 Issue: Politics / Government / Regulation	51	52	54	44	42	755
6 Issue: The COVID-19 Pandemic	68	47	34	36	32	734
7 Issue: Public Perception	46	36	55	43	44	669
8 Issue: Realtors themselves	43	36	50	46	48	649
9 Issue: Technology / Disruption	44	42	42	31	26	602
10 Issue: Increase of For-Sale-by-Owner services	30	36	40	32	45	523
11 Issue: Information / Data	42	35	17	22	13	458
12 Issue: Education / Staying Up To Date / Experience	16	31	27	29	35	378
13 Issue: Pressure on Commissions	15	31	35	26	24	380
14 Issue: Increasing expectations from home buyers and sellers	13	29	24	30	37	350
15 Issue: Market Conditions / Pricing	15	33	28	13	19	336
16 Issue: Paperwork / Forms	17	22	29	27	25	339
17 Issue: Social Media / Internet	11	24	23	25	23	293
18 Issue: Interest Rates / Mortgages / CMHC	17	13	25	16	15	259
19 Other Issue- Please describe below	19	8	5	1	11	155
20 Issue: Realtor.ca	7	7	6	9	7	106
21 Issue: Taxes	5	3	9	7	11	89
No Response	372	379	394	487	488	
	1,104					



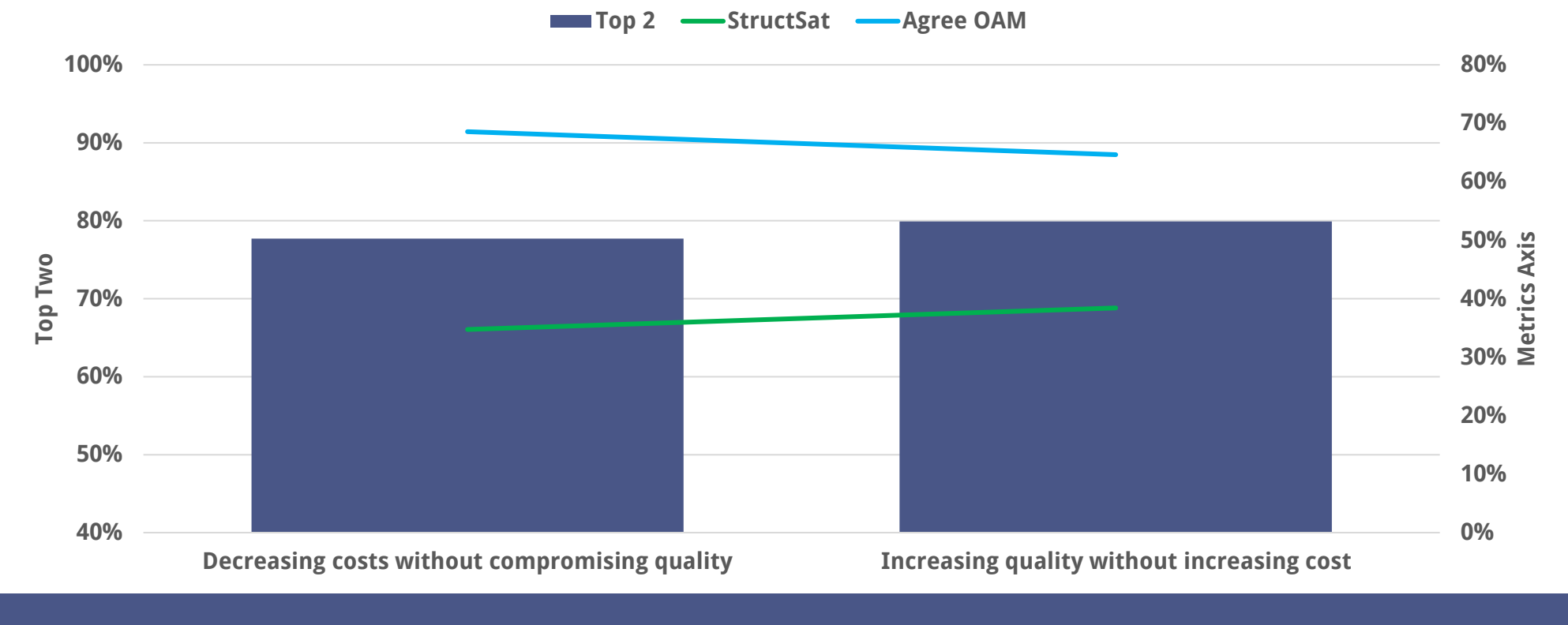
Q5. Below is a series of potential issues facing organized real estate in Alberta. Please take a moment to rank the top five issues from most significant issue to the least significant.





Q10. Please help us better understand your priorities, with respect to value and costs, by indicating how important or unimportant each of the following are.

2021 Summary						
Responses	Mean	Score	Top 2	Corr. StrucSat	StrucSat	Agree OAM
1 Decreasing the cost of your membership without compromising the quality of services received	1.85	0.86	77.7%	-0.07	35%	69%
2 Increasing the quality and selection of services received, thereby improving the value of your membership, without increasing the cost of your membership	1.85	0.86	79.9%	0.10	38%	65%





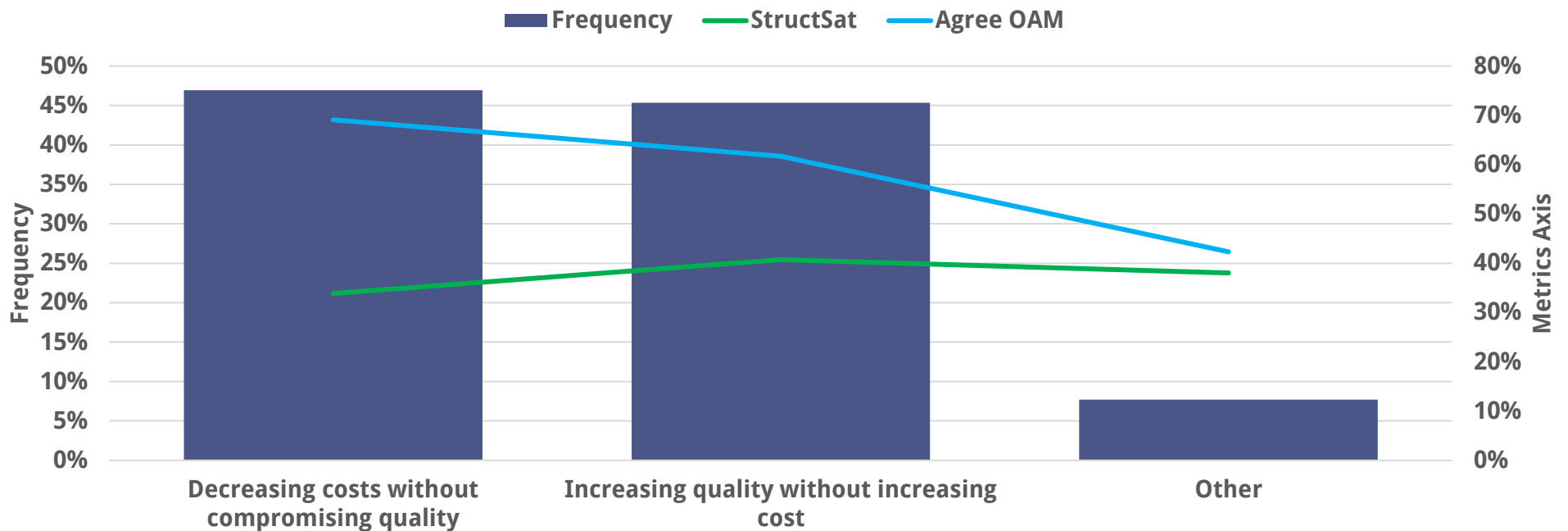
Q10. Please help us better understand your priorities, with respect to value and costs, by indicating how important or unimportant each of the following are.

		Decrease Cost						
Improve quality		Very important	Important	Somewhat important	Neither	Somewhat unimportant	Unimportant	Very unimportant
	Very important	68%	18%	7%	4%	1%	2%	1%
	Important	40%	35%	17%	5%	1%	1%	0%
	Somewhat important	37%	15%	32%	7%	4%	1%	4%
	Neither	42%	13%	4%	38%	0%	4%	0%
	Somewhat unimportant	40%	27%	27%	0%	0%	7%	0%
	Unimportant	74%	16%	0%	0%	0%	11%	0%
	Very unimportant	71%	0%	14%	14%	0%	0%	0%



Q11. If you had to choose just one priority, please indicate which of the following priorities is the most important to you as a member:

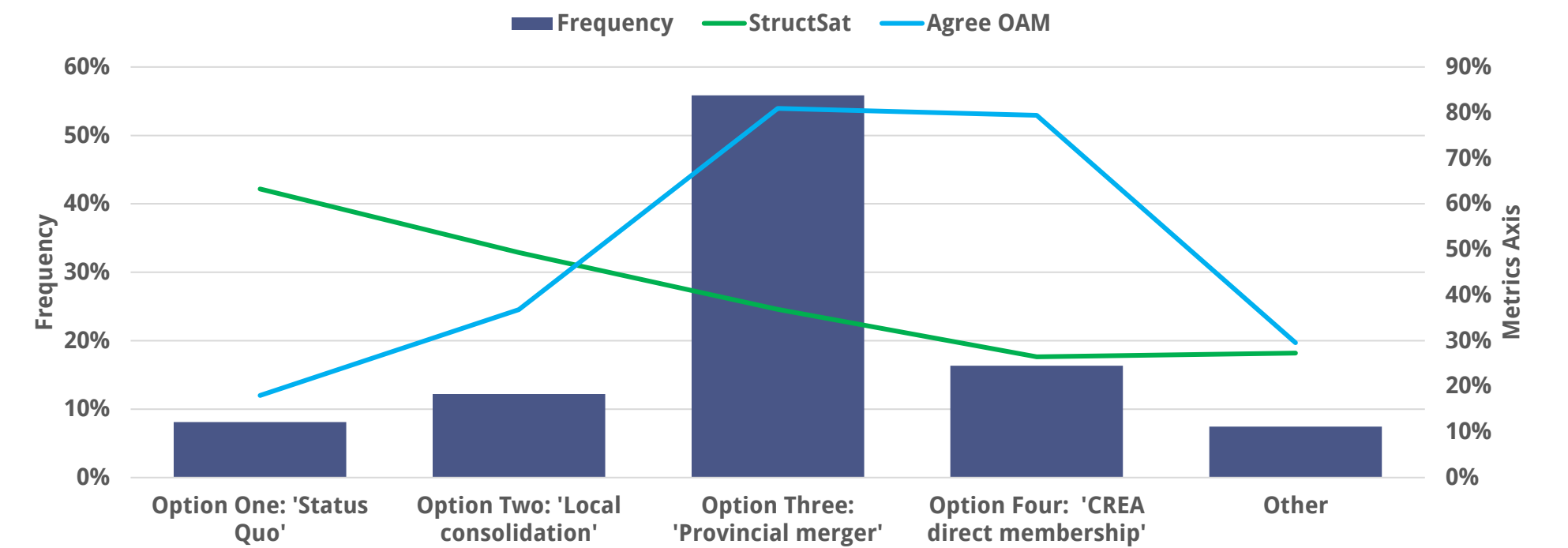
2021 Summary				
Responses	Count	Frequency	StructSat	Agree OAM
1 Decreasing the cost of your membership without compromising the quality of services received	323	46.9%	34%	69%
2 Increasing the quality and selection of services received, thereby improving the value of your membership, without increasing the cost of your membership	312	45.3%	41%	62%
3 Other (please specify)	53	7.7%	38%	42%
4 Don't know / Not applicable	16			
No Response	400			
	1,104	100%		





Q13. Of these four options, which do you think would be the single best solution with respect to managing cost of membership?

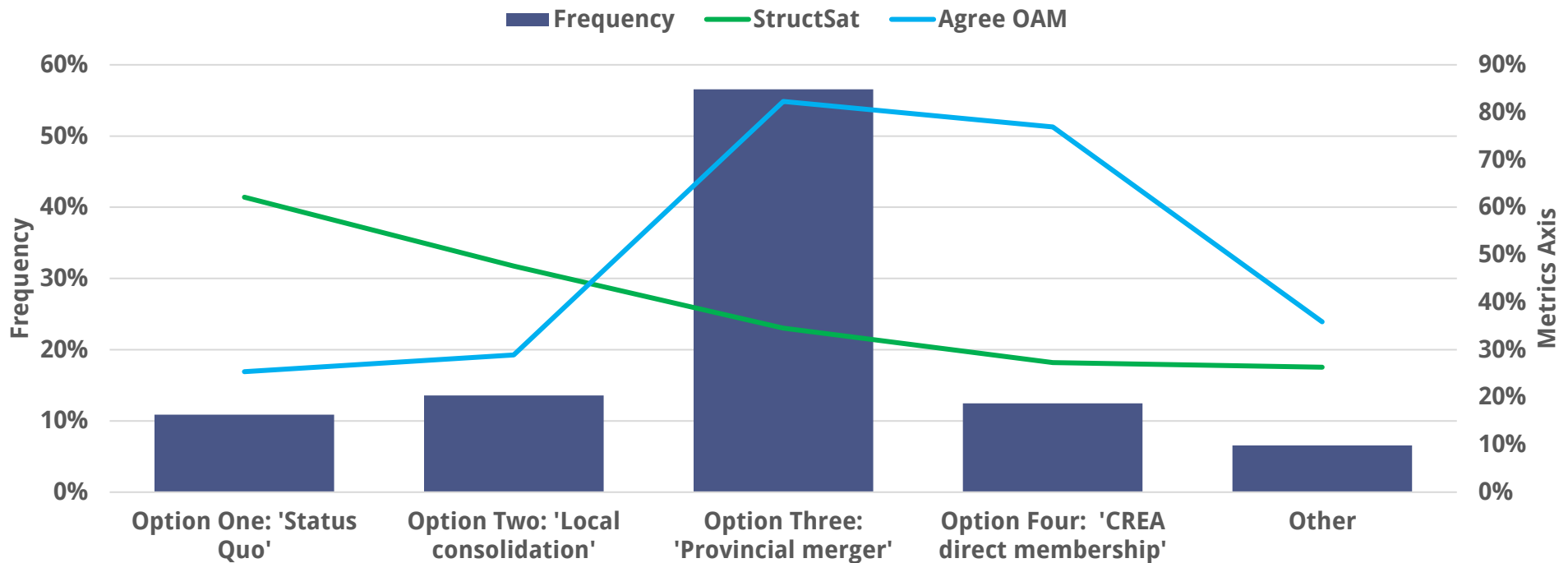
2021 Summary				
Responses	Count	Frequency	StructSat	Agree OAM
1 Option One: 'Status Quo'	51	8.1%	63%	18%
2 Option Two: 'Local consolidation'	77	12.2%	49%	37%
3 Option Three: 'Provincial merger'	352	55.9%	37%	81%
4 Option Four: 'CREA direct membership'	103	16.3%	26%	79%
5 Other (please specify)	47	7.5%	27%	30%
6 Don't know / Not applicable	65			
No Response	409			
	1,104	100%		





Q14. Of these four options , which do you think would be the single best solution with respect to providing quality and value for membership?

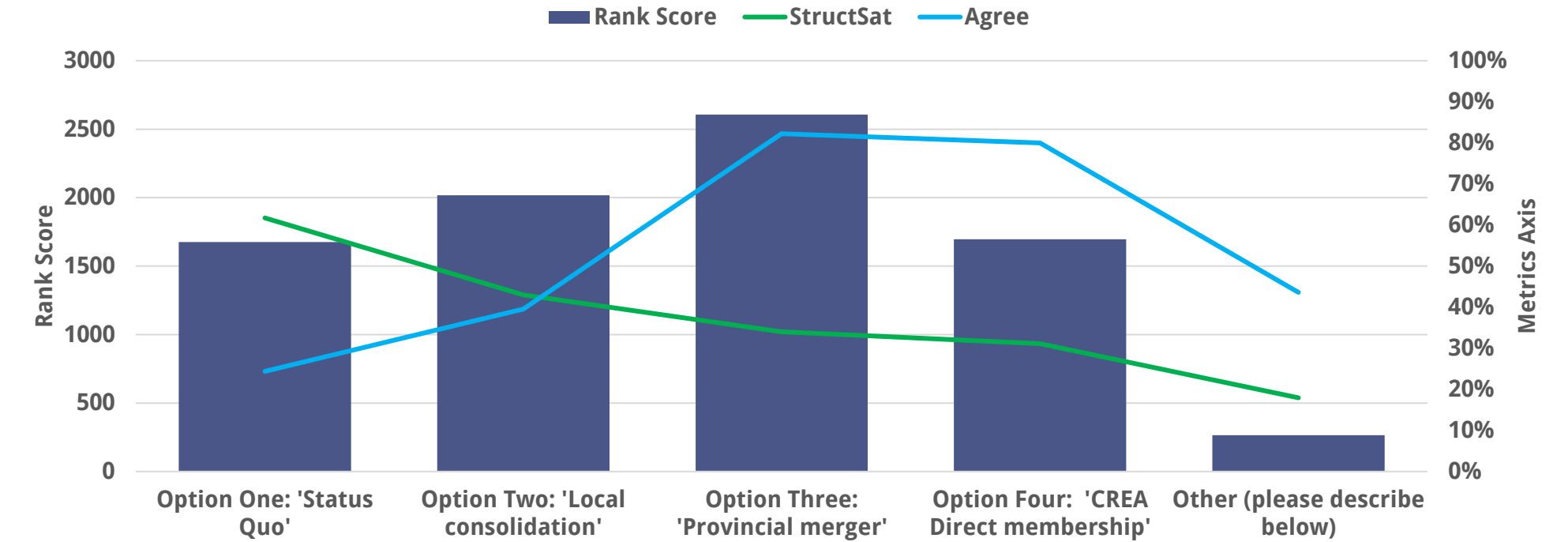
2021 Summary				
Responses	Count	Frequency	StructSat	Agree OAM
1 Option One: 'Status Quo'	68	10.9%	62%	25%
2 Option Two: 'Local consolidation'	85	13.6%	48%	29%
3 Option Three: 'Provincial merger'	354	56.5%	35%	82%
4 Option Four: 'CREA direct membership'	78	12.5%	27%	77%
5 Other (please specify)	41	6.5%	26%	36%
6 Don't know / Not applicable	69			
No Response	409			
	1,104	100%		





Q15. Please rank the following options, from most preferred, to least preferred.

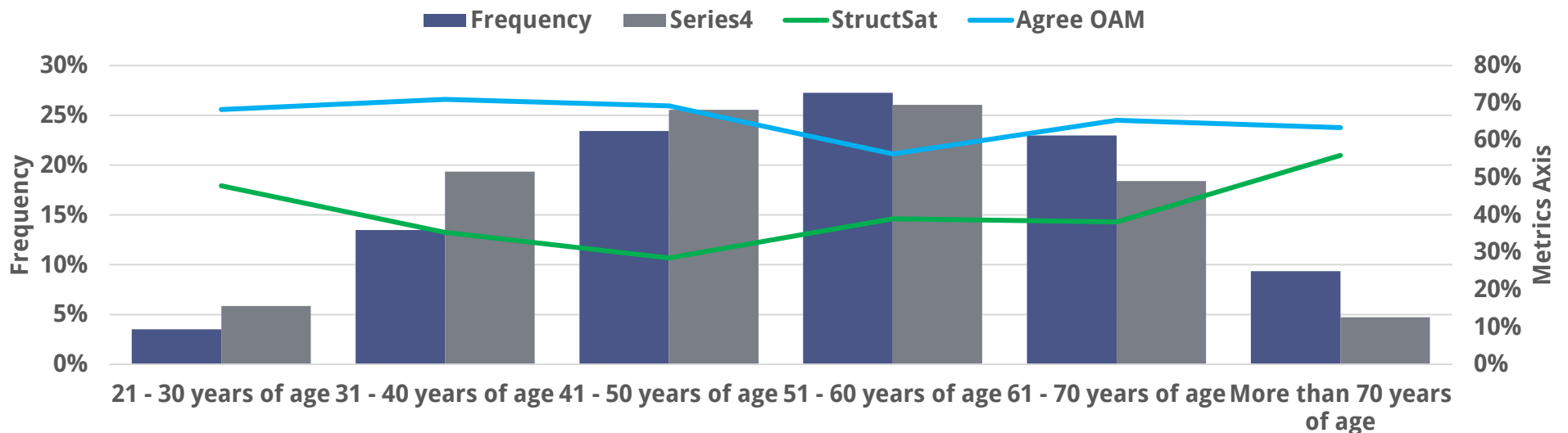
2021 Summary						
Responses	Rank 1	Rank 2	Rank 3	Rank 4	Rank 5	Rank Score
1 Option One: 'Status Quo'	83	86	152	179	103	1676
2 Option Two: 'Local consolidation'	93	190	196	91	22	2017
3 Option Three: 'Provincial merger'	359	111	88	43	18	2607
4 Option Four: 'CREA Direct membership'	90	144	84	159	100	1696
5 Other (please describe below)	30	9	9	7	39	266
No Response	449	564	575	625	822	
	1,104					





Q16. Please tell us your age

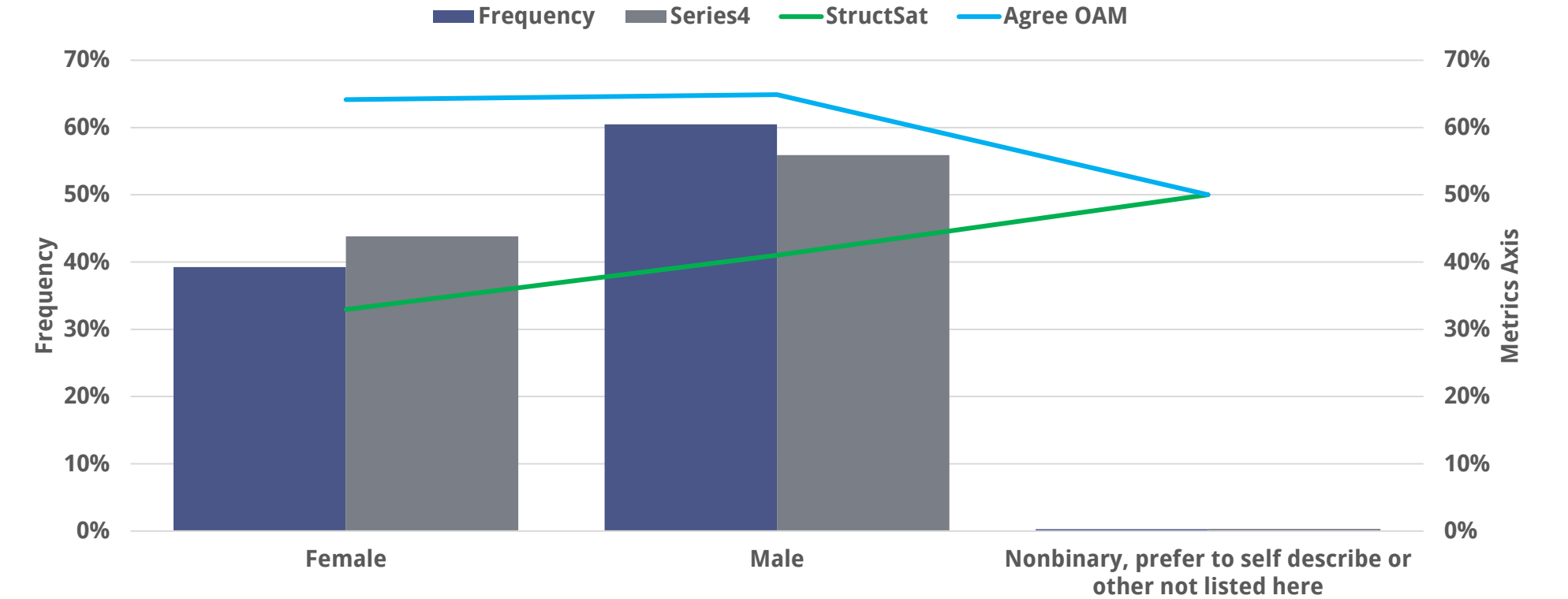
2021 Summary				
Responses	Count	Frequency	StructSat	Agree OAM
1 Less than 21 years of age	0	0.0%	-	-
2 21 - 30 years of age	23	3.5%	48%	68%
3 31 - 40 years of age	88	13.5%	35%	71%
4 41 - 50 years of age	153	23.4%	28%	69%
5 51 - 60 years of age	178	27.3%	39%	56%
6 61 - 70 years of age	150	23.0%	38%	65%
7 More than 70 years of age	61	9.3%	56%	63%
8 I prefer not to answer	27			
9 I do not know / no opinion	0			
No Response	424			
	1,104	100%		





Q17. Please indicate your gender.

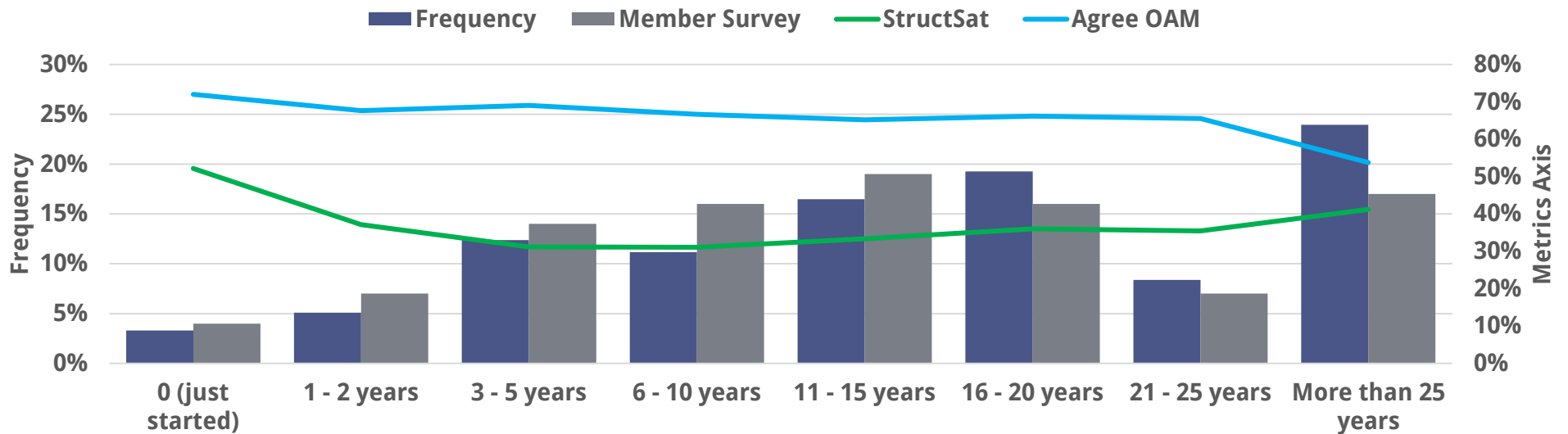
2021 Summary				
Responses	Count	Frequency	StructSat	Agree OAM
1 Female	259	39.2%	33%	64%
2 Male	399	60.5%	41%	65%
3 Nonbinary, prefer to self describe or other not listed here	2	0.3%	50%	50%
4 I prefer not to answer	21			
No Response	423			
	1,104	100%		





Q3. Please tell us how many years you have worked in real estate.

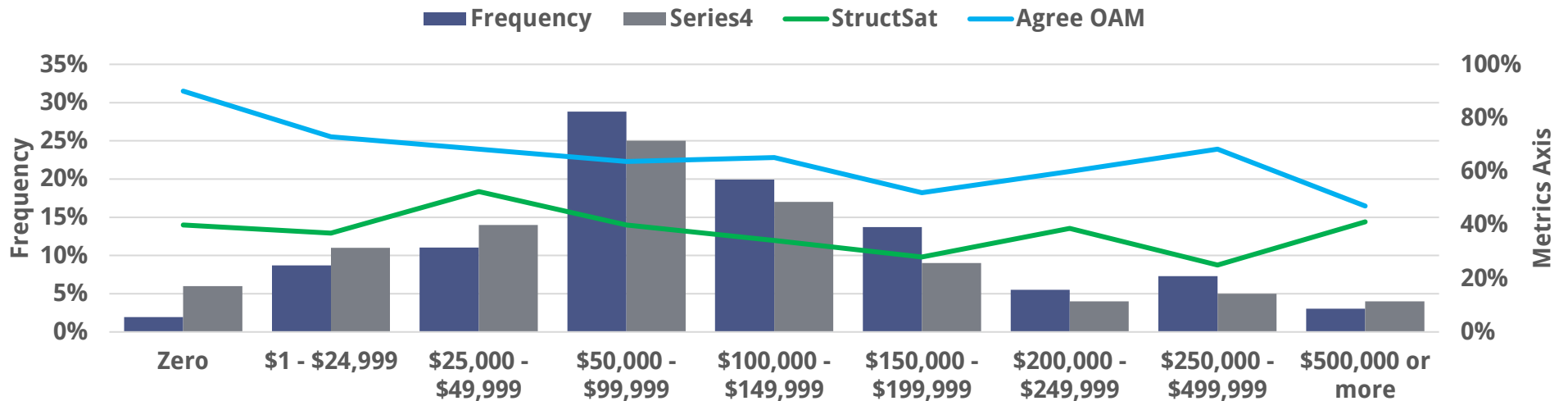
2021 Summary				
Responses	Count	Frequency	StructSat	Agree OAM
1 0 (just started)	33	3.3%	52%	72%
2 1 - 2 years	51	5.1%	37%	68%
3 3 - 5 years	124	12.4%	31%	69%
4 6 - 10 years	112	11.2%	31%	67%
5 11 - 15 years	165	16.5%	33%	65%
6 16 - 20 years	193	19.3%	36%	66%
7 21 - 25 years	84	8.4%	35%	66%
8 More than 25 years	240	24.0%	41%	54%
9 I prefer not to answer	2			
10 I do not know / no opinion	0			
No Response	100			
	1,104	100%		






Q18. What are your annual GROSS commissions generated from real estate?

2021 Summary				
Responses	Count	Frequency	StructSat	Agree OAM
1 Zero	11	2.0%	40%	90%
2 \$1 - \$24,999	49	8.7%	37%	73%
3 \$25,000 - \$49,999	62	11.0%	52%	68%
4 \$50,000 - \$99,999	162	28.8%	40%	64%
5 \$100,000 - \$149,999	112	19.9%	34%	65%
6 \$150,000 - \$199,999	77	13.7%	28%	52%
7 \$200,000 - \$249,999	31	5.5%	39%	60%
8 \$250,000 - \$499,999	41	7.3%	25%	68%
9 \$500,000 or more	17	3.0%	41%	47%
10 I prefer not to answer	105			
11 I do not know / not applicable	13			
No Response	424			
	1,104	100%		



The background of the top half of the card features a series of light gray hexagonal outlines of varying sizes, arranged in a diagonal line from the top left towards the center. The bottom half of the card is a solid dark blue.

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