

June 2007

UniverCity Resident Survey



MUSTEL GROUP
MARKET RESEARCH



UniverCity
THE COMMUNITY AT SIMON FRASER

➤ Executive Overview

The following are highlights from the UniverCity Resident Survey 2007, conducted on behalf of the UniverCity Community Trust:

- In an attempt to better understand the demographic make-up of UniverCity's resident population and further gather feedback regarding their attitudes, opinions, expectations and needs of their community, a self-completion mail-back survey was designed in conjunction with the SFU Community Trust.

Influences and Satisfaction

- The strongest influences or reasons for choosing UniverCity include its quiet natural setting, its location, particularly for those who attend SFU or work in Burnaby, Vancouver or other nearby municipalities, and the affordable price.
- Other influencing factors of note include the architectural design of the buildings, the accompanying views, the outdoor recreational opportunities and the sustainability features of the development, although when asked less than half of all residents could actually name any specific features or initiatives.

➤ Executive Overview

- Overall, 9-in-10 residents are satisfied, either very or somewhat, with UniverCity as a place to live; satisfaction is similarly strong when it comes to access to green space and pathways, recreation and physical activity and provision of public transit.
- Less satisfaction exists for the current provision of retail, business, health and childcare services. In spite of some satisfaction expressed with access to public transit, some concern is still expressed about the community's dependence upon private vehicles and the subsequent problems encountered with available parking.
- Overall most residents, about two-thirds, have had their expectations met, while for some they have been exceeded (14%), with just 1-in-5 residents who feel their expectations have not been met by the community. This is mainly due to the current lack of available services and amenities such as grocery, retail, health or entertainment.

Awareness and Use of Amenities

- Currently the UniverCity amenities most commonly used are the mountain trails or paths (44% use them at least once a week or more), which the majority of residents who use them rate as accessible, visible, safe and providing an excellent or good experience.

➤ Executive Overview

- Also used by a similar proportion (41% once a week or more) is the food or grocery store. Restaurants, retail, business or personal services are used by one-quarter or less of the residents at least once a week or more, perhaps a reflection of the current lack of availability.
- Awareness of the additional SFU amenities is quite high, varying between about half for the museum, art gallery and lectures, to about two-thirds who are aware of the recreational facilities, classes, lessons and programs, the theatre and stores in the Student Services building.
- While awareness of the various community passes or memberships is high in most cases, the uptake of these tends to be relatively low, with the exception of the Community Card:
 - Transit Pass: *Aware (87%) vs. Obtained (45%);*
 - Community Card: *Aware (81%) vs. Obtained (59%);*
 - SFU Gym Membership: *Aware (72%) vs. Obtained (22%);*
 - SFU Library Pass: *Aware (71%) vs. Obtained (19%);*
 - Car Co-op Membership: *Aware (56%) vs. Obtained (2%).*

➤ Executive Overview

- Barriers to obtaining the Community Card are mostly time constraints, but also for about 1 in 5 residents a lack of awareness of the benefits or how to obtain one.
- When asked what might make the card more valuable most could think of nothing in particular, otherwise there were requests for more recreation, retail and parking discounts or offers. Reasons for not obtaining the transit pass were mostly due to a lack of need.
- When asked, 9-in-10 residents would recommend life at UniverCity to friends or family, mostly because of the quiet, natural environment and views, but also because of the planned sustainable community and convenient location, particularly for commuting.

Demographics

- The majority of residents previously resided in other parts of Burnaby (29%), Vancouver (26%) or the Tri Cities area (12%), with 41% who owned their previous property and 59% who either rented or lived with parents. In contrast, 76% of residents at UniverCity own their property, with just 4% reportedly living in a flex suite and one third with household affiliations to SFU, mostly students.

➤ Executive Overview

- Two-thirds of households have two adults present, with one quarter having just one adult; and while 1-in-5 households have children present, just 15% have children under the age of 5.
- Of the 15% more than half currently use childcare services of some kind, while most (84%) would be interested in using childcare spaces if they were made available in the UniverCity community.
- Currently residents most often travel to other parts of Burnaby (58%) or Vancouver (32%) for various medical services, while a total of 87% of residents would be likely to use primary health services if they were available at UniverCity (53% very likely and 33% somewhat likely).
- In total 85% of residents are employed for pay, 10% who work from home and 78% outside the home (or both). Of those who work outside the home most work in Burnaby (42%) or Vancouver (37%), and mostly in professional or technical fields (52%).
- For those who commute to work the common mode of travel is by personal vehicle (60%), followed by transit (34%), with 4% who currently carpool. Of those who drive alone 15% express an interest in a carpool program, with the rest who prefer to drive alone, work odd hours or need their vehicle for work.

➤ Methodology

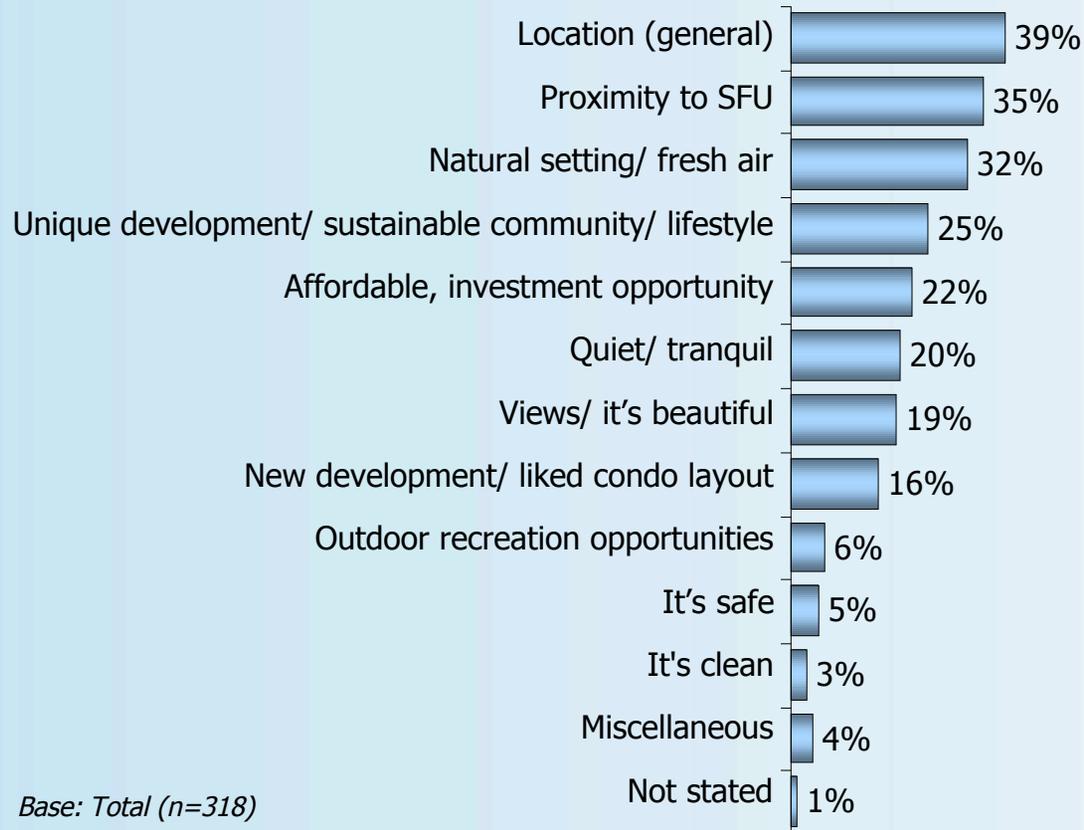
- In an attempt to better understand the demographic make-up of UniverCity's resident population and further gather feedback regarding their attitudes, opinions, expectations and needs of their community, a self-completion mail-back survey was designed in conjunction with the SFU Community Trust.
- The survey was hand delivered to all listed UniverCity residences with a return date of April 1st. In order to boost responses a second delivery of surveys was made to all those who had not yet responded, with an extended return date of May 14th. These deliveries were followed up with a postcard reminder.
- Additionally, a telephone number search was made on all addresses and calls were made to non-responders to remind them to complete their survey. They were also offered to chance to complete the survey on the telephone. All those completing a survey were offered the opportunity to win one of two prizes, an 80G iPod and \$500 cash.
- In total 318 residents completed and returned a survey (though late returns will be added as they arrive). The margin of error on this sample size is +/- 4.5 at the 95% confidence level.

Detailed Findings



MUSTEL GROUP
MARKET RESEARCH

➤ Reasons to Live at UniverCity

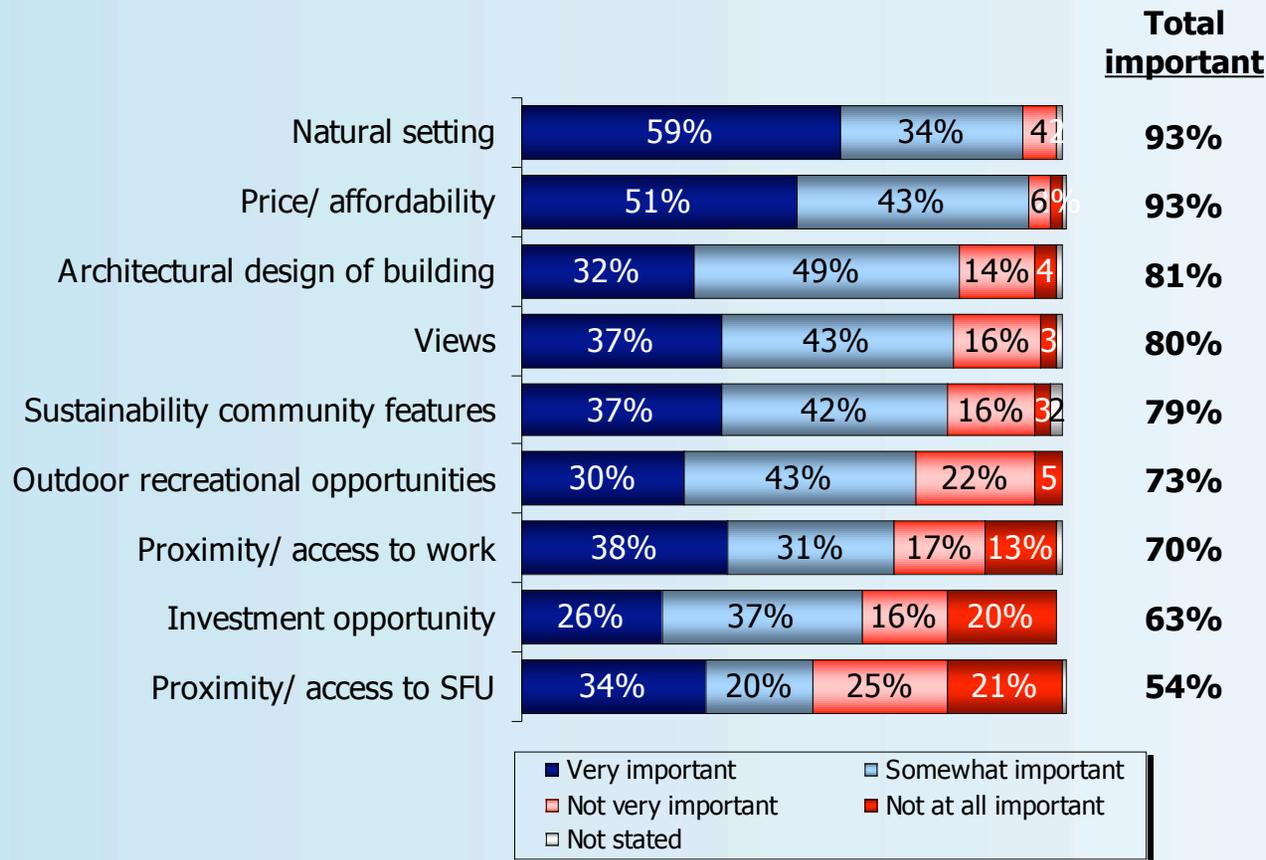


- Overall, the attractions of living at UniverCity centre mostly around its location, which includes its proximity to SFU as well as the natural setting in which it has been built, providing beautiful quiet surroundings and views.
- Its unique character and sustainability was an attraction to one-quarter of residents, with a similar proportion who found it an affordable investment opportunity.

Base: Total (n=318)

Q.A1) What attracted you to live at UniverCity?
 Why did you choose to live here?

➤ Factors Influencing Decision to Live at UniverCity

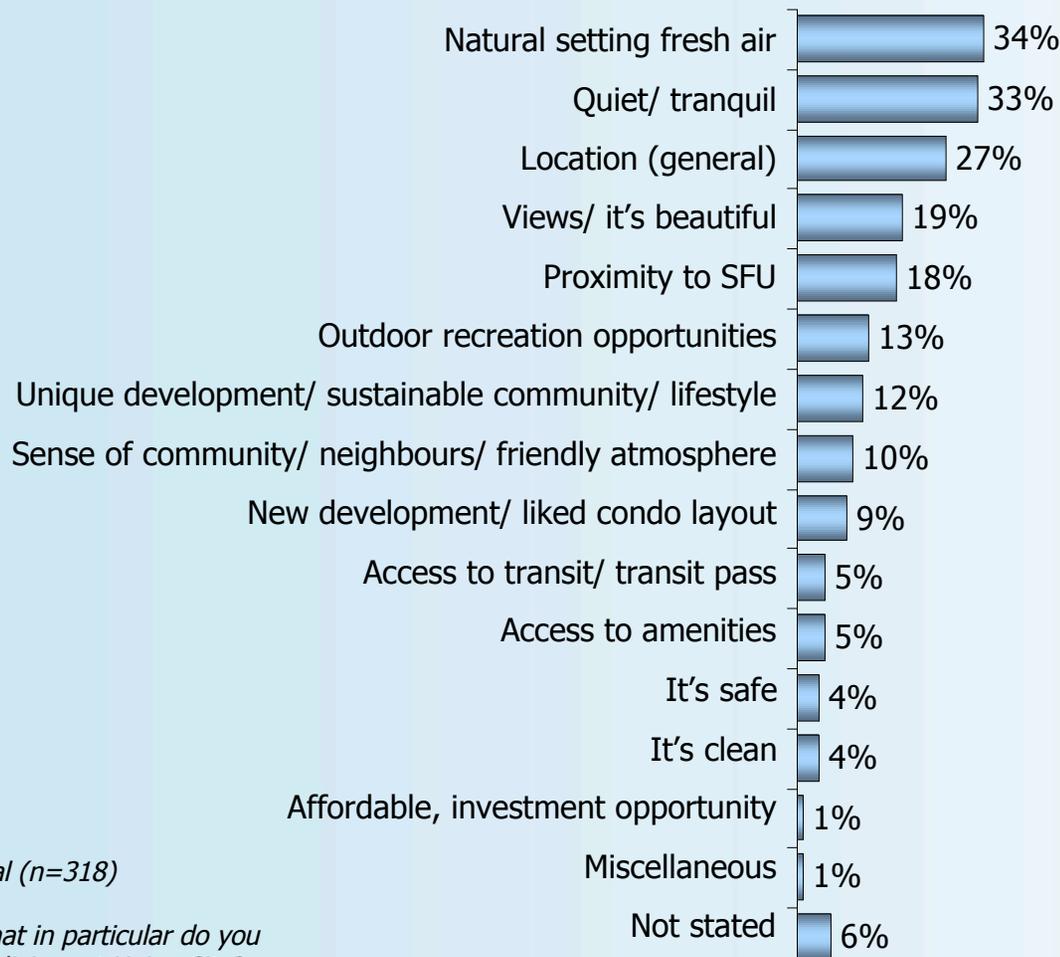


- The strongest aided influences when choosing to live at UniverCity include the natural setting and the affordability of the development, important to more than 9-in-10 residents.
- The architecture, the views and the sustainable design closely follow in importance for approximately 8-in-10.
- Recreation opportunities hold some importance for almost three-quarters of residents, with a similar proportion for whom proximity to work is important.

Base: Total (n=318)

Q.A2) How important were each of the following in your decision to live at UniverCity?

➤ Life at UniverCity: Likes

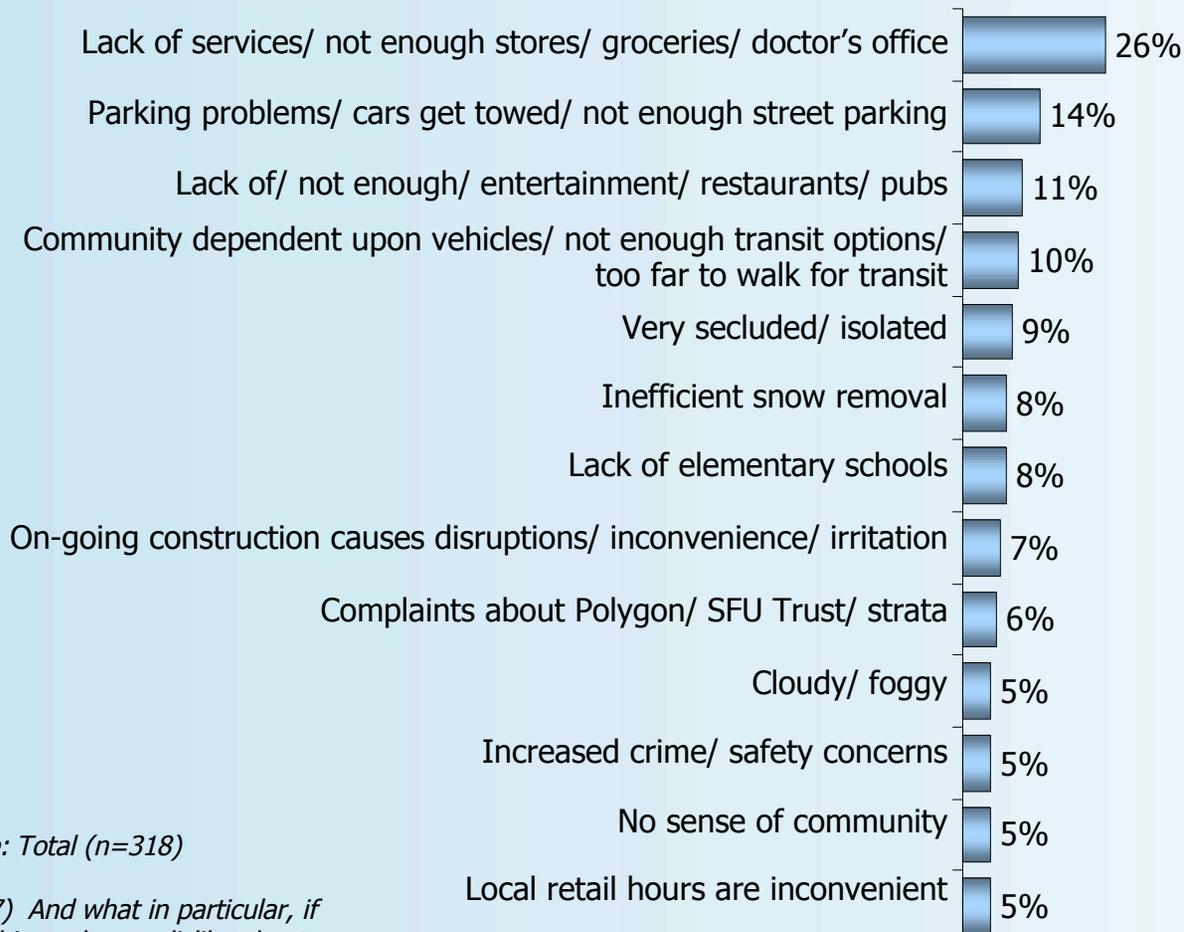


- The quiet, natural environment in which the UniverCity development is set, with its natural beauty and accompanying views, are the main attributes that residents like about life there.
- For those currently working or studying, the proximity to SFU is a particular bonus.
- Others particularly enjoy the outdoor recreation opportunities and the uniqueness of the development.

Base: Total (n=318)

Q.A6) What in particular do you like about living at UniverCity?

Life at UniverCity: Dislikes



- In terms of dislikes about life at UniverCity, residents most commonly raise the issue of the lack of services and amenities such as retail and health services.
- Also of note are concerns about insufficient parking, and the need for transportation alternatives as well as a desire for some recreation or entertainment outlets such as restaurants or a pub.

Base: Total (n=318)

Q.A7) And what in particular, if anything, do you dislike about living at UniverCity?

continued...

➤ Life at UniverCity: Dislikes (cont'd)

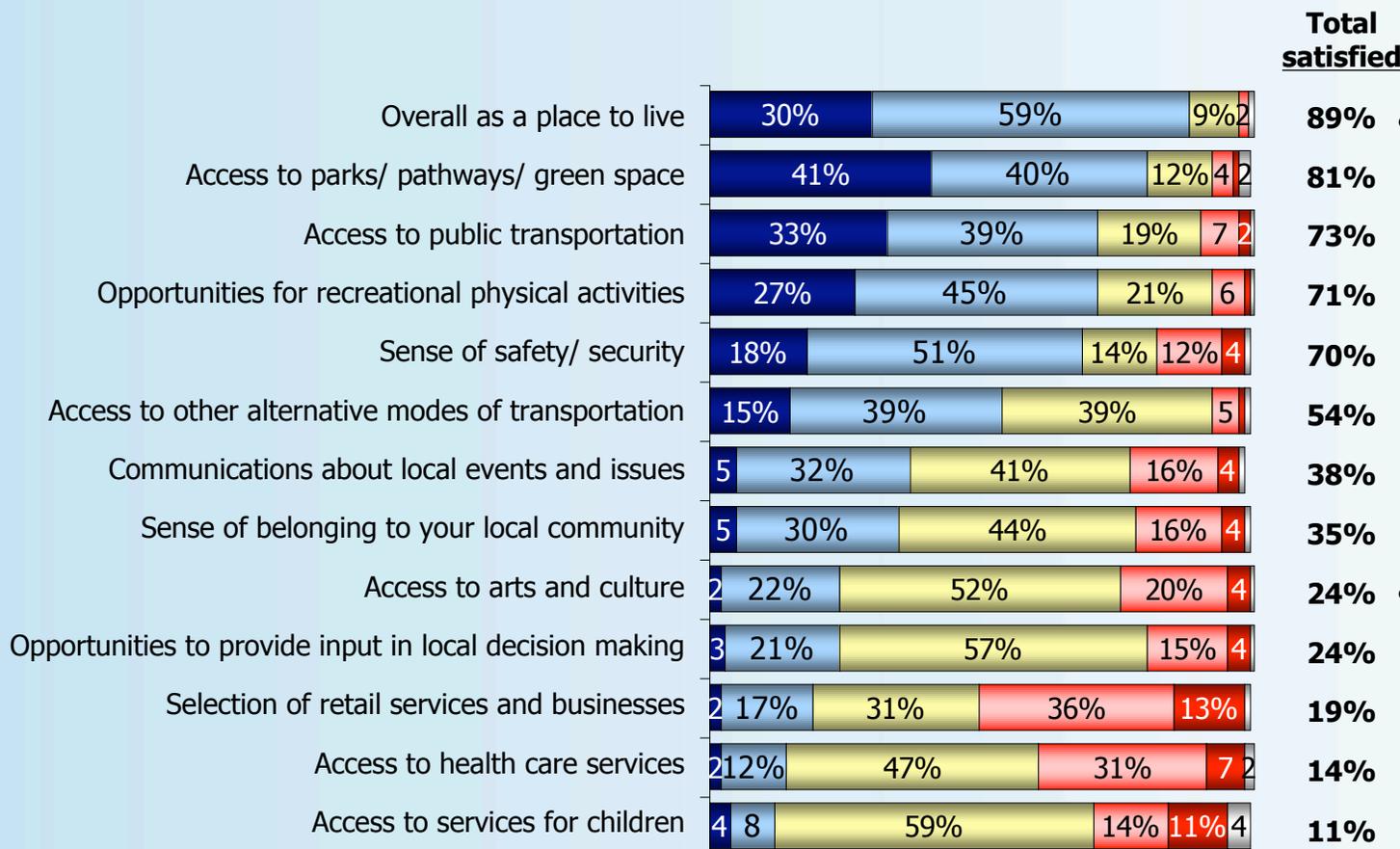


- Most other dislikes about life at UniverCity are many and varied and noted in each case by less than 1-in-10 residents.

Base: Total (n=318)

Q.A7) And what in particular, if anything, do you dislike about living at UniverCity?

► Level of Satisfaction With Aspects of Living at UniverCity



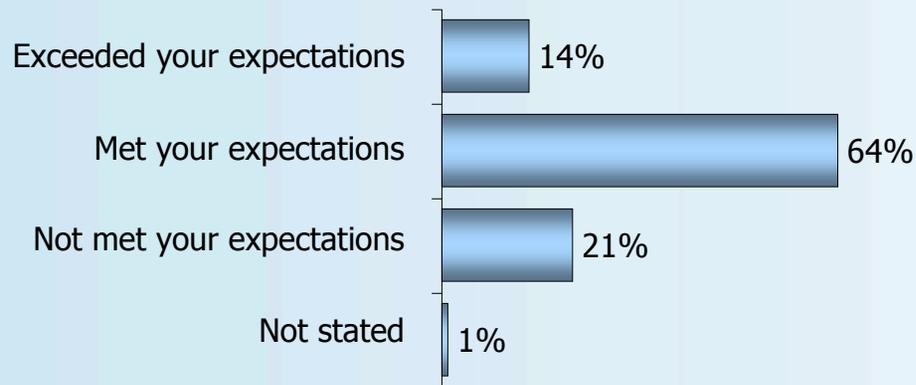
- Overall satisfaction is high amongst residents, as it is with access to the natural surroundings and recreational opportunities, and in contrast to previous concerns, access to public transportation.
- Satisfaction is lowest with retail, business, health and childcare services that are available.

Base: Total (n=318)

Q.A8) To what extent are you satisfied with each of the following aspects of living at UniverCity?



➤ Expectations of Life at UniverCity

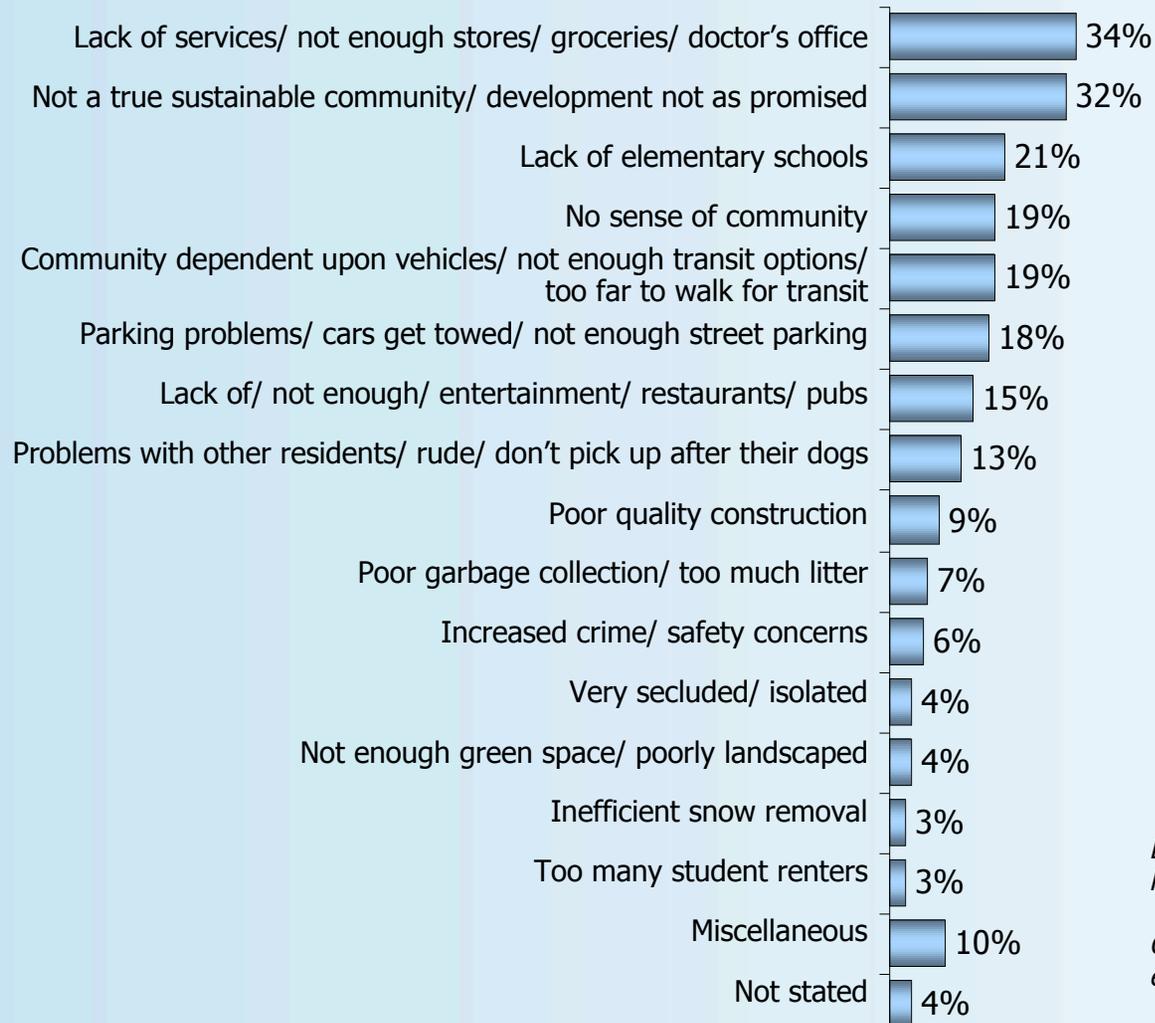


Base: Total (n=318)

Q.A3) Has living at UniverCity:

- Most residents of UniverCity, more than three-quarters, feel they have had their expectations either met or exceeded, while about 1-in-5 feel they have not.

Reasons Expectations Have Not Been Met



- Failure to meet expectations is due most commonly to a lack of services or amenities which might include retail, health and childcare services and entertainment.
- Closely following is a concern that the development is not 'truly' sustainable; additionally there are concerns that the community is too dependent upon vehicles with not enough transit alternatives, which also leads to issues over the availability of parking spaces.

Base: Total those whose expectations have not been met (n=68)

Q.A3b) In what ways have your expectations not been met?

➤ Awareness of Sustainability Features or Initiatives

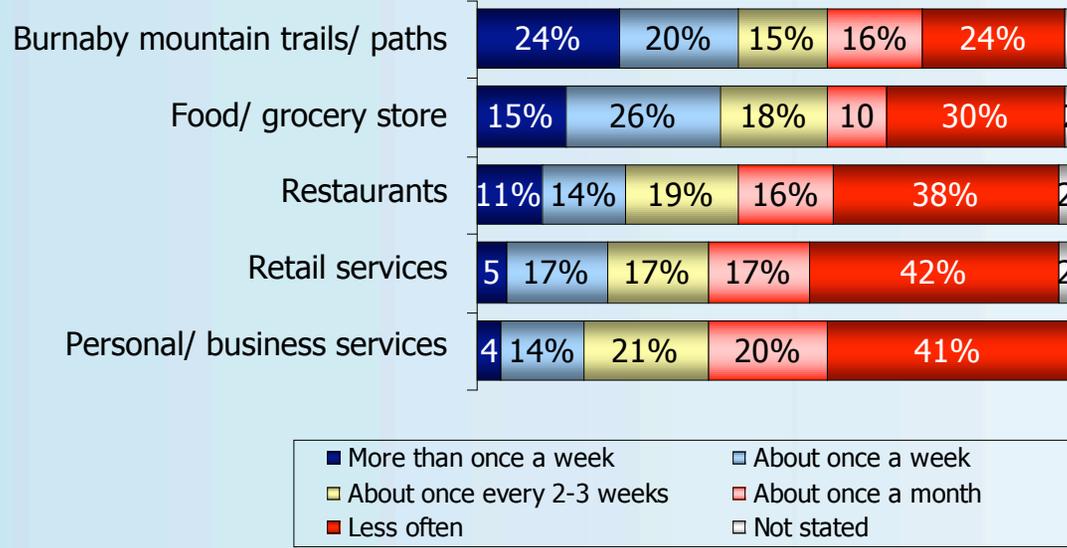


- Less than half of all residents are able to name any sustainability features of UniverCity.
- Amongst those who are, unaided awareness is highest of the community transit pass, water management and the car co-op program.

Base: Total (n=318)

Q.A9) Please list the sustainability features or initiatives at UniverCity of which you are aware.

➤ Current Use of Amenities or Services at UniverCity

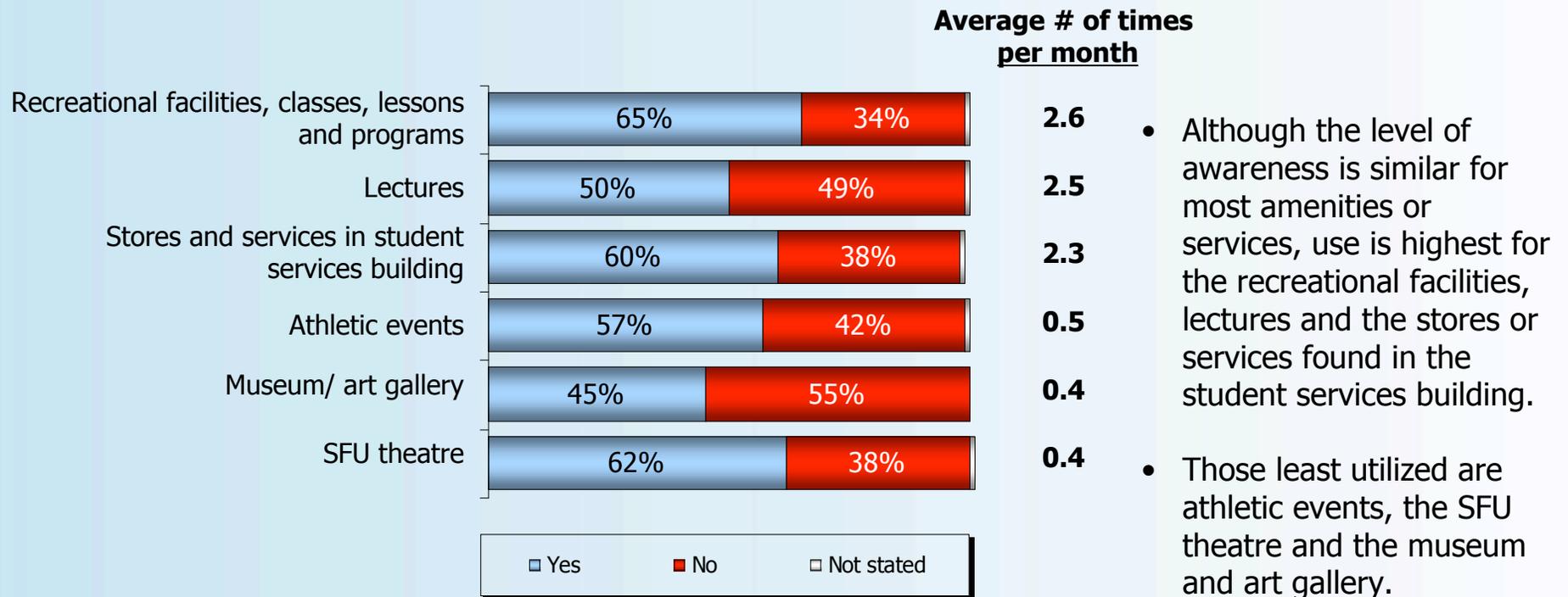


Base: Total (n=318)

Q.B1) How often do you use each of the following at UniverCity?

- Currently, residents most commonly make use of the trails and paths on Burnaby Mountain, closely followed by use of the food or grocery stores currently available.
- Restaurants are used by a quarter of residents at least once a week or more, while retail, personal or business services are currently the least utilized, perhaps a reflection of the availability in light of previous comments.

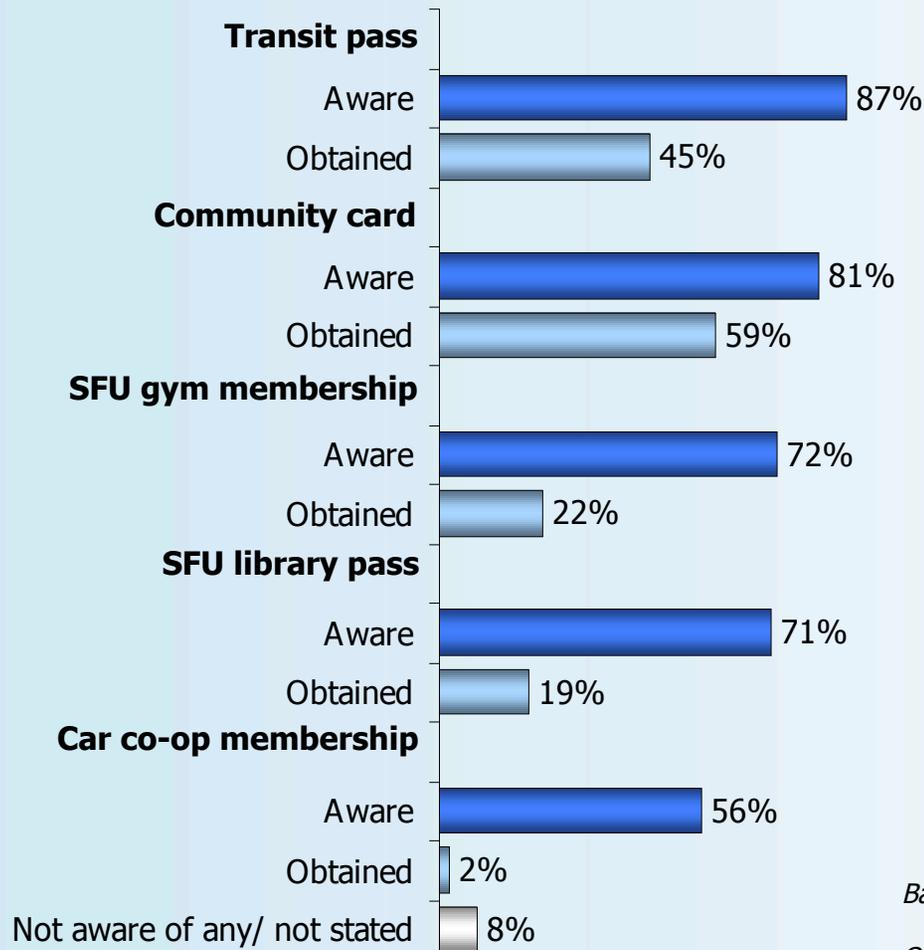
➤ Awareness and use of Services or Amenities at SFU



Base: Total (n=318)

Q.B2) For each of the following services and amenities at SFU, please indicate if you are aware of this service and if yes, your frequency of using the service/ amenity.

➤ Awareness and Uptake of Passes and Memberships

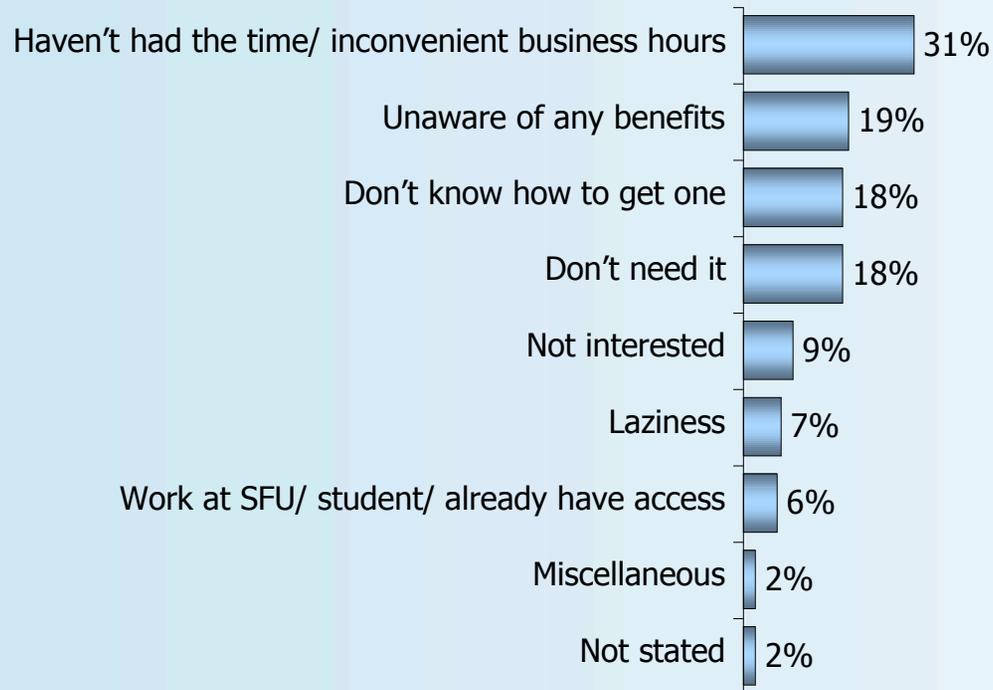


- While awareness of most of the various community passes or memberships is high at more than two-thirds, the uptake is relatively low with the exception of the community card and to some extent the transit pass.
- Approximately 1-in-5 residents have obtained a gym membership or library pass, while just 2% have signed up for the car co-op program.

Base: Total (n=318)

Q.B3) Are you aware and have you obtained a:

► Reasons For Not Obtaining a Community Card

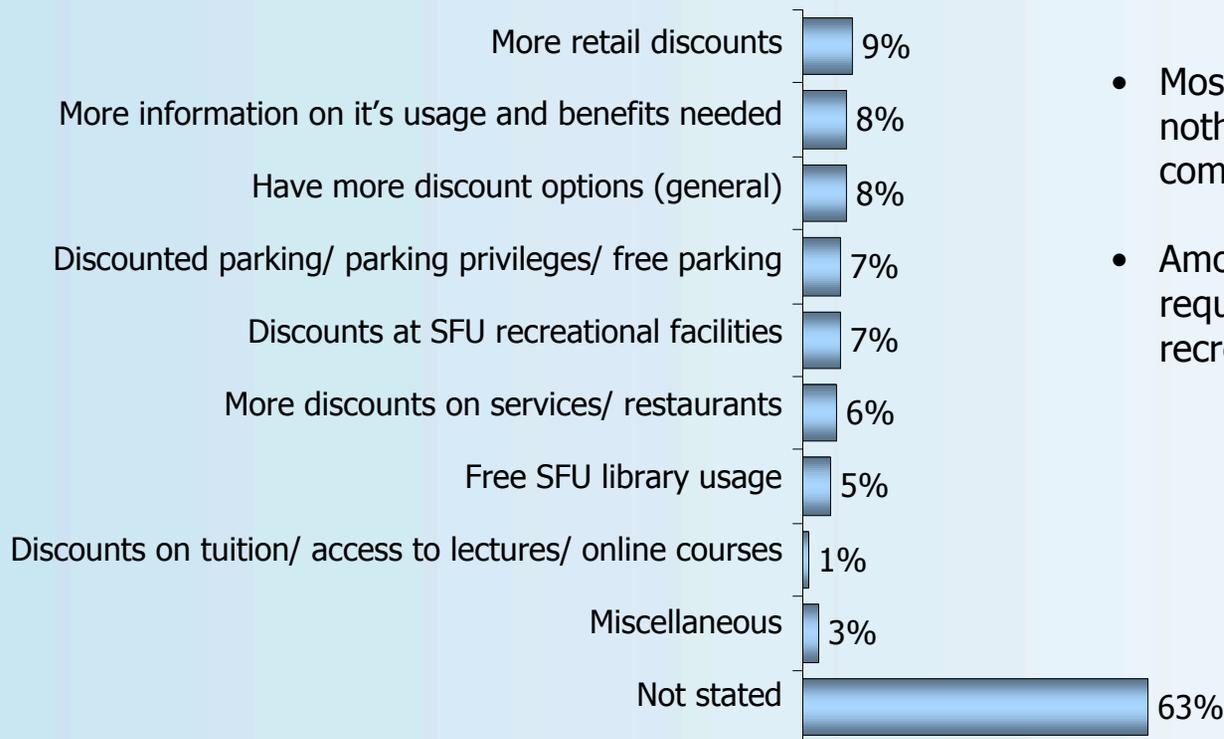


- The barriers to obtaining a community card appear to be time constraints, but perhaps more importantly a lack of awareness of the benefits and how to obtain the card.

Base: Total are aware of but have not obtained a community card (n=68)

Q.B4) Why do you think you have not obtained a community card?

➤ Benefits to Make Community Card More Valuable

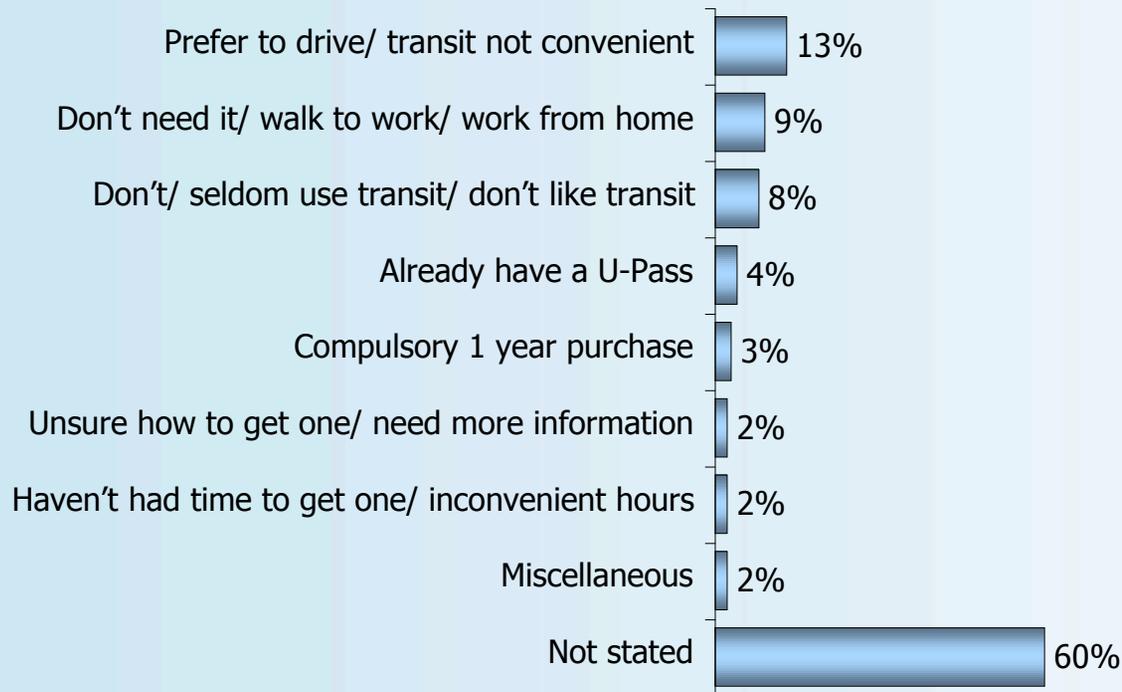


- Most residents could think of nothing in particular to make the community card more valuable.
- Amongst those who can most request more discounts for retail, recreation and parking.

Base: Total (n=318)

Q.B5) What additional benefits would make the community card more valuable?

➤ Reasons For Not Obtaining a Transit Pass

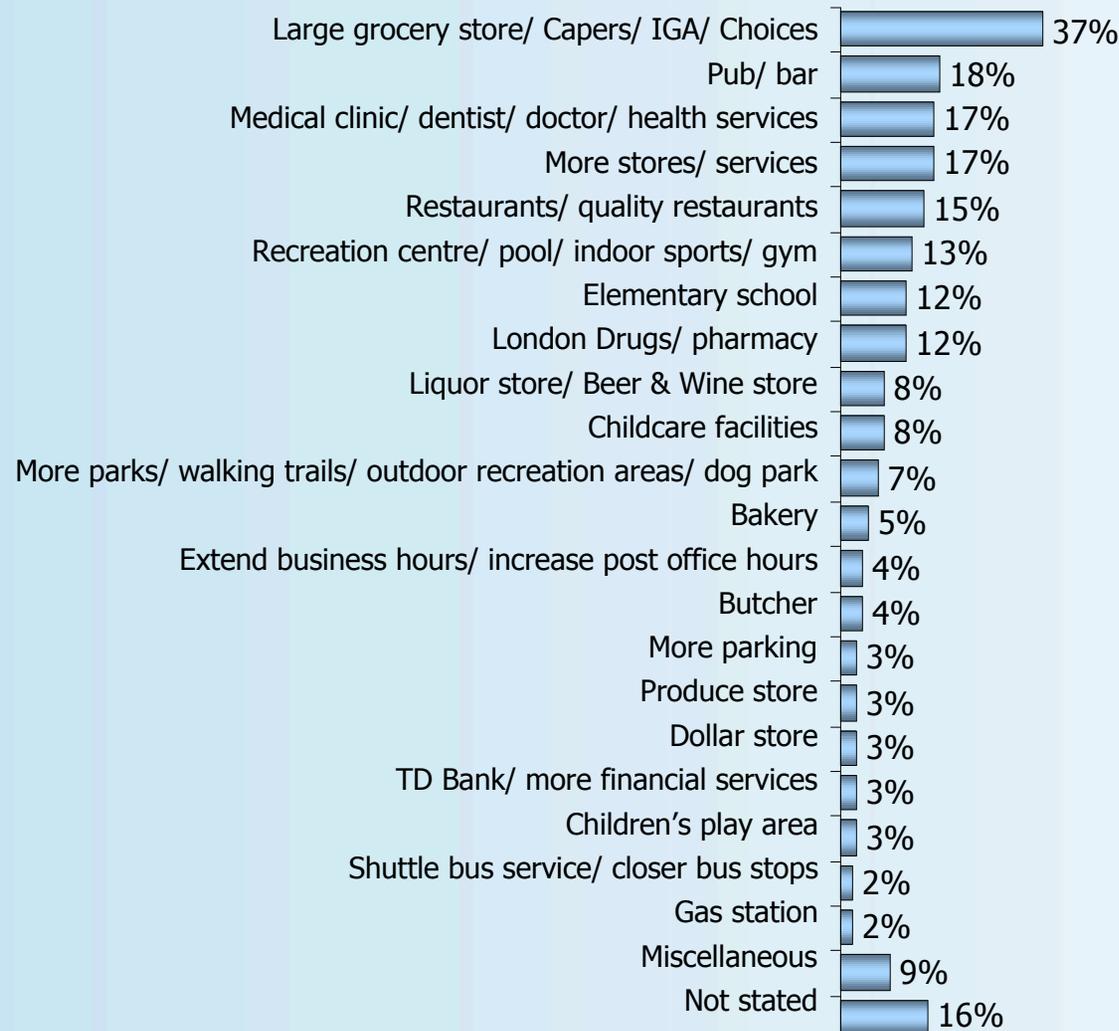


- Amongst those not obtaining a transit pass the main reason is a lack of need as they don't use transit often enough or simply prefer to drive.

Base: Total (n=318)

Q.B6) If you are aware but have not obtained a transit pass: why do you think you have not obtained a transit pass?

➤ Additional Amenities Needed at UniverCity

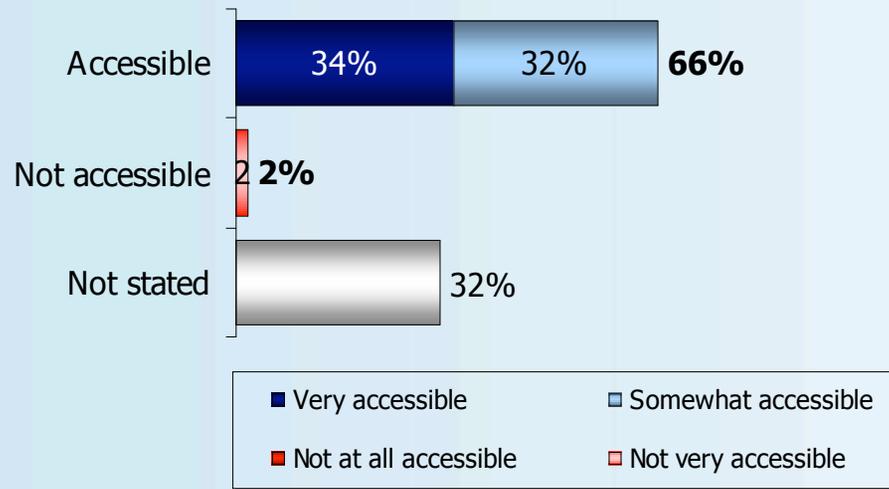


- Amongst the many and varied additional amenities and services mentioned, the most commonly requested is that of a larger grocery store, with certain suggested named examples.
- Other mentions of note include various health services, retail, food and entertainment outlets.

Base: Total (n=318)

Q.B10) What additional facilities, services or amenities do you believe are needed at UniverCity?

➤ Accessibility of Burnaby Mountain Trail Network

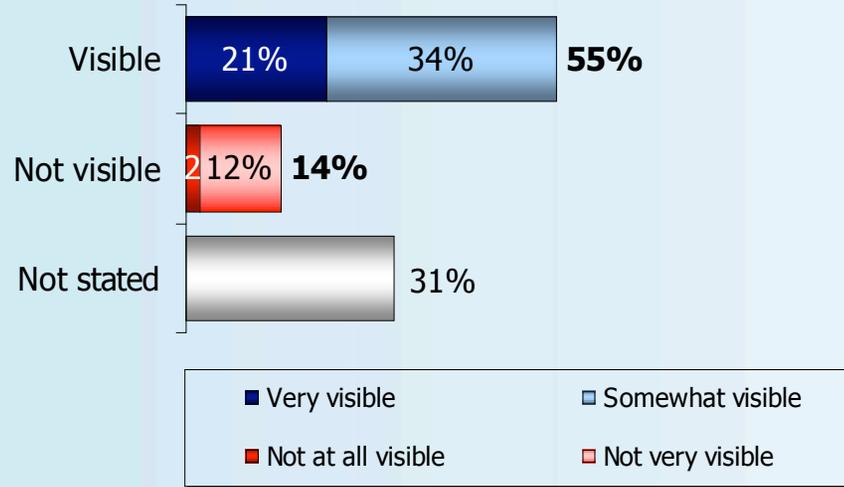


- With more than two-thirds of residents who currently use the trails on Burnaby Mountain, almost all consider them to be accessible, half of whom consider them 'very' accessible.

Base: Total (n=318)

Q.B8) If you use the Burnaby Mountain Trail network, how would you rate it for: a) Accessibility

➤ Visibility of Burnaby Mountain Trail Network

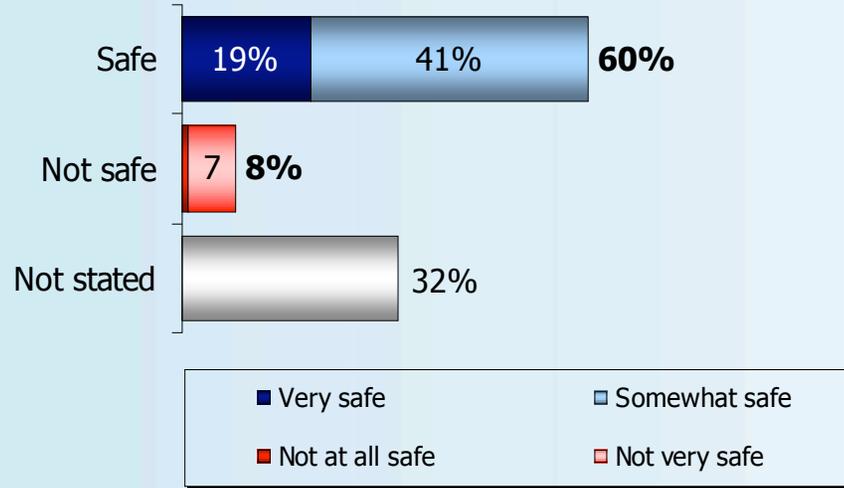


- Most residents who use the trails also feel they are visible, with approximately 1-in-5 residents who feel they are not.

Base: Total (n=318)

Q.B8) If you use the Burnaby Mountain Trail network, how would you rate it for: b) Visibility

➤ Safety/ Security of Burnaby Mountain Trail Network

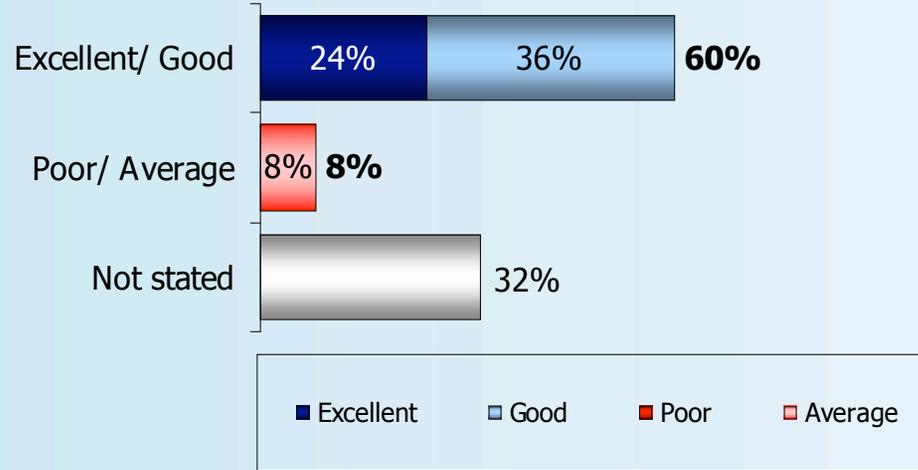


- Overall the trails are felt to be safe and secure by a majority of users.

Base: Total (n=318)

Q.B8) If you use the Burnaby Mountain Trail network, how would you rate it for: c) Safety/ Security

➤ Quality/Experience of Burnaby Mountain Trail Network

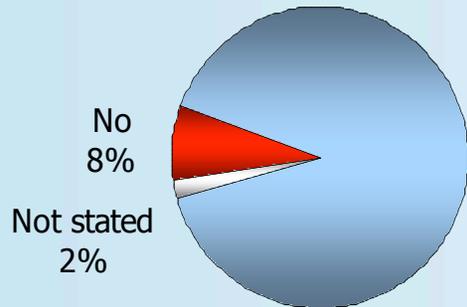


- And the majority of residents who use the trails report them as providing an 'excellent' or 'good' experience overall.

Base: Total (n=318)

Q.B8) If you use the Burnaby Mountain Trail network, how would you rate it for: d) Quality/ Experience

➤ Reasons to Recommend Life at UniverCity



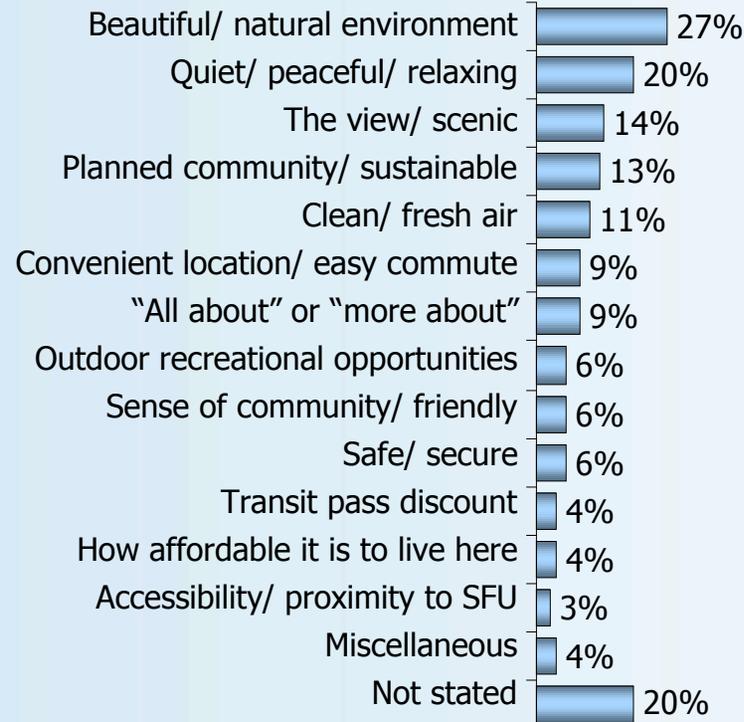
Base: Total (n=318)

Q.A10) Would you recommend UniverCity to friends or family?

Q.A11) How would you finish this sentence:

Yes
90%

**If People Knew _____ about UniverCity,
 They Would Want to Live Here**



- With 9-in-10 of all residents saying they would recommend life at UniverCity, the main reasons include the quiet, natural environment and views.
- Also of note is the type of planned community, its convenient location for commuting or the sense of community and feeling of safety.

Base: Total would recommend UniverCity to others (n=285)

➤ Previous Residence Prior to Moving to UniverCity

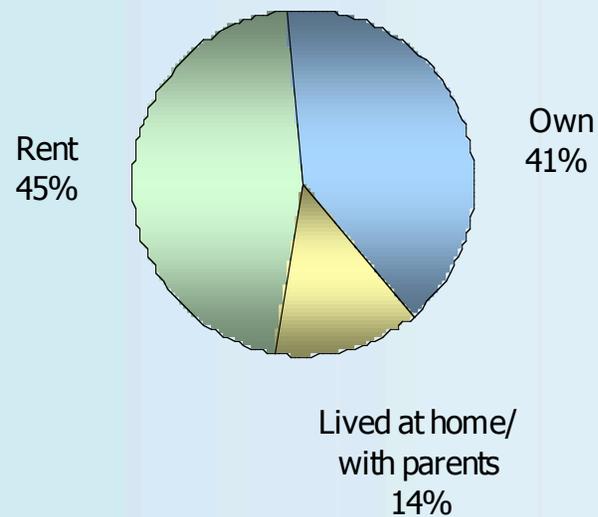


- The majority of residents, more than half, lived in either Burnaby or Vancouver prior to moving to UniverCity.
- An additional one-third moved from other parts of the GVRD.

Base: Total (n=318)

Q.A4) Where did you live before moving to UniverCity?

➤ Home Tenure Prior to Moving to UniverCity

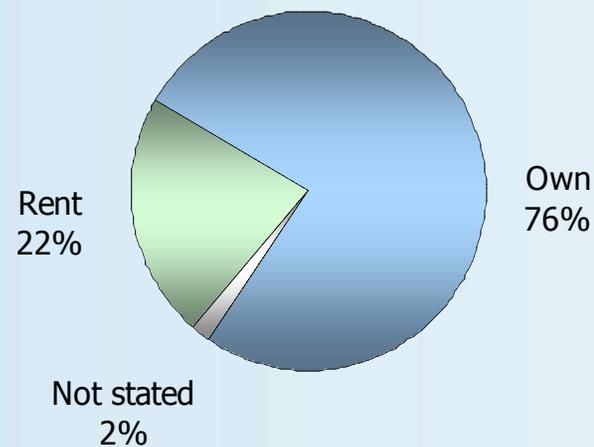


- More than half of all residents either rented or lived with parents prior to moving to UniverCity.

Base: Total (n=318)

Q.A5) Did you own or rent your previous residence?

➤ Current Home Tenure

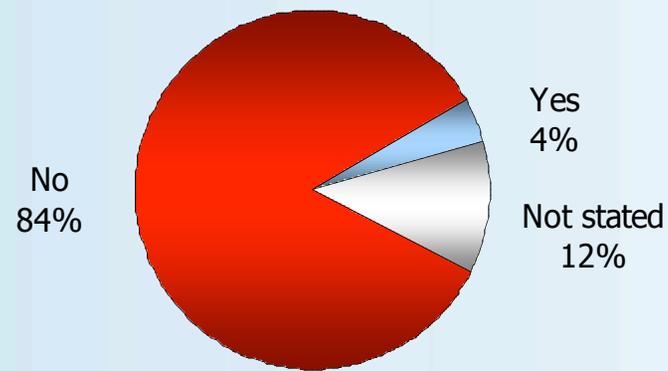


- Approximately three-quarters of UniverCity residents own the property they currently occupy.

Base: Total (n=318)

Q.C3) Do you own or rent your suite?

➤ Incidence of Secondary or Flex Suite Occupancy

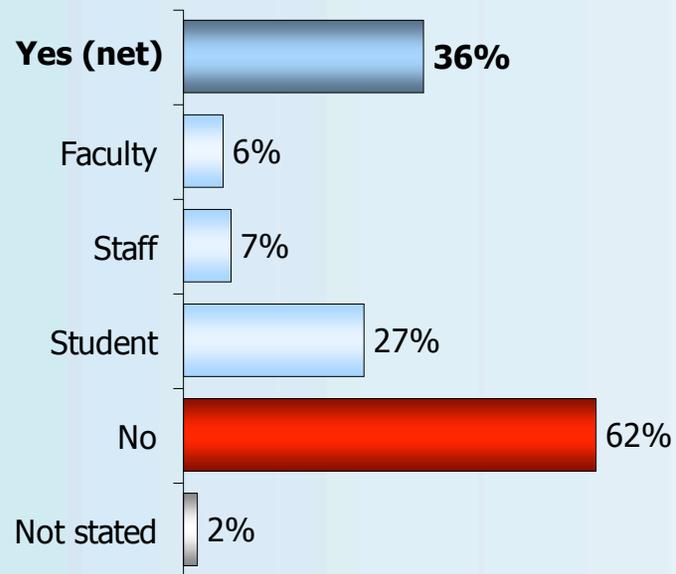


- Just 4% of residents say they currently live in a secondary or 'flex' suite.

Base: Total (n=318)

Q.C4) Do you live in a secondary or flex suite?

➤ Incidence of Household Associated with SFU

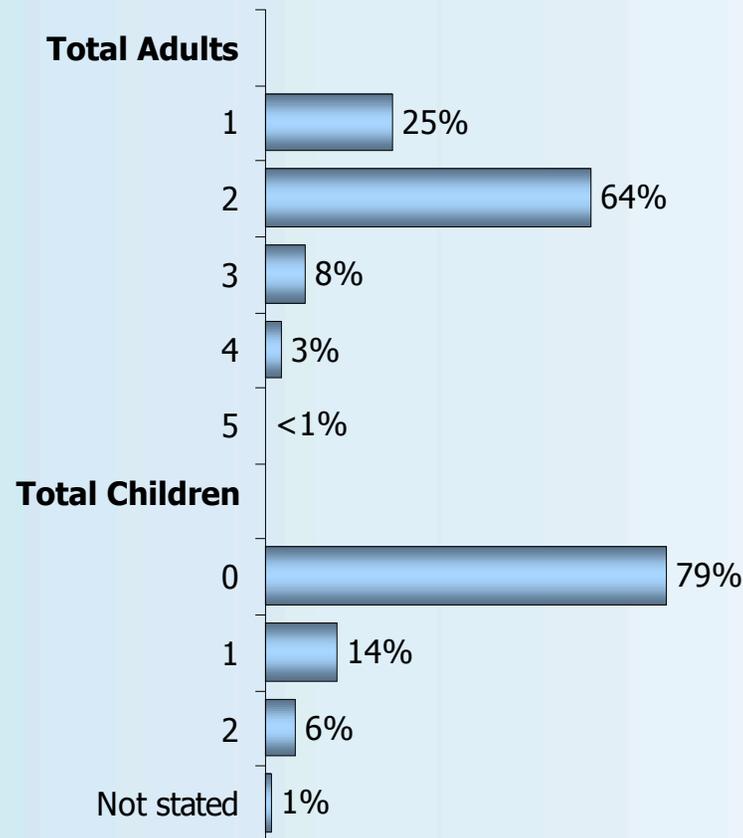


- Approximately one-third of residents are associated or have someone in their household associated with Simon Fraser University, mostly as students.

Base: Total (n=318)

Q.C5) Are you or someone in your household associated with SFU?

➤ Household Composition

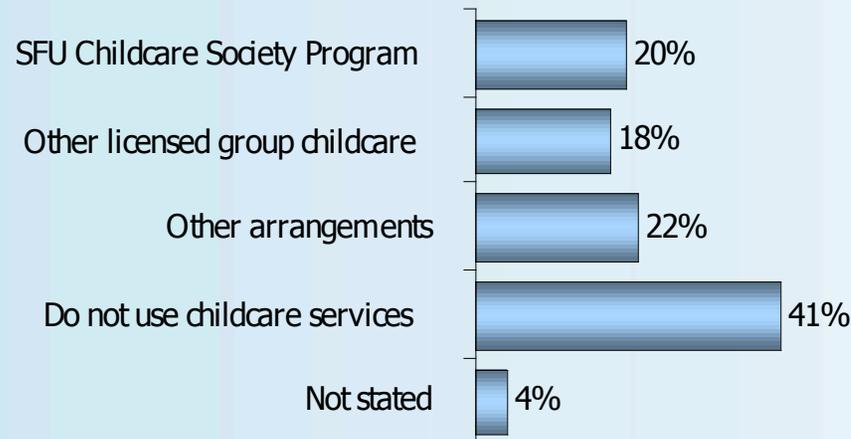


Base: Total (n=318)

Q.C1) How many people including yourself live in your household?

- Households at UniverCity are most likely to have two adults (making up almost two-thirds of homes) or a single adult (one-quarter).
- While most, about 8-in-10 are without children, those with children tend to be smaller family units with just one or two children.

➤ Childcare Services Currently Used



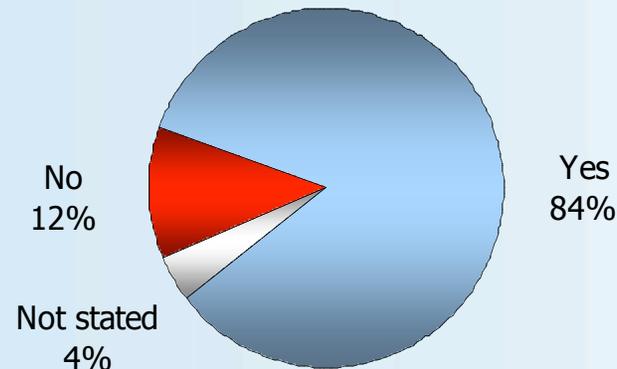
- Amongst the 15% of homes with children under the age of 5, more than half currently use childcare services, with 1-in-5 who use the SFU Childcare Society Program, and a similar proportion who use other licensed childcare or make other arrangements.

Base: Total with children under age 5 (n=49)*

Q.C2a) Is/ are your child(ren) in:

* Low base size, interpret with caution.

➤ Interest in UniverCity Childcare Services



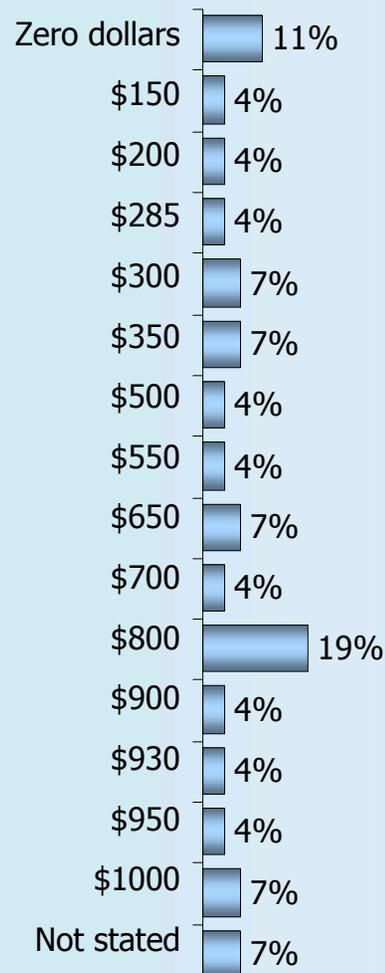
- And if more childcare spaces were made available in the UniverCity community, most of those with children under the age of 5 would be interested in making use of those spaces.

*Base: Total with children under age 5 (n=49)**

Q.C2b) If more childcare spaces could be made available in the UniverCity community, would you be interested in using?

** Low base size, interpret with caution.*

➤ Monthly Childcare Services Expenditure



Average spent = \$546.30

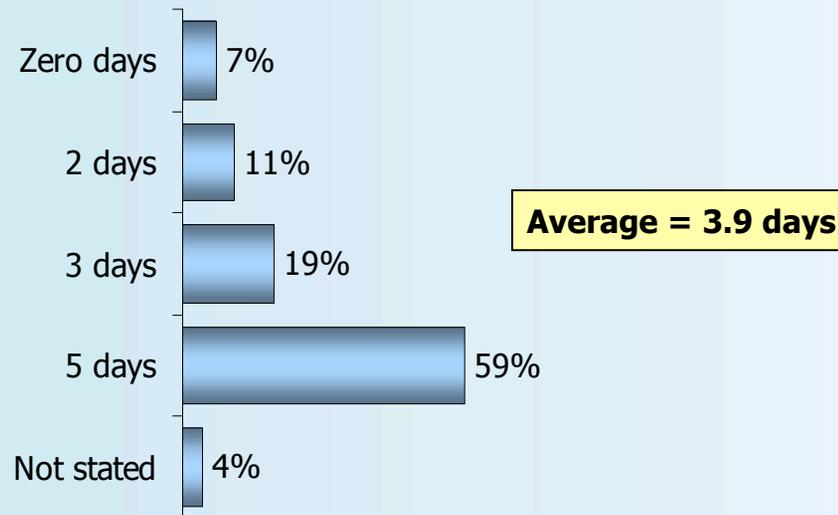
- The amount spent on childcare each month varies quite widely, with families spending on average \$546.30 per month.

*Base: Total with children under age 5 and use childcare services (n=27)**

Q.C2c) Approximately how much per month do you spend on childcare services?

** Low base size, interpret with caution.*

➤ Days Per Week Enrolled in Childcare Services



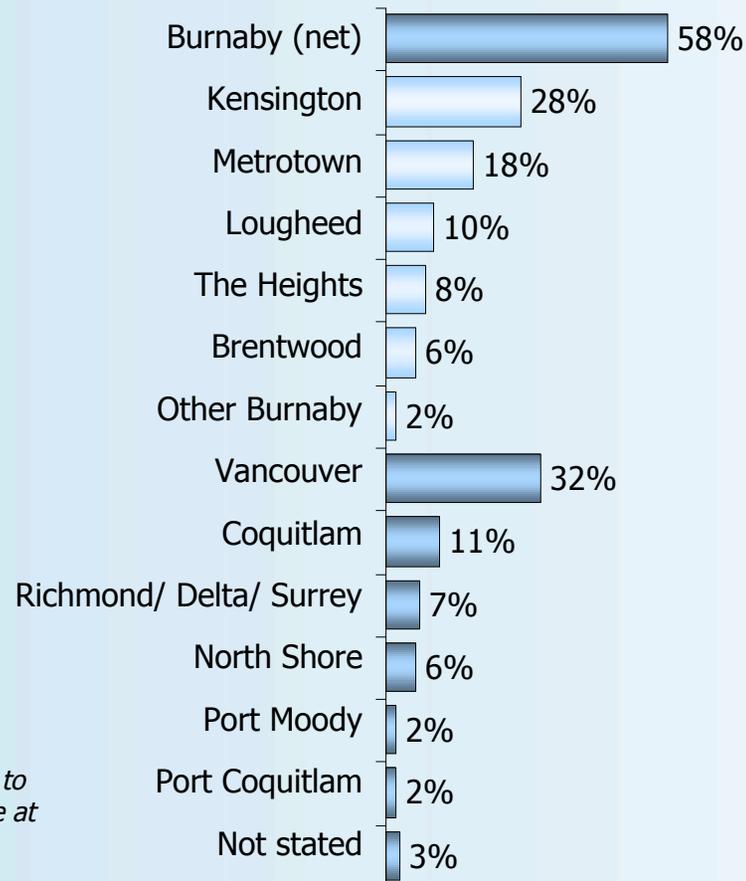
- Children spend an average of approximately 4 days per week in care facilities.

*Base: Total with children under age 5 and use childcare services (n=27)**

Q.C2d) Approximately how many days per week are your children enrolled in childcare services?

** Low base size, interpret with caution.*

➤ Location Currently Travel to for Medical Services

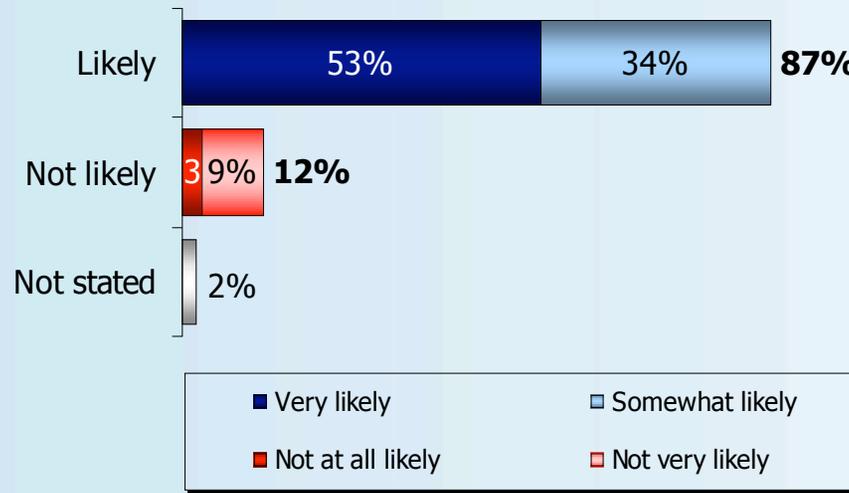


- Currently most residents travel to other parts of Burnaby or to Vancouver for their medical services needs.

Base: Total 'very' or 'somewhat' likely to use primary health services if available at UniverCity (n=275)

Q.B9b) Where do you currently travel to for medical services?

➤ Likelihood of Using Primary Health Services at UniverCity

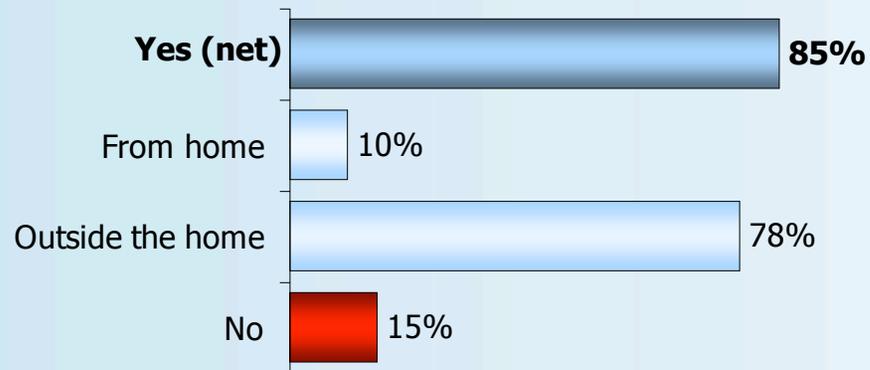


- Almost 9-in-10 residents say they would make use of primary health services if they were made available at UniverCity.

Base: Total (n=318)

Q.B9) If primary health services were available at UniverCity (e.g. medical, dental, physio, etc.), how likely would you be to use the services?

► Employment Status

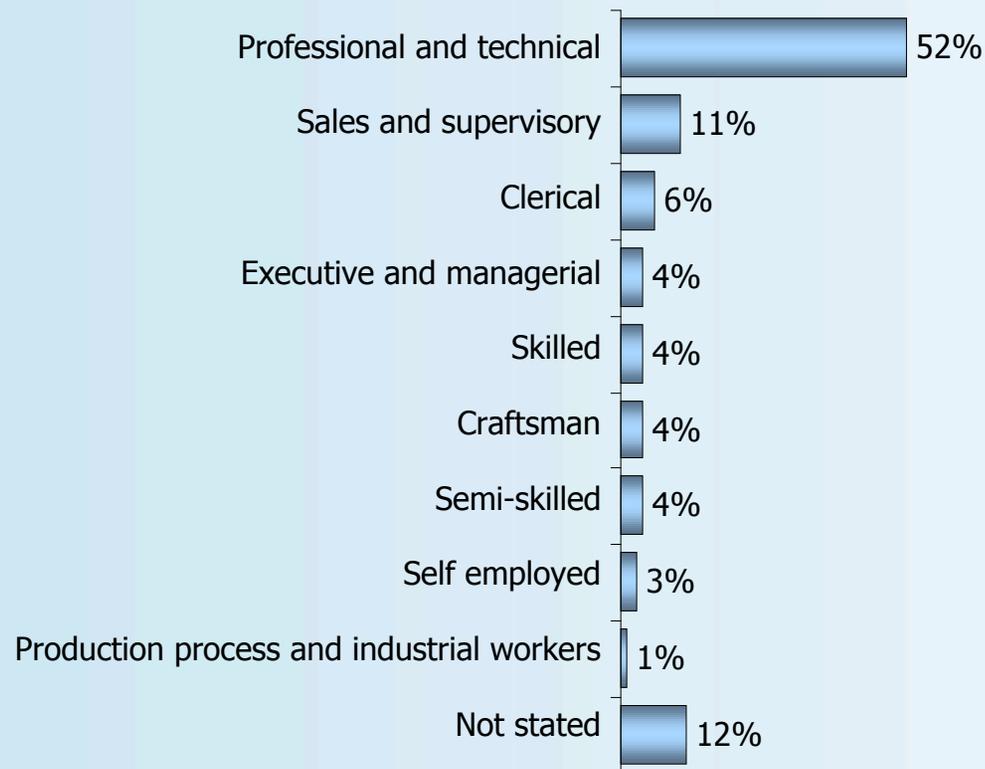


Base: Total (n=318)

Q.B7a) Are you employed or working for pay?

- The majority of residents are currently employed for pay, with just 1-in-10 who do so from home, with most outside the home or both.

➤ Occupation

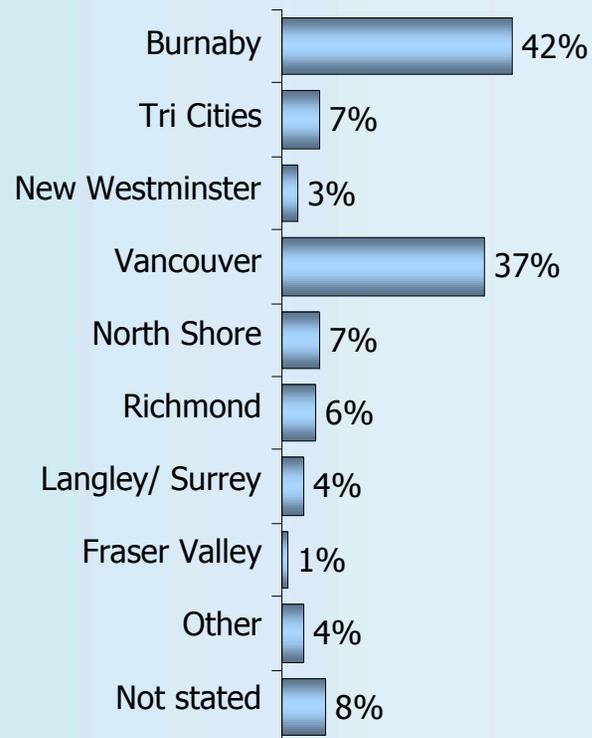


- About half of residents who are employed for pay work in a professional or technical field.

Base: Total employed for pay (n=270)

Q.C6) If you are employed for pay, what is your occupation? (Type of job)

➤ Work Location

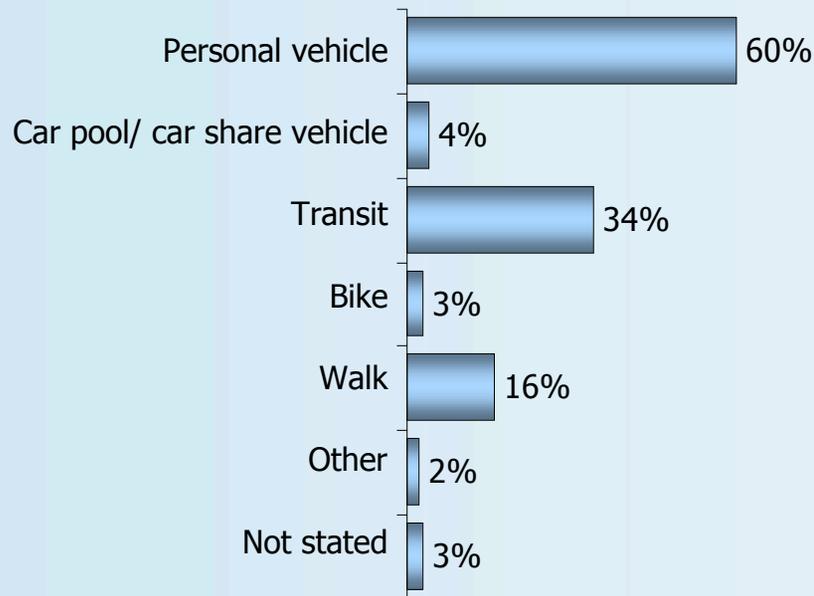


- Amongst those who commute to their place of work the majority, more than three-quarters, travel to either Burnaby or Vancouver

Base: Total work outside the home (n=270)

Q.B7b) Where do you work?

➤ Mode of Transportation to Work

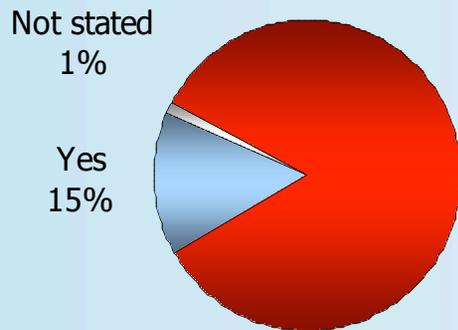


- The most common mode of transportation for commuters is by private vehicle, followed by public transit and then walking.
- Just 4% currently carpool.

Base: Total employed or working for pay (n=270)

Q.B7c) What is your usual mode of transportation to work?

➤ Interest in Joining a Carpool Program

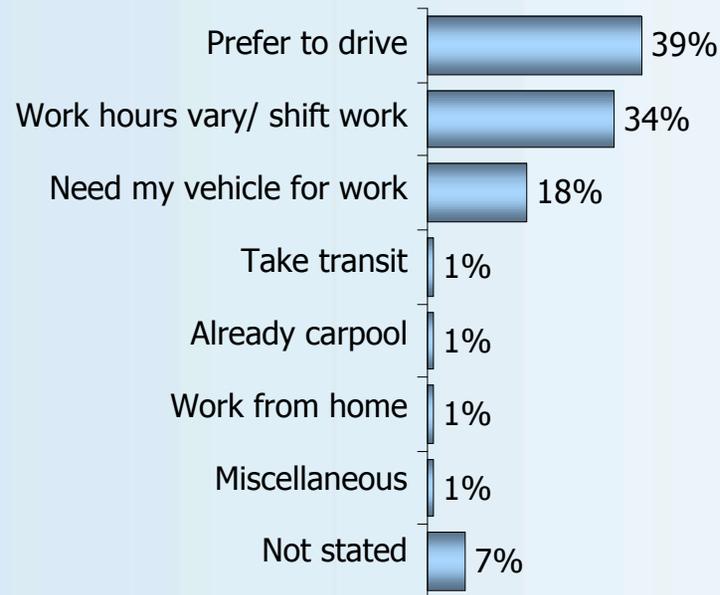


Base: Total use a personal vehicle to travel to work (n=163)

Q.B7d) Would you be interested in joining a carpool program? Why would you not be interested?

No
84%

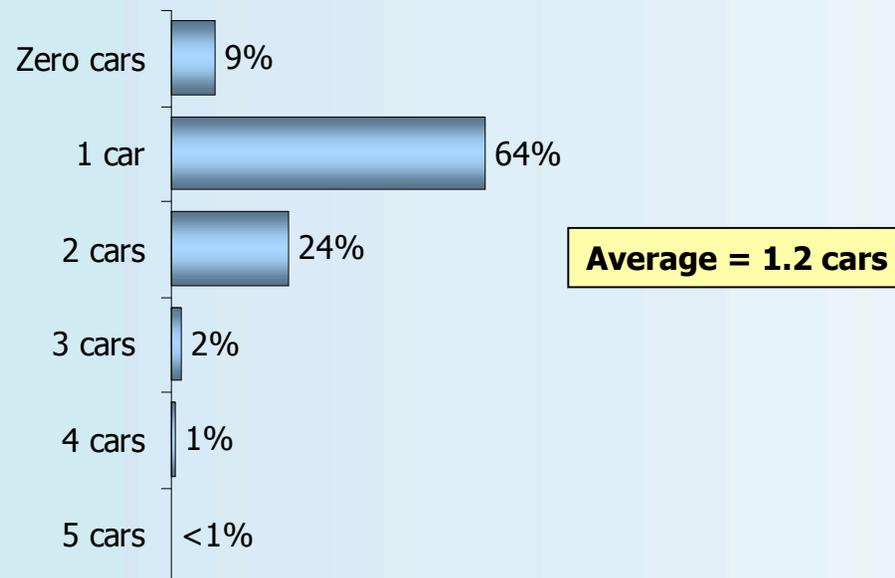
Reasons Not Interested in Joining a Carpool Program



Base: Total not interested in joining a carpool program (n=137)

- Of those who drive alone to work, most show no interest in joining a carpool program, either because they prefer to drive alone, require their vehicle for work or work odd hours.

➤ Number of Cars in Household

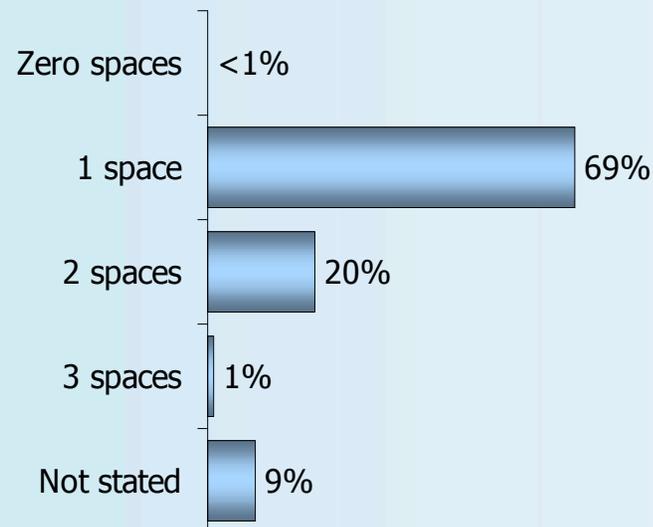


Base: Total (n=318)

Q.C7a) How many cars does your household own?

- Most households, almost two-thirds, own just one vehicle, with about one-quarter of households who have two.
- About 1-in-10 households do not own a private vehicle.

➤ Number of Parking Spaces



- Most residents, more than two-thirds, have one parking space, with at least 1-in-5 residents who have two or more spaces.

Base: Total (n=318)

Q.C7b) How many parking spaces do you have?

➤ Parking Additional Cars

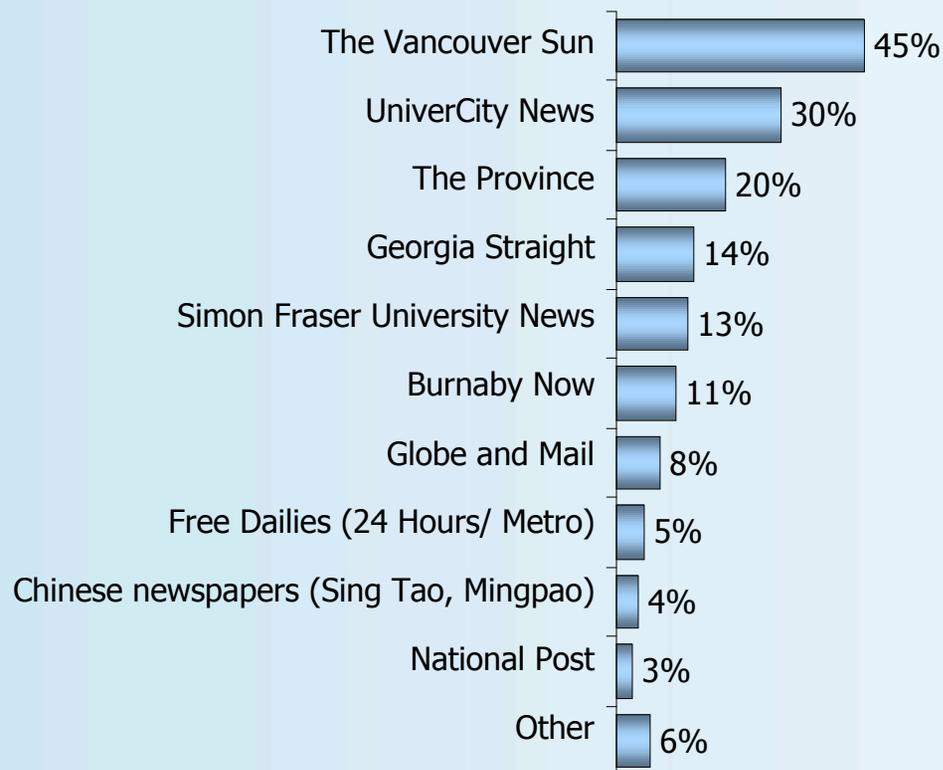


- Amongst those who have additional vehicles most, more than one-third, use street parking.
- About 1-in-5 utilize the SFU resident parking program, while the remainder either rent additional spaces or use the visitor parking.

Base: Total households with more cars than parking spaces (n=50)

Q.C7c) If you have extra cars, where do you park these car(s)?

➤ Residents' Choice of Newspapers

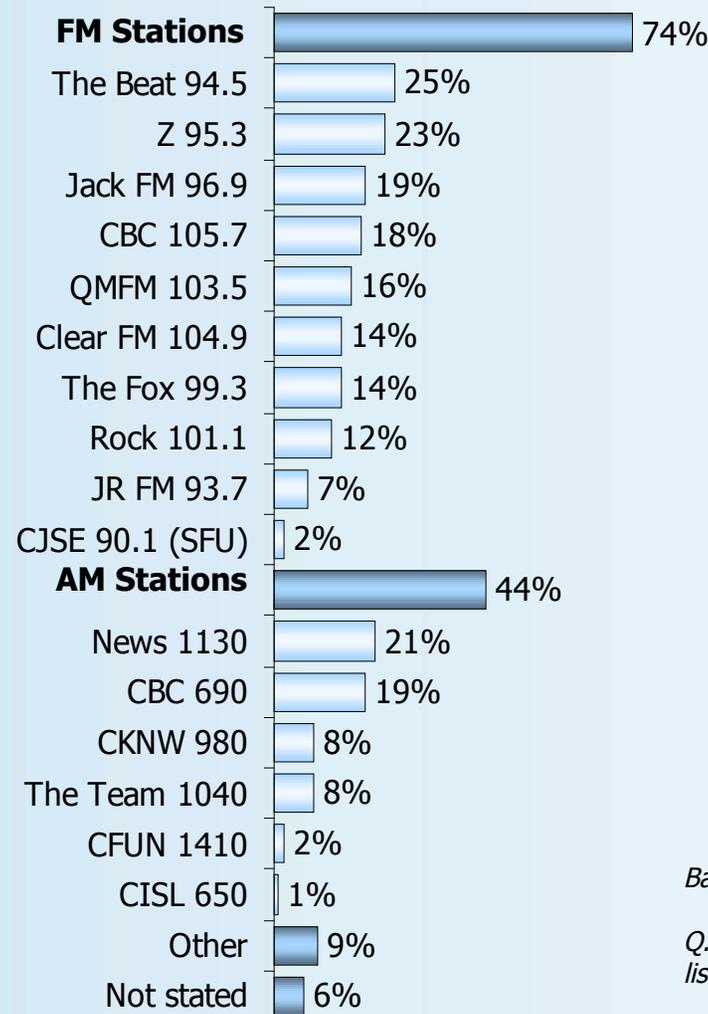


- Although the Vancouver Sun is the newspaper named most often, almost one-third of all residents reportedly read the UniverCity News.
- The Province is read by 1-in-5 residents while the Georgia Straight and Simon Fraser University News and Burnaby Now are the next most commonly read.

Base: Total (n=318)

Q.B11a) What newspapers do you read on a regular basis?

➤ Residents' Choice of Radio Stations

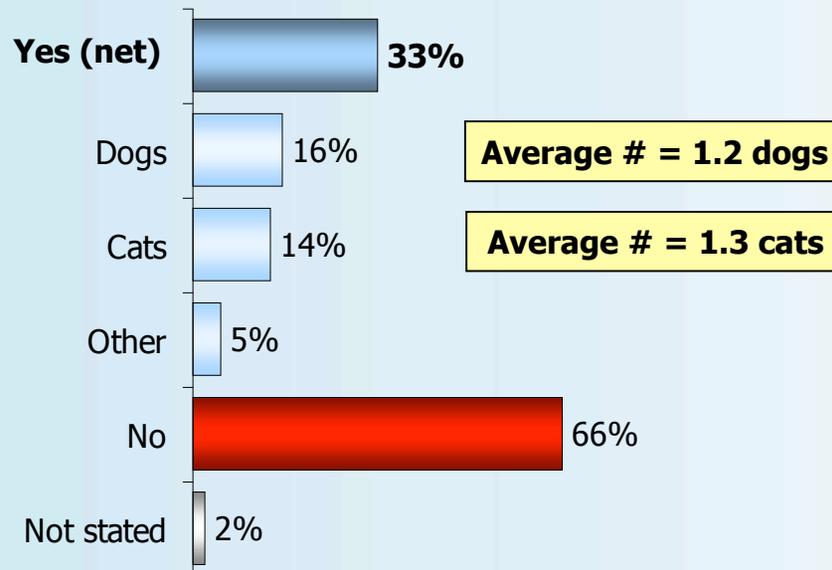


- In terms of listening to radio the majority, about three-quarters, listen to the mainstream FM stations.
- Just less than half listen to AM radio, including those stations more commonly found to be 'talk radio' stations.

Base: Total (n=318)

Q.B11b) What radio stations do you listen to on a regular basis?

➤ Incidence of Pet Ownership

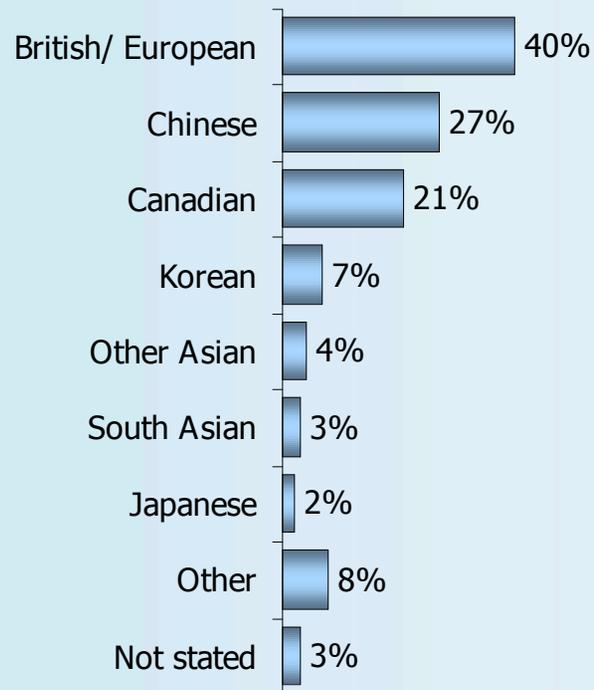


Base: Total (n=318)

Q.C8) Do you have pets?

- One-third of households currently keep a pet of some kind, split quite evenly between dogs and cats.

➤ Ethnic Background

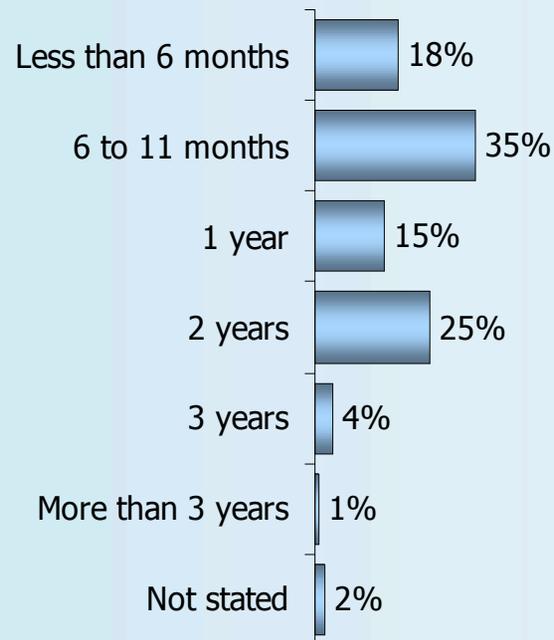


Base: Total (n=318)

Q.C9) While we all live in Canada, our ancestors come from many different ethnic backgrounds. What is the main ethnic background of your ancestors?

- Though quite diverse overall, the most common ethnic background of residents is British or European, with an additional 1-in-5 who describe themselves as Canadian.
- Approximately one-quarter are of Chinese origin, with the remainder mostly made up of other south or south east Asian origins.

➤ Years Lived at UniverCity



- Currently just more than half of all residents have lived in the UniverCity community for less than a year, with just less than half who have been there a year or more.

Base: Total (n=318)

Q.C10) How long have you lived at UniverCity?

➤ Distribution of Surveys by Development

Distribution of Interviews	
	<u>Total</u> (318) %
<i>Development</i>	
Aurora	11
Harmony at the Highlands	20
Millennium	11
Novo	14
Novo 2	16
Serenity	22
Other	5

Questionnaire



MUSTEL GROUP
MARKET RESEARCH