December 2014

UniverCity Resident Survey

UniverCity
ON BURNABY MOUNTAIN

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Executive Overview

The following are highlights from the UniverCity Resident Survey 2014, conducted on behalf of the SFU 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 an online survey was conducted with invitations mailed to all households on a postcard. The survey was first designed in 2007 then updated and repeated in 2010 and 2012, with the survey completed on paper by mail on the first two occasions and online in 2012 and 2014.

Influences and Awareness and of Sustainability Features

- The strongest influences or reasons for choosing UniverCity continue to include the natural setting, affordability of the development, proximity or access to amenities, and recreational opportunities.
- Other influencing factors of note in 2014 include proximity to work, sustainability features of the development, and the architectural design of the buildings.
- Consistent with 2007, 2010, and 2012 the majority of residents previously resided in other parts of Burnaby (30%), Vancouver (25%) or the Tri Cities area (8%), with most that considered one of these three areas prior to moving to UniverCity.

Executive Overview

- When prompted with various sustainability features found within the community more than eight-in-ten residents are aware of at least one, with half or more aware of most features.
- Consistent with 2007, 2010, and 2012 almost all residents continue to say they would recommend UniverCity to friends and family (92%).

Work and Transportation

- As found in the three previous surveys, the majority of residents is employed for pay (86%), 7% work from home,73% outside the home and 6% say they do both. Of those who work outside the home, most travel the short distance to SFU (30%), other parts of Burnaby (16%) or to Vancouver (35%).
- While the most common mode of transportation for commuters continues to be by private vehicle, the proportion of residents that drives has continued a downward trend from 60% in 2007 to fewer than four-in-ten this year (39%).
- Use of public transit is consistent with that reported in 2012, currently used by 28%; the proportion of those who walk to work is consistent with a year ago and trending upwards since 2007, now also at 28%.

Executive Overview

- While approximately nine-in-ten residents have at one time or another used public transit, just over one-third uses it at least once a week or more, however the majority of those that use it do so just a few times a month or less often (51%).
- Fewer than one-in-five residents has at some time made use of the car co-op service; of those that have, most use it just a few times a year or less often.

Demographics

- The majority of households at UniverCity have two adults (65%) or a single adult (19%). While half of all homes are without children, the proportion with children has increased steadily from 20% in 2007 to 50% currently.
- More than three-quarters of residents at UniverCity currently own their property (78%), and for more than half of them it was their first purchase (54%).
- While in 2012 the majority of homeowners at UniverCity had downsized, this year is more divided between those that have downsized (42%), those that have bought a larger property (37%), and the remaining 21% that moved to a similar sized unit.
- While just over half of all residents are currently satisfied with the size of their home, more than one-in-ten is considering a move outside of the community (13%), and 16% is considering a move within UniverCity.

Executive Overview

- On average, the ideal home size would be 1,633 square feet or 3 bedrooms, with 62% that report being prepared to pay $500,000 or more for their desired home.
- Half of all households are currently dissatisfied with the amount of storage space they have and would like more.
- Requirements among those interested in more space vary, with one quarter interested in a smaller space (5x5), approximately four-in-ten interested in a mid-size space (5x10), and one-in-five interested in a larger space (6x16). However, in each case only a minority is willing to pay the average monthly rental cost of such storage.
- Consistent with the proportion reported in 2012, more than four-in-ten households have someone associated with Simon Fraser University, including faculty, students or staff.
- The majority of households have just one car (58%) and one parking space (76%). Amongst those with an additional vehicle most use street parking (62%) or rent additional spaces (46%).

Methodology

- Following an initial survey in 2007 and follow-up surveys in 2010 and 2012, the SFU Community Trust commissioned market research in 2014 to track the demographic make-up of UniverCity's resident population and further gather feedback regarding their attitudes, opinions, expectations and needs of their community.
- For the purposes of tracking some of the questions used in the self-completion mail-back survey, designed in 2007 in conjunction with the Trust, and used again in 2010 and 2012, were retained for the 2014 survey. As in 2012 the survey in 2012 was administered using an online methodology.
- A postcard invitation was mailed out November 14th 2014 to all UniverCity residences from lists made available by the Trust. Included on the postcard was a survey link that respondents could use to access the survey. They were asked to respond by December 7th. In addition to the postcard invitation emails were sent out by the Trust to households for whom they held email addresses, and finally phone calls were made to households for whom a publicly listed telephone number was available.
- As an incentive, all those completing a survey were offered the opportunity to enter a prize draw with the chance to win a $250 gift certificate for Nesters market.

Methodology

- In total 208 residents completed a survey from a total of 1,625 households that were invited. The margin of error on this finite sample size is +/- 6% at the 95% confidence level.

The following notations have been used in this report to signify changes over time:

▲ Significantly higher	▲ Directionally higher
▼ Significantly lower	▼ Directionally lower

Significance is tested at the 95% confidence level. Directionally higher/lower is not yet statistically significant at the 95% confidence level, but suggests a possible emerging trend of interest.

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Key Findings

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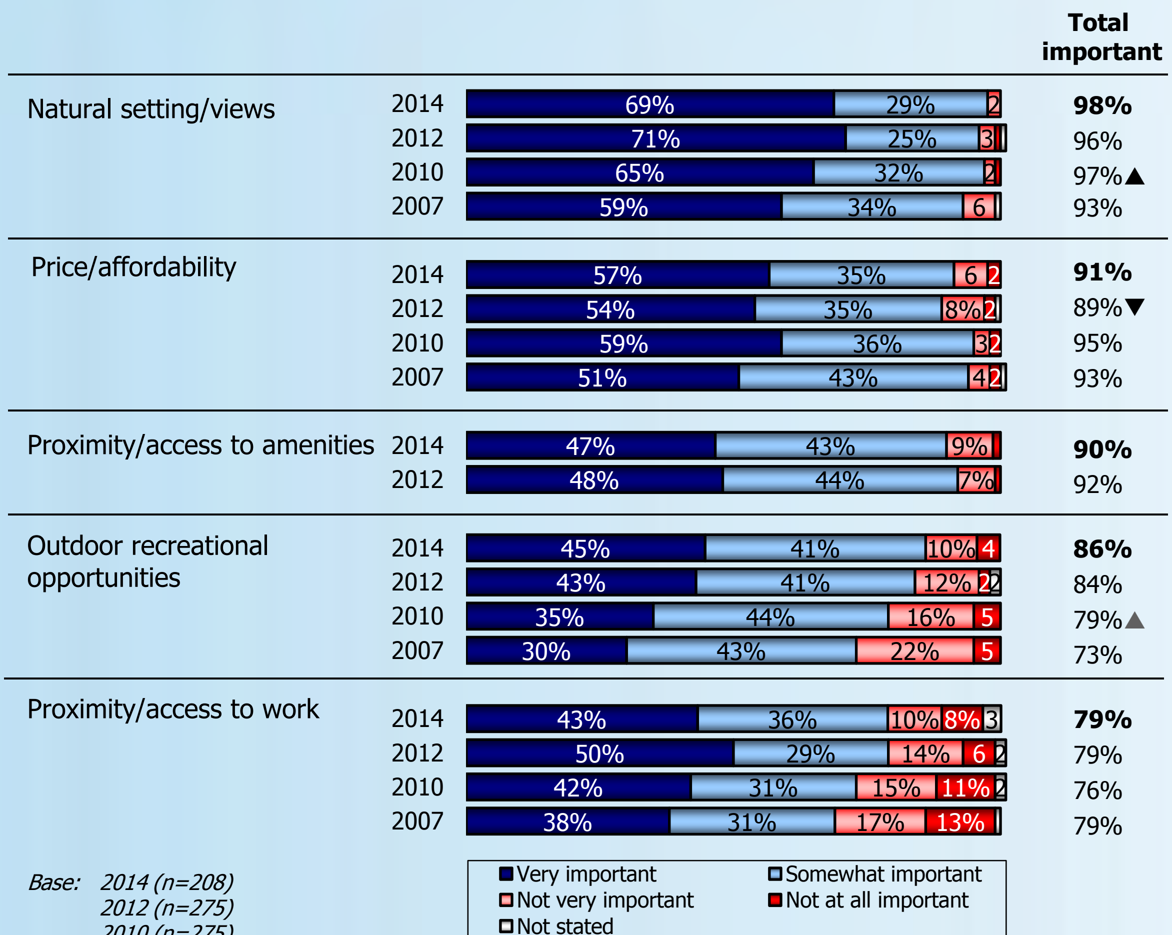
Factors Influencing Decision to Live at UniverCity



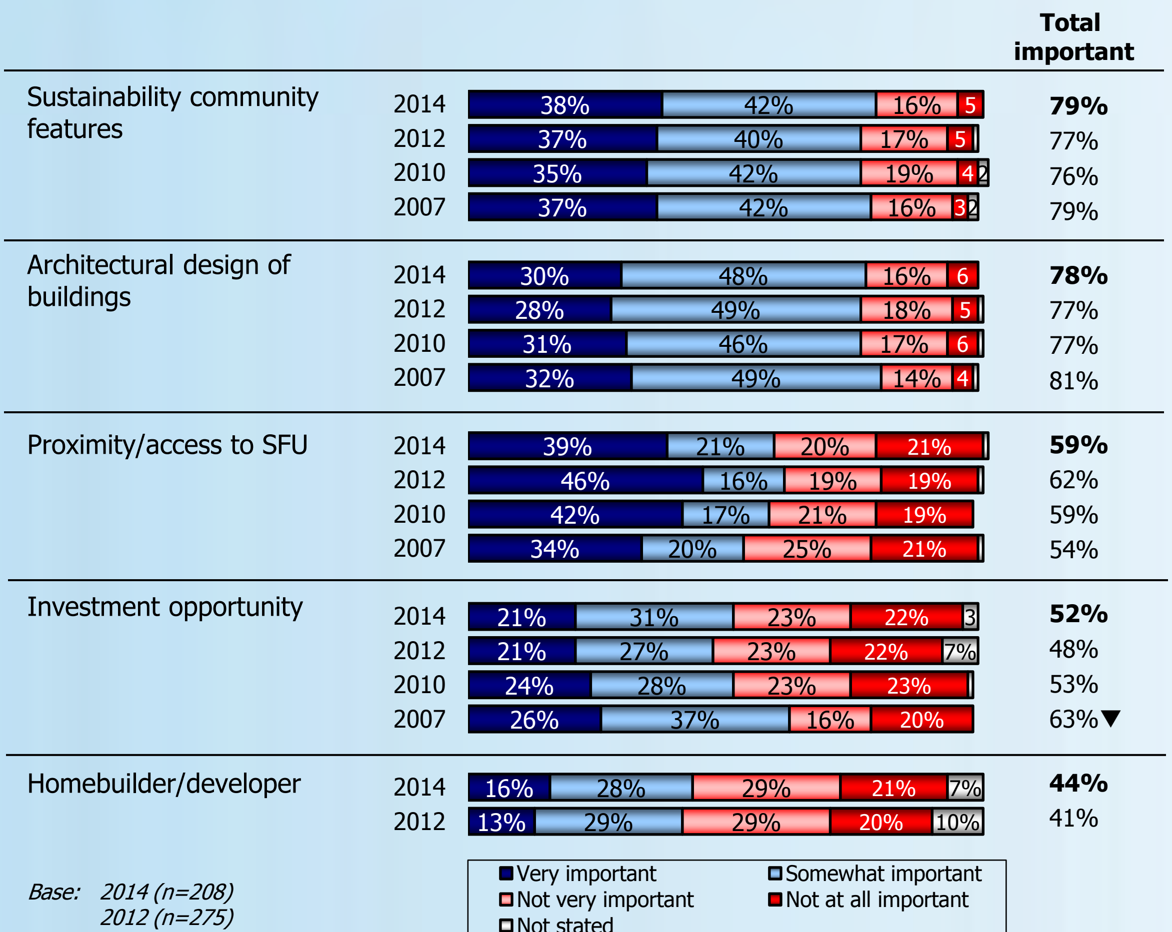
Base: 2014 (n=208)
2012 (n=275)
2010 (n=275)
2007 (n=318)

- When prompted, the strongest influences when choosing to live at UniverCity continue to include the natural setting, affordability of the development, proximity or access to amenities, and recreational opportunities.
- In 2014, proximity to work, sustainability features and architectural design remain important for more than three-quarters of residents.

continued

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

Factors Influencing Decision to Live at UniverCity (cont'd)



Base: 2014 (n=208)
2012 (n=275)
2010 (n=275)
2007 (n=318)

- At approximately six-in-ten, the proportion that rates proximity to SFU as important is consistent with previous years.
- The importance of the community as an investment opportunity appears to stabilize this year following a downward trend since 2007.
- As found in previous years the homebuilder or developer is rated lowest in terms of importance.

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

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Life at UniverCity: Likes

Likes:	2007 (318) %	2010 (275) %	2012 (273) %	2014 (208) %
Natural setting/fresh air	34	36	38	38
Location (general)	27	22	29▲	26
Sense of community/good for families/ neighbours/friendly atmosphere	10	25▲	29	39▲
Proximity to SFU	18	18	24▲	15▼
Quiet/tranquil	33	29	23	20
Access to amenities/Nesters Market	5	16▲	23▲	24
Unique development/sustainable community/ lifestyle	12	8	23▲	12▼
Outdoor recreation opportunities	13	14	18	15
Views/it's beautiful	19	16	16	14
Close to Elementary School/Daycare	-	2	14▲	14
It's safe	4	6	12▲	14
Access to transit/transit pass	5	9▲	7	6
Affordable/investment opportunity	1	1	4▲	3
New development/liked condo layout	9	6	4	3
It's clean	4	6	3▼	3
Miscellaneous	1	2	-	1
Not stated	6	3	5	12▲

Q.A7) What in particular do you like about living at UniverCity?

- The location and natural setting of the UniverCity development continue to be the most common appeal of life there.
- Encouragingly, those mentioning the sense of community continues to trend upward, increasing significantly in 2014; while mentions of access to amenities is unchanged this year, those mentioning the uniqueness of the sustainable development decreases to levels more similar to 2007 and 2010.
- Also seeing a decrease this year is the proportion mentioning the proximity to SFU.
- Mentions of the elementary school and daycare are unchanged this year as is the sense of safety in the community.
- Also seeing no change this year is the proportion of those mentioning affordability as an attribute of the community.

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Life at UniverCity: Dislikes

Dislikes:	2007 (318) %	2010 (275) %	2012 (273) %	2014 (208) %
Lack of retail services/no liquor store	26	9▼	19▲	16
Very secluded/isolated	9	10	13	8▼
Problems with other residents/rude/don't pick up after their dogs	5	10▲	13	13
No sense of community	5	4	12▲	6▼
Weather (cloudy/foggy/snow)	5	2▼	11▲	5▼
Not a true sustainable community/development not as promised	-	2	11▲	9
Problems with students/turning into university housing	3	5	10▲	9
Community dependent upon vehicles/not enough transit options/ too far to walk for transit	10	6▼	10▲	7
Complaints about Polygon/SFU Trust/strata	6	4	10▲	7
Not enough green space/poorly landscaped	3	8▲	9	4▼
Too much traffic/dangerous drivers/speeding	4	5	8	7
Lack of larger home sizes (i.e. above 1300 sq. ft.)/ lack of storage/need more space for family	-	5	8	6
On-going construction causes disruptions/inconvenience/irritation	7	3▼	7▲	10
Parking problems/cars get towed/not enough street parking	14	10	7	6
Road concerns (too narrow, need lighting, etc.)	4	4	7	3▼
Too noisy	2	6▲	7	5

continued...

- This year sees no significant change in dissatisfaction with retail services, and the lack of a liquor store, mentioned by fewer than one-in-five in 2014.
- Unchanged since 2012, just over one-in-ten mention issues they have had with other residents, while about one-in-ten also raise concerns about increased student rentals and disappointment with sustainability features.
- Decreasing directionally this year, fewer than one-in-ten residents highlight the secluded nature of the community as a dislike, while down significantly are those mentioning a lack of a sense of community, concerns about a lack of green space and concerns about the local roads.

Life at UniverCity: Dislikes (cont'd)

Dislikes (cont'd):	2007 (318) %	2010 (275) %	2012 (273) %	2014 (208) %
Poor garbage collection/too much litter	2	5▲	7	10
Lack of/not enough/entertainment/restaurants/pubs	11	4▼	6	8
Removal of Transit Pass	-	-	5	2▼
Need medical clinic/doctor's office	-	-	4	4
Cost of living (i.e. retail, parking)	-	-	4	1▼
Growing population/too crowded	-	-	4	3
Increased crime/safety concerns/need Police Dept.	5	2▼	3	5
Lack of recreational opportunities/trails/community centre/ swimming pool	4	2	3	5
Poor quality construction	2	1	2	1
Poor cell phone reception	1	<1	-	-
Local retail hours are inconvenient	5	3	-	-
Lack of off-leash dog area/park	-	5	-	-
Poor investment/too expensive	-	5	-	-
Inefficient snow removal	8	6	-	-
Lack of elementary schools	8	-	-	-
Real estate prices/poor resale value	-	-	-	3
Miscellaneous	3	4	5	4
Not stated	13	18▲	14	22▲

Q.A8) And what in particular, if anything, do you dislike about living at UniverCity?

- Comments regarding removal of the transit pass and the increasing cost of living in the community have decreased since 2012, while other comments remain unchanged.

Area Lived in Prior to Moving to UniverCity

	Previously Lived			
	2007 (318) %	2010 (275) %	2012 (273) %	2014 (208) %
Burnaby	29	32	30	30
Vancouver	26	24	24	25
Tri Cities (Coquitlam, Port Coquitlam, Port Moody)	12	12	13	8▼
North Shore	6	6	6	3
Other Metro Vancouver	12	12	8	8
Other BC	3	1	5▲	4
Other Canada	5	5	5	8
USA	4	4	6	4
Other	<1	4	4	2
Not stated	2	-	-	8

Q.A5i) Where did you live before moving to UniverCity?

- Consistent with all previous years, the majority of residents in 2014 previously lived in either Burnaby, Vancouver or the Tri-Cities prior to moving to UniverCity.
- An additional 11% moved from other parts of Metro Vancouver, while the proportion coming from other parts of B.C. is unchanged since 2012, currently 4%.

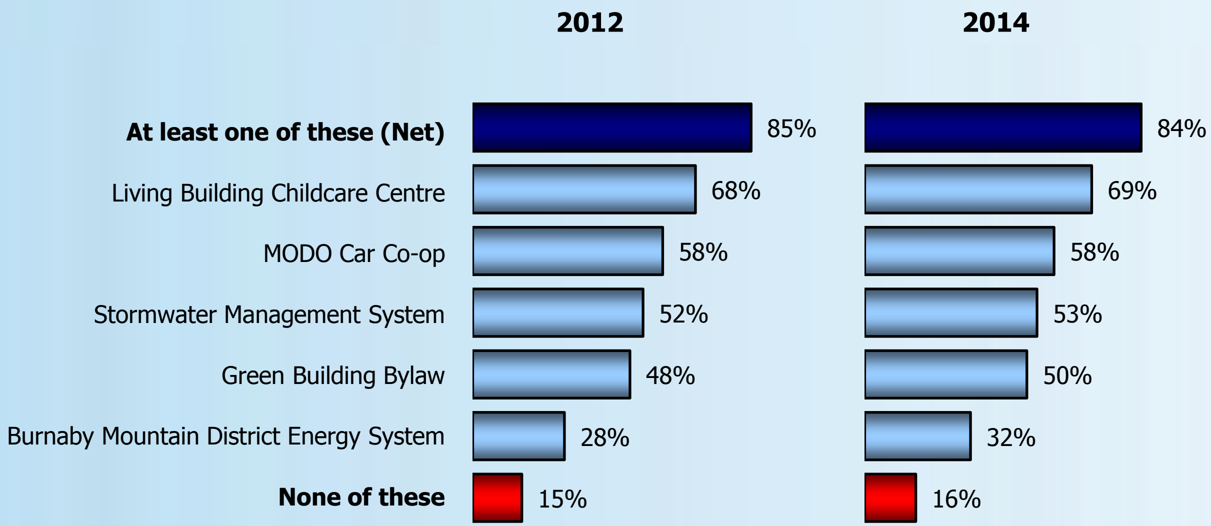
Areas Considered Prior to Moving to UniverCity

	Previously Considered		
	2010 (275) %	2012 (273) %	2014 (208) %
Burnaby	57	58	59
Vancouver	37	41	38
Tri Cities (Coquitlam, Port Coquitlam, Port Moody)	19	36▲	30
North Shore	16	18	15
New Westminster	9	18▲	18
Richmond	2	2	3
Other Metro Vancouver	3	3	3
Other BC	<1	<1	1
Other Canada	<1	-	1
USA	<1	-	-
Other	<1	-	-
Not stated	-	6	11

Q.A5ii) And where did you consider moving to before moving to UniverCity?

- Also consistent with the measures taken in 2010 and 2012, the large majority of residents considered living in either Burnaby or Vancouver before settling on UniverCity.
- This year almost one-third had considered the Tri-Cities, with fewer than one-in-five considering either the North Shore or New Westminster.

Awareness of Sustainability Features or Initiatives

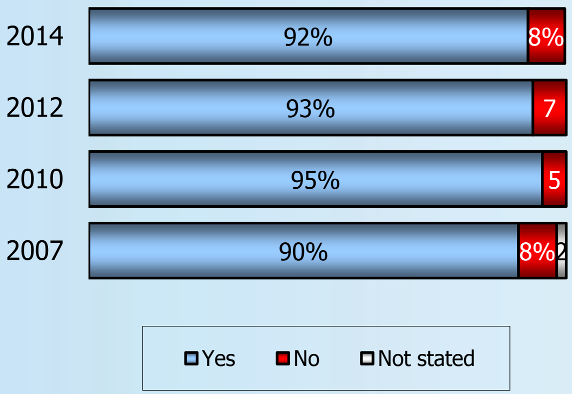


Base: 2014 (n=192)
2012 (n=273)

Q.A10) Before today which of the following sustainability features or initiatives at UniverCity were you aware of?

- When prompted with various sustainability features found within the community, more than eight-in-ten residents are aware of at least one feature, with about half or more aware of most features.
- The most commonly known feature is the Living Building Childcare Centre, followed by the MODO Car Co-op.
- About half of all residents is aware of the Stormwater Management System, with a similar proportion aware of the Green Building Bylaw.
- Least commonly known remains the Burnaby Mountain District Energy System.

Would Recommend Life at UniverCity



Base: 2014 (n=191)
2012 (n=273)
2010 (n=275)
2007 (n=318)

Q.A6a) Would you recommend UniverCity to friends or family?

- Consistent with previous measures, the large majority of residents continue to say they would recommend UniverCity to friends and family.

Reasons to Recommend Life at UniverCity

	Total would recommend UniverCity to others
	2014 (175) #
Sense of community/ good for families/ friendly atmosphere	42
Natural setting/ fresh air	20
It's safe	16
Quiet/ tranquil	15
Affordable/ investment opportunity	12
Good location/ close to work/ other municipalities	11
Views/ it's beautiful	11
Enjoy living here	11
Unique development/ sustainable community/ lifestyle	11
Access to amenities/ Nesters Market	10
Proximity to SFU	7
Close to elementary school/ daycare	7
Outdoor recreation opportunities	6
Access to transit	5
It's clean	1
No reason provided	15

Q.A12) Why is that?

- In 2014 survey participants that stated they would recommend UniverCity to others were further asked their reasons why.
- Among the large majority that would recommend the community to others the most common reason stated is the sense of community felt there, that it is friendly and good for families
- Other positive aspects that are highlighted include the natural, quiet setting, the views and beautiful surroundings, as well as a sense of safety.
- For others the appeal lies in the location, the access to work and other parts of the Lower Mainland in general. It is seen as a unique, sustainable development that is also a good investment opportunity.
- Also appreciated are the amenities and services such as Nesters Market, daycare and elementary school.

Reasons NOT to Recommend Life at UniverCity

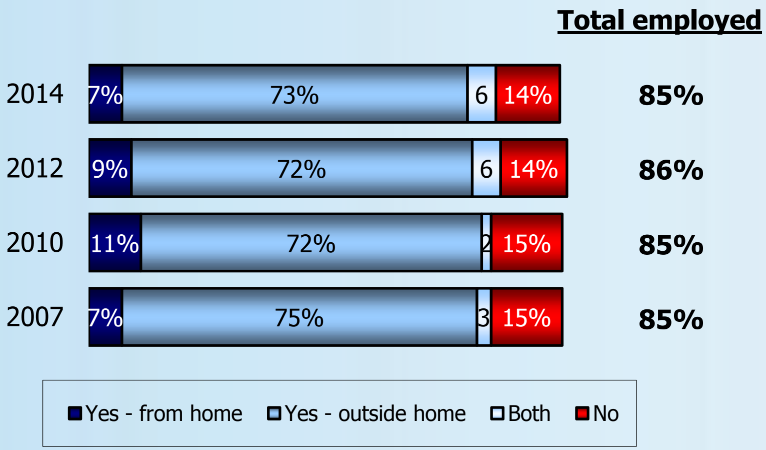
	Total would not recommend UniverCity to others	
	2012 (19) #	2014 (16) #
Very secluded/ isolated/ long commute off the mountain	5	6
Lack of amenities/ services	4	5
No sense of community	4	1
Property has not held its value/ no appreciation	3	1
Not a true sustainable community/ development not as promised	3	2
Problems with other residents	2	4
Too much traffic/ dangerous drivers/ speeding	1	-
Too crowded/over-developed/units are too close together	1	3
Lack of larger home sizes/need more space for family	1	2
Miscellaneous	-	1
No reason provided	5	3

Q.A12) Why not?

- Among the few that would not recommend UniverCity no single reason stands out, with comments varying between being "too secluded" to being "too crowded".
- Other things that put off the residents include a lack of amenities, disappointment with sustainability features, problems encountered with other residents, and a lack of larger sized units.

Section B

Employment Status



Base: 2014 (n=191)
2012 (n=273)
2010 (n=275)
2007 (n=318)

Q.B6) Are you employed or working for pay?

- Proportionally unchanged compared with 2007, 2010 and 2012, the majority of residents are currently employed for pay.
- Most work outside the home, with 7% that works from home, and 6% that do both.

Work Location

	Total employed outside the home						
	Respondent				Other Adults*		
	2007 (270) %	2010 (204) %	2012 (213) %	2014 (150) %	2010 (131) %	2012 (177) %	2014 (125) %
Burnaby/SFU	42	45	36▼	46▲	51	46	43
SFU	n/a	n/a	n/a	30	n/a	n/a	22
Burnaby	n/a	n/a	n/a	16	n/a	n/a	22
Vancouver	37	39	30▼	35	31	30	34
Tri Cities	7	10	8	5	4	7	2▼
North Shore	7	6	5	-	1	7▲	2▼
Richmond	6	6	6	3	3	3	6
New Westminster	3	5	5	2	2	2	2
Langley/Surrey	4	5	5	3	2	5	6
Fraser Valley	1	1	1	1	-	-	1
Other	4	11	10	5▼	6	-	12
Not stated	-	-	-	-	-	-	2

Q.B7) Where do you work?

Q.B7) If other adults or grown children in your household work outside the home, where do they work?

** Not asked in 2007*

- Amongst those who commute to their place of work the majority, more than three-quarters, travels to either Burnaby or Vancouver.
- In 2014 survey participants were asked to differentiate between those working at SFU and those working in other parts of Burnaby. Among respondents the majority travel the short distance to SFU, while other adults divide evenly between the two.
- The proportion of those commuting to other parts of the Lower Mainland shows some directional decrease over time since 2007.
- Among other adults in the household that commute, proportions generally reflect those of the respondents themselves, with an increase this year of those commuting further afield.

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Mode of Transportation to Work

	Total employed outside the home						
	Respondent				Other Adults*		
	2007 (270) %	2010 (204) %	2012 (213) %	2014 (150) %	2010 (131) %	2012 (177) %	2014 (125) %
Personal vehicle	60	51▼	41▼	39	53	46	52
Transit	34	36	25▼	28	39	27	23
Walk	16	22	27	28	13	25	19
Car pool/car share vehicle	4	3	3	3	3	7	7
Bike	3	5	1	1	3	-	2
Other	2	-	2	1	2	3	2
Not stated	3	2	-	-	4	-	-

Q.B8) What is your usual mode of transportation to work?

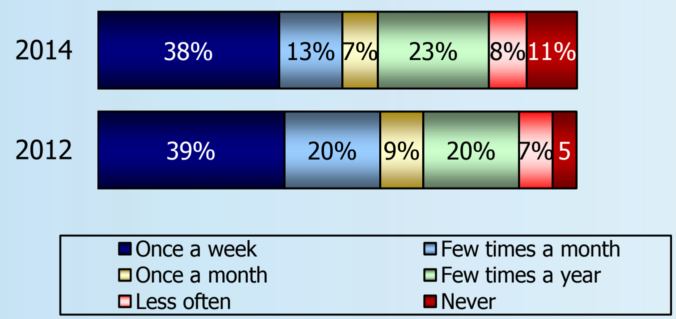
Q.B5) What is their usual mode of transportation to work?

** Not asked in 2007*

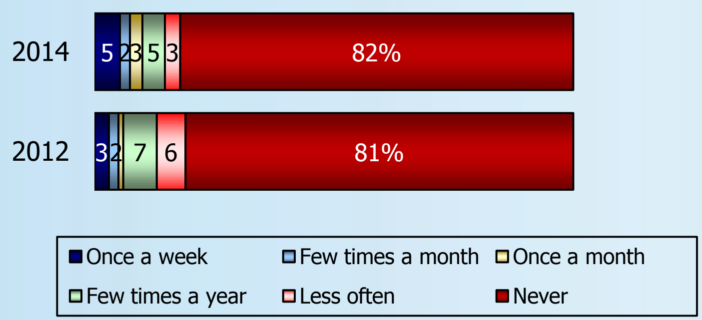
- The most common mode of transportation for commuters continues to be by private vehicle with the proportion of residents that drives consistent with the level reported in 2012.
- Also consistent with 2012 is reported use of public transit, currently at 28%, as well as the proportion of those who walk to work, also 28%.

Use of Transportation Alternatives

Public Transportation



Car Co-op / Car Share



Base: 2014 (n=190)
2012 (n=273)

Q.B9) How often if at all do you personally use:

- As in 2012 the large majority of participants have at one time or another used public transit, with just over one-third uses it at least once a week or more.
- However, the majority of those that use it do so a few times a month or less often (51%).
- Consistent with 2012, one-in-five residents in 2014 has at one time or another made use of the car co-op service; however users in 2014 make use of it more frequently than those in the past, with the majority using it once a month or more.

Section C

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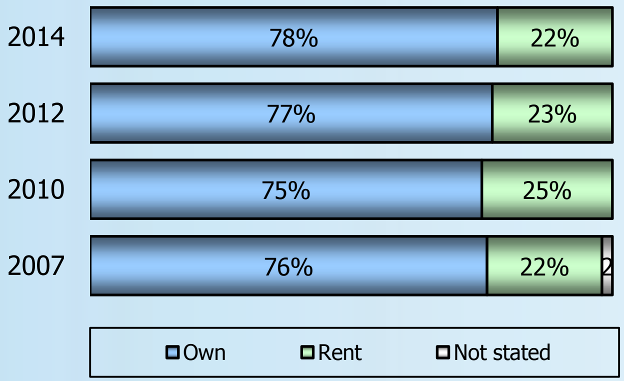
Household Composition

	2007 (318) %	2010 (275) %	2012 (273) %	2014 (208) %
Total Adults:				
1	25	25	22	19
2	64	68	68	65
3	8	6	8	6
4	3	<1	3▲	1
5	<1	-	1	1
Not stated	-	-	-	10
MEAN	1.9	1.8	2.0	1.9
Total Children:				
0	79	69▼	59▼	50▼
1	14	19	23	14
2	6	10▲	18▲	26▲
3+	-	1	1	1
Not stated	1	2	-	10
MEAN	0.3	0.4	0.6	0.8
Average Household Size	2.2	2.2	2.6	2.7

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

- Households at UniverCity are most likely to have two adults (making up two-thirds of homes) or a single adult (almost one-in-five).
- While half of all homes are without children, the proportion with children has increased steadily from 20% in 2007 to 50% currently.
- Those with children tend to be smaller family units with just one or two children.
- The average household size is now approximately 2.7 people.

Current Home Tenure

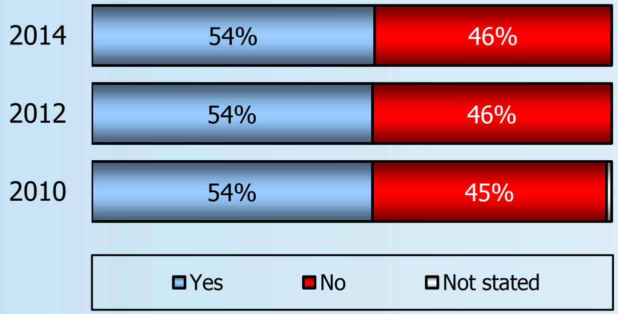


Base: 2014 (n=189)
2012 (n=273)
2010 (n=275)
2007 (n=318)

Q.C4a) Do you own or rent your suite?

- Consistent with previous years, approximately three-quarters of UniverCity residents own the property they currently occupy.

First Time Home Purchase

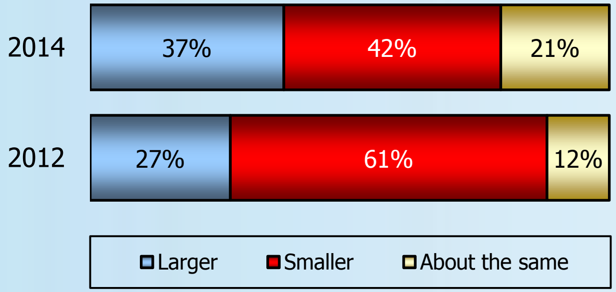


Base: 2014 Homeowners (n=147)
2012 Homeowners (n=209)
2010 Homeowners (n=205)

Q.C4b) Is this the first home you have purchased?

- Unchanged since 2010, for more than half of UniverCity residents that own their property this is the first property they have purchased.

Size of Residence Compared with Previous Home

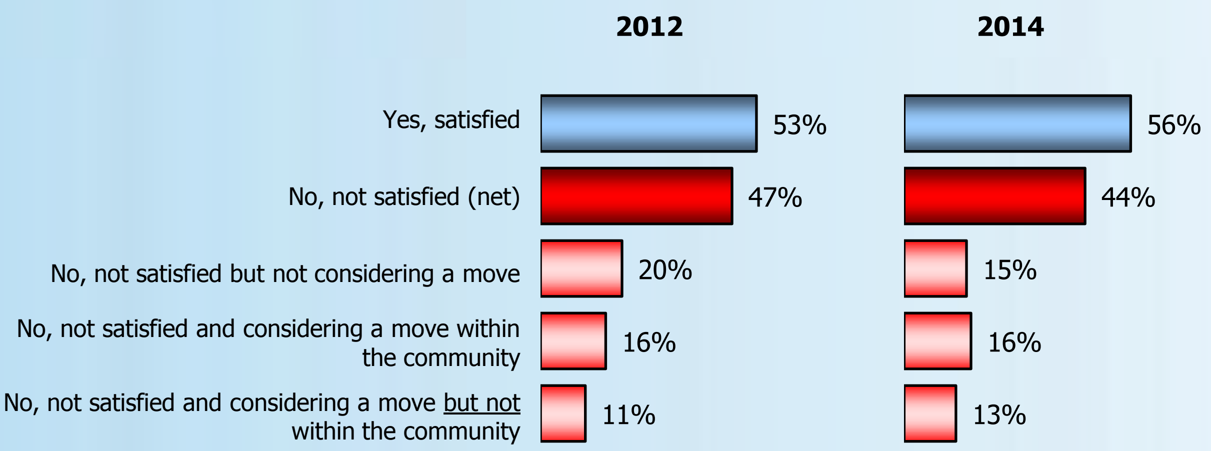


Base: 2014 Total have owned before (n=67)
2012 Total have owned before (n=97)

Q.C4c) Is your current home smaller, larger or about the same size as your previous home?

- Among current homeowners more than one-third have scaled up from their previous home, compared with 42% that have scaled down and 21% that moved from a similar sized property.

Satisfaction with Size of Current Suite



Base: 2014 (n=189)
2012 (n=273)

Q.C5a) Are you satisfied with the size of your current residence?

- More than half of all residents are currently satisfied with the size of their home, compared with 44% dissatisfied.
- About one-in-ten is considering a move outside of the community, with 16% considering a move within UniverCity, and 15% not satisfied but not yet considering a move.

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Reason for Moving Out of the Community

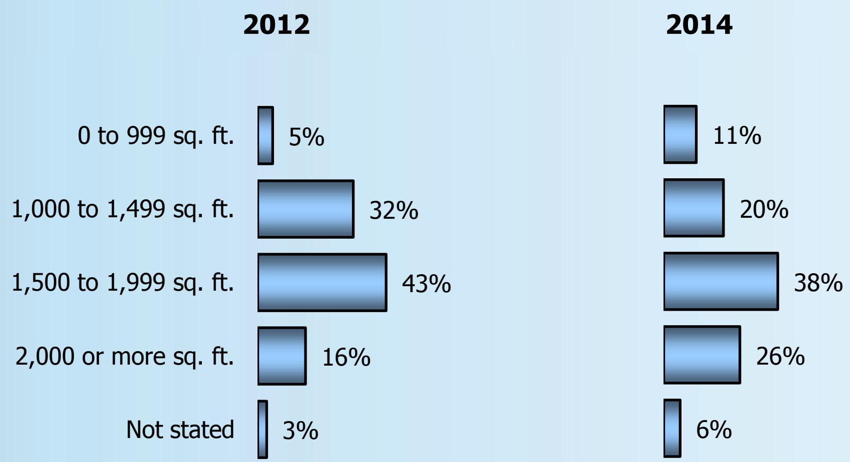
	Those considering a change but not within the community	
	2012 (31) %	2014 (24)* %
Lack of larger home sizes/need more space for family/own yard or garden	65	50
Very secluded/isolated/long commute off the mountain	23	29
Too crowded/ lack of privacy/units are too close together	16	17
Parking problems	13	8
Lack of amenities/services	10	13
Cost of living (i.e. retail, parking)	10	-
Removal of transit pass	7	-
Poor quality construction	3	-
Property has not held its value/no appreciation	-	8
No sense of community/problems with other residents/too many students	-	4
Not a true sustainable community/development not as promised	-	4
No reason provided	-	4

Q.C5b) Why is that?

** Interpret with caution: small base size*

- Among those considering a move outside of UniverCity the most common reason is the need for more space for a growing family, and the desire for personal outdoor space.
- This is followed by almost one-third that feels somewhat isolated in the mountaintop community, while 17% finds it too crowded, mostly due to the way the units are spaced.
- A little more than one-in-ten cites the lack of amenities as a reason for considering a move out of the community (13%).

Ideal Home Size – Square Footage



Average = 1,498 sq. ft.

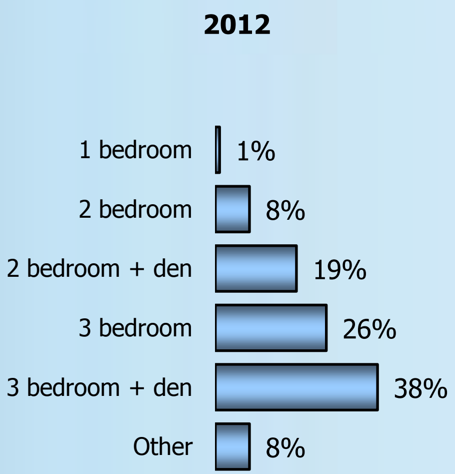
Average = 1,633 sq. ft.

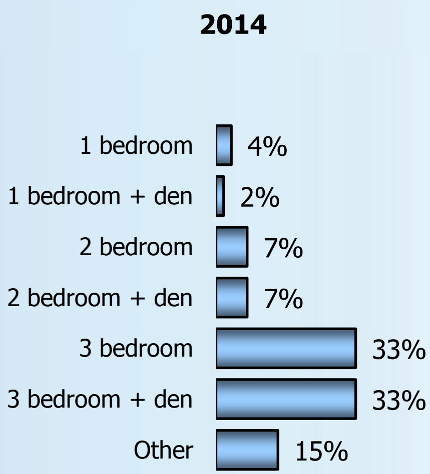
Base: 2014 Total those considering a change (n=55)
2012 Total those considering a change (n=74)

Q.C6a) What would be your ideal home size?
Square Footage

- Among those considering a change, either within or outside the community, the average ideal home size is 1,633 square feet.
- Approximately one-quarter are interested in a home 2,000 square feet or larger.

Ideal Home Size – Number of Bedrooms



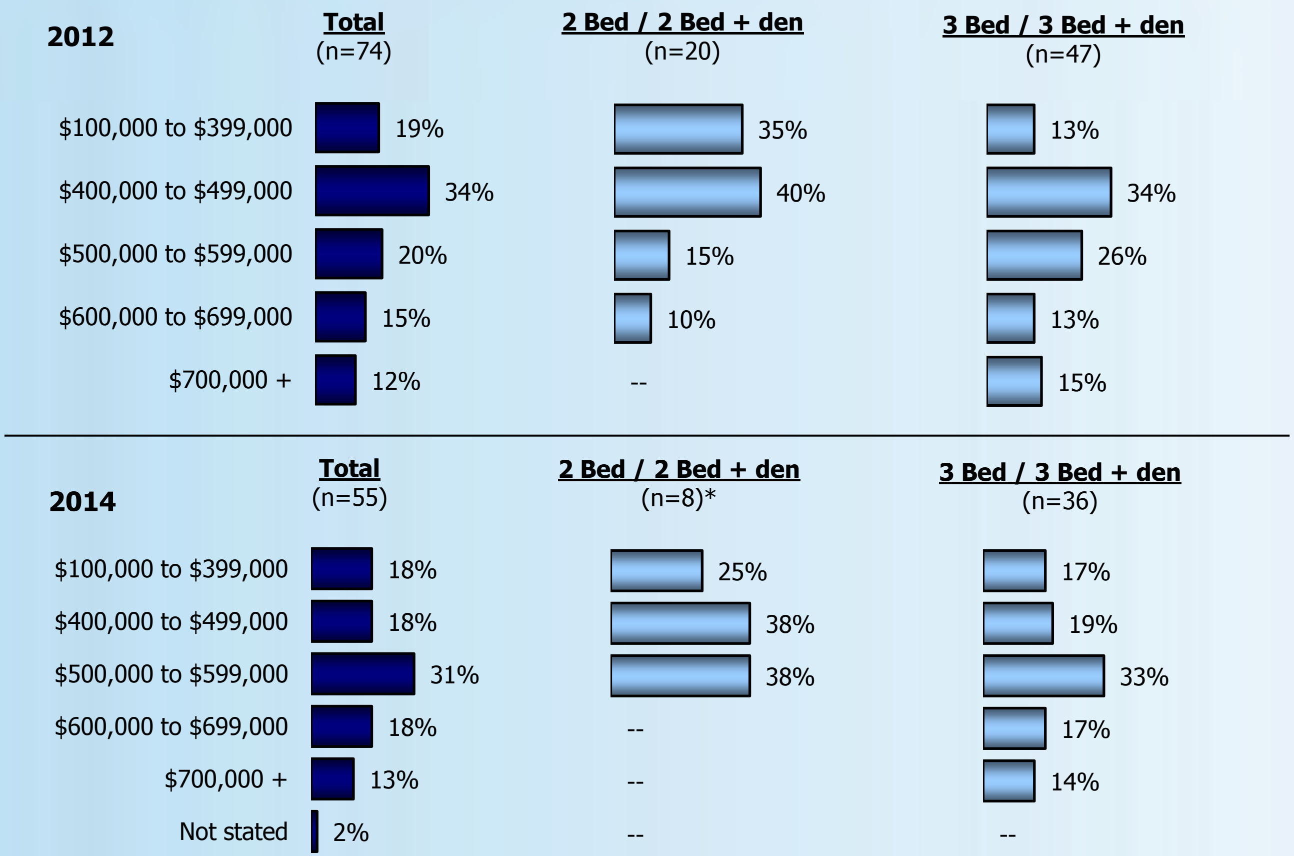


- And among those looking to move, the majority, about two-thirds would like at least three bedrooms (66%).

Base: 2014 Total those considering a change (n=55)
2012 Total those considering a change (n=74)

Q.C6b) What would be your ideal home size?
Number of Bedrooms

Price Range Willing to Pay



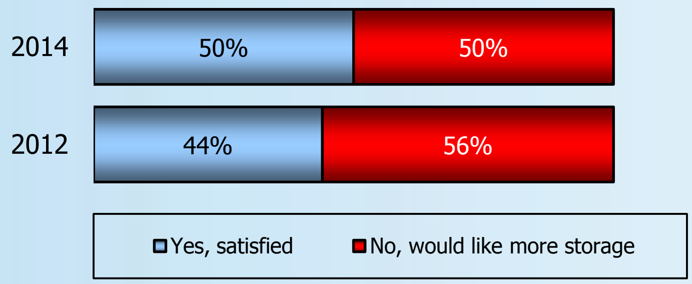
Base: 2014 Total those considering a change (n=55)
2012 Total those considering a change (n=74)

Q.C6c) And what price would you be willing to pay?

** Interpret with caution: small base size*

- In 2014, the majority of those looking to move to a larger residence would now be willing to pay $500,000 or more (62%).
- This is largely driven by those looking for a three bedroom residence or larger (64% willing to pay $500,000 or more).
- Among the few reportedly looking for a two bedroom residence just over one-third is prepared to pay $500,000 or more (38%).

Satisfaction with Current Storage Space

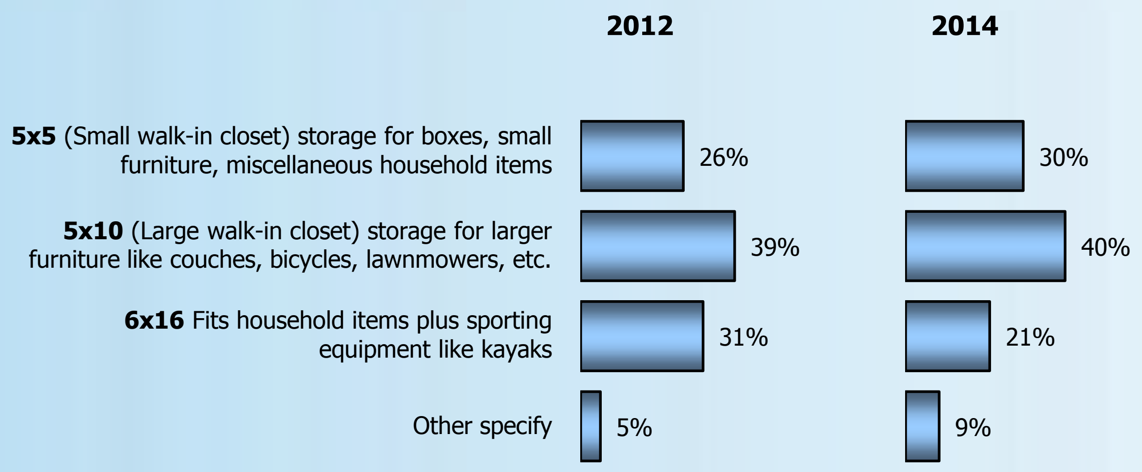


Base: 2014 (n=188)
2012 (n=273)

Q.9b) Are you satisfied with the amount of storage you currently have?

- Among those answering, half are currently satisfied with the amount of storage space they have, while half are not and would like more.

Current Storage Needs



Base: 2014 Total would like more storage (n=94)
2012 Total would like more storage (n=153)

Q.9b) Which of the following is closest to your estimated storage needs:

- Requirements among those interested in more space vary, with almost one-third interested in the small walk-in closet sized space (5x5), four-in-ten interested in the large walk-in closet sized space and approximately one-in-five interested in a larger space (6x16).

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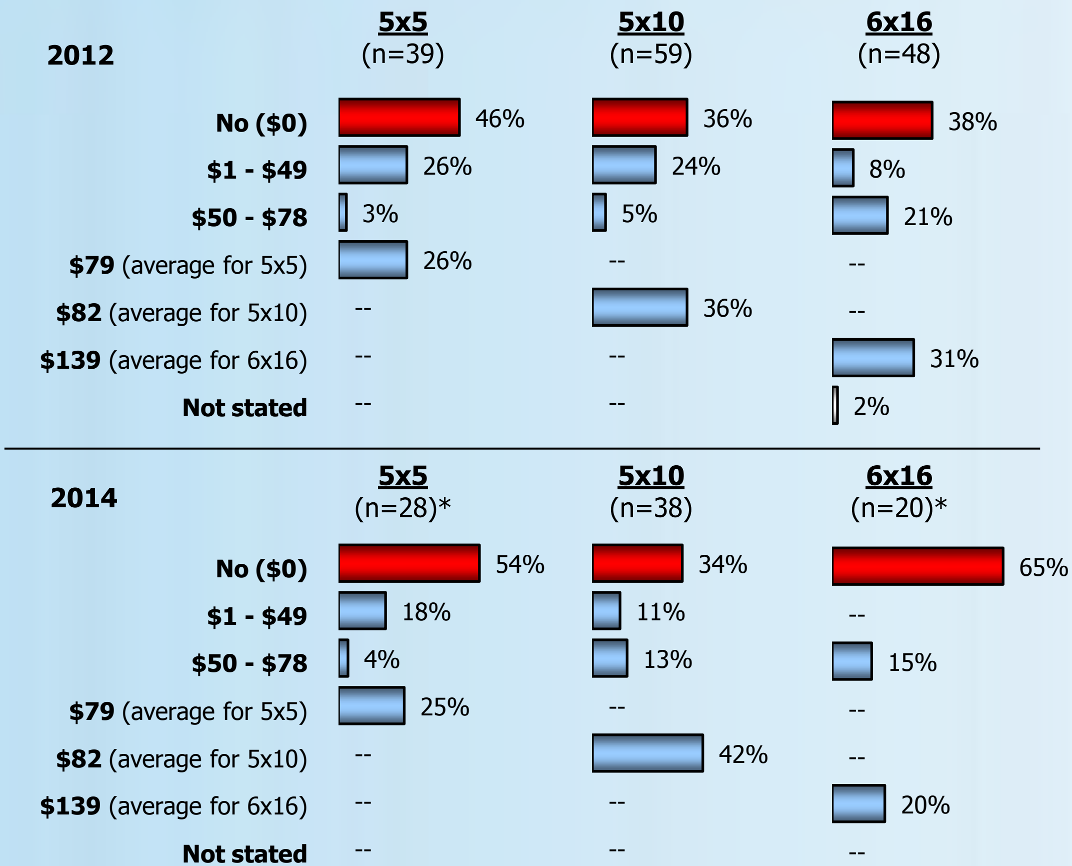
UniverCity
ON BURNABY MOUNTAIN

Willingness to Pay for Storage Needs



- Among those interested in the small space in 2014, more than half say they would not pay for it; one-in-five would pay up to $50, while one-quarter would pay the average of $79.
- Among those interested in the mid-size space about one-third would not pay for it; one-quarter would pay no more than $78, while 42% would pay the average of $82.
- And among those interested in the larger space two-thirds would not pay for it; 15% say they would pay no more that $78, while one-in-five would pay the average of $139.

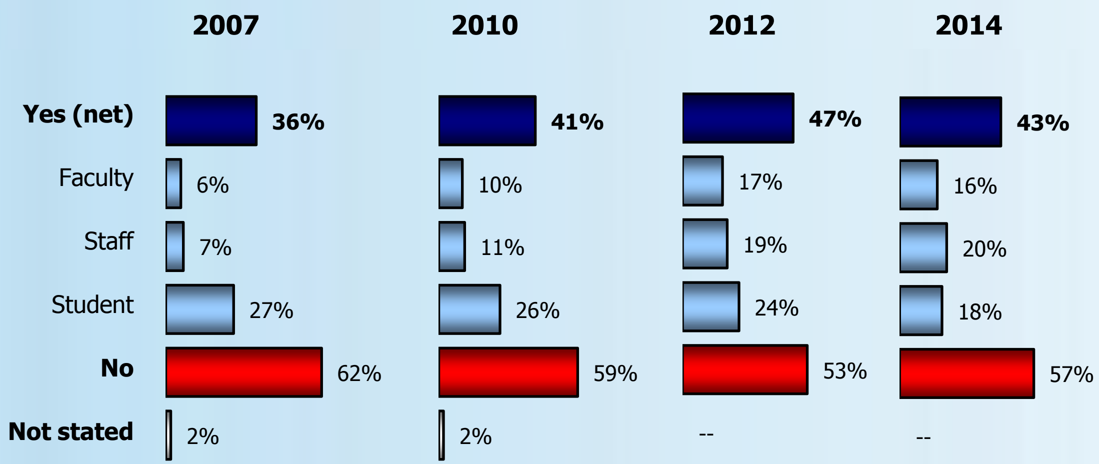
** Interpret with caution: small base sizes*

Base: 2014 Total would like more storage (n=94)
2012 Total would like more storage (n=153)

Q.9c) The typical rental storage cost in the region for that size of storage is [$79/$82/$139] per month. Would you be willing to pay that associated cost to get the storage you need?

Q.C7d) IF NO: What if anything would you be willing to pay for it?

Incidence of Household Associated with SFU



Base: 2014 (n=187)
2012 (n=273)
2010 (n=275)
2007 (n=318)

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

- In 2014 more than four-in-ten households report having someone associated with Simon Fraser University.
- This year representation is quite evenly distributed between faculty, staff and students and generally consistent with 2012.

Number of Cars and Parking Spaces

	2007 (318) %	2010 (275) %	2012 (273) %	2014 (208) %
Household cars:				
Zero cars	9	8	10	9
1 car	64	65	64	58
2 cars	24	24	25	23
3 cars	2	1	1	-
4 cars	1	-	-	-
5 cars	<1	-	<1	-
Not stated	-	-	-	11
Average	**1.2 cars**	**1.2 cars**	**1.2 cars**	**1.2 cars**
Those with cars	(288) %	(247) %	(246) %	(168) %
Parking spaces:				
Zero	<1	<1	-	-
1 space	76	79	78	76
2 spaces	23	20	22	23
3 spaces	1	<1	<1	1
5 spaces	-	<1	-	-

Q.C7a) How many cars does your household own?
Q.C7b) How many parking spaces do you have?

- Statistically unchanged compared all previous years, the majority of households in 2014 owns just one vehicle, with about one-quarter of households that has two.
- A total of 1-in-10 households does not own a private vehicle.
- Approximately three-quarters of all households report that they have one parking space, with one-quarter that has two or more spaces.

Parking Additional Cars

	Total households with more cars than parking spaces			
	2007 (50) %	2010 (38) %	2012 (43) %	2014 (26)* %
Street parking	38	45	70▲	62
SFU (resident parking program)	18	11	2	-
Rent additional spots(s)	16	18	35▲	46
Visitor parking	10	3	7	12
Other	8	-	7	-
Not stated	20	26	-	-

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

** Interpret with caution: small base size*

- Amongst those who have more vehicles than spaces, almost two-thirds use street parking.
- Almost half this year report renting additional spots, while the remainder use the visitor parking.
- Changes are not statistically significant at these sample sizes.

Languages Spoken at Home

	2007 (318) %	2010 (275) %
British/European	40	43
Canadian	21	24
Chinese	27	24
Korean	7	7
South Asian	3	5
Japanese	2	2
Other Asian	4	1
Other	8	5
Not stated	3	3

Q.C12) While we all live in Canada, our ancestors come from many different ethnic backgrounds. What is the main ethnic background of your ancestors?

	2012 (273) %	2014 (208) %
English	91	81
Chinese	13	11
Mandarin	11	9
Cantonese	7	7
French	7	3
Spanish	5	3
Korean	2	1
Punjabi	<1	1
Other	11	6
Not stated	-	11

Q.C10) Which language or languages are most commonly spoken in your household?

- In the surveys completed in 2007 and 2010 residents were asked of their ethnic backgrounds. In 2012 and 2014 the question was changed to enquire which were the main languages spoken at home.

- While the previous question identified a rich and diverse community in terms of ancestry, the new question provides insight into the dominant languages spoken within the community and provides some guidance in terms of the most effective languages used when communicating with the community

- Currently more than eight-in-ten households speak English, with about one-in-ten that speaks Chinese; French and Spanish are the next most common languages spoken.

- It should be noted however that the survey was provided in English and Chinese but no other languages.

Years Lived at UniverCity

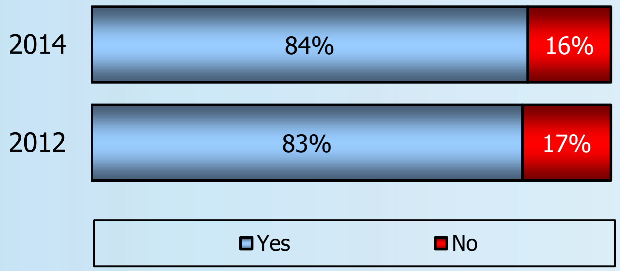
	2007 (318) %	2010 (275) %	2012 (273) %	2012 (208) %
Less than 6 months	18	10▼	6▼	12▲
6 to 11 months	35	14▼	3▼	3
1 year	15	10▼	5▼	6
2 years	25	18▼	13	8▼
3 years	4	14▲	16	8▼
*more than 3 years	1	33▲	58▲	47▼
4 years	n/a	n/a	11	9
5 years	n/a	n/a	15	13
6 years	n/a	n/a	15	7▼
7 years	n/a	n/a	14	4▼
8 years	n/a	n/a	3	14▲
Not stated	2	2	-	17

Q.C14) How long have you lived at UniverCity?

**Answer options in 2007 and 2010 only went up to "More than 3 years" and did not break out any further*

- In 2014 more than one-in-ten residents in the survey say they have lived in the UniverCity community for less than a year, compared with fewer than one-in-ten in 2012.
- Almost half of those households in the survey have lived in the community for four or more years, with more than one-third living there for five or more years (38%).

Future Plans



Base: Total 2014 (n=185)
Total 2012 (n=273)

Q.C12a) Are you planning to stay in the community for the foreseeable future?

- The large majority of residents is planning to stay in the community for the foreseeable future.

Reasons for Leaving the Community

	Total not planning to stay in the community	
	2012 (47) %	2014 (30) %
Student/ graduating/ short term resident	23	-
Community is too small/ isolated/ prefer central location	19	10
Lack of larger home sizes/ need more space for family	19	47
Too long of a commute	15	10
Moving for personal reasons (e.g. job, family)	11	27
Lack of services/ amenities	9	10
Cost of living (i.e. retail, parking)	9	3
Removal of transit pass	9	-
No sense of community/ problems with other residents	6	20
Community dependent upon vehicles/ not enough transit options	6	10
Not a true sustainable community/ development not as promised	4	10
Dislike leasehold properties	4	7
Disruption from on-going construction/ overdevelopment	4	13
Poor property value for money/ Not appreciated as much as other areas	4	-
Too much traffic/ dangerous drivers/ speeding	2	-
Parking problems/ cars towed/ lack of street parking	2	7
Miscellaneous	-	3
Not stated	9	7

Q.C12b) Why is that?

- Among those not planning to remain in the community almost half expresses a desire for a larger residence for growing families.
- Approximately one-quarter cites personal reasons for their intention to move, such as for a job or to be closer to family.
- For others the reasons are quite varied and include those who feel a lack of a sense of community, a feeling of isolation in the mountaintop community, and a lack of services.
- For some their commute is proving too much while others feel there are not enough transit options.
- For about one-in-ten the on-going construction and continued development has had an impact.

Distribution of Surveys by Development

Distribution of Interviews				
	2007 (318) %	2010 (275) %	2012 (273) %	2014 (208) %
Development				
Altaire Tower 1	-	3	3	4
Altaire Tower 2	-	6	3	2
Aurora	11	7	8	6
Centreblock	-	-	-	1
Cornerstone Building	-	4	3	1
Harmony	20	18	15	13
Highland House	-	-	-	1
Lift	-	-	-	6
Nest	-	-	2	4
Novo	14	10	10	5
Novo 2	16	11	8	10
One University Crescent	11	12	14	11
Origin	-	-	-	3
Serenity	22	18	20	19
The Hub	-	4	3	2
Verdant	-	10	12	12
Other	5	-	1	-

MUSTEL GROUP
MARKET RESEARCH

Questionnaire

Welcome to the UniverCity Resident Survey. The information from this survey will provide valuable direction for the planning of services and amenities, improving the quality of life for UniverCity residents. Please be assured that all responses are confidential and results will be reported in aggregate form only.

A. UniverCity Life

A1. How important were each of the following in your decision to live at UniverCity?

	Very Important	Somewhat Important	Not Very Important	Not At All Important	N/A or Don't know
a Price/ affordability	☐1	☐2	☐3	☐4	☐99
b Natural setting/views	☐1	☐2	☐3	☐4	☐99
c Proximity/access to amenities and services	☐1	☐2	☐3	☐4	☐99
d Architectural design of buildings	☐1	☐2	☐3	☐4	☐99
e Sustainability features	☐1	☐2	☐3	☐4	☐99
f Proximity/access to SFU	☐1	☐2	☐3	☐4	☐99
g Proximity/access to work	☐1	☐2	☐3	☐4	☐99
h. Investment opportunity	☐1	☐2	☐3	☐4	☐99
i. Outdoor recreational opportunities	☐1	☐2	☐3	☐4	☐99
j. Homebuilder/developer	☐1	☐2	☐3	☐4	☐99

A2. What in particular do you like about living at UniverCity?

A3. What in particular, if anything, do you dislike about living at UniverCity?

A4i. Where did you live before moving to UniverCity?

	Lived before UniverCity (check only one in this column) ⇓
a. Burnaby	☐1
b. Tri-Cities (Coquitlam/PoCo/Port Moody)	☐2
c. New Westminster	☐3
d. Vancouver	☐4
e. North Shore	☐5
f. Richmond	☐6
g. Langley/Surrey	☐7
h. Fraser Valley	☐8
i. Other Specify:______________________________	☐9

A4ii. And which other communities did you consider moving to before choosing UniverCity?

	Considered before UniverCity (check all that apply in this column) ⇓
a. Burnaby	☐1
b. Tri-Cities (Coquitlam/PoCo/Port Moody)	☐2
c. New Westminster	☐3
d. Vancouver	☐4
e. North Shore	☐5
f. Richmond	☐6
g. Langley/Surrey	☐7
h. Fraser Valley	☐8
i. Other Specify:______________________________	☐9

A5. Before today which of the following sustainability features or initiatives at UniverCity were you aware of?

	Yes	No	Don't know
a. Green Building Bylaw	☐ 1	☐ 0	☐ 99
b. Burnaby Mountain District Energy System	☐ 1	☐ 0	☐ 99
c. MODO Car Co-Op	☐ 1	☐ 0	☐ 99
d. Living Building Childcare Centre	☐ 1	☐ 0	☐ 99
e. Stormwater Management System	☐ 1	☐ 0	☐ 99

A6a. Would you recommend UniverCity to friends or family?

☐ 1 Yes
☐ 2 No

A6b. IF YES: Why is that?

A6b. IF NO: Why not?

B. Service/Amenity Needs

B1. Are you currently employed or working for pay?

☐ 1 Yes, work from home
☐ 2 Yes, work outside the home
☐ 3 No

B2. IF WORK OUTSIDE THE HOME: Where do you work?

	You
a. SFU	☐ 1
b. Burnaby	☐ 2
c. Tri-Cities (Coquitlam/PoCo/Port Moody)	☐ 3
d. New Westminster	☐ 4
e. Vancouver	☐ 5
f. North Shore	☐ 6

g. Richmond	☐7
h. Langley/Surrey	☐8
i. Fraser Valley	☐9
j. Other or multiple locations	☐10

B3. What is your usual mode of transportation to work?

	You
a. Personal vehicle	☐1
b. Car pool/ car share vehicle	☐2
c. Public Transit (e.g. bus, SkyTrain etc)	☐3
d. Bike	☐4
e. Walk	☐5
f. Other	☐6

B4. If other adults or grown children in your household work outside the home, where do you they work?

	Other Adult1	Other Adult2	Other Adult3	Other Adult4	Other Adult 5
a. SFU	☐1	☐1	☐1	☐1	☐1
b. Burnaby	☐2	☐2	☐2	☐2	☐2
c. Tri-Cities (Coquitlam/PoCo/Port Moody)	☐3	☐3	☐3	☐3	☐3
d. New Westminster	☐4	☐4	☐4	☐4	☐4
e. Vancouver	☐5	☐5	☐5	☐5	☐5
f. North Shore	☐6	☐6	☐6	☐6	☐6
g. Richmond	☐7	☐7	☐7	☐7	☐7
h. Langley/Surrey	☐8	☐8	☐8	☐8	☐8
i. Fraser Valley	☐9	☐9	☐9	☐9	☐9
j. Other or multiple locations	☐10	☐10	☐10	☐10	☐10
No others in household work for pay outside the home					

B5. And what is their usual mode of transport to work?

	Other Adult1	Other Adult2	Other Adult3	Other Adult4	Other Adult 5

a. Personal vehicle	☐1	☐1	☐1	☐1	☐1
b. Car pool/ car share vehicle	☐2	☐2	☐2	☐2	☐2
c. Public Transit (e.g. bus, SkyTrain etc)	☐3	☐3	☐3	☐3	☐3
d. Bike	☐4	☐4	☐4	☐4	☐4
e. Walk	☐5	☐5	☐5	☐5	☐5
f. Other	☐6	☐6	☐6	☐6	☐6

B6. How often, if at all, do you personally use:

	At least once a week	A few times a month	Once a month	A few times a year	Less Often	Never
a. Public Transportation (e.g. bus, SkyTrain etc)	☐1	☐2	☐3	☐4	☐5	☐6
b. Car Co-Op/ Car Share	☐1	☐2	☐3	☐4	☐5	☐6

C. You and Your Household

The following information will help us plan for the economic, recreational and housing needs of our community, today and into the future. Please note again that all responses are confidential and results will be reported as totals only.

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

	Number of children		Number of adults
a. Children Under 5 years of age	_______	e. Adults 18 – 34 years	_______
b. Children 5 – 9	_______	f. Adults 35 – 49 years	_______
c. Children 10 – 14	_______	g. Adults 50 – 64 years	_______
d. Children over 14	_______	h. Adults 65 years or better	_______

C2. Do you own or rent your suite?

☐1 Own
☐2 Rent

C3. IF OWN: Is this the first home you've purchased?

☐1 Yes
☐2 No

C4. IF NOT FIRST HOME ASK: Is your current home smaller, larger or about the same size as your previous home?

☐1 **Smaller**
☐2 **Larger**
☐3 **About the same**

C5. Are you satisfied with the size of your current residence?

- ☐1 Yes, Satisfied
- ☐2 No, Not Satisfied, but not considering a move
- ☐3 No, Not Satisfied and Considering a change within the community
- ☐4 No, Not Satisfied, and Considering a change <u>but not</u> within the community

IF C5 = Considering a change <u>but not</u> within the community: **Why is that?**

IF CONSIDERING A CHANGE:

C6a. What would be your ideal home size: #:______________ Square Feet

#:________________ bedrooms

C6b. And what price range would you be willing to pay? RANGES: $:___________________

C7a. Are you satisfied with the amount of storage you currently have?

- ☐1 Yes, satisfied
- ☐2 No, would like more storage

IF WOULD LIKE MORE STORAGE:

C7b. Which of the following is closest to your estimated storage needs:

A) 5x5 (Small walk-in closet) storage for boxes, small furniture, miscellaneous household items. [NOT SHOWN:$79 per month]

B) 5X10 (Large walk-in closet) storage for larger furniture like couches, bicycles, lawnmowers, etc. [NOT SHOWN:$82 per month]

C) 6x16 (Fits household items plus sporting equipment like kayaks. [NOT SHOWN:$139 per month]

D) Other: SPECIFY

IF A, B or C ASK:

C7c. The typical rental storage cost in the region for that size of storage is: INSERT CORRESPONDING AMOUNT FROM RESPONSE GIVEN ABOVE Would you be willing to pay that associated cost to get the storage you need?

- ☐1 Yes
- ☐2 No

C7d. IF NO ASK: What if anything would you be willing to pay for it: $:_____________ per month (if not willing to pay write 0)

C8. Including yourself, how many people in your household are associated with SFU as:

Faculty: #_______
Staff: #_______

Student: #_______

C9a. **How many cars does your household have?** #:_______ Car(s)

C9b. **How many parking spaces do you have?** #:_______ Space(s)

C9c. **IF HAVE MORE CARS THAN SPACES: Where do you park the extra cars?**

☐1 On the street
☐2 SFU Resident Parking Program
☐3 Rent additional spot(s)
☐4 Visitor Parking
☐5 Other: ____________________

C10. **Which language or languages are most commonly spoken in your household?**

☐1 English
☐2 French
☐3 Cantonese
☐4 Mandarin
☐5 Korean
☐6 Punjabi
☐7 Other: ____________________

C11. **How long have you lived at UniverCity?**

☐1 Less than 6 months
☐2 6 – 11 months
☐3 1 year
☐4 2 years
☐5 3 years
☐6 4 years
☐7 5 years
☐8 6 years
☐9 7 years
☐10 8 years

C12. **Are you planning to stay in the community for the foreseeable future?**

☐1 Yes
☐2 No ⇒ why is that? ____________________

Thank you!
Your participation and feedback are greatly appreciated