

# 2004 RESIDENTS STUDY



Prepared for  
Community Associations of The Woodlands

Prepared by  
Creative Consumer Research  
February 2004

# Agenda

- Objectives
- Methodology
- Key Findings
- Research Findings
  - 2004 Results
  - Comparison to Previous Studies

# Objectives

# Objectives

- The major objective of this research project is to obtain resident opinions on various issues related to living in The Woodlands, including:
  - Satisfaction with available services;
  - Issues of priority;
  - Satisfaction with delivery of services;
  - Use of existing community facilities and amenities;
  - Identify any changes occurring since the 2002, 2001, 2000, and 1999 Resident Surveys where appropriate.

# Methodology

# Methodology

- CCR conducted 756 interviews with residents of The Woodlands
  - Alden Bridge N=157
  - Cochran's Crossing N=159
  - Grogan's Mill N=128
  - Indian Springs N=101
  - Panther Creek N=130
  - College Park N=45
  - Sterling Ridge N=31
  - Carlton Woods N=5

# Methodology

- Requirements for participation:
  - Currently reside in The Woodlands
  - Head of household
  - Currently reside in a single family dwelling
  - Respondent/family/household members do not work in:
    - Market Research
    - Advertising
    - Public Relations
  - Respondent/family/household members have never served on the Board or been employed by village associations, The Woodlands Operating Company, RDRC, CATW, WCA, or TWA

# Methodology

- Respondents randomly called from sample provided to CCR by the Community Associations of The Woodlands management
  - Respondents informed of the study sponsor
  - Given a telephone number to call with any questions



# Methodology

- CCR Responsibilities:
  - Design questionnaire
  - Conduct interviewing at CCR Houston facility
  - Validate surveys
  - Data processing and analysis
  - Significance testing
    - 95% confidence level for responses of 30 or greater
    - Performed for current year results in comparison section only

# Methodology

- Marks of significance seen throughout the report are as follows unless otherwise noted:
  - “+”--Significantly greater than all others in category
  - “\*”--Significantly different from 2004 results
  - “P”--Significantly different from Panther Creek
  - “G”--Significantly different from Grogan’s Mill
  - “C”--Significantly different from Cochran’s Crossing
  - “I”--Significantly different from Indian Springs
  - “A”--Significantly different from Alden Bridge
  - “L”--Significantly different from College Park
  - “S”--Significantly different from Sterling Ridge/Carlton Woods

# Respondent Profile

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
<b>GENDER</b>								
Male	38%	39%	39%	39%	43%	32%	36%	31%
Female	62%	61%	61%	61%	57%	68%	64%	69%
<b>AVERAGE RESPONDENT AGE</b>	49	46	48	52	50	51	39	50
<b>AVERAGE HOUSEHOLD INCOME</b>	\$109,710	\$115,020	\$113,400	\$104,580	\$100,190	\$111,110	\$102,670	\$121,790
<b>OWN CURRENT RESIDENCE</b>	96%	95%	98%	95%	99%	95%	98%	94%
<b>AVERAGE NUMBER OF YEARS LIVED IN THE WOODLANDS</b>	8	5	8	13	8	11	2	4
<b>AVERAGE NUMBER OF PEOPLE IN HOUSEHOLD</b>	3	3	3	3	3	3	3	3
<b>AVERAGE NUMBER OF CHILDREN IN HOUSEHOLD</b>	1.89	1.92	2.08	1.65	1.98	1.67	1.89	1.71
<b>AVERAGE AGE OF CHILDREN IN HOUSEHOLD</b>	11	10	11	13	12	13	5	9

Chart 1 of 2

Q1./Q46./Q47./Q48./Q49./Q50./Q51./Q52.

# Respondent Profile (continued)

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
<b>MARITAL STATUS</b>								
Married	87%	87%	90%	86%	86%	82%	91%	89%
Separated/Divorced	4%	4%	3%	6%	3%	5%	4%	3%
Single	5%	6%	3%	6%	6%	6%	2%	3%
Widowed	3%	3%	3%	2%	5%	6%	2%	3%
<b>HIGHEST LEVEL OF EDUCATION</b>								
High school or less	7%	8%	6%	5%	12%	8%	7%	0%
Some college	17%	12%	16%	23%	11%	18%	18%	28%
Bachelor's degree	45%	46%	42%	46%	43%	43%	62%	39%
Some post graduate	8%	6%	11%	6%	8%	7%	2%	8%
Post graduate degree	23%	24%	25%	19%	27%	24%	11%	22%

Chart 2 of 2

Q44./Q45.

# Dialing Information

	Total Sample
No Answer	1910
Busy	349
Answering machine	2409
Language barrier	25
Over quota	56
Disconnect/wrong number	1814
Call back	3688
Qualified refusal	76
Fax/modem	131
Initial refusal	720
Terminate – Do not currently reside in The Woodlands	11
Terminate – Do not currently reside in a house	38
Terminate – Employment screener	33
Terminate – Do not currently reside in designated village	61
Terminate in the middle	11
Completed interviews	756
<b>TOTAL DIALINGS</b>	<b>12088</b>
2004 RATIO OF TOTAL DIALINGS TO COMPLETED SURVEYS	16:1
2002 RATIO OF TOTAL DIALINGS TO COMPLETED SURVEYS	11:1
2000 RATIO OF TOTAL DIALINGS TO COMPLETED SURVEYS	10:1
1999 RATIO OF TOTAL DIALINGS TO COMPLETED SURVEYS	9:1

# Executive Summary

# Executive Summary

- In general, The Woodlands residents are pleased with their community and the Community Associations
  - Residents enjoy the community environment and maintenance in terms of the parks, pathways, open spaces, garbage collection, and street maintenance
  - They also approve of the Fire Services and Emergency Medical services
  - Although it is not as much of a concern as in the past, traffic/traffic enforcement remains a concern to many residents
  - In general, residents feel safe but there is room to improve their comfort level on pathways and in parks

# Executive Summary

- The Woodlands Community Magazine, local newspapers, and the Internet remain major methods of communication
  - However, fewer respondents are reading the Community Magazine and the Villager than before
  - Most have Internet access
- Deed restriction enforcement is an important issue,
  - Although a majority feel enforcement is about right, fewer feel this way compared to past years
  - Contact with staff of the Community Associations has mostly been with the Residential Design Review Committee
- Residents remain split as to the preferred alternatives to annexation, but most agree that they are opposed to the idea of annexation



# Community Differences

- In general, the communities are very similar in opinions. There are only a few differences:
  - Fire services seems more of a concern in Alden Bridge
  - College Park views garbage collection and street maintenance as issues
  - While Grogan's Mill residents feel recreation programs and deed restriction enforcement need to be examined
  - The Cochran's Crossing and Indian Springs communities seem most pleased with the services the Association provides and the deed restriction enforcement
  - Residents in Alden Bridge seem to feel more secure in their community
  - Also, Alden Bridge residents seem to find the Community Magazine most useful
  - Panther Creek residents seem to have the most contact with the Association staff

# Research Findings 2004 Results

# Community Services

# Community Assessment Rate/Services

- In general, residents are satisfied with the services provided by the Community Associations
  - Residents rate parks and open spaces highly
  - 88% rate the Association as good to excellent in terms of services provided
  - In terms of value for the money, the assessment rate is seen as:
    - Excellent by 7%
    - Very good by 25%
    - Good by 35%

} 67%

# Facility Use

- There is little consensus on which facilities are needed in The Woodlands
  - 77% are either unsure as to what facility to add or feel none are necessary
  - 2% suggest providing better recreation/activities for children/teens

# Rating Community Services

(1 = Poor; 5 = Excellent)

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
Fire Services	4.44	4.48	4.44	4.47A	4.38	4.38	4.31	4.61A
Pathways	4.37	4.57	4.27	4.38	4.28	4.38	4.22	4.53
Parks and Open Spaces	4.36	4.55	4.30	4.34	4.32	4.28	4.34	4.36
Emergency Medical Services	4.33	4.36	4.38	4.33	4.28	4.29	4.32	4.33
Garbage Collection	4.29	4.44	4.33	4.27	4.14	4.37	3.84A,C,G,P	4.31
Swimming Pools	4.29	4.41	4.32	4.12A	4.25	4.22	4.29	4.46
Recreation Facilities	4.28	4.41	4.21	4.18	4.23	4.35	4.24	4.41
Street Maintenance	4.17	4.31	4.14	3.99	4.36	4.22	3.84I,P,A	4.06
Recycling Collection	4.12	4.08	4.13	4.08	4.24	4.13	4.02	4.27
Recreation Programs	4.11	4.27	4.05	3.94A	4.16	4.06	4.20	4.10
Law Enforcement	4.03	4.07	3.93	4.15	4.05	4.05	3.90	4.00
Deed Restriction Enforcement	3.91	4.01	3.99	3.71A,C,I	4.02	3.85	3.85	3.79
Neighborhood Watch	3.85	3.94	3.75	3.77	3.95	3.94	3.73	3.79
Traffic Enforcement	3.63	3.61	3.48	3.66	3.64	3.68	3.76	3.82

# Rated Community Service a '4' or '5'

(1 = Poor; 5 = Excellent)

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
Parks and Open Spaces	86%	92%	85%	84%	85%	82%	89%	78%
Pathways	84%	93%	80%A	82%	84%	85%	87%	80%
Garbage Collection	84%	89%	85%	86%	81%	88%	62%+	80%
Street Maintenance	82%	86%	81%	78%	86%	86%	64%^	73%
Recreation Facilities	78%	79%	78%	72%	76%	80%	82%	78%
Recycling Collection	74%	73%	76%	73%	79%	77%	65%	78%
Law Enforcement	72%	72%	68%	77%	73%	77%	67%	75%
Swimming Pools	69%	75%	67%	55%^	74%	71%	74%	69%
Recreation Programs	65%	71%G	65%G	54%	69%G	62%	73%G	66%
Fire Services	65%	66%	66%	66%	64%	61%	57%	70%
Deed Restriction Enforcement	63%	68%	66%	58%	63%	58%	62%	58%
Emergency Medical Services	60%	61%	62%	60%	59%	64%	53%	55%
Traffic Enforcement	56%	57%	51%	56%	57%	60%	64%	55%
Neighborhood Watch	55%	57%	58%	49%	61%	57%	56%	42%l

^Significantly different than all but Sterling Ridge/Carlton Woods

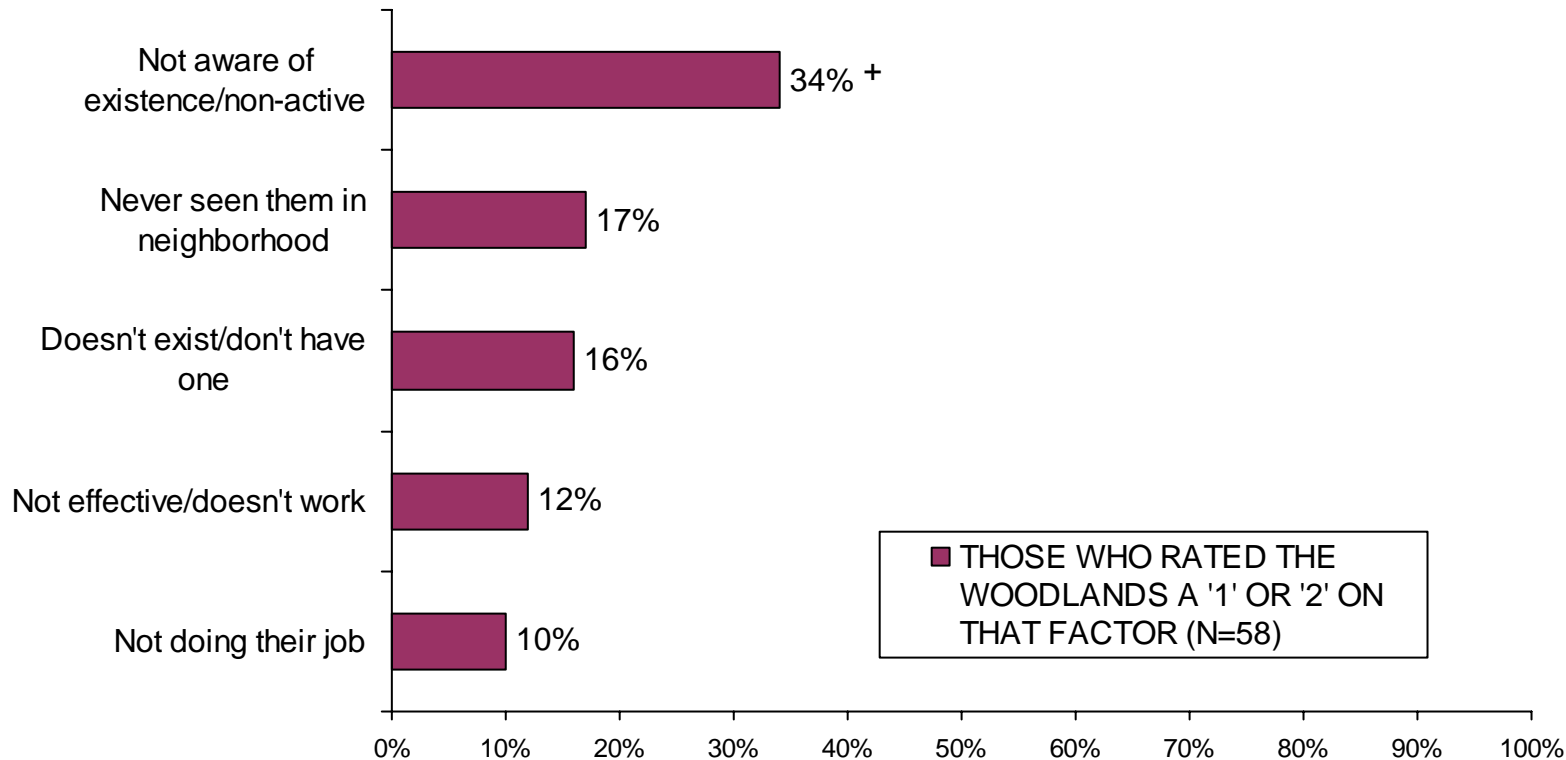
# Rated Community Service a '1' or '2'

(1 = Poor; 5 = Excellent)

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
Traffic Enforcement	14%	13%	13%	12%	13%	15%	13%	9%
Neighborhood Watch	8%	8%	11%	8%	3%	6%	7%	12%
Deed Restriction Enforcement	7%	6%	5%	10%	6%	8%	6%	14%
Law Enforcement	6%	7%	6%	3%	6%	6%	8%	11%
Street Maintenance	5%	2%	6%	6%	2%	3%	11%	11%
Recycling Collection	5%	4%	9%	3%	4%	4%	4%	8%
Recreation Programs	4%	3%	4%	5%	2%	3%	0%	6%
Parks and Open Spaces	3%	4%	4%	2%	3%	2%	0%	3%
Garbage Collection	3%	1%	4%	2%	6%	2%	6%	0%
Recreation Facilities	2%	1%	2%	3%	3%	2%	0%	3%
Swimming Pools	2%	2%	2%	4%	2%	3%	0%	3%
Fire Services	2%	0%	1%	1%	2%	2%	4%	0%
Pathways	1%	2%	1%	2%	4%	2%	0%	3%
Emergency Medical Services	1%	1%	1%	1%	2%	1%	2%	6%

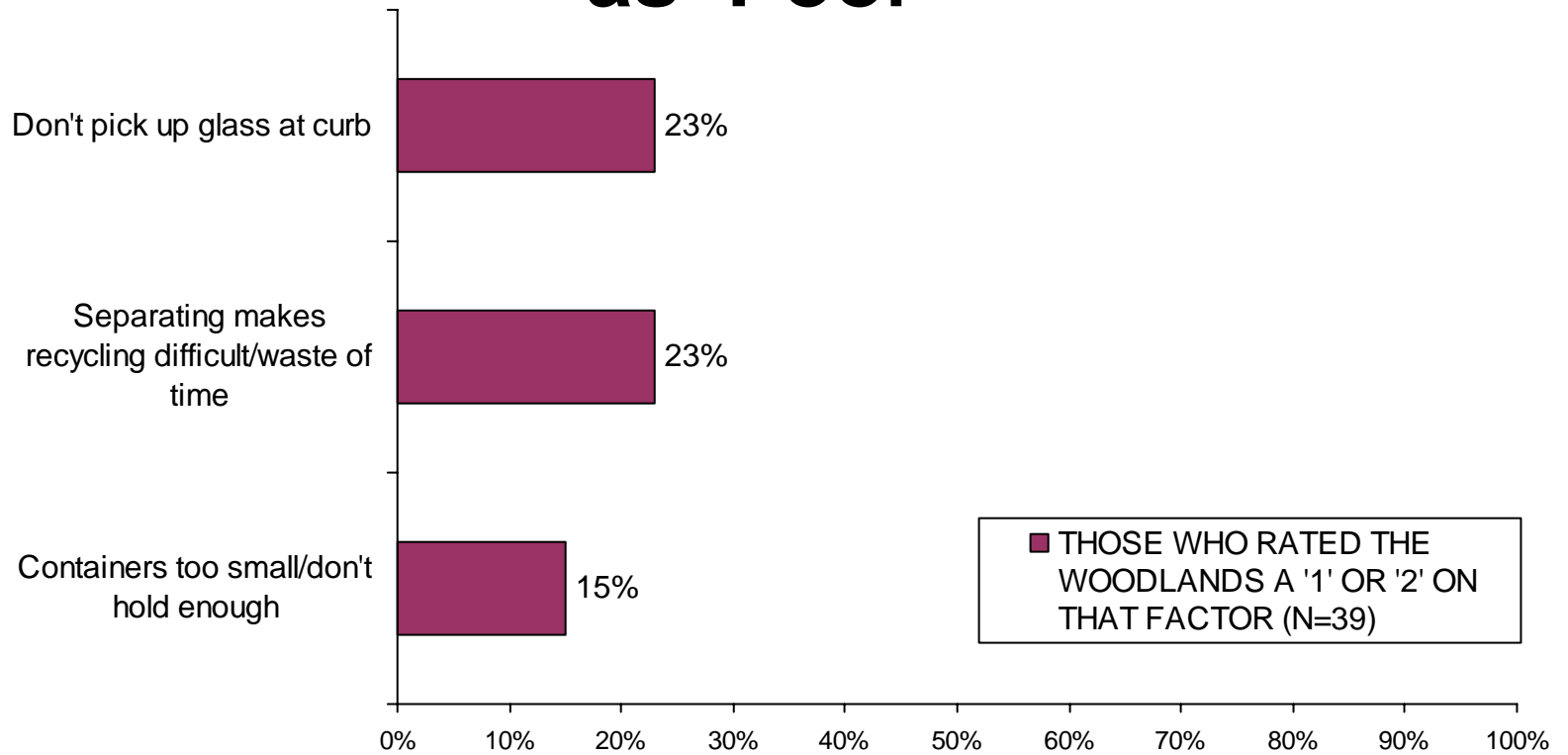


# Reasons Rated Neighborhood Watch as 'Poor'



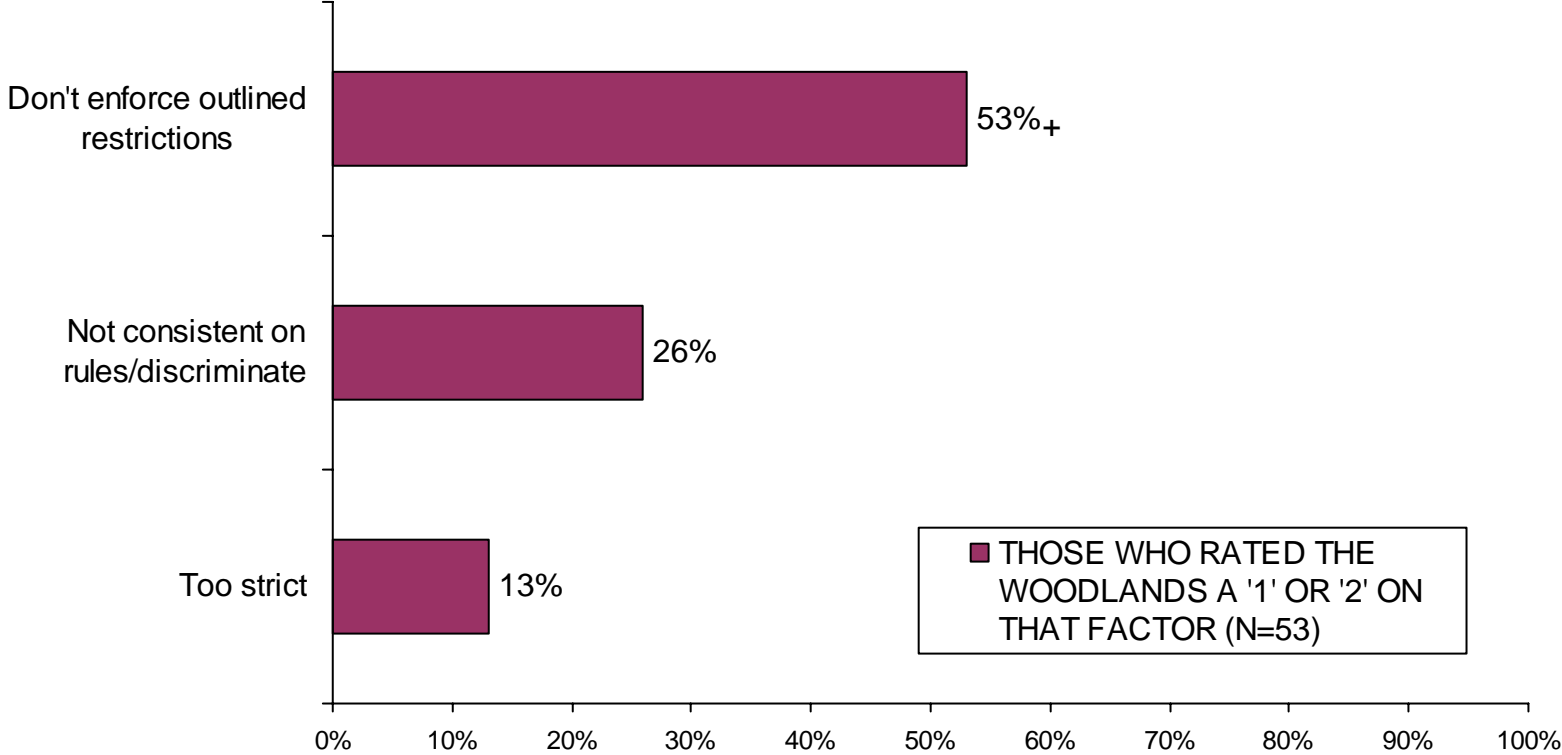
Q7. Open-ended question

# Reasons Rated Recycling Collection as 'Poor'



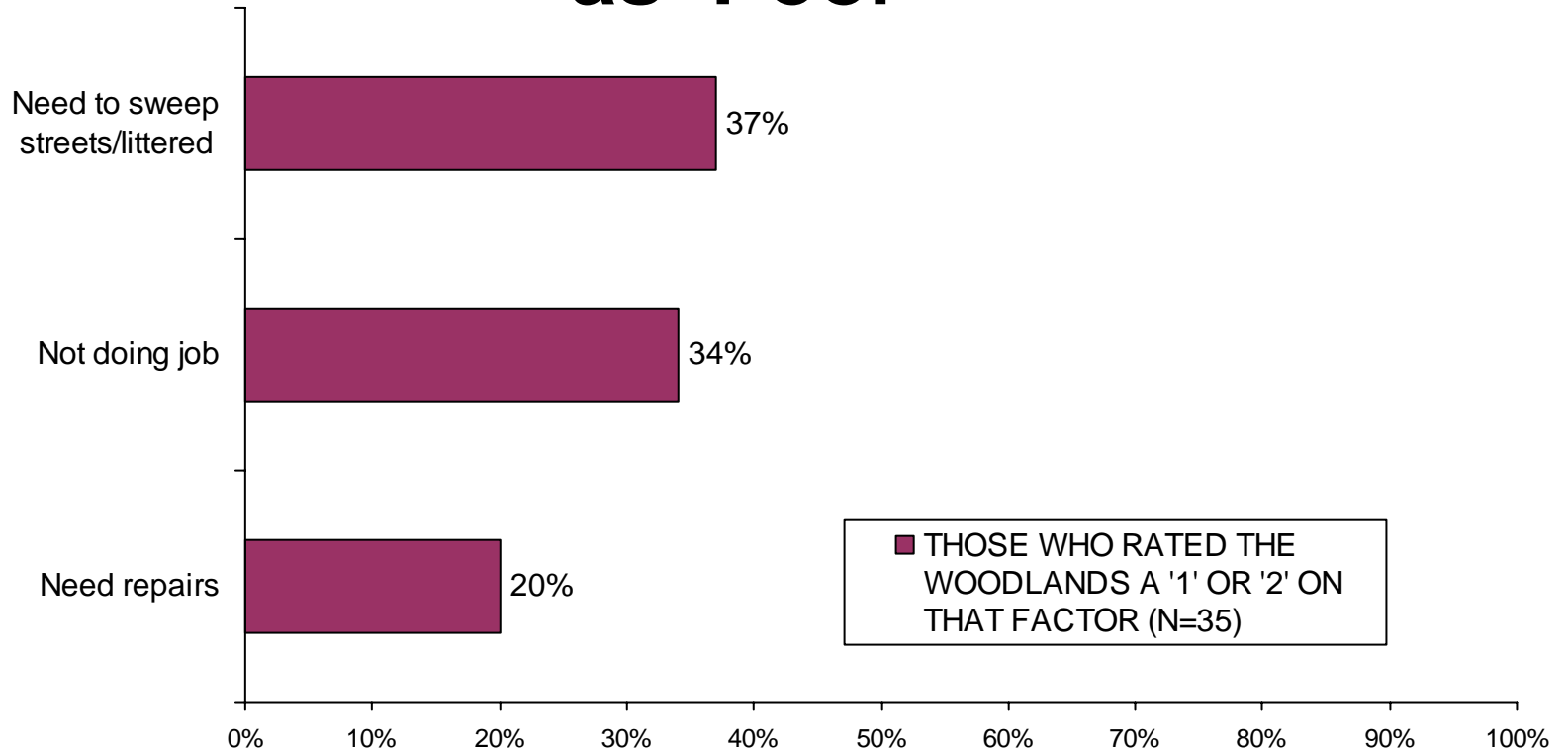
Q7. Open-ended question

# Reasons Rated Deed Restrictions Enforcement as 'Poor'



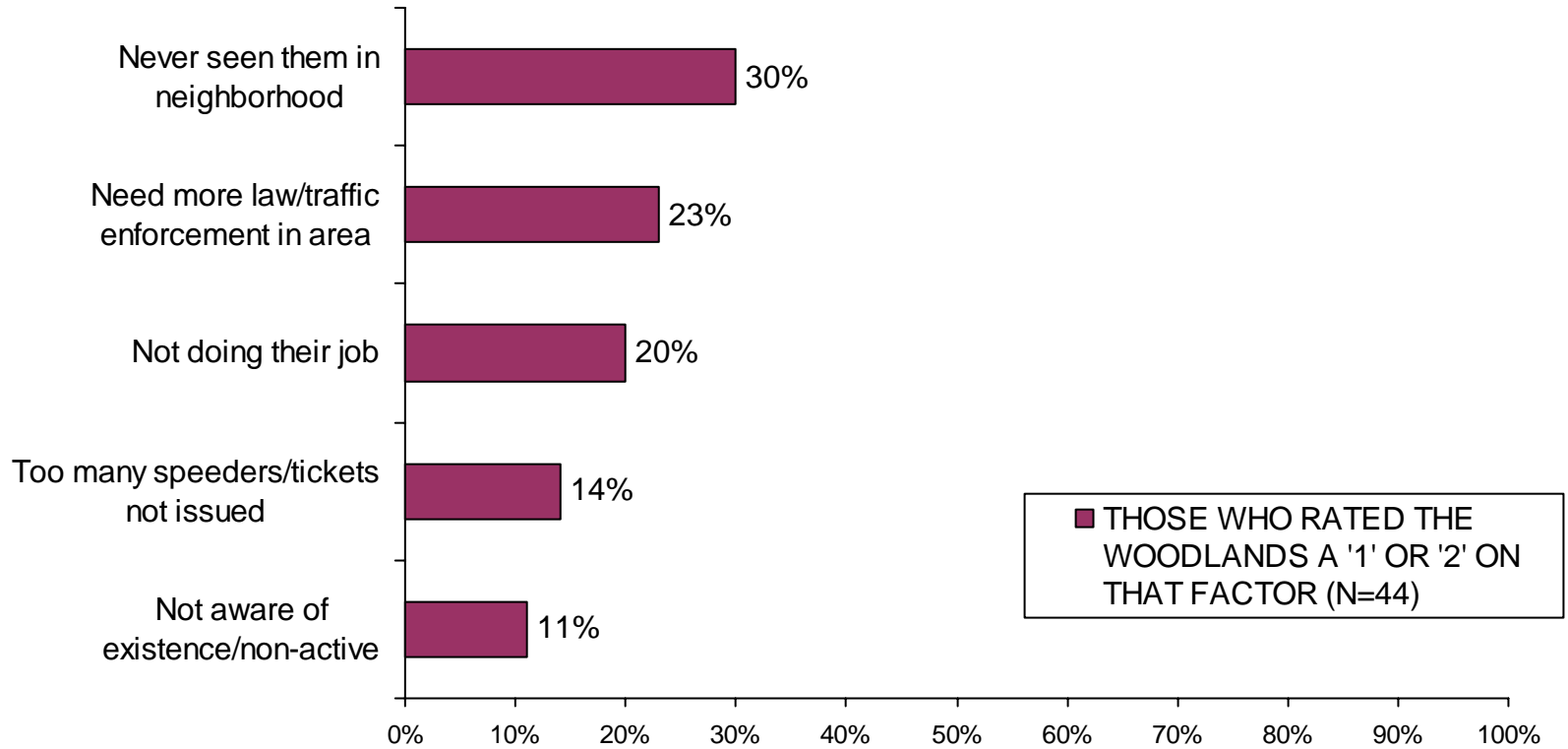
Q7. Open-ended question

# Reasons Rated Street Maintenance as 'Poor'



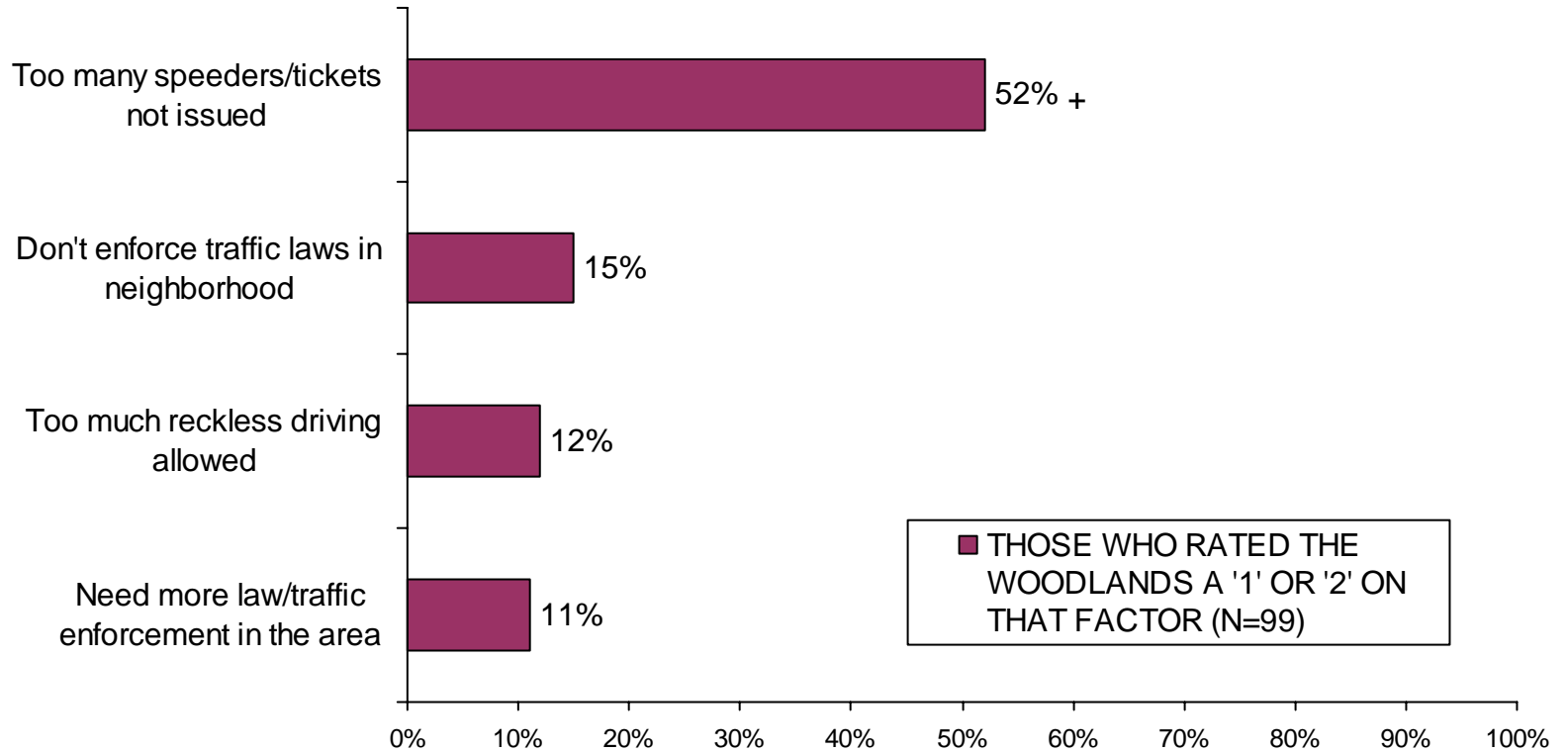
Q7. Open-ended question

# Reasons Rated Law Enforcement as 'Poor'



Q7. Open-ended question

# Reasons Rated Traffic Enforcement as 'Poor'



Q7. Open-ended question

# Satisfaction With Services Provided by Community Association

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
Excellent	18%	22%	18%	19%	11%	20%	13%	8%
Very good	41%	42%	47%G	34%	50%G,P	36%	40%	28%
Good	29%	25%	24%	37%A,C	29%	31%	36%	31%
Fair	6%	6%	6%	5%	4%	7%	4%	8%
Poor	2%	1%	2%	1%	3%	1%	7%	3%

**59% Excellent/very good**

# Rating Assessment Rate Overall in Terms of Value for the Money

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
Excellent	7%	12%	8%	4%	6%	8%	2%	6%
Very good	25%	27%	30%	20%	24%	22%	24%	19%
Good	35%	30%	32%	44%A,C	41%	35%	42%	22%
Fair	24%	24%	24%	22%	19%	28%	24%	44%
Poor	6%	5%	5%	9%	8%	5%	7%	6%



# Likelihood to Use...

## Other Services/Programs Offered in Other Communities

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
None/nothing	61%	64%	62%	63%	59%	56%	67%	61%
Satisfied with present services/programs	3%	4%	3%	3%	3%	5%	0%	0%
Better recreation/activities for children/teens	2%	2%	3%	5%	1%	0%	0%	0%
Don't know/unsure	16%	15%	14%	16%	19%	17%	16%	19%

Q10. Open-ended questions

# Recreational Facilities Likely to Use that Are Offered in Other Communities

Senior citizen activities.

I would like to see a beautiful park, a green house, and a nature center.

Better recreation for kids.

More big city services.

I would like to have more senior centers.

Additional friendship center.

More senior services.

Traffic enforcement.

Cheaper golf.

An ice skating facility.

Racquetball courts.

More outdoor activities. A coffee shop within the community.

A dog park.

I wish there was no additional fee for the swimming pool.

Sailing or water programs.

More social functions; community involvement functions.

# Willingness to Pay Higher Assessment Fee if Offer Programs/Service/Facilities Mentioned

Willingness to pay	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
Very willing	4%	2%	3%	6%	4%	7%	4%	3%
Somewhat willing	7%	11%	6%	6%	6%	8%	2%	14%
Neither willing nor unwilling	2%	0%	2%	1%	5%	2%	0%	3%
Not very willing	3%	5%	4%	2%	4%	2%	4%	3%
Not at all willing	6%	5%	6%	6%	7%	8%	9%	0%
No services/facilities requested	61%	64%	62%	63%	59%	56%	67%	61%
Don't know/unsure	16%	14%	17%	18%	15%	18%	13%	17%

Q11. Closed-ended question

# Law Enforcement/Safety

# Traffic Concerns

- Traffic control and enforcement are a concern in The Woodlands
  - Out of the 16 Community Service factors rated, traffic flow/signalization was rated lowest at 3.63 on a 5-point scale; with five being excellent
    - 52% of those rating this factor as poor (1 or 2 rating) feel there are too many speeders and not enough tickets being issued

## Traffic Concerns (cont.)

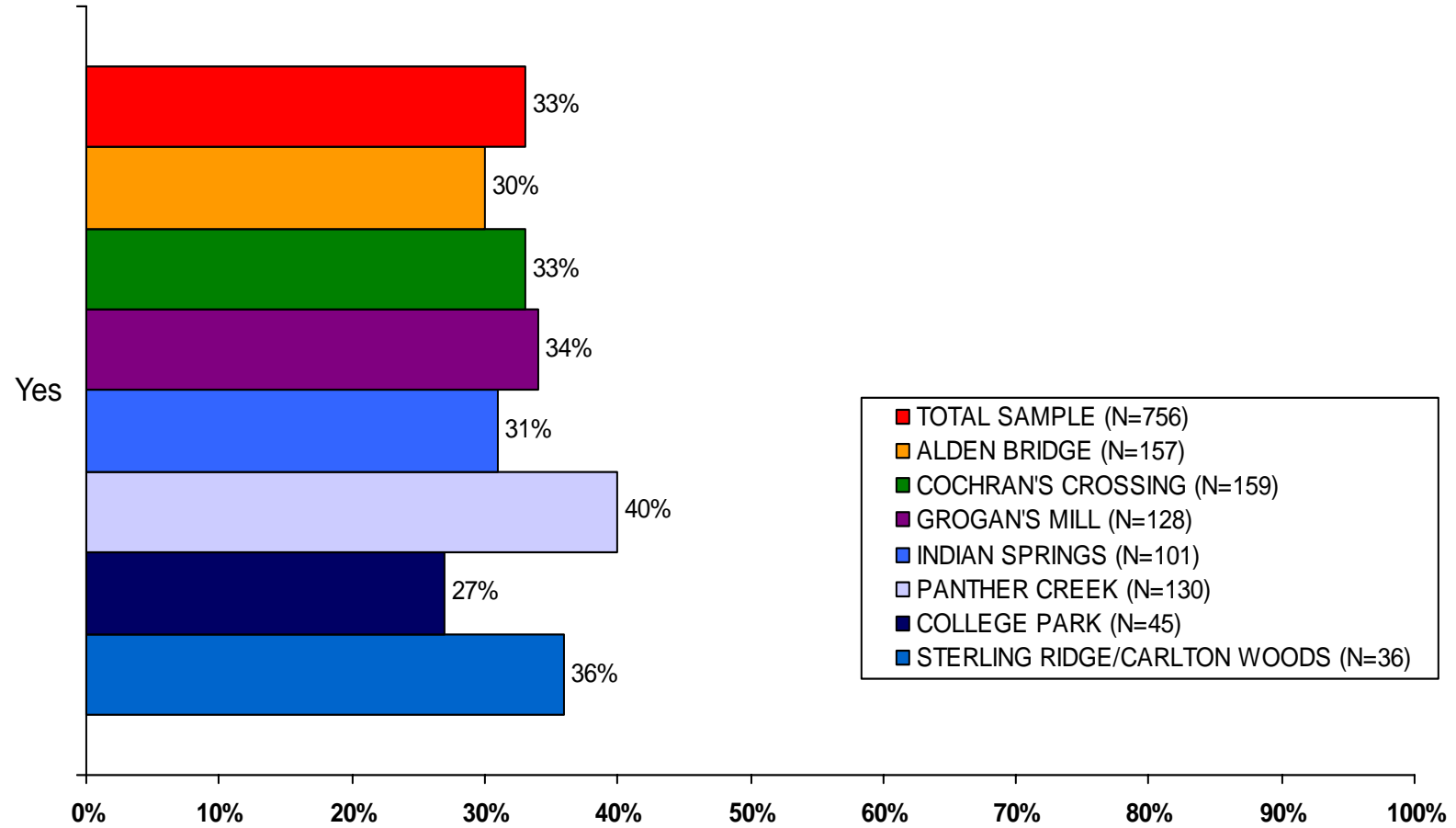
- 33% feel traffic enforcement has improved in the past year
  - 72% of residents feel it is important for the Association to continue paying for the additional enforcement
    - 45% of those who feel it is important are even willing to pay more in assessments in order to pay for additional enforcement

# Safety Issues

- For the most part, residents feel The Woodlands provides a safe and well-maintained environment
  - They feel safest in their neighborhoods during the day (64% feel very safe)
  - However, residents rate safety on pathways lower than the other areas (only 27% feel very safe)

# Has Traffic Enforcement Improved in Past Year?

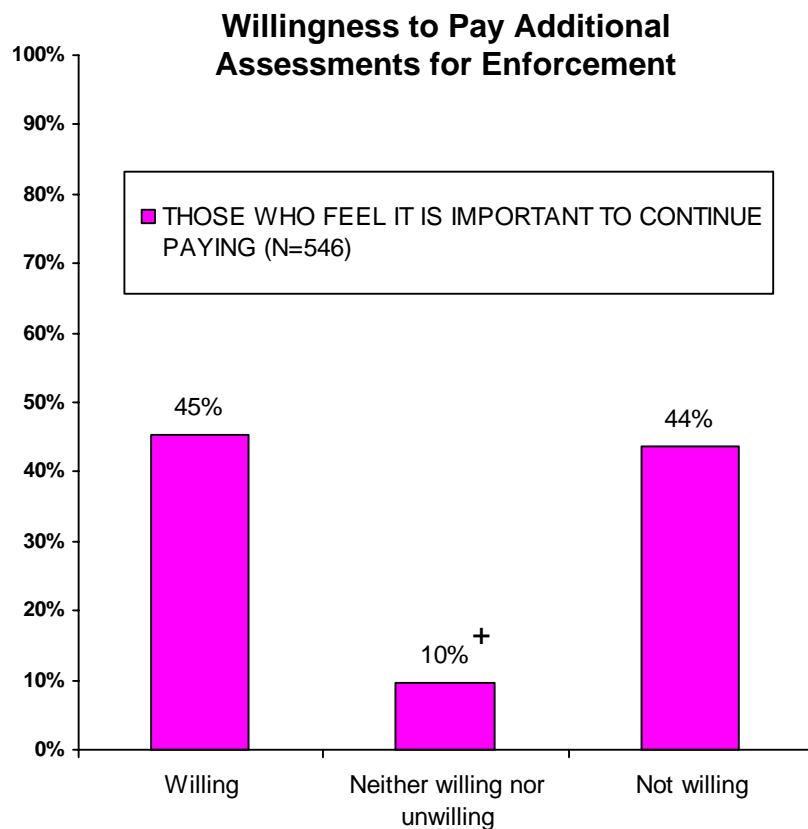
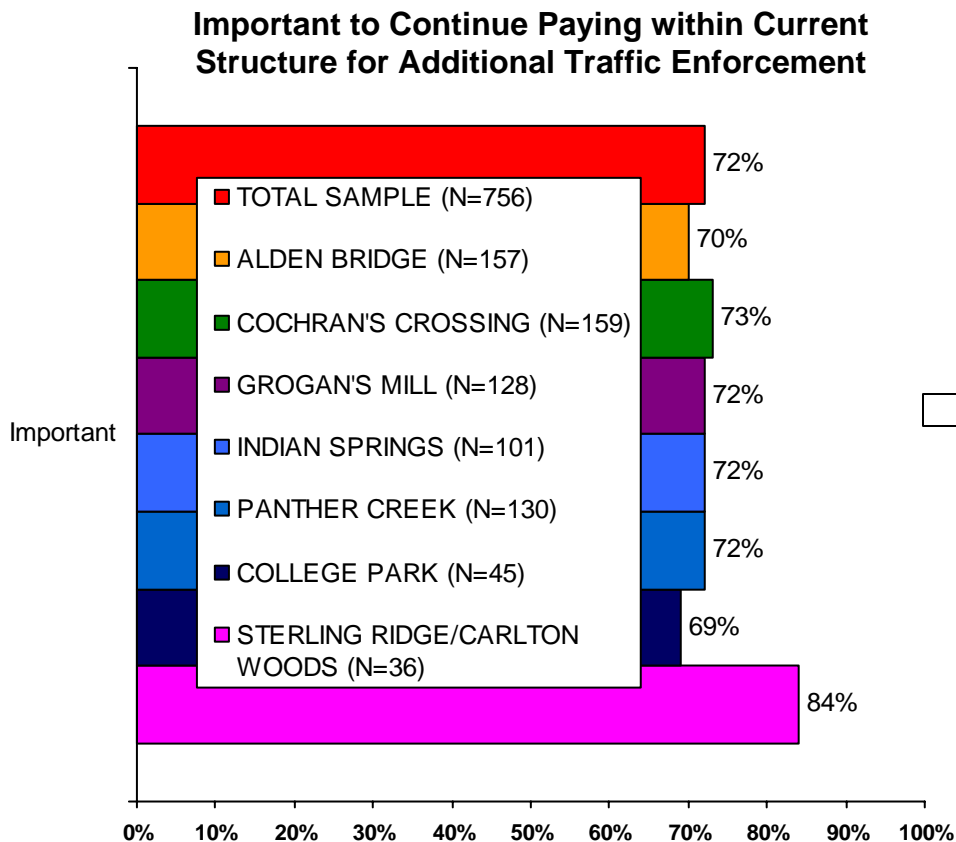
2004 Residents Study



Q12. Closed-ended



# Should the Associations Continue Paying for Additional Enforcement



Q13./Q14. Closed-ended questions

# Rating Safety Level

(1 = Do not feel safe at all; 5 = Feel very safe)

	In neighborhood during day		In neighborhood at night		In community parks		On pathways	
	Mean Scores	% Rating Very Safe	Mean Scores	% Rating Very Safe	Mean Scores	% Rating Very Safe	Mean Scores	% Rating Very Safe
<b>Total Sample (N=756)</b>	4.57	64%	4.15	40%	4.05	31%	3.93	27%
<b>Alden Bridge (N=157)</b>	4.73	75%	4.36	54%	4.20	36%G	4.10	36%C
<b>Cochran's Crossing (N=159)</b>	4.53	61%A	4.14	40%A	3.95A	30%	3.85A	24%
<b>Grogan's Mill (N=128)</b>	4.51	59%A	4.06A	33%A	3.89A	24%	3.77A	17%
<b>Indian Springs (N=101)</b>	4.54	60%A	4.10A	37%A	4.01	32%	3.90	27%
<b>Panther Creek (N=130)</b>	4.50	59%A	4.05A	34%A	4.07	28%	3.93	27%
<b>College Park (N=45)</b>	4.67	71%	4.04	36%	4.23	38%	3.93	31%
<b>Sterling Ridge/ Carlton Woods (N=36)</b>	4.44	56%	4.31	47%	4.28	36%	4.16G	42%

Q15. Closed-ended rating question

# Covenants/Deed Restrictions

# Deed Restrictions

- Residents are satisfied with the enforcement of deed restrictions
  - 84% indicate that the enforcement of deed restrictions is very or somewhat effective
  - 64% feel that the level of deed restriction enforcement is “about right”
    - 95% feel deed restrictions are somewhat to very important
    - Only 12% have filed a complaint about deed restrictions

# Effectiveness of Enforcement of Deed Restrictions

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
Very effective	45%	44%	51%G	34%	52%G	40%	51%	44%
Somewhat effective	39%	41%	37%	41%	31%	42%	44%	39%
Neither effective nor ineffective	7%	8%	5%	8%	6%	8%	2%	8%
Not very effective	5%	4%	3%	12%	3%	6%	0%	0%
Not at all effective	3%	2%	1%	3%	4%	3%	2%	3%

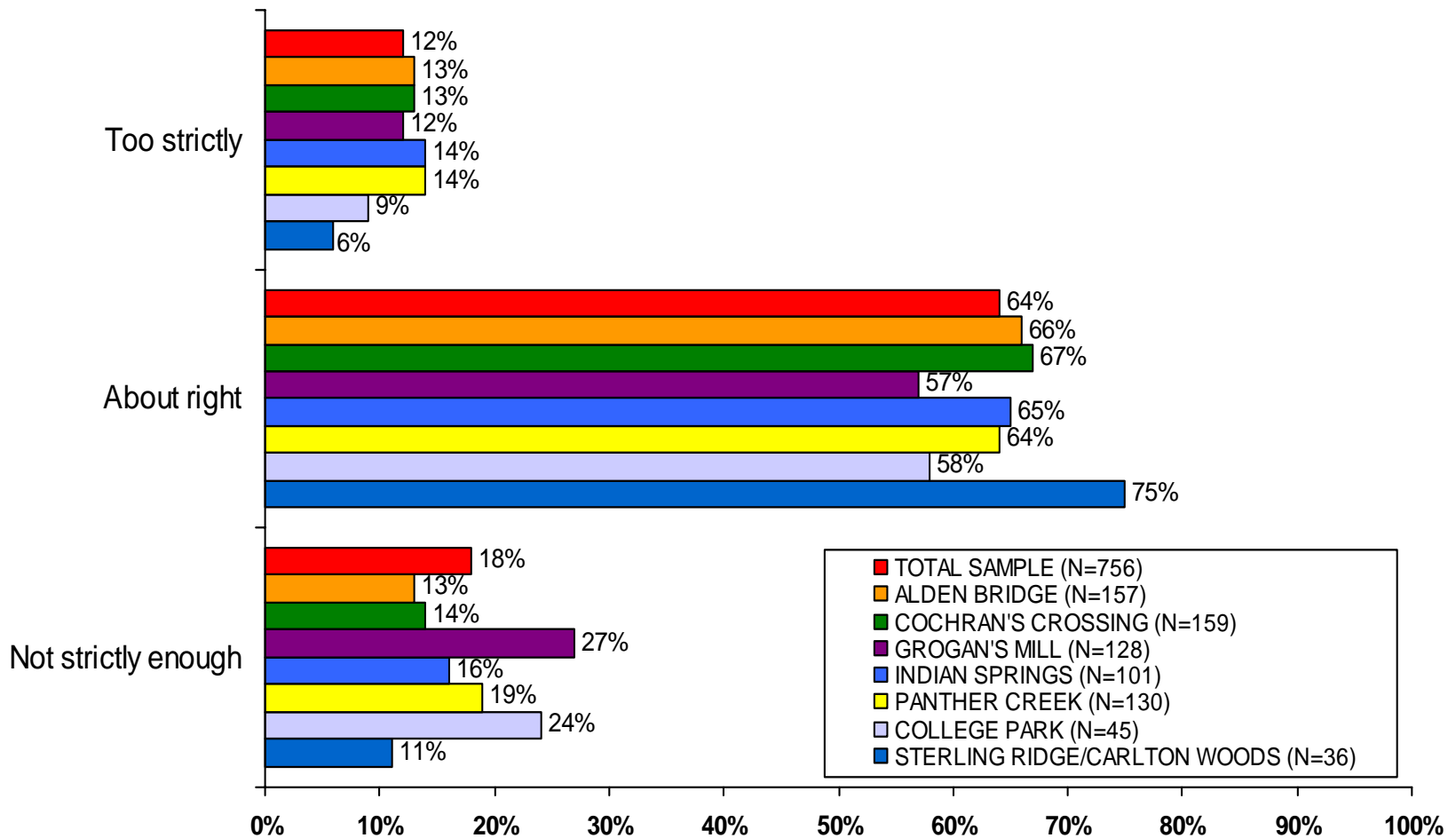
**84% Very/somewhat effective**

# Importance of Deed Restriction Enforcement

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/CARLTON WOODS (N=36)
Very important	71%	73%	71%	72%	67%	68%	76%	64%
Somewhat important	24%	21%	24%	21%	27%	26%	24%	22%
Neither important nor unimportant	3%	1%	3%	4%	4%	4%	0%	8%
Not very important	1%	4%	0%	2%	1%	1%	0%	0%
Not at all important	0%	0%	0%	1%	0%	1%	0%	0%

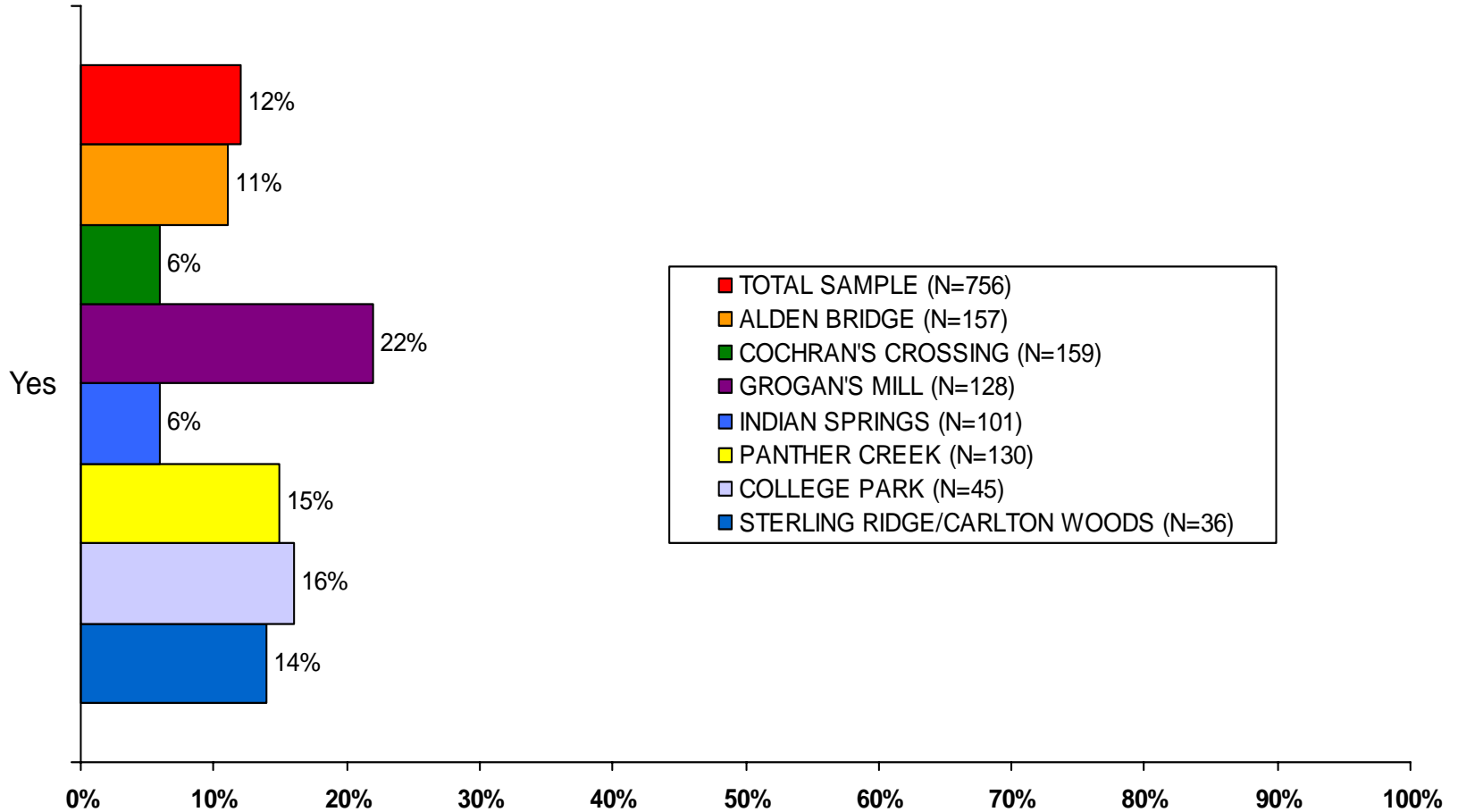
**95% Very/somewhat important**

# Feel That Deed Restrictions Are Enforced...



Q18. Closed-ended

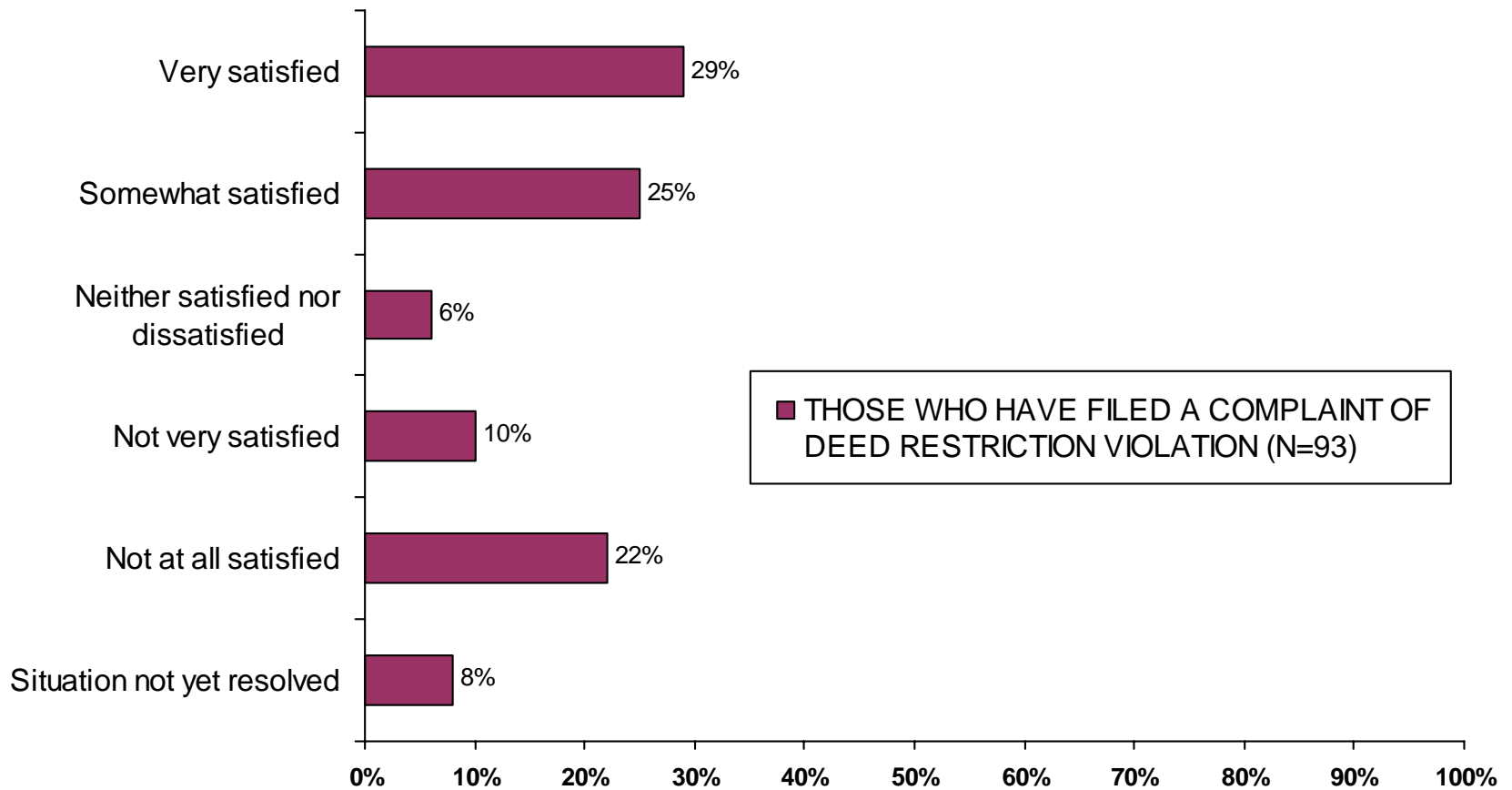
# Filed Complaint About Deed Restriction in Village



Q19. Closed-ended question



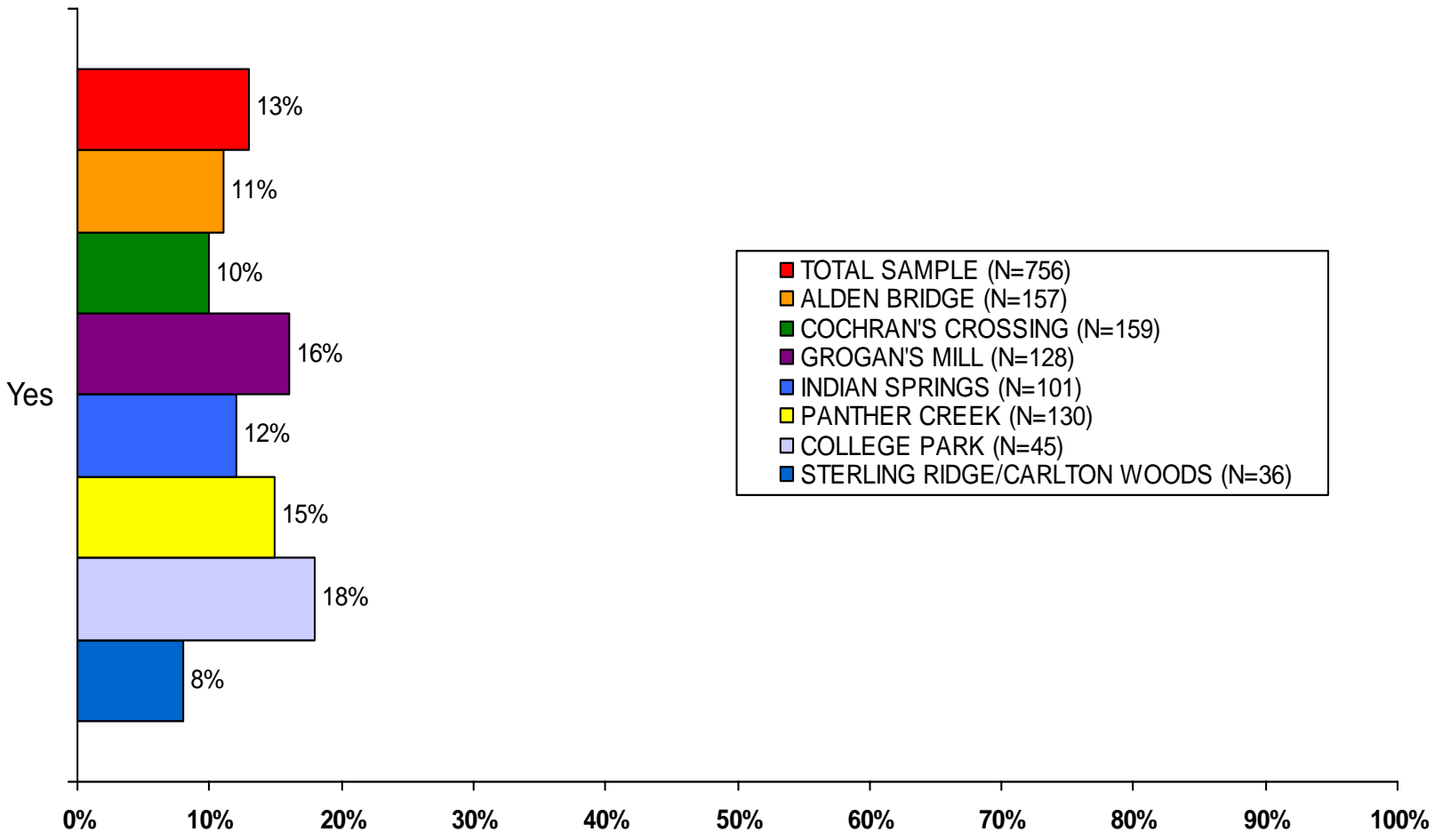
# Satisfaction with Association's Response to Complaint Filed



Q20. Closed-ended

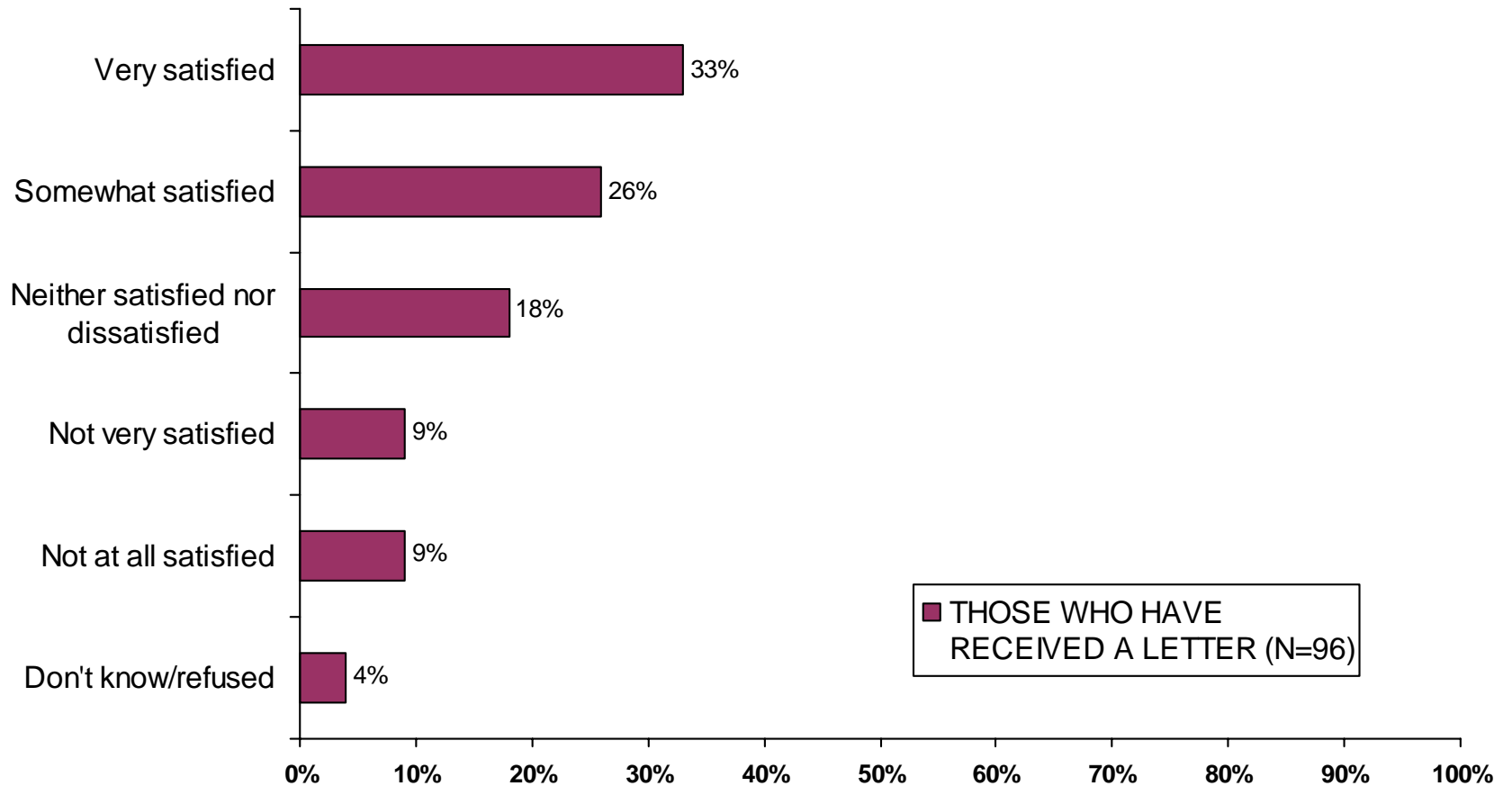
# Received Letter About Deed Restriction Violation on Property

2004 Residents Study



Q21. Closed-ended

# Satisfaction with Association's Response to/Resolution of the Situation



Q22. Closed-ended question

# Communications

# Methods of Communication

- The research indicates three methods that will be most effective for communications with residents:
  - Newspapers regularly read:
    - Houston Chronicle (73%) and The Villager (49%)
  - On the Internet:
    - 88% have access either at home or work
  - The Woodlands Community Magazine:
    - 29% **primarily** learn about community activities through the Magazine/newsletter

# The Internet

- The Internet is an effective information source
  - 88% of respondents indicate having access to the Internet, either at home or at work
  - Residents seek communication on the Internet regarding community events/activities (44%) and programs in the community (20%)

# The Woodlands Community Magazine

- The Woodlands Community Magazine reaches most residents
  - 94% overall receive the Magazine
  - 66% read all or most of the contents
  - 82% indicate that the Magazine is an effective information source
    - Residents want to see community event and activity information in the Magazine (30%) and human interest stories (14%)

# How Primarily Learn About Activities in Community

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
The Villager	35%	25%	39%A	43%A	41%A	32%	22%	31%
The Woodlands Community Magazine (includes those referring to magazine as the Newsletter)	29%	34%C	24%	28%	27%	27%	38%	33%
Neighbors/friends/word-of-mouth	13%	13%	14%	13%	6%	18%	18%	11%
Local newspapers	11%	11%	11%	7%	11%	15%	7%	11%
Don't know/unsure	3%	4%	3%	2%	1%	1%	7%	8%
E-neighbor or Internet newsletter	2%	3%	3%	0%	4%	1%	2%	0%
Hometown News	1%	1%	1%	2%	1%	2%	4%	0%
Schools	1%	1%	2%	0%	3%	0%	2%	0%
Magazines (unspecified)	1%	1%	0%	2%	0%	2%	0%	3%
Newspaper (unspecified)	1%	1%	1%	1%	0%	0%	0%	0%

Q23. Closed-ended question



# The Woodlands Community Magazine

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
<b>Receives/uses The Woodlands Community Magazine</b>	<b>94%</b>	<b>95%</b>	<b>96%</b>	<b>96%</b>	<b>91%</b>	<b>93%</b>	<b>93%</b>	<b>89%</b>
<b>Typically Reads...</b>	(N=712)	(N=149)	(N=153)	(N=123)	(N=92)	(N=121)	(N=42)	(N=32)
All of magazine	29%	33%C	22%	33%	34%	26%	31%	28%
Most of magazine	37%	40%	36%	33%	34%	38%	38%	44%
Some of magazine	30%	23%	40%A	32%	28%	30%	26%	25%
None of magazine	3%	3%	2%	3%	2%	6%	5%	3%
<b>Magazine effectiveness</b>	(N=712)	(N=149)	(N=153)	(N=123)	(N=92)	(N=121)	(N=42)	(N=32)
Very effective	37%	46%	33%A	30%A	32%A	38%	43%	44%
Somewhat effective	45%	40%	49%	47%	51%	45%	40%	38%
Neither effective nor ineffective	8%	6%	10%	7%	8%	8%	7%	9%
Not very effective	6%	5%	3%	9%	4%	6%	7%	9%
Not at all effective	3%	1%	3%	5%	3%	2%	2%	0%

Q24./Q25./Q26. Closed-ended questions

# Articles/Information Would/Would Not Like to See in Magazine

Base: Those who receive/read The Woodlands Community Magazine

	TOTAL SAMPLE (N=712)	ALDEN BRIDGE (N=149)	COCHRAN'S CROSSING (N=153)	GROGAN'S MILL (N=123)	INDIAN SPRING S (N=92)	PANTHER CREEK (N=121)	COLLEGE PARK (N=42)	STERLING RIDGE/CARLTON WOODS (N=32)
<b>Information would like to see in magazine</b>								
Don't know/no input	48%	52%	43%	54%	42%	45%	52%	50%
Events/activities in the community	30%	25%	39%A,G,P	24%	36%	27%	31%	31%
Human interest stories	14%	13%	16%	13%	20%	11%	14%	19%
New programs available	13%	9%	14%	16%	12%	10%	14%	13%
Crime rate statistics	11%	8%	14%	13%	13%	9%	5%	9%
Special holiday events	7%	8%	7%	5%	9%	6%	0%	9%

Q27.Closed-ended question

# Internet Access

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
<b>HAVE ACCESS, EITHER AT HOME OR AT WORK</b>	88%	90%	93%	88%	86%	81%	82%	86%
<b>Types of information would be most likely to use on community association website</b>								
<b>Those who have Internet access</b>	(N=662)	(N=142)	(N=148)	(N=112)	(N=87)	(N=105)	(N=37)	(N=31)
Events/activities in the community	44%	41%	47%	42%	43%	42%	43%	58%
Don't know/no input	35%	28%	31%	46%A,C	36%	35%	35%	35%
Programs in the community	20%	21%	21%	18%	22%	16%	24%	16%
Human interest stories	9%	10%	13%	5%	9%	8%	5%	13%
Crime rate statistics	9%	6%	11%	9%	8%	7%	8%	23%
Special hoilday events	8%	7%	11%	7%	7%	10%	3%	13%

Q28. Closed-ended questions/Q29. Open ended question

# Newspaper Readership

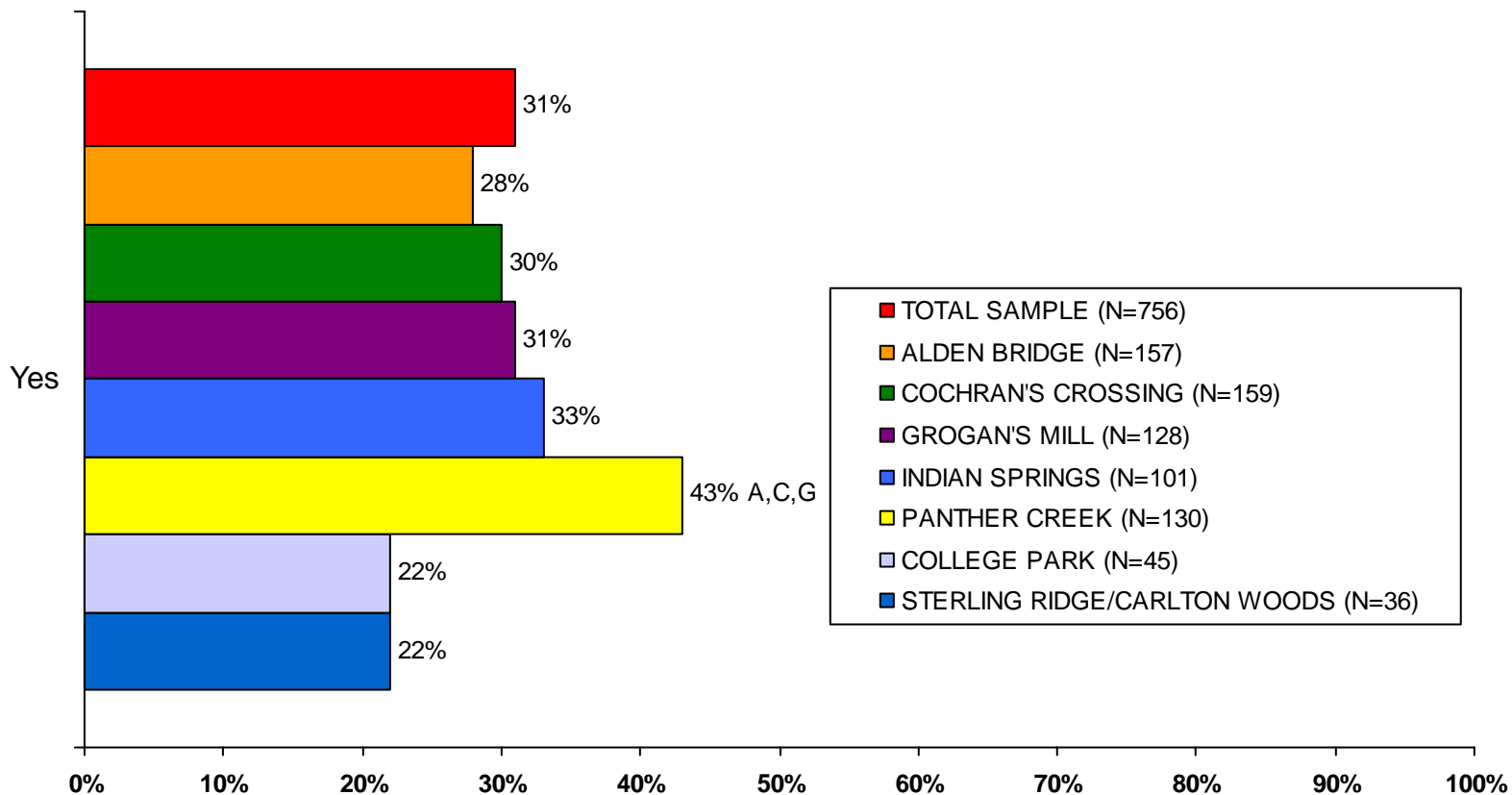
	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	RIDGE/ CARLTON WOODS (N=36)
Houston Chronicle	73%	70%	70%	76%	76%	75%	60%G,I,S	81%
The Villager	49%	45%	56%	51%	51%	50%	36%	39%
Conroe Courier	7%	6%	9%	8%	6%	9%	4%	3%
None	7%	11%	5%	5%	6%	4%	20%	3%
Wall Street Journal	3%	3%	1%	4%	3%	2%	0%	3%
This Week Section/ Houston Chronicle	2%	1%	2%	2%	4%	2%	0%	0%

# Communication with Association Staff

# Association Staff

- The Association Staff provides good service to homeowners
  - 238 contacted an Association Staff Member in the past five years:
    - The Staff rates somewhat high on all aspects on a 5-point scale with a 5 being excellent
      - Courtesy: 4.04 with 38% excellent rating
      - Professionalism: 4.02 with 34% excellent rating
      - Helpfulness: 3.89 with 33% excellent rating
      - Timeliness of response: 3.84 with 31% excellent rating

# In Past Five Years, Have Had Personal Contact With Member of Association Staff



Q31. Closed-ended question

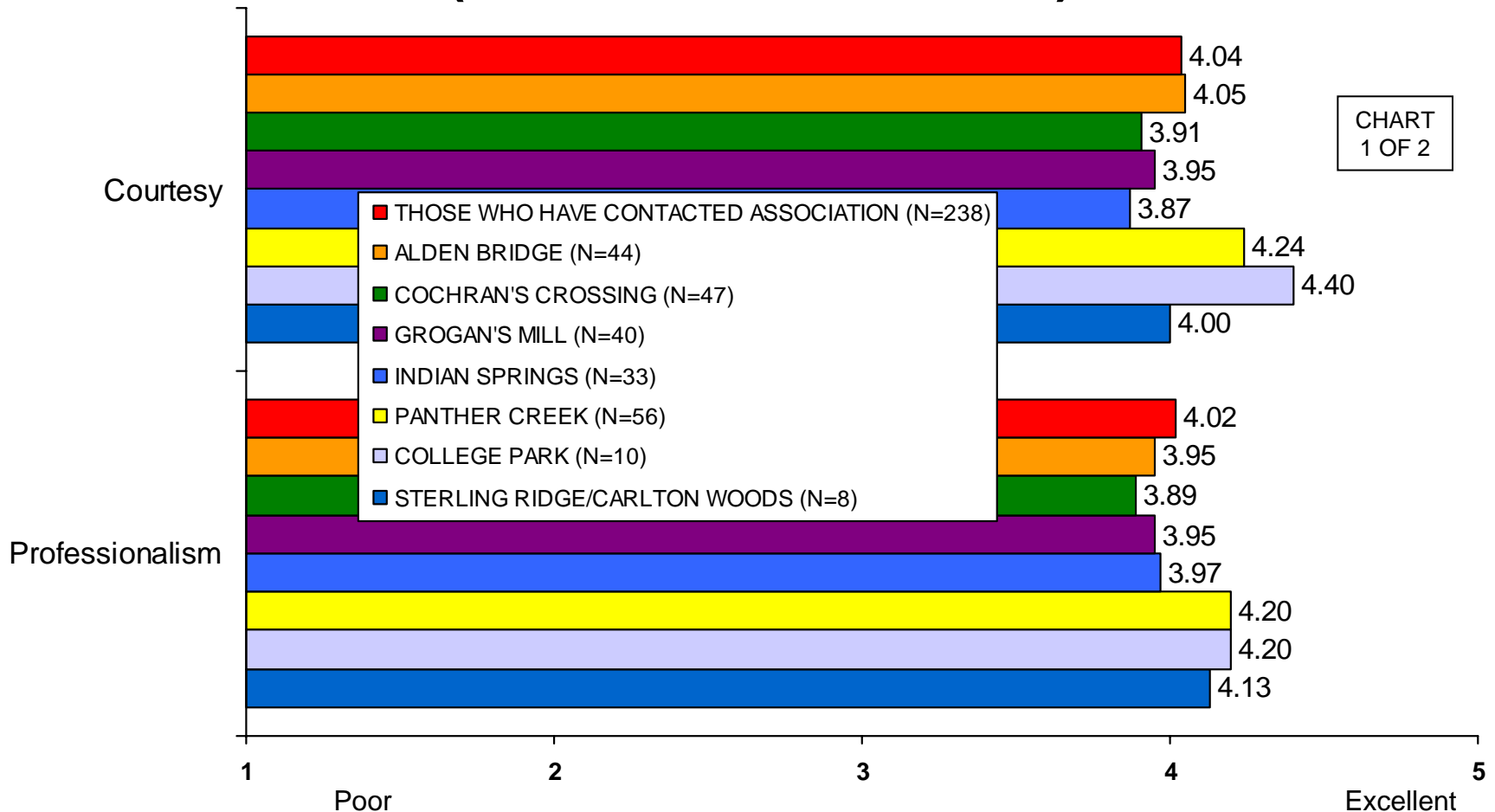
# Departments Contacted

THOSE WHO HAVE COMMUNICATED WITH A MEMBER OF THE ASSOCIATION STAFF	TOTAL SAMPLE (N=238)	ALDEN BRIDGE (N=44)	COCHRAN'S CROSSING (N=47)	GROGAN'S MILL (N=40)	INDIAN SPRINGS (N=33)	PANTHER CREEK (N=56)	COLLEGE PARK (N=10)	STERLING RIDGE/ CARLTON WOODS (N=8)
Deed Restrictions/Residential Design Review/RDRC Committee	54%	61%	51%	68%	45%	50%	50%	38%
Don't know/don't remember	16%	7%	26%	15%	15%	16%	20%	25%
Recreation	14%	18%	17%	8%	18%	9%	10%	25%
Administration	11%	16%	9%	5%	15%	7%	20%	13%
Maintenance	11%	16%	2%	13%	6%	14%	10%	13%

Q32. Closed-ended question



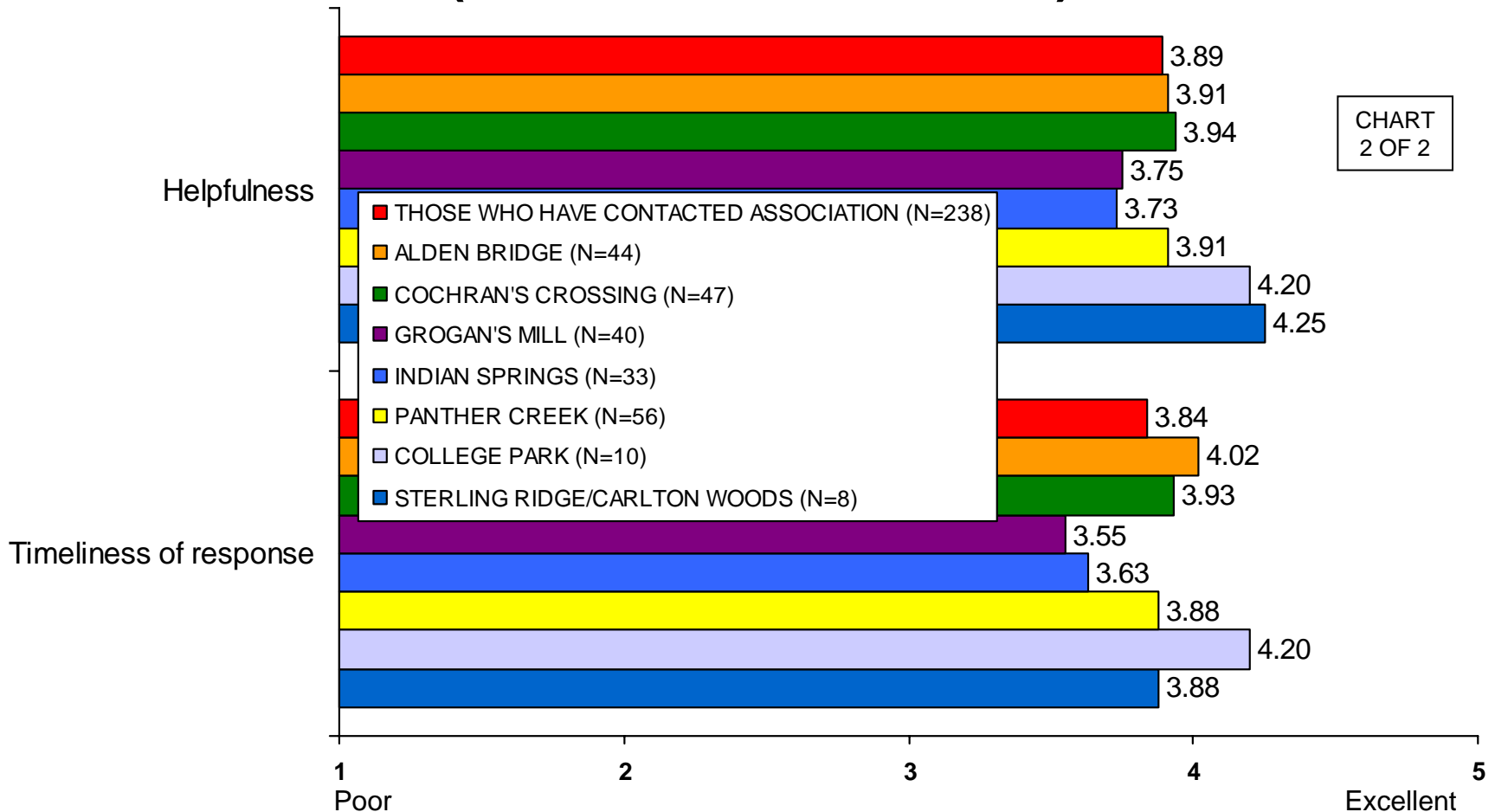
# Rating Association Staff Based on Contact (1 = Poor; 5 = Excellent)



Q33. Closed-ended rating question

# Rating Association Staff Based on Contact (1 = Poor; 5 = Excellent)

CHART  
2 OF 2



Q33. Closed-ended rating question

# Local Governance

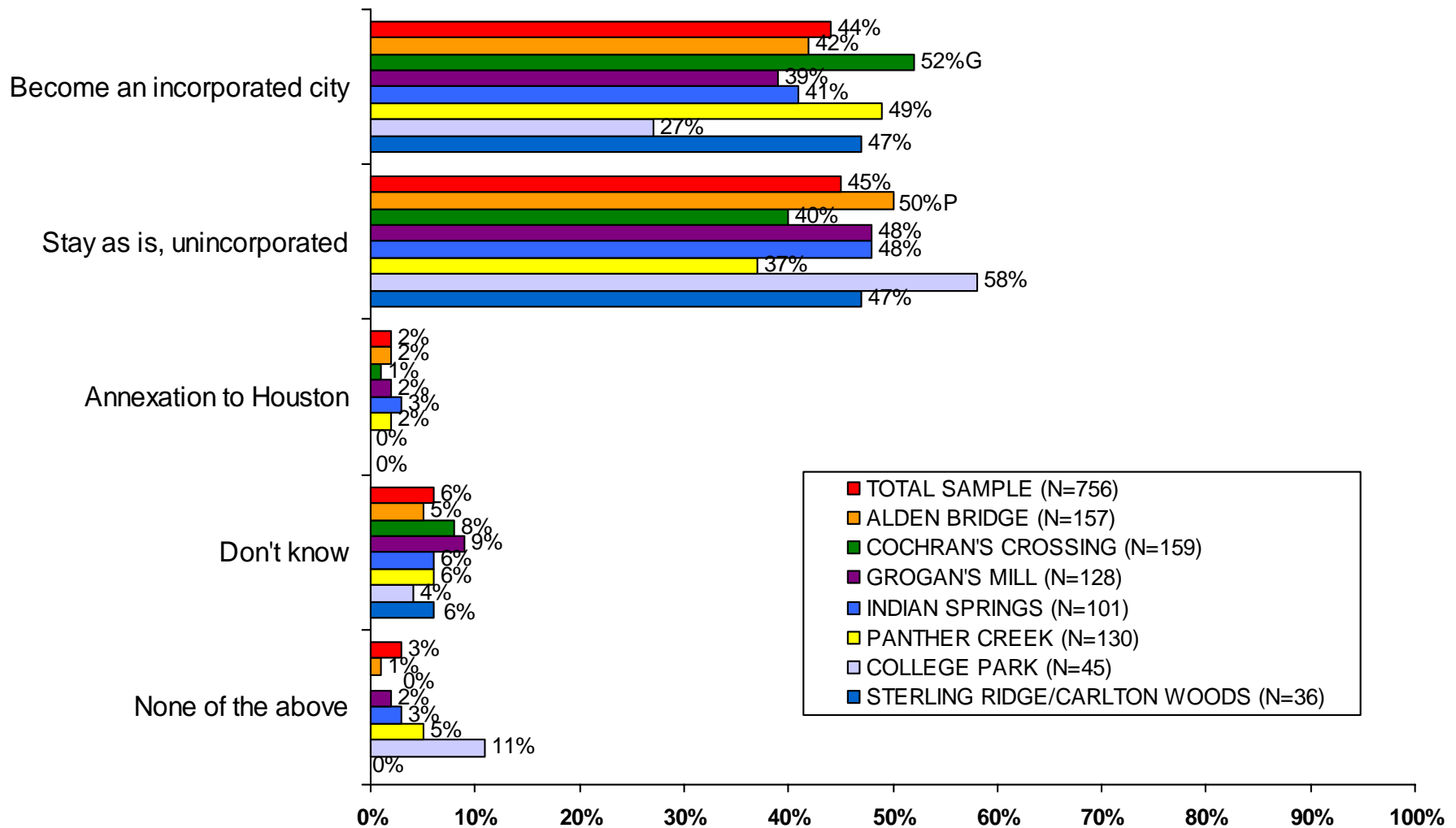
# Annexation Issues

- Only 2% of residents are in favor of annexation to Houston
  - 44% prefer that The Woodlands become an incorporated city
  - 45% wish to remain unincorporated
  - 6% are undecided
- Safety/security are the top amenity the association can provide

# Organizational Awareness

- Residents have a general, but not strong awareness for most organizations in the area
  - Most are unfamiliar with San Jacinto River Authority, Joint Powers Agency, and The Woodlands Commercial Owners Association

# Preferred Option in Regards to Potential Annexation to Houston



# Advantages of Becoming an Incorporated City

Those Who Chose Becoming an Incorporated City	TOTAL SAMPLE (N=332)	ALDEN BRIDGE (N=66)	COCHRAN'S CROSSING (N=82)	GROGAN'S MILL (N=50)	INDIAN SPRINGS (N=41)	PANTHER CREEK (N=64)	COLLEGE PARK (N=12)	STERLING RIDGE/ CARLTON WOODS (N=17)
<b>Advantages</b>								
Cannot be annexed to Houston	40%	29%	43%	50%	29%	44%	58%	41%
Self-governing/have own government	30%	27%	29%	34%	34%	27%	42%	24%
More independent/make own decisions	14%	14%	15%	16%	20%	13%	8%	6%
Have good services/have own services	11%	12%	11%	14%	2%	6%	17%	35%
Lower taxes	10%	12%	10%	8%	0%	13%	17%	12%
Better schools	8%	5%	7%	4%	15%	13%	8%	6%
Community involvement	7%	6%	5%	4%	12%	8%	8%	6%
Political power	6%	3%	5%	12%	10%	5%	8%	6%
More police/sheriff's deputies	6%	6%	5%	4%	5%	9%	17%	6%
More city services	6%	12%	4%	4%	7%	5%	8%	0%
Have own law enforcement	5%	6%	6%	4%	5%	6%	8%	0%

# Disadvantages of Becoming an Incorporated City

Those Who Chose Becoming an Incorporated City	TOTAL SAMPLE (N=332)	ALDEN BRIDGE (N=66)	COCHRAN'S CROSSING (N=82)	GROGAN'S MILL (N=50)	INDIAN SPRINGS (N=41)	PANTHER CREEK (N=64)	COLLEGE PARK (N=12)	STERLING RIDGE/ CARLTON WOODS (N=17)
<b>Disadvantages</b>								
None	27%	24%	28%	30%	15%	30%	33%	35%
Higher taxes	20%	18%	18%	24%	15%	23%	17%	18%
Don't know/unsure	16%	17%	13%	10%	24%	16%	25%	24%
Higher costs/pay for more things	13%	17%	17%	12%	10%	11%	8%	6%
Dislike Houston	7%	3%	4%	6%	7%	17%	0%	0%
Can still be annexed	5%	3%	5%	4%	5%	13%	0%	0%
More/worse politics	5%	9%	6%	4%	5%	2%	0%	6%



# Advantages of Staying an Unincorporated City

Those who chose to stay as is, unincorporated	TOTAL SAMPLE (N=342)	ALDEN BRIDGE (N=78)	COCHRAN'S CROSSING (N=63)	GROGAN'S MILL (N=62)	INDIAN SPRINGS (N=48)	PANTHER CREEK (N=48)	COLLEGE PARK (N=26)	STERLING RIDGE/ CARLTON WOODS (N=17)
<b>Advantages</b>								
Cannot be annexed by Houston	27%	18%	21%	34%	29%	38%	42%	18%
Lower taxes	18%	15%	17%	32%	15%	10%	23%	12%
Have good services/have own	14%	12%	19%	11%	19%	17%	0%	12%
Self-governing/have own government	14%	13%	22%	11%	8%	19%	0%	18%
More independent/make own decisions	12%	17%	14%	10%	13%	10%	4%	6%
Don't know/unsure	10%	12%	10%	6%	4%	13%	23%	12%
More city services	9%	8%	10%	10%	17%	10%	0%	6%
Community involvement	8%	9%	6%	8%	6%	13%	4%	12%
Better schools	8%	10%	11%	6%	4%	6%	4%	6%

# Disadvantages of Staying an Unincorporated City

Those who chose to stay as is, unincorporated	TOTAL SAMPLE (N=342)	ALDEN BRIDGE (N=78)	COCHRAN'S CROSSING (N=63)	GROGAN'S MILL (N=62)	INDIAN SPRINGS (N=48)	PANTHER CREEK (N=48)	COLLEGE PARK (N=26)	STERLING RIDGE/ CARLTON WOODS (N=17)
<b>Disadvantages</b>								
None	32%	31%	35%	34%	25%	23%	42%	47%
Don't know/unsure	22%	32%	24%	16%	23%	15%	23%	12%
Higher taxes	15%	9%	19%	15%	19%	23%	8%	12%
Can still be annexed to Houston	8%	8%	3%	10%	13%	8%	8%	6%
Dislike Houston	6%	5%	0%	11%	4%	10%	4%	6%
Reduced police	6%	4%	10%	5%	8%	2%	4%	12%
Higher costs/pay for more things	5%	3%	11%	3%	6%	4%	4%	6%
Reduced fire services	5%	0%	6%	6%	8%	4%	4%	6%

# Advantages/Disadvantages of Annexation to Houston

Those who chose to be annexed to Houston	TOTAL SAMPLE (N=13)	ALDEN BRIDGE (N=3)	COCHRAN'S CROSSING (N=2)	GROGAN'S MILL (N=2)	INDIAN SPRINGS (N=3)	PANTHER CREEK (N=3)
<b>Advantages</b>						
Better schools	4 respondents	1 respondent	0 respondents	2 respondents	1 respondent	0 respondents
Lower taxes	3 respondents	1 respondent	1 respondent	0 respondents	1 respondent	0 respondents
More city services	3 respondents	0 respondents	1 respondent	0 respondents	1 respondent	1 respondent
Political power	2 respondents	0 respondents	0 respondents	0 respondents	1 respondent	1 respondent
<b>Disadvantages</b>						
Higher taxes	1 respondent	1 respondent	0 respondents	0 respondents	0 respondents	0 respondents
Reduced quality of services	2 respondents	0 respondents	0 respondents	0 respondents	1 respondent	1 respondent
Metro/public/mass transportation	3 respondents	0 respondents	1 respondent	1 respondent	0 respondents	1 respondent

\*Note small base sizes

\*\*No Sterling Ridge/Carlton Woods or College Park respondents chose the Annexation to Houston option

# Most Important for Association to Provide

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
Safety/security	24%	20%	26%	28%	21%	23%	33%	11%
Satisfied/keep up good work	9%	10%	10%	10%	9%	8%	4%	6%
Deed restriction/covenant enforced	8%	8%	11%	13%	7%	7%	0%	3%
Information/growth/ construction/community	5%	5%	4%	4%	7%	4%	4%	8%

Q34. Open-ended question

# Most Important for Association to Provide

Taking care of our area and making sure everything is okay. Make sure it's safe and plenty of light in the morning and night.

Upkeep of the sidewalks.

Maintenance of neighborhood.

Deed restrictions and the local issues.

Enforcement of rules for everybody, not just certain people, and to create some type of increase in law enforcement and less focus on making money and more on making a safe place.

Clear unbiased information concerning growth projects, building projects, and recreational facilities.

The safety of the parks and neighborhoods.

The deed restrictions are important and the maintenance of the pathways and parks.

One of the things is security is very well done. I'm not scared or anything. I haven't seen any problems.

Police. The Association should consider creating a separate school district and police department.

A safe place to live, regulate the parks.

I would like to provide safety and lighting in our community.

Protect our property value.

Trash and security and maintaining the area.

Protect the environment.

Maintain property value and keep up the parks.

Planting trees.

Q34. Open-ended question

# Least Important for Association to Provide

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
None/nothing	41%	46%	46%	42%	40%	35%	22%	42%
Special events/activities	4%	4%	4%	4%	3%	5%	2%	3%

Q35. Open-ended question

# Least Important for Association to Provide

Telling people what they can or cannot do.

Free concerts.

All the traffic. Controlling the population. Trying to lower our taxes.

Shopping areas. City services. More schools in our area.

Adding a skateboard park. Use the money to keep the Woodlands beautiful. The traffic is a nightmare for everybody.

Golf tournaments.

Rebuilding of the community signs in the medians.

Quicker clean up of dead animals on the road.

Social activity.

The recreation activities.

Personally, I would say the recreation.

Social functions.

The entertainment, parties, and sports.

# Rating Understanding of Entities

(1 = Never heard of it/have no understanding;

5 = Very familiar/have very thorough understanding)

	CISD (Conroe Independent School District)		WCA (Woodlands Community Association)		TWA (The Woodlands Association)		MUD (Municipal Utility District)		MCSO (Montgomery County Sheriff's Office)	
	Mean Scores	% Rating Very Familiar	Mean Scores	% Rating Very Familiar	Mean Scores	% Rating Very Familiar	Mean Scores	% Rating Very Familiar	Mean Scores	% Rating Very Familiar
<b>Total Sample (N=756)</b>	4.11	49%	3.69	29%	3.64	29%	3.61	28%	3.58	28%
<b>Alden Bridge (N=157)</b>	4.07	53%	3.76	33%	3.81	34%	3.72	36%	3.62	31%
<b>Cochran's Crossing (N=159)</b>	4.35	55%	3.72	30%	3.55	24%	3.64	28%	3.61	28%
<b>Grogan's Mill (N=128)</b>	3.94C	48%	3.64	30%	3.55	30%	3.65	27%	3.7	35%
<b>Indian Springs (N=101)</b>	4.08	45%	3.58	21%	3.56	21%	3.48	22%	3.51	21%
<b>Panther Creek (N=130)</b>	4.15	48%	3.75	28%	3.68	33%	3.52	28%	3.59	31%
<b>College Park (N=45)</b>	4.07	53%	3.69	36%	3.64	36%	3.62	27%	3.29	22%
<b>Sterling Ridge/ Carlton Woods (N=36)</b>	3.70C	31%	3.50	17%	3.75	22%	3.59	17%	3.30	8%

Chart 1 of 3

Q39. Closed-ended rating question



# Rating Understanding of Entities

(1 = Never heard of it/have no understanding;

5 = Very familiar/have very thorough understanding)

	Your Village Association		Community Associations of The Woodlands		The Woodlands Operating Company		RDRC (Residential Design Review Committee)	
	Mean Scores	% Rating Very Familiar	Mean Scores	% Rating Very Familiar	Mean Scores	% Rating Very Familiar	Mean Scores	% Rating Very Familiar
<b>Total Sample (N=756)</b>	3.56	27%	3.54	24%	3.46	26%	3.21	21%
<b>Alden Bridge (N=157)</b>	3.69	34%	3.54	28%	3.53	31%	3.21	22%
<b>Cochran's Crossing (N=159)</b>	3.54	24%	3.64	27%	3.50	24%	3.30	21%
<b>Grogan's Mill (N=128)</b>	3.55	25%	3.37	22%	3.41	25%	3.18	24%
<b>Indian Springs (N=101)</b>	3.43	21%	3.48	16%	3.51	23%	3.11	15%
<b>Panther Creek (N=130)</b>	3.62	29%	3.67	28%	3.57	27%	3.33L	19%
<b>College Park (N=45)</b>	3.42	22%	3.49	29%	3.09	27%	2.84	27%
<b>Sterling Ridge/ Carlton Woods (N=36)</b>	3.42	25%	3.41	11%	3.14	14%	3.12	14%

Chart 2 of 3

Q39. Closed-ended rating question

# Rating Understanding of Entities

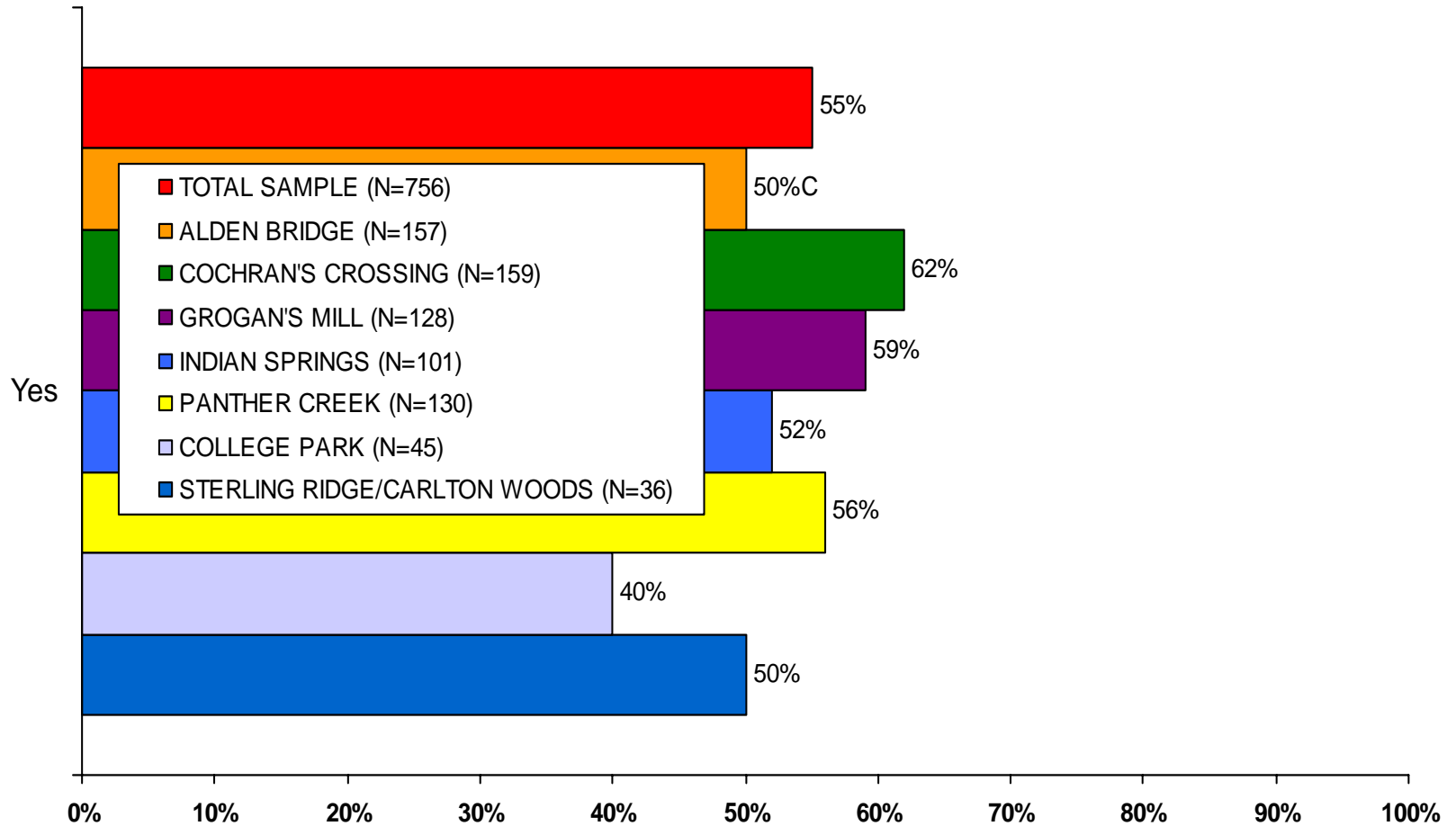
(1 = Never heard of it/have no understanding;  
5 = Very familiar/have very thorough understanding)

	TCID (Town Center Improvement District)		SJRA (San Jacinto River Authority)		JPA (Joint Powers Agency)		WCOA (The Woodlands Commercial Owners Association)	
	Mean Scores	% Rating Very Familiar	Mean Scores	% Rating Very Familiar	Mean Scores	% Rating Very Familiar	Mean Scores	% Rating Very Familiar
<b>Total Sample (N=756)</b>	3.04	18%	2.40	11%	2.28	10%	2.15	9%
<b>Alden Bridge (N=157)</b>	2.96	22%	2.41	13%	2.34	13%	2.27	15%
<b>Cochran's Crossing (N=159)</b>	3.25	18%	2.42	9%	2.49	11%	2.22	10%
<b>Grogan's Mill (N=128)</b>	3.01	20%	2.35	13%	2.19	9%	1.94	8%
<b>Indian Springs (N=101)</b>	3.05	17%	2.36	11%	2.26	6%	2.15	5%
<b>Panther Creek (N=130)</b>	3.16	20%	2.62	15%	2.35	12%	2.21	8%
<b>College Park (N=45)</b>	2.51	11%	2.07P	4%	1.77C	0%	1.98	2%
<b>Sterling Ridge/ Carlton Woods (N=36)</b>	2.71	6%	2.12P	6%	1.81C	3%	2.00	3%

Chart 3 of 3

Q39. Closed-ended rating question

# Is The Woodlands Operating Company Separate and Distinct from Others Rated?



Q40. Closed-ended question

# The Community

# Aspects Residents Like About The Woodlands

- Overall, residents are pleased with various aspects of The Woodlands:
  - Environment/Aesthetics
    - Specifically, the many trees, parks, and overall beauty
  - Sense of community/community atmosphere
  - General safety/security

# General Areas of Concern

- In general, residents appear satisfied with The Woodlands, but they express concerns about:
  - Annexation
  - Rapid growth
    - Commercial
    - Residential
  - Traffic
  - Security/Law enforcement

# Aspects Liked About Living in The Woodlands

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
Appearance/beauty of area/tree/greenery/forestation	32%	30%	30%	39%	32%	32%	31%	36%
Family atmosphere/environment/community	19%	23%	21%	14%	17%	14%	20%	25%
Parks/woods/parkways/open spaces	16%	15%	14%	13%	23%	15%	13%	19%
Conveniently located	12%	11%	8%	13%	9%	15%	27%+	8%
Safe/security	12%	12%	16%	8%	10%	12%	13%	3%
Schools/quality education	9%	9%	11%	8%	7%	12%	4%	8%
Aesthetics/neat/clean	9%	8%	11%	5%	7%	11%	7%	11%
Feels like small town/close to city/rural	7%	6%	8%	9%	8%	5%	7%	17%
Shopping/restaurants/entertainment	7%	6%	6%	6%	8%	8%	8%	11%
Nice/friendly neighbors/people	7%	8%	8%	8%	11%	2%	2%	6%
Overall lifestyle/quality of life	6%	8%	9%	4%	5%	7%	0%	6%
Quiet/peaceful	6%	7%	6%	5%	7%	5%	9%	8%
Everything need right here/self-sustaining	6%	6%	5%	7%	6%	9%	2%	0%

Q41. Open-ended question

# Aspects Liked About Living in The Woodlands

It doesn't feel like you live in a big city, but you're still close.

It is a very safe and quiet community to raise my family in.

Convenience of everything and the appearance of the area.

No billboards. No signs. No trash on the streets.

The environment and the green lands surrounding the area.

Green spaces and the trees.

Safe environment and the school for the children.

The beauty of it. The many trees make it seem like you are out in the country.

Quiet area. Beauty of the area in the city.

Nice community, very beautiful.

The beauty of the area. The parks and open spaces are very beautiful.

Everything, the view, the peace!

I like the control of what the neighbors can do, that people have a standard of what they can do.

The wooded areas. The quietness and the isolation.

I like the open space and landscape around the area.

The lack of government. The safety.

I like the woods and the paths, and recreational facilities and the shopping and restaurants and the rural feel.

It's peaceful and quiet and I feel safe.



# Suggestions to Improve The Woodlands

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
None/nothing	26%	27%	23%	25%	32%	24%	33%	22%
Traffic control	15%	15%	14%	17%	16%	17%	9%	11%
Slow over-population/too crowded	8%	13%	8%	4%	3%	12%	2%	6%
Stop cutting down trees/plant replacement trees	8%	9%	9%	10%	10%	4%	7%	0%
Slow construction/commercial businesses	8%	6%	8%	9%	15%	5%	2%	8%
Better law enforcement/lower crime/more police officers	8%	8%	8%	6%	9%	8%	4%	17%

Q42. Open-ended question

# Changes Would Make to The Woodlands

More activities for seniors.

Be incorporated.

I would like them to redesign the placement of the shopping center signs so the pathways aren't blocked to traffic.

Control the expansion.

Getting the road through 2498.

Better parks.

Do something about the traffic.

Slow down the building of the commercial businesses.

Lower taxes.

I would like better traffic control in the streets, keeping it more green, and something to keep the teenagers out of trouble, and maybe a park and ride.

Protect the parks from fire.

My concern is crime.

Put in double path ways for runners.

Ice skating rink now.

Reduce assessment fees.

The cleaning of the pools.

Q42. Open-ended question

# Most Important Issues Facing The Woodlands Residents

	TOTAL SAMPLE (N=756)	ALDEN BRIDGE (N=157)	COCHRAN'S CROSSING (N=159)	GROGAN'S MILL (N=128)	INDIAN SPRINGS (N=101)	PANTHER CREEK (N=130)	COLLEGE PARK (N=45)	STERLING RIDGE/ CARLTON WOODS (N=36)
Traffic control/flow/congestion	20%	16%	19%	24%	27%	18%	9%	22%
Annexation--opposed	16%	15%	18%	15%	18%	15%	16%	8%
New construction/growth/over development	15%	15%	15%	18%	16%	18%	9%	11%
None/nothing	10%	11%	10%	9%	5%	11%	11%	8%
Law enforcement/crime/safety	10%	7%	13%	9%	9%	8%	11%	14%
Over-population of schools	6%	8%	7%	5%	5%	4%	2%	6%
Taxes too high	5%	3%	7%	4%	3%	8%	2%	8%

Q43. Open-ended question

# Most Important Issues Facing The Woodlands Residents

Traffic and crime are going to be a big problem as the community grows.

Traffic control and law enforcement.

The school district needs to improve.

Traffic. It's overcrowded in our area when driving home.

Annexation of The Woodlands into Houston.

Annexation into Houston.

Traffic. A lot of traffic. Sawdust is very busy.

Dealing with new construction. Construction is blocking the traffic flow.

Traffic. Not enough lanes.

Security.

Needs a better school system.

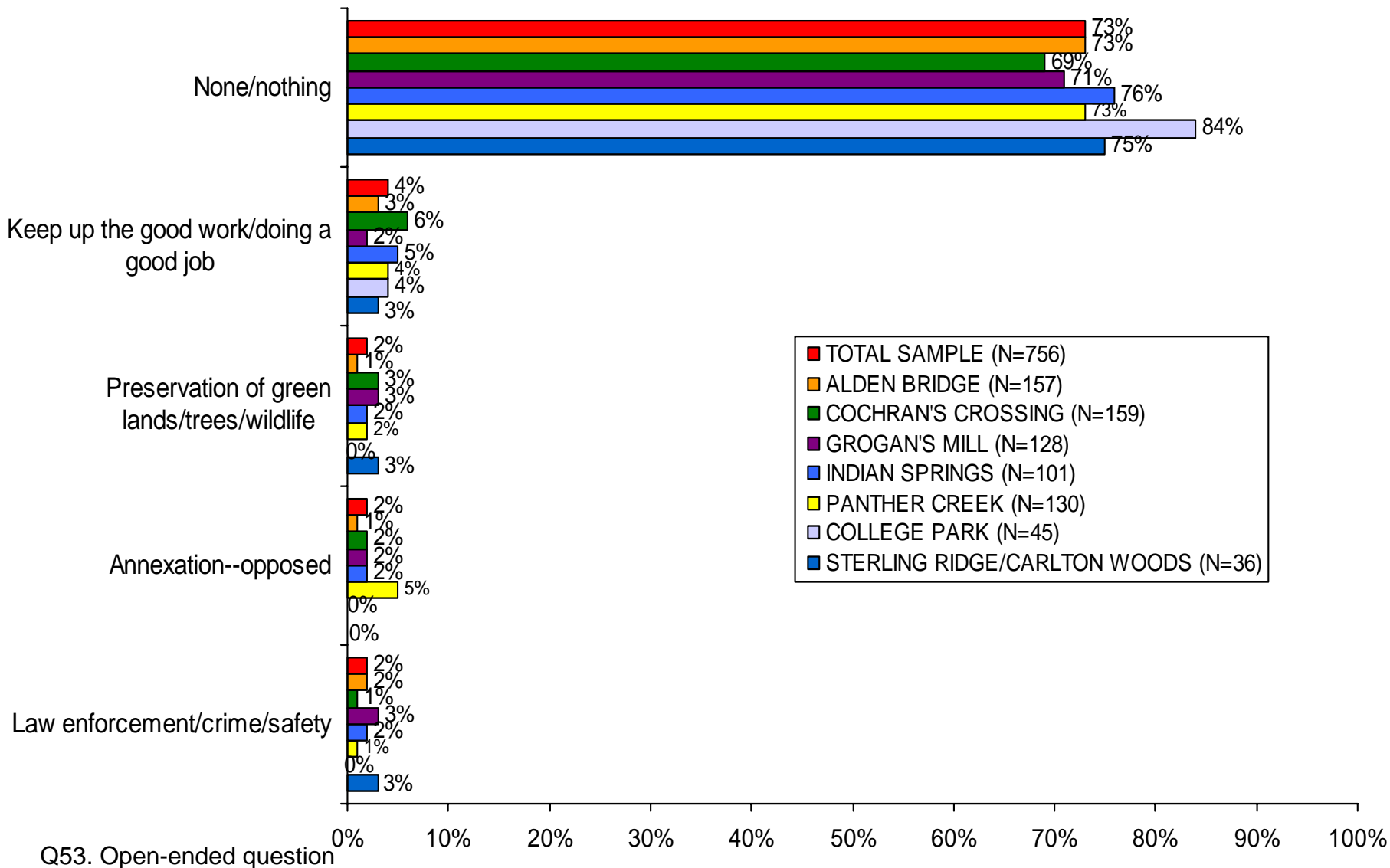
Police and fire protection.

Growth. Too much construction.

Too many speeders; need more police.

To NOT be annexed to Houston.

# Suggestions for Improving The Woodlands



# A Few of the Suggestions for Improving The Woodlands

Better garbage pickup.

The school district is extremely important in The Woodlands.

The cleaning of the pools and the places to look nice.

Continue trying to preserve the forest.

Be very aware of the school situation, classes are way too big.

I think they need to lower the evaluation because the overall value of houses is going up.

Good job.

Hire more competent people to work there.

Get to know your neighbors, just don't be a name on a list, be involved.

Stick to the original plan - Mitchell's Plan.

Some of the associations are not honest with the growth of the city such as the residential area ones, no clear answers on what can be built and what can't be built and proposed future building.

They need more lighting on the streets it's way too dark.

Keep communicating with everyone and listen to everyone's ideas.

# Research Findings - Comparison to Previous Studies

# Changes Since Previous Studies

- Concerns
  - Residents continue to be less concerned about the threat of annexation from the 1999 study
    - Residents continue to choose to stay unincorporated
      - 45% in 2004 vs. 42% in 2002
  - Residents seem less concerned with growth and development and traffic issues than in 2000



# Changes Since Previous Studies

- Concerns
  - Residents are significantly less concerned about overcrowded schools since 2002
  - Residents are more satisfied with services provided by their community association than in 2004
    - 12% gave excellent ratings in 2002 compared to 18% giving excellent ratings in 2004

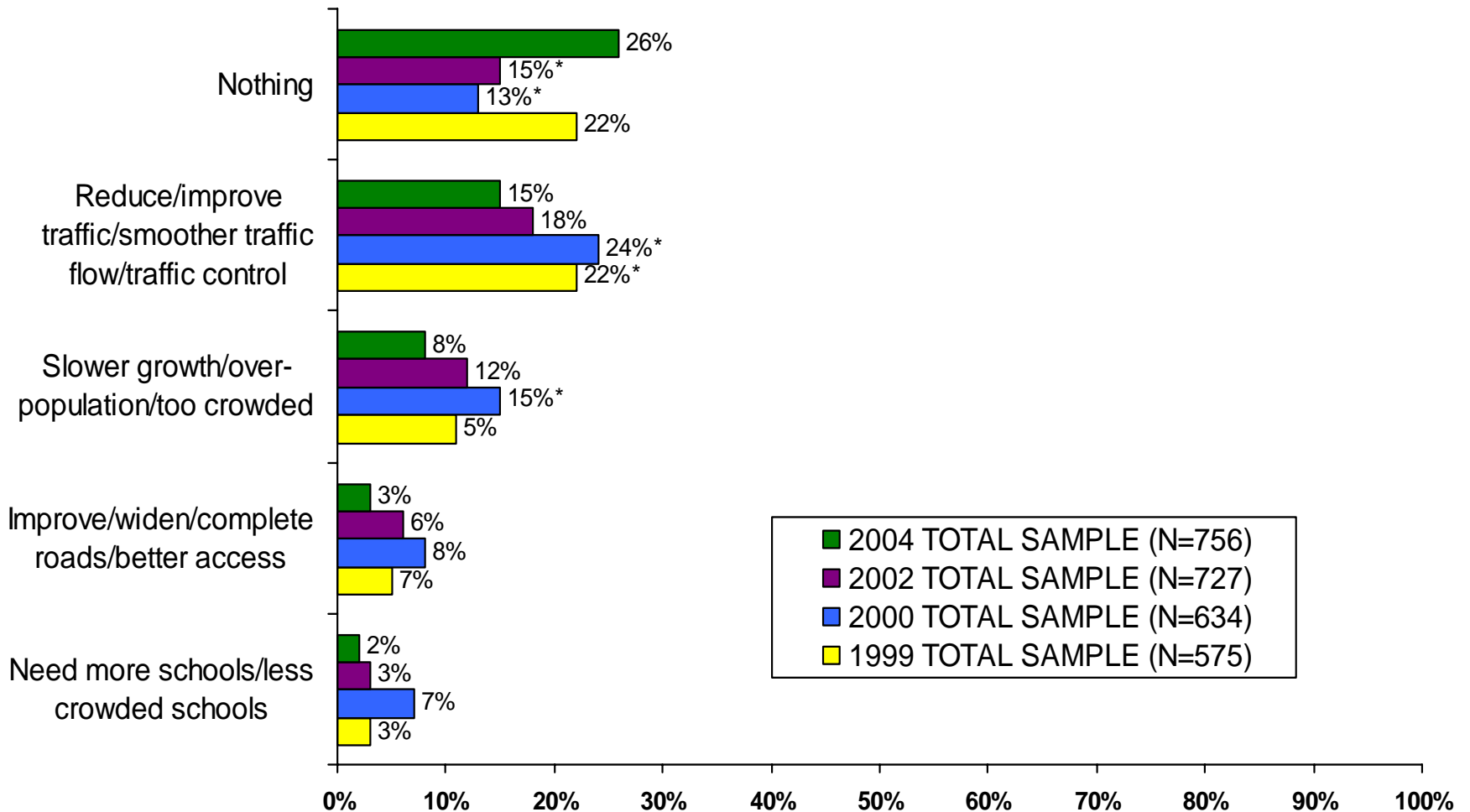
# Changes Since Previous Studies

- Communication
  - Usage of local newspapers as a source of community activities continues to decline since 1999
  - A high portion of respondents continue to report receiving The Woodlands Magazine and readership for the Magazine is up slightly
    - Reading all of Magazine: 29% in 2004 vs. 25% in 2002
    - Reading most of Magazine: 37% in 2002 and 2004

# Changes Since Previous Studies

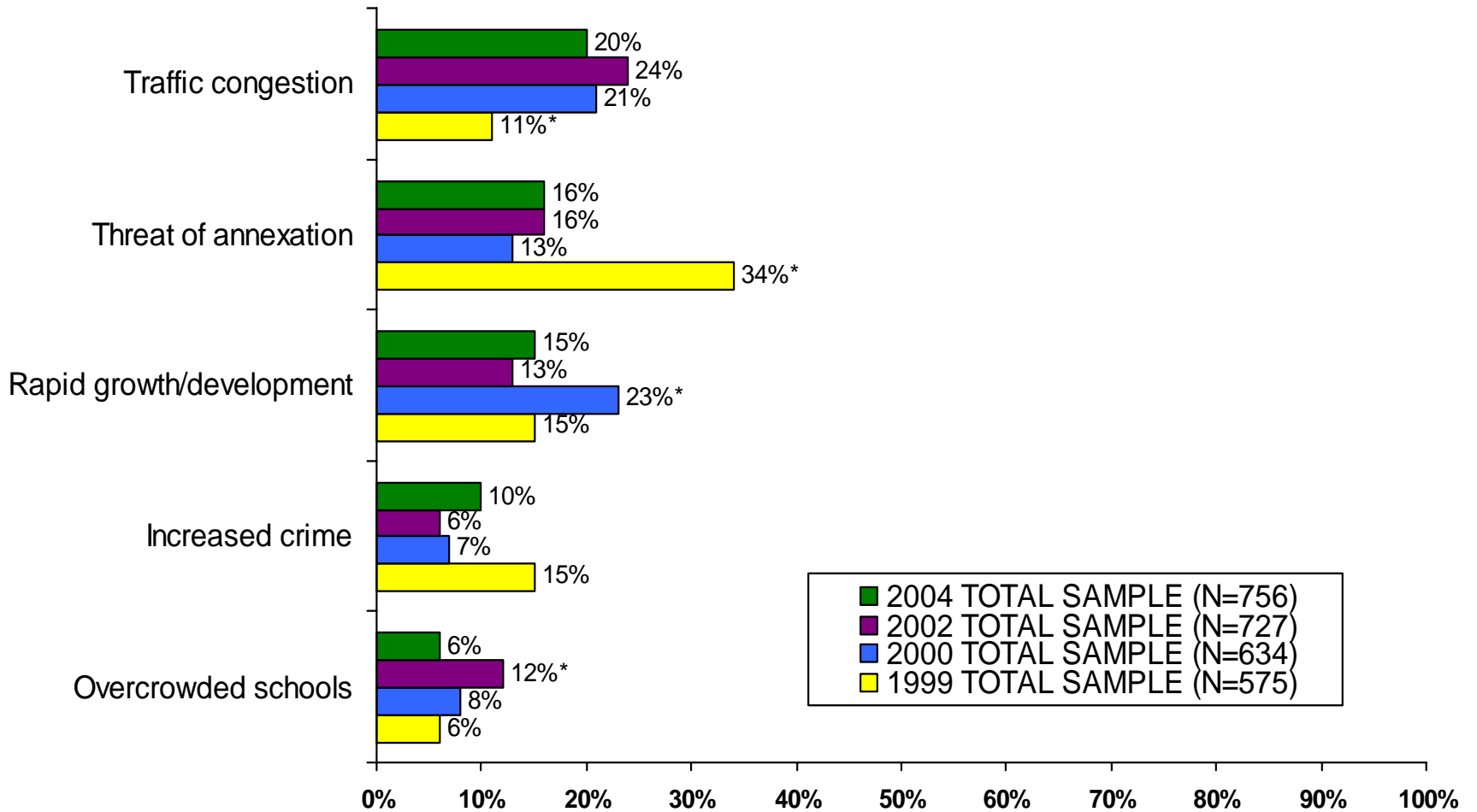
- Deed Restrictions
  - Contact with Association Staff has increased (31%) since 2002
    - More residents have contacted the Recreation department in 2004 (14%) than in 2002 (6%) This is still less than in 1999 (58%)
  - Fewer residents feel enforcement is about right
    - 64% in 2004, 69% in 2002, and 70% in both 2000 and 1999

# Changes/Suggestions for Improving The Woodlands



Q42. Open-ended question

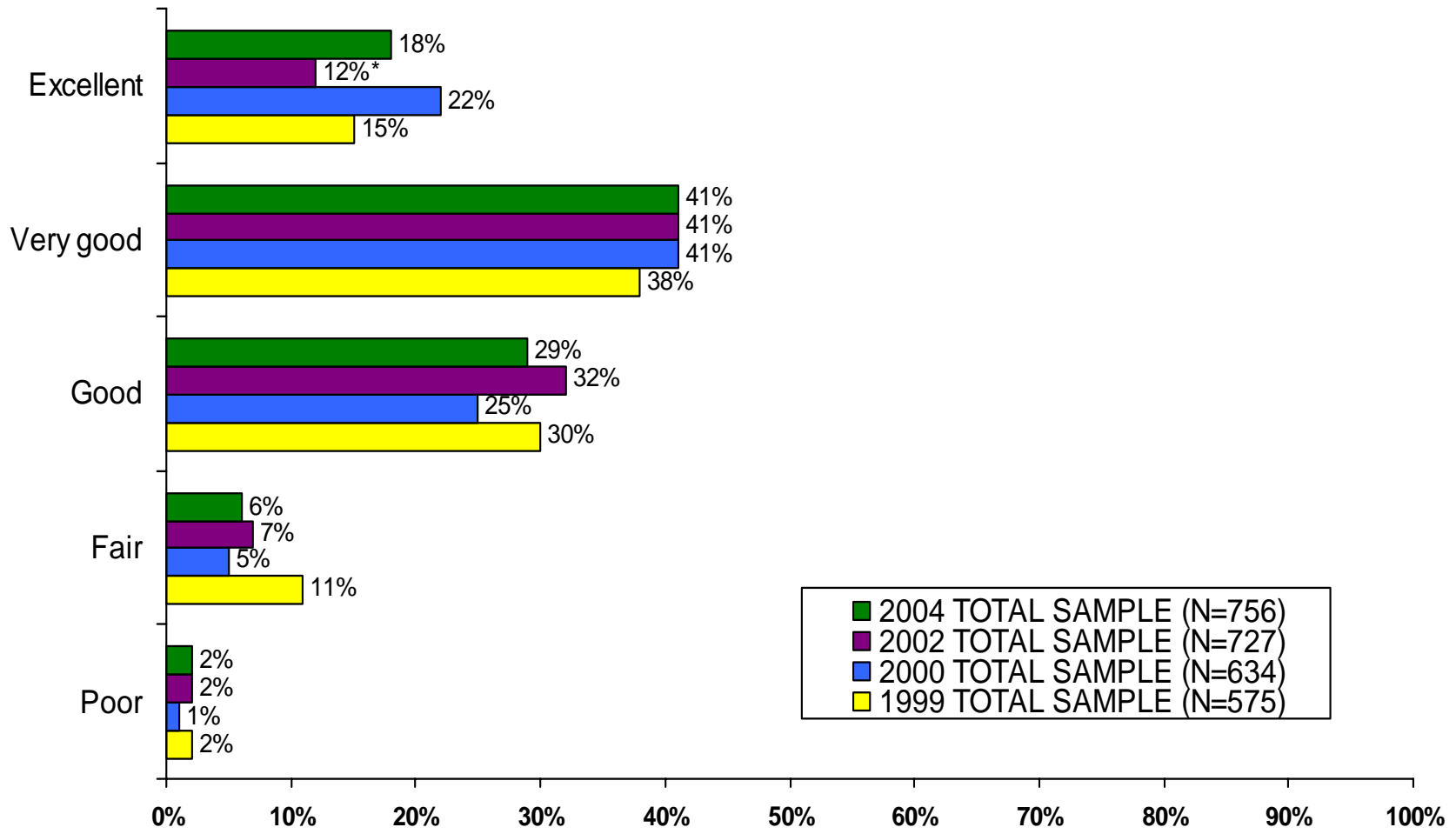
# Most Important Issues Facing The Woodlands Residents



Q43. Open-ended question

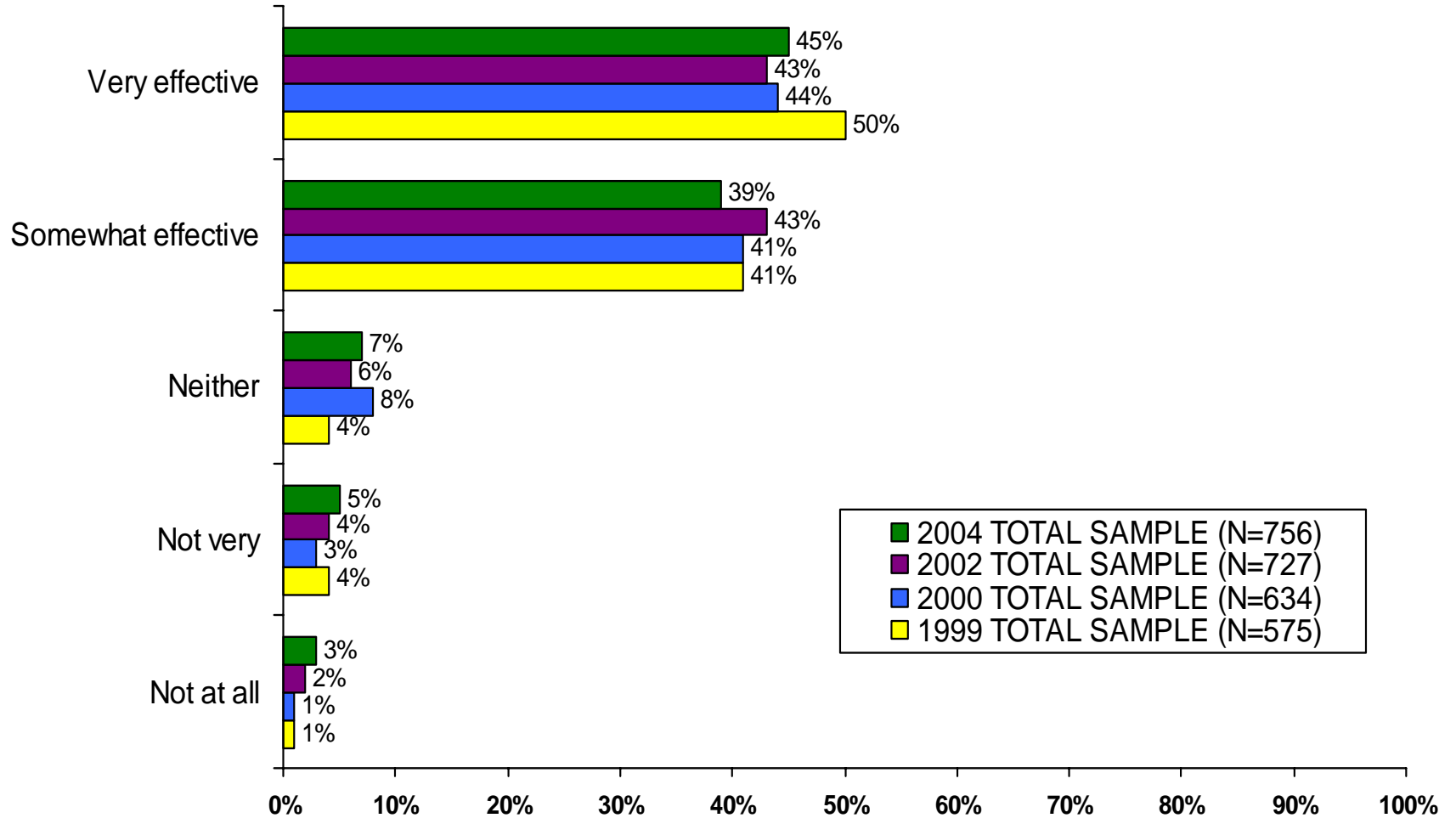
# Satisfaction with Services Provided by Community Association

2004 Residents Study



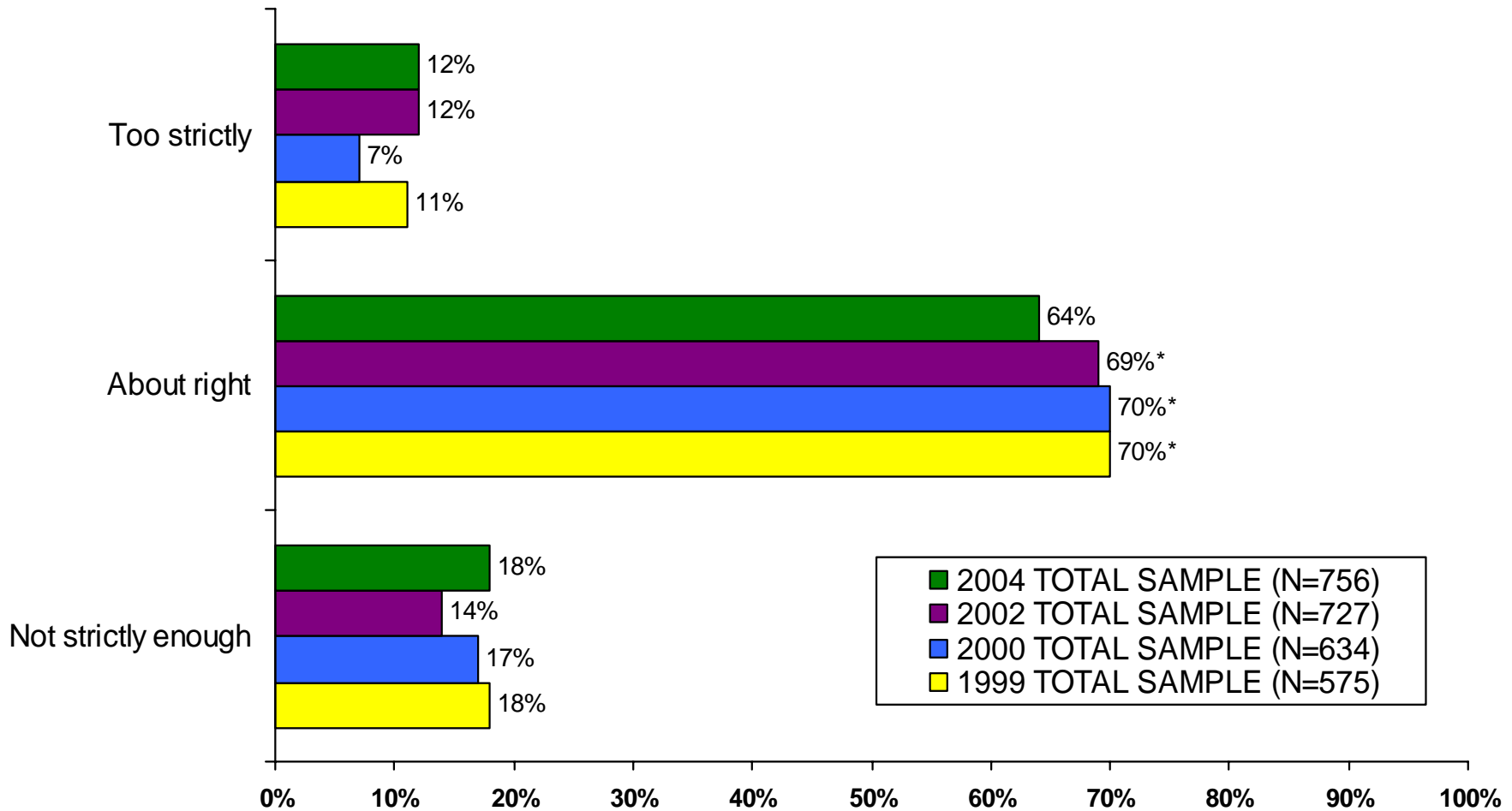
Q8. Closed-ended rating question

# Effectiveness of Enforcement of Deed Restrictions



Q16. Closed-ended

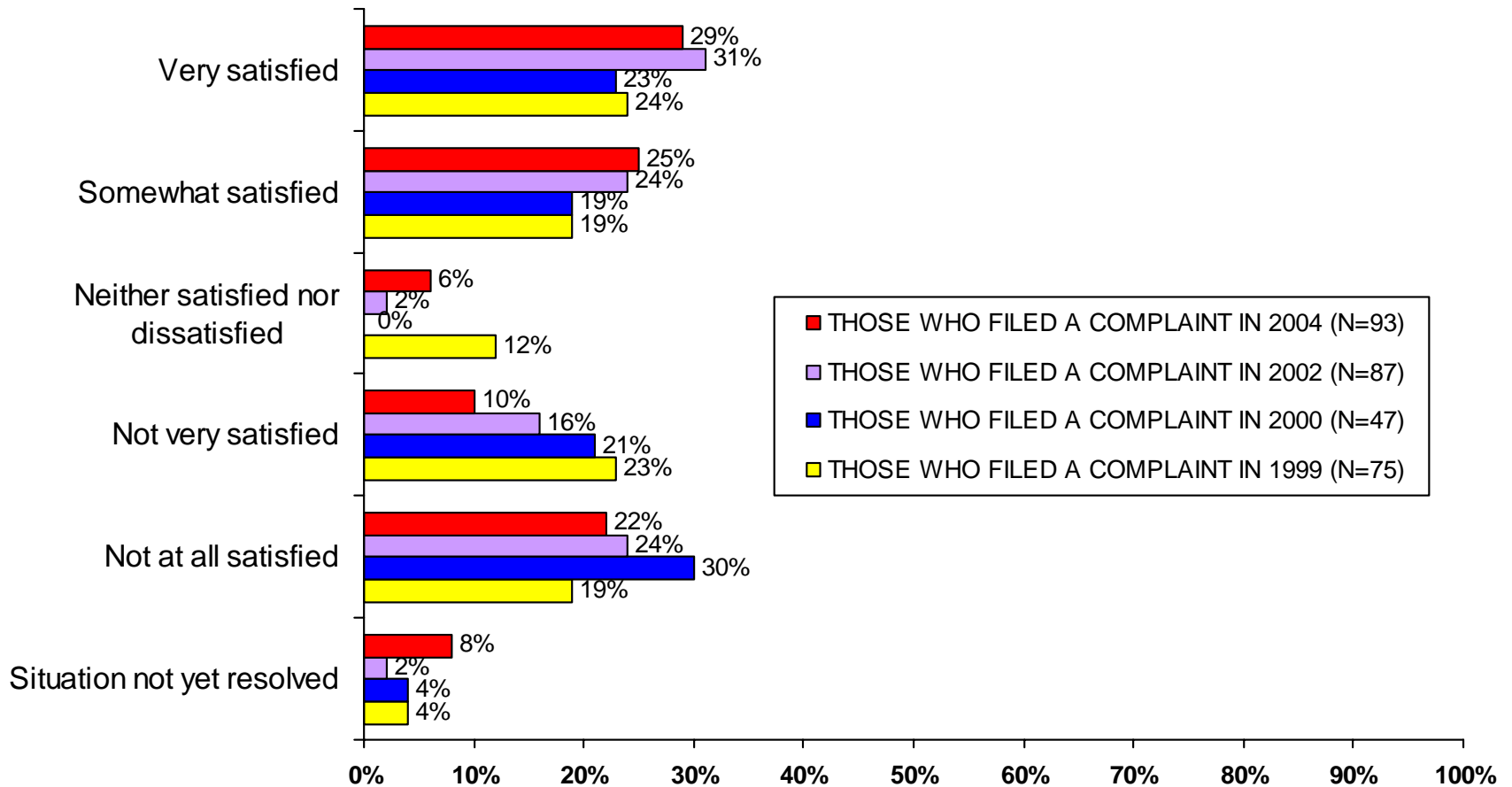
# Feel That Deed Restrictions Are Enforced...



Q18. Closed-ended

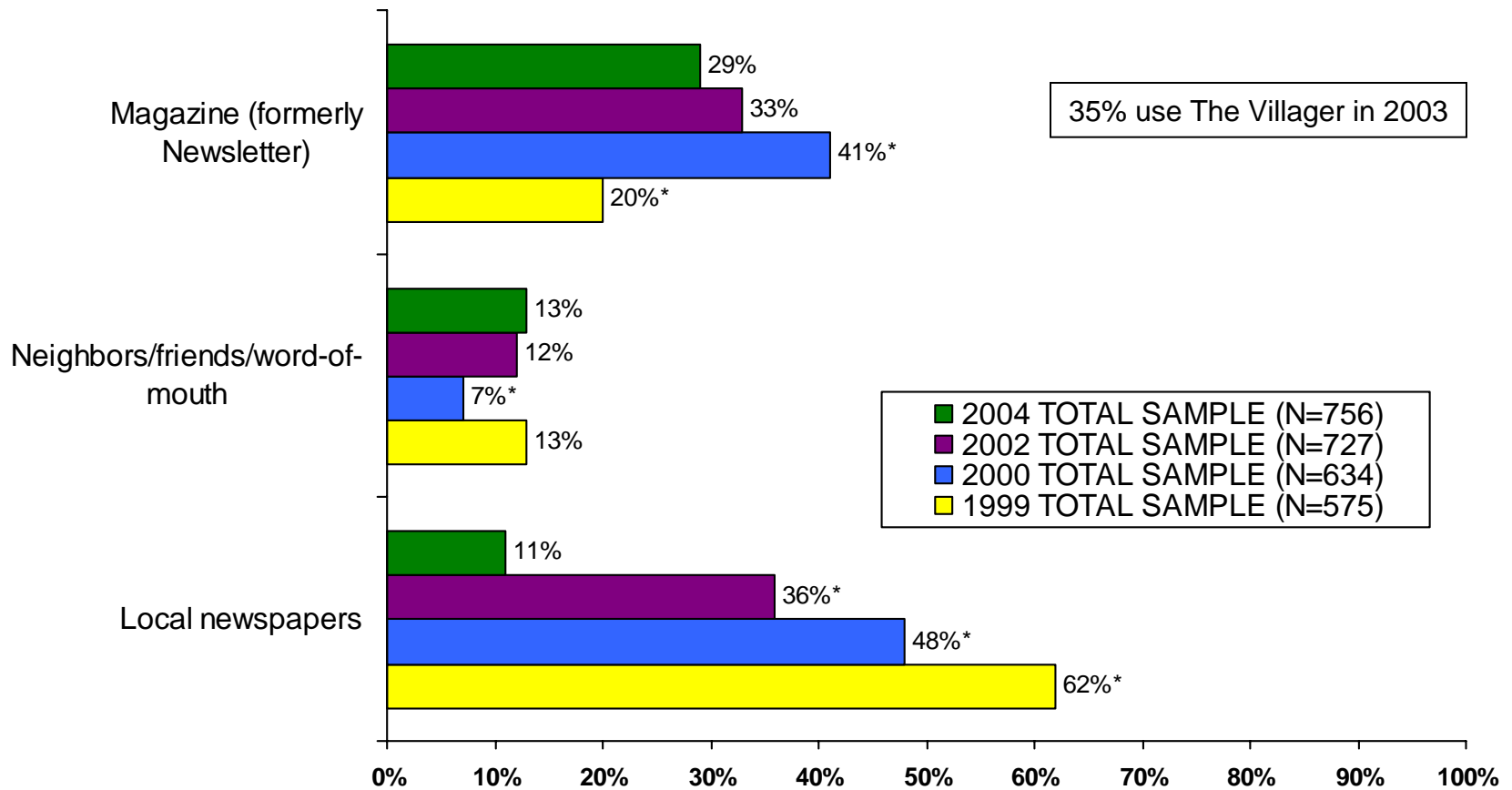


# Satisfaction with Association's Response to Complaint Filed



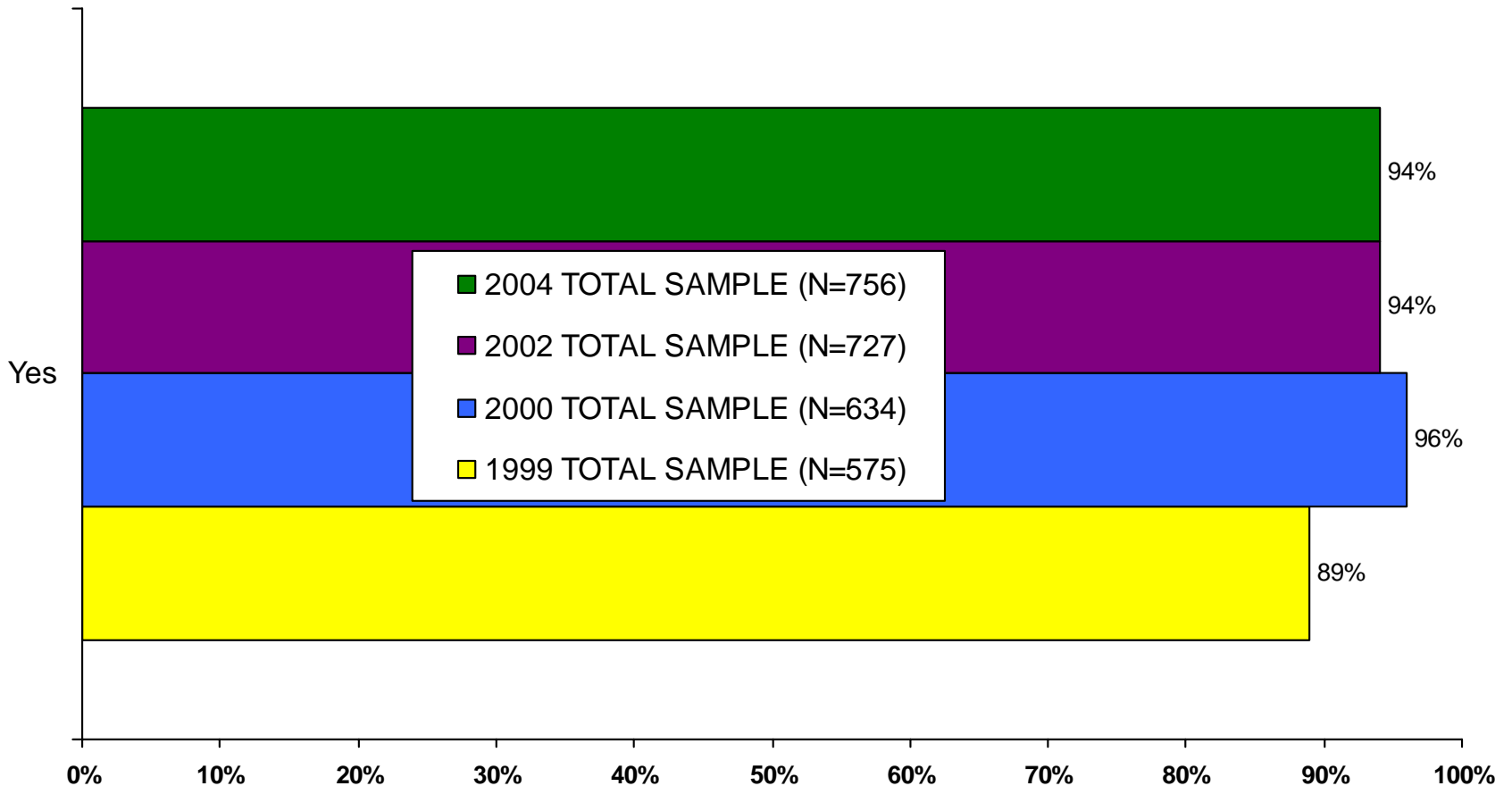
Q20. Closed-ended

# How Primarily Learn About Activities in Community



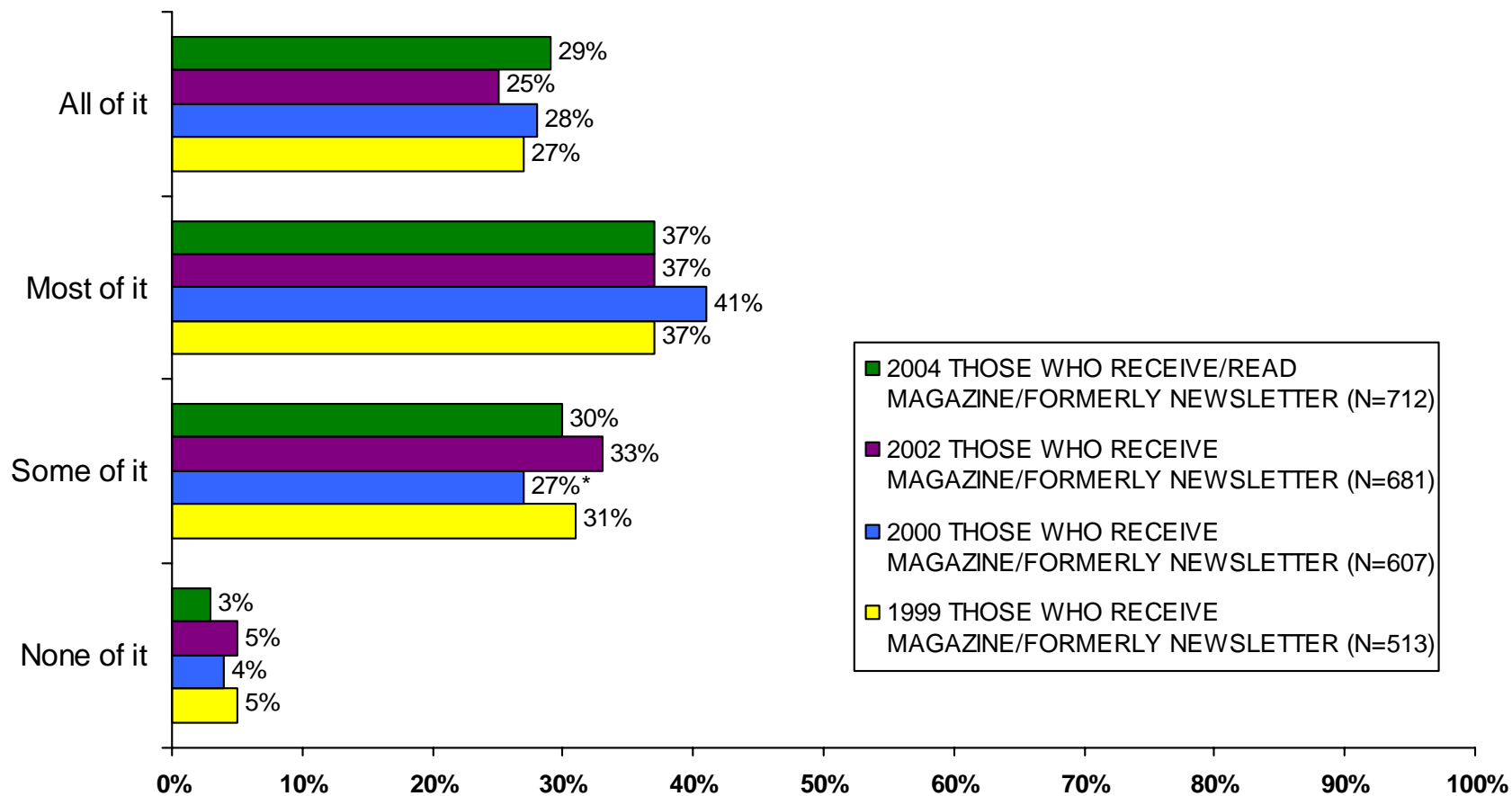
Q23. Closed-ended question

# Receive The Woodlands Community Magazine (Formerly Newsletter)



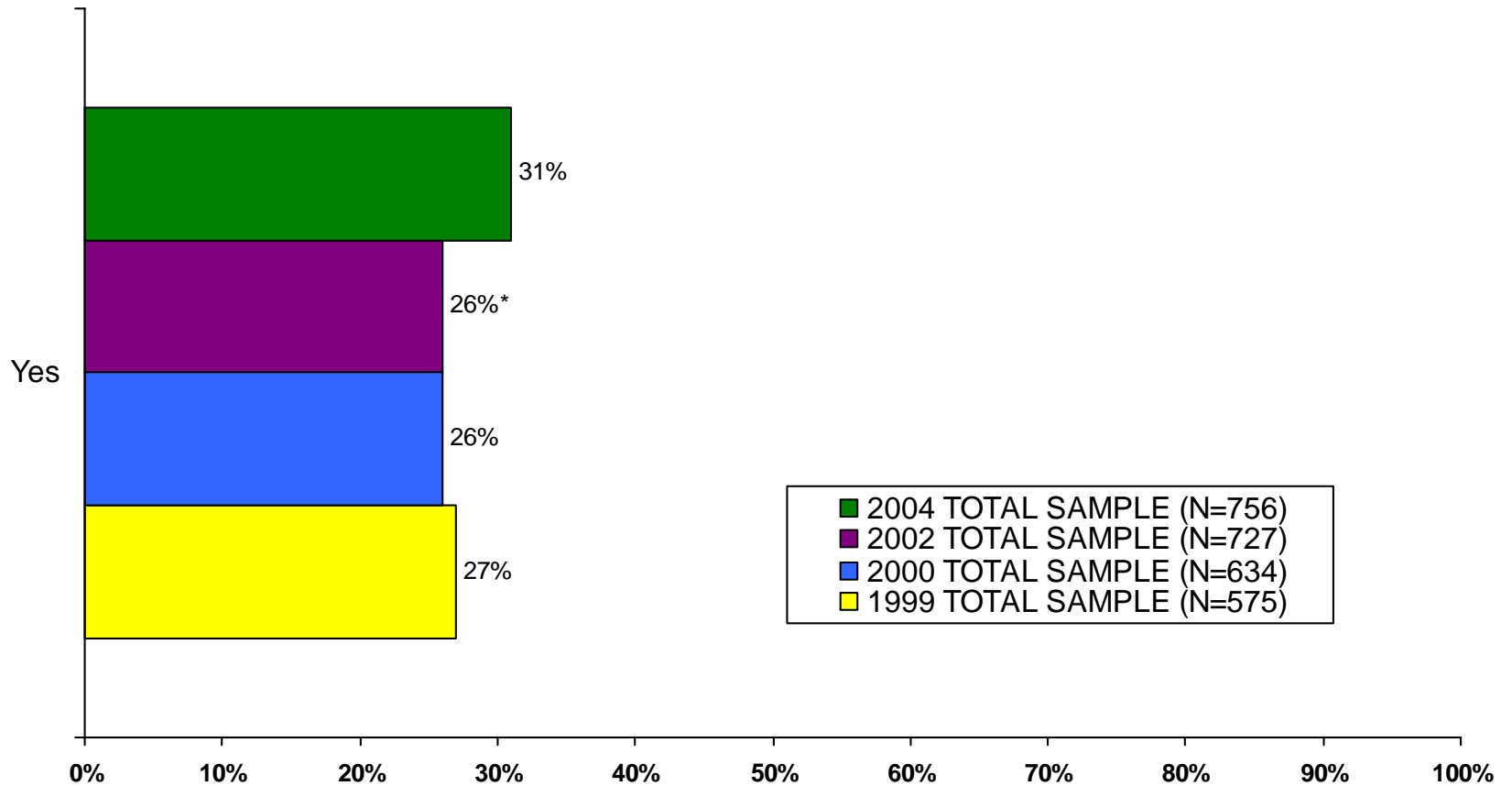
Q24. Closed-ended question

# When Receive Magazine (Formerly Newsletter), Typically Read...



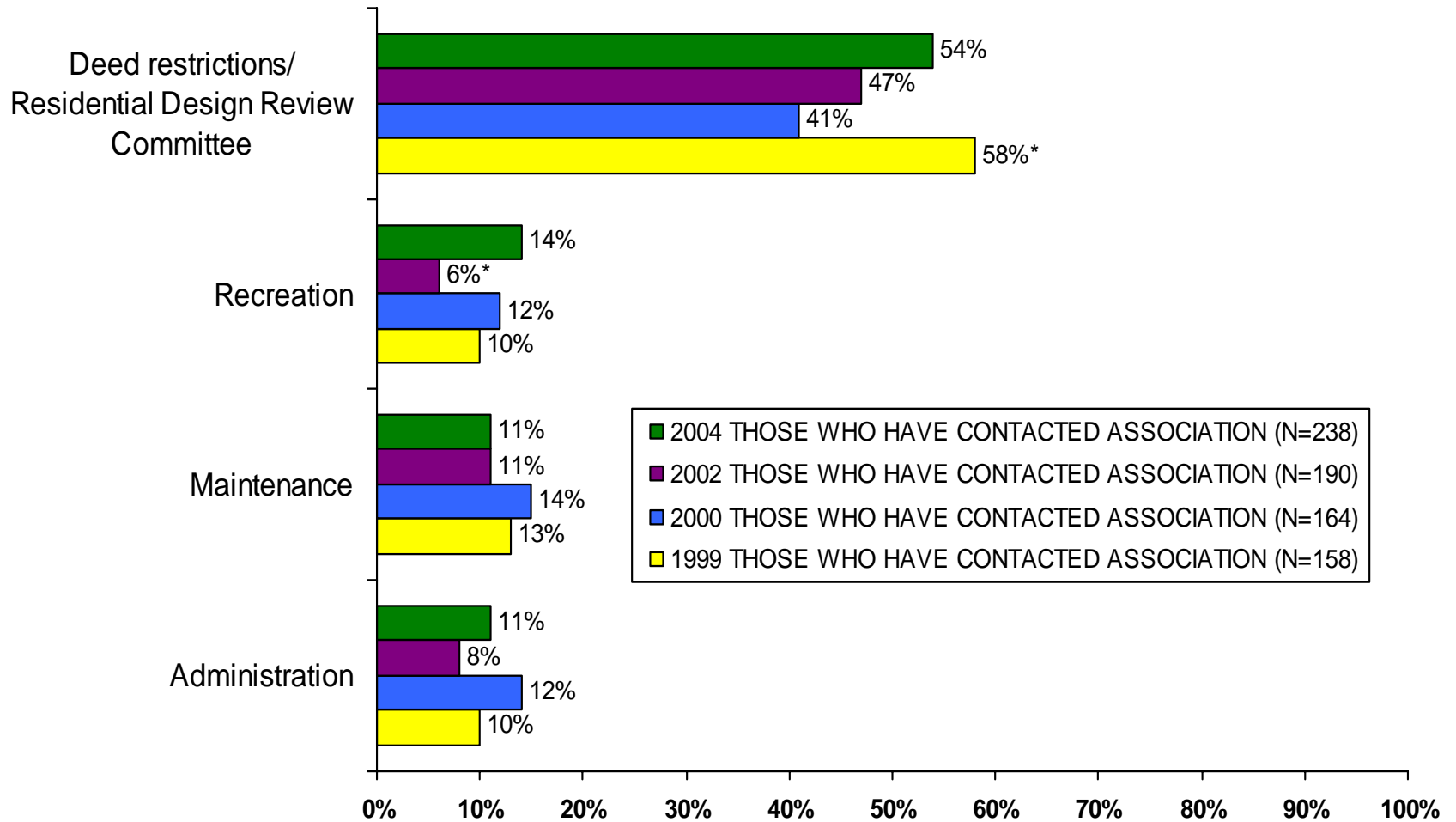
Q25. Closed-ended question

# In Past Five Years, Have Had Personal Contact With Member of Association Staff



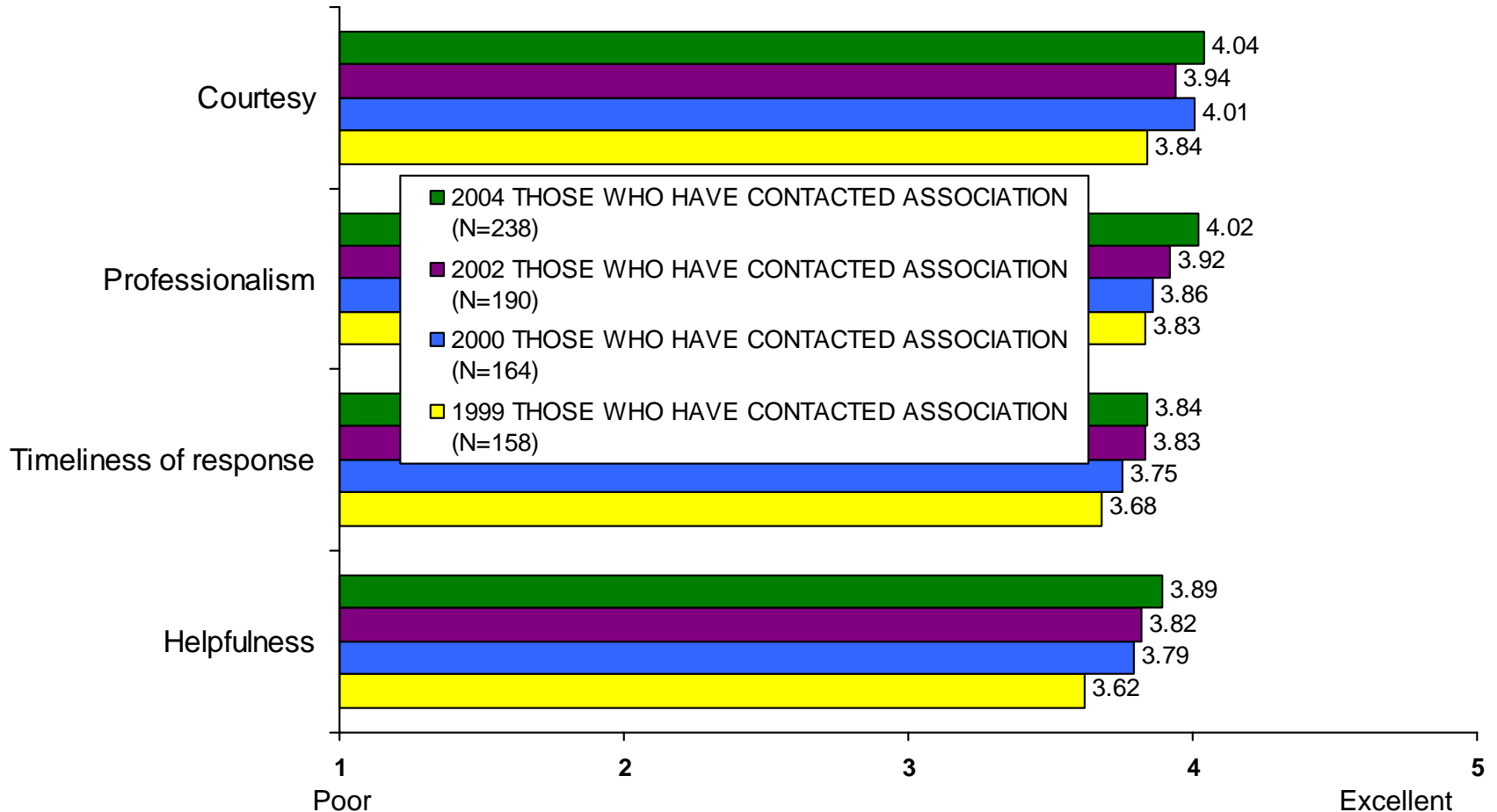
Q31. Closed-ended question

# Departments Contacted



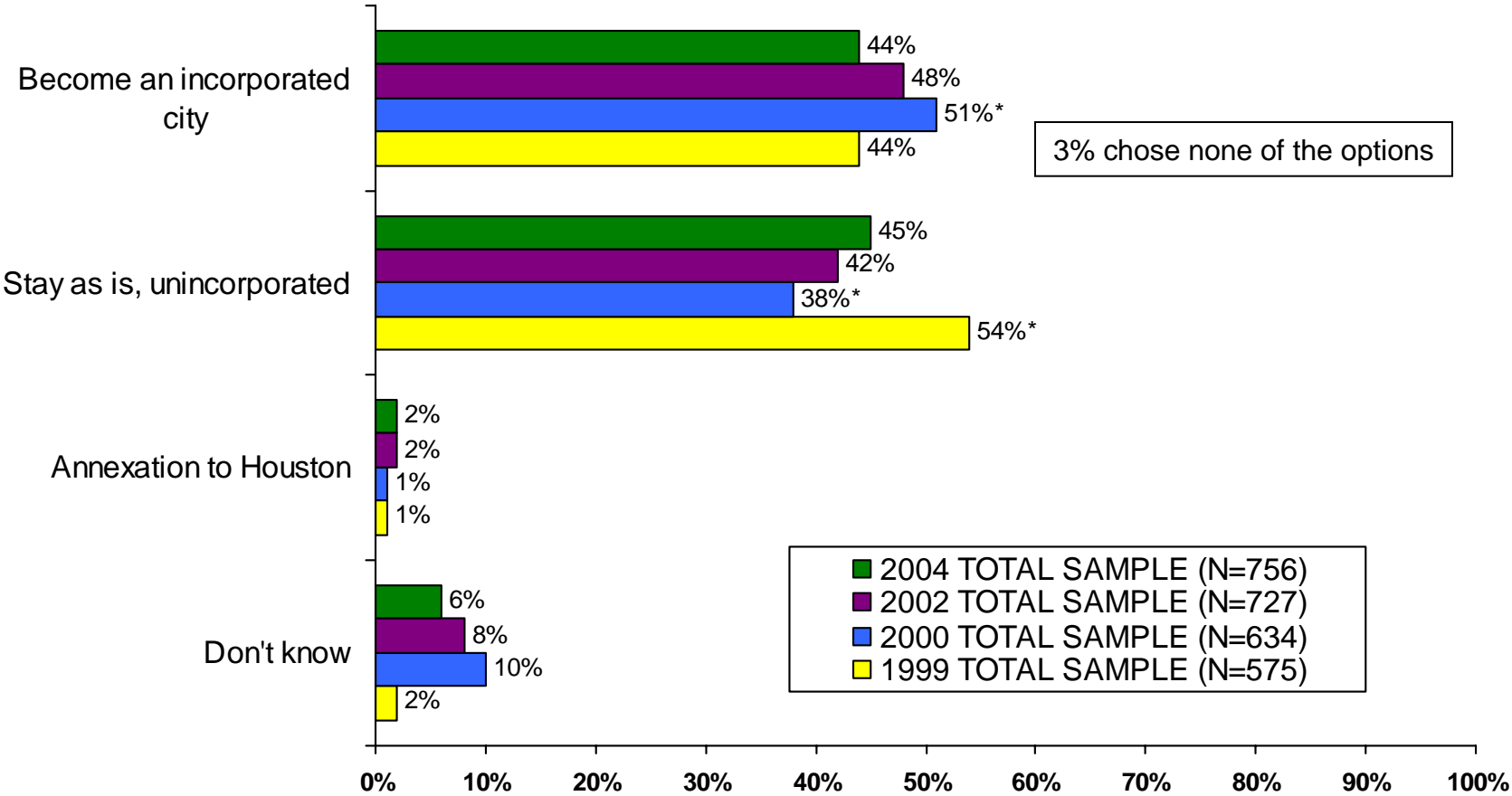
Q32. Closed-ended question

# Rating Association Staff Based on Contact (1 = Poor; 5 = Excellent)



Q33. Closed-ended rating question

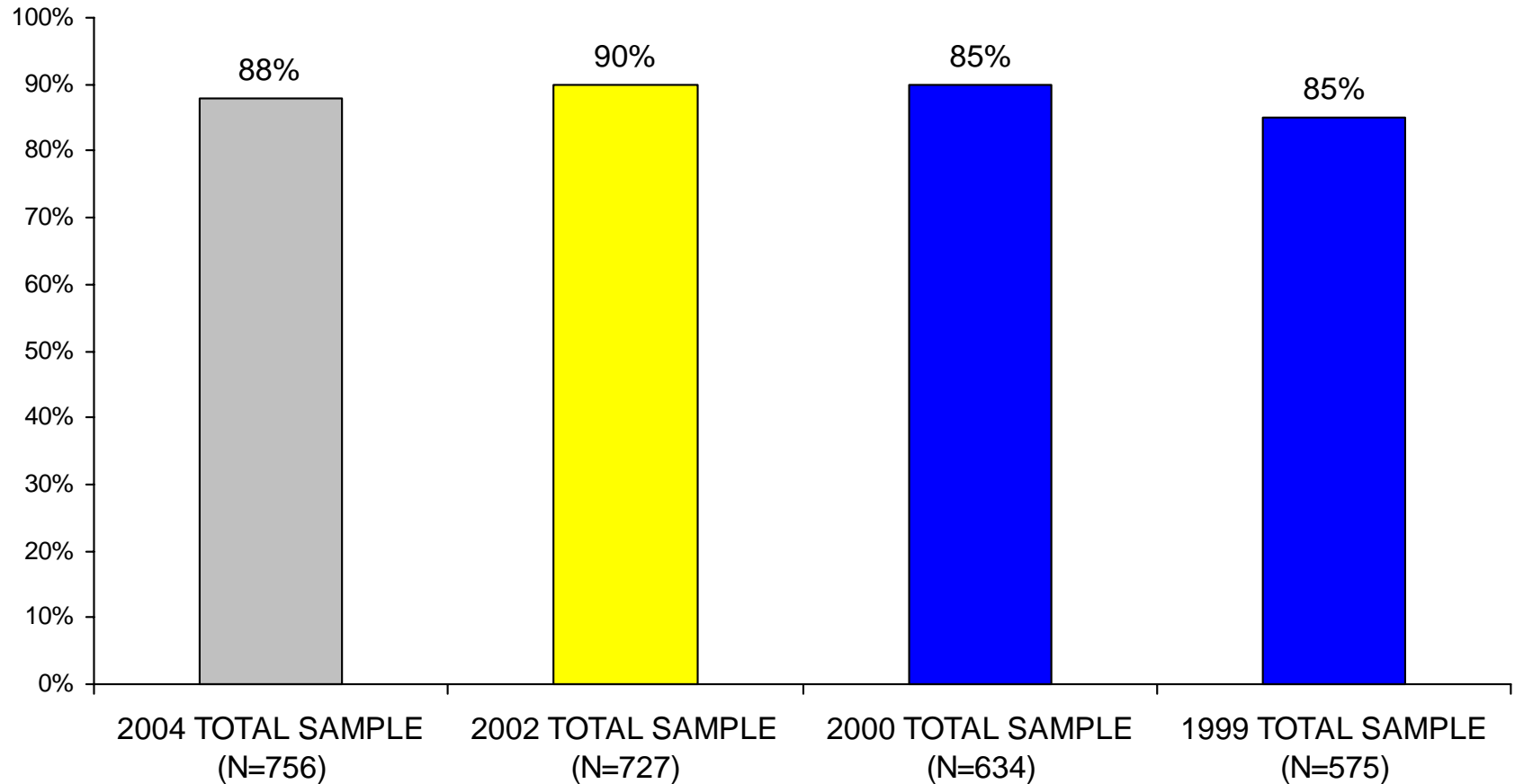
# Preferred Option in Regards to Potential Annexation to Houston



Q36. Closed-ended question

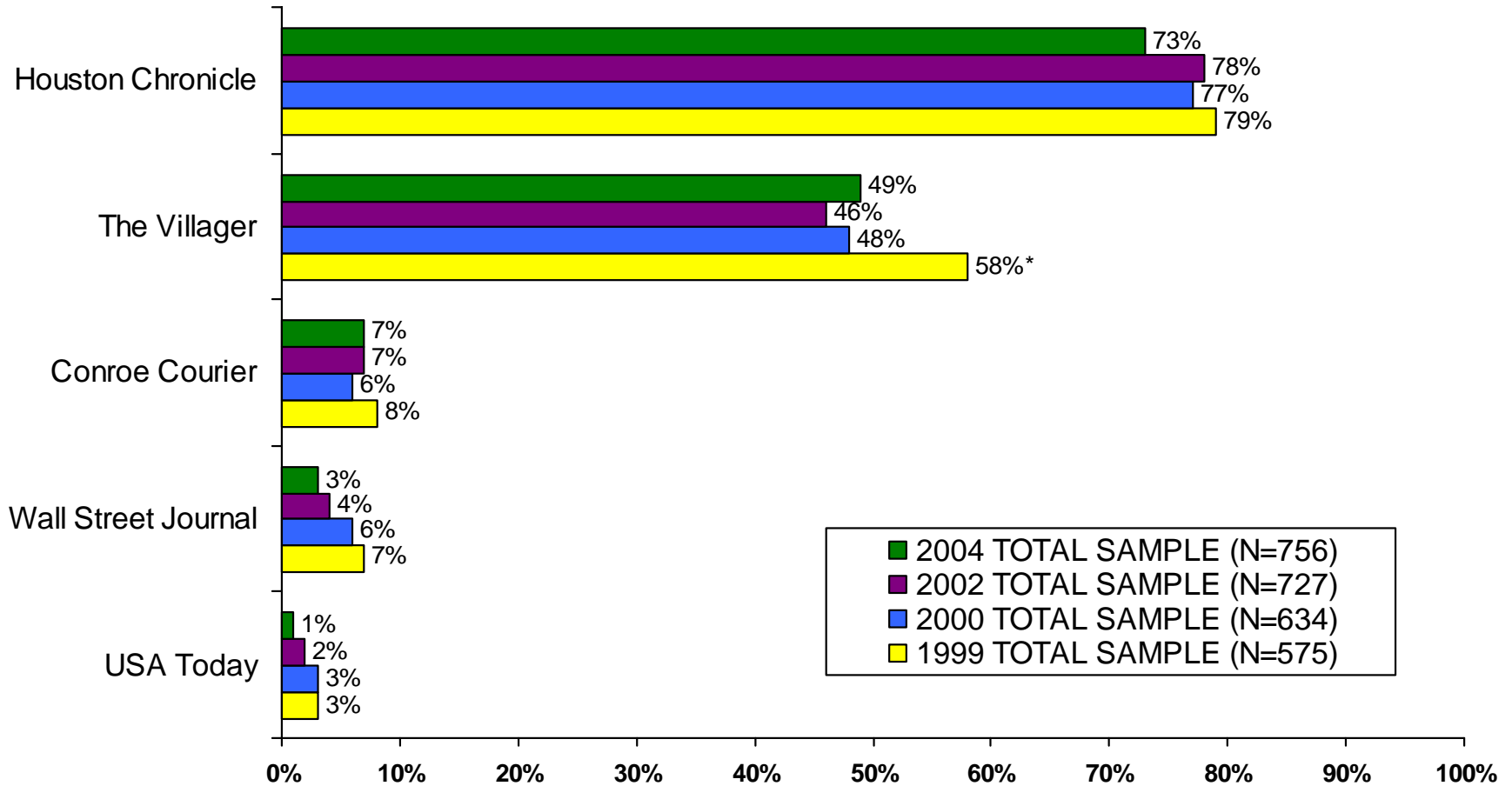


# Internet Access



Q28. Closed-ended question

# Newspaper Readership



Q30. Closed-ended question

# Questionnaire