

PML Property Owner Survey
Summary of Results
Presentation to PMLA Board
January 19, 2008

Topics

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- Survey Questions Overview
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Survey Background

- Why do a survey: get baseline data about **today's** PML property owners and their views on current/future issues
 - Demographics: personal and property-related
 - Current amenity feedback
 - Future amenity opinions
- Initiated by Long Range Planning Committee (LRPC)
 - Formed: early 2007
 - Current membership: Mike Gustafson, Rita Hart, Gary Oing, Ron Dodson, Ken Codeglia
- Researched tools/technology alternatives
 - Studied other HOA survey experiences
 - Selected web-based tool (Survey Monkey) in April 2007

Survey Design Approach

- Goal: minimize cost AND maximize participation
- Utilize advanced online survey tool techniques
 - Limited use of required answers to questions
 - Question response logic (skip irrelevant questions)
 - Randomized order of answers to eliminate bias
- Accept BOTH online and printed submissions
- Advertise survey availability/status: PMLA website, PML News, Voice postings
- Offer incentives to respondents
- Response period: July 1, 2007 to November 1, 2007

Survey Content & Response Overview

- Three sections (66 questions)
 - Property owner demographics (15)
 - Current amenity feedback (42)
 - Future amenity opinions (9)
- Response totals
 - 602 started survey
 - 539 completed survey: 95% (511) online, 5% (28) printed forms
 - 470 provided names for incentive drawing
- Note: some respondents did not answer all questions

Survey Questions Overview

- Property owner demographics
 - Property: length of ownership, type of property, purchase reasons
 - Personal: age, gender, household size, annual income
- Current amenity feedback
 - Overall satisfaction
 - Frequency of use, overall quality, suggestions for improvement
- Future amenity opinions
 - Existing: development needs, economic value, personal importance
 - Desired new amenities
 - Assessment increases
- “Results Detail” pages show total responses (nn) and percentages and response counts for top choices

PO Demographics Results

- Length of time this property owned [any property owned] (591)
 - 42% (246) 0 to 5 yrs [36% (213)]
 - 30% (175) 5+ to 10 yrs [30% (173)]
 - 17% (103) 10+ to 20 yrs [21% (122)]
 - 11% (67) 20+ yrs [13% (79)]
- Household size (588)
 - 59% (345) Two
 - 32% (191) More than two
 - 9% (52) One
- Gender of responder (588)
 - 57% (336) Male
 - 43% (252) Female

PO Demographics Results

- Age of respondent (590)
 - 37% (218) 35+ to 55
 - 35% (207) 55+ to 65
 - 20% (119) 65+ to 75
 - 5% (31) 75+
- Type of property (590)
 - 43% (252) Primary residence
 - 42% (246) Second home not used as a rental
 - 7% (41) Second home used as a short term rental
 - 4% (26) Vacant lot
 - 2% (11) Second home used as a primary rental

PO Demographics Results

- Primary purchase reasons (*multiple choices allowed*) (590)
 - 80% (473) Mountain/small-town lifestyle and/or scenery
 - 76% (447) Lake/Marina/Beaches
 - 65% (385) Gated community with security services
 - 52% (308) Golf course
 - 51% (303) Quality and/or variety of overall amenities
 - 40% (238) Country Club restaurant/bar
 - 30% (177) Swimming pool
 - 21% (124) Investment property

PO Demographics Results

- Total annual household income (572)
 - 28% (163) \$100,001 to \$200,000
 - 24% (135) Prefer not to answer
 - 23% (130) \$50,001 to \$100,000
 - 15% (85) More than \$200,000
 - 7% (38) \$35,001 to \$50,000
 - 4% (21) Less than \$35,000

Current Amenity Feedback: Overall

- Satisfaction with overall PML amenities/services based on current assessments/fees (556)
 - 48% (265) Satisfied
 - 22% (120) Very Satisfied
 - 18% (102) Neutral
 - 9% (53) Dissatisfied
 - 2% (11) Very Dissatisfied
 - 1% (5) No Opinion
- Suggestions for improvements, *if dissatisfied*: 145 (!!!)
- Other comments/feedback: 173

Current Amenity Feedback: Usage

- Five possible “frequency of use” choices for each amenity
 - Never
 - 1 to 6 (~ less than once every 2 months)
 - 7 to 12 (~ monthly)
 - 13 to 24 (~ 1 to 2 times per month)
 - 25 to 52+ (~ weekly or more often)
- If “Never” was selected, follow-up questions on amenity quality and suggestions for improvement were not asked
- Only top three “frequency of use” responses for each amenity are shown

Current Amenity Feedback: Usage

- Golf course (592)
 - 34% (199) 1 to 6
 - 33% (195) Never
 - 17% (103) 25 to 52+
- Lake/Marina/Beaches (588; 18 Never)
 - 34% (200) 1 to 6
 - 24% (141) 7 to 12
 - 21% (121) 13 to 24
- Country Club restaurant and bar (580)
 - 59% (340) 1 to 6
 - 15% (85) 7 to 12
 - 11% (64) Never

Current Amenity Feedback: Usage

- Safety department (575; 49 Never)
 - 59% (339) 1 to 6
 - 20% (115) 7 to 12
 - 9% (53) 13 to 24
- Tennis (572)
 - 82% (470) Never
 - 11% (61) 1 to 6
 - 5% (5) 25 to 52+
- Equestrian center (571)
 - 63% (362) Never
 - 34% (196) 1 to 6
 - 1% (7) 25 to 52+

Current Amenity Feedback: Usage

- Lake Lodge (571)
 - 50% (283) Never
 - 38% (214) 1 to 6
 - 8% (46) 7 to 12
- Campground (568)
 - 92% (523) Never
 - 7% (42) 1 to 6

Current Amenities Usage Summary

- Most-used amenities
 - Lake/Marina/Beaches: 63% (370) monthly or more; 18 “Never”
 - Golf course: 33% (199) monthly or more; 195 “Never”
 - Safety department: 32% (187) monthly or more; 49 “Never”
- Largest number of “Never” (no use) responses
 - Campground (92%), Tennis (82%), Equestrian center (63%)
 - Lake Lodge (50%)
 - Golf course (33%)
- Only 11% (64!) “Never” use Country Club Restaurant/Bar
- PML has a rich variety of amenities that are used by its diverse set of property owners

Current Amenity Feedback: Quality

- Six possible overall quality rating choices for each amenity
 - Excellent
 - Good
 - Average
 - Poor
 - Very Poor
 - Unable to rate – never used
- Responders were asked to rate the specific amenity for overall quality and completeness
- Specific suggestions to improve the amenity were also solicited
- Only top two overall quality rating responses for each amenity are shown

Current Amenity Feedback: Quality

- Golf Course (388; 0 Poor or Very Poor)
 - 47% (183) Excellent
 - 41% (160) Good
 - Suggestions for improvement: 136
- Lake/Marina/Beaches (558; 11 Poor or Very Poor)
 - 60% (337) Good
 - 21% (119) Excellent
 - Suggestions for improvement: 312
- Country Club restaurant and bar (510; 79 Poor or Very Poor)
 - 38% (193) Average
 - 38% (192) Good
 - Suggestions for improvement: 321

Current Amenity Feedback: Quality

- Safety department (519; 14 Poor or Very Poor)
 - 45% (231) Good
 - 40% (209) Excellent
 - Suggestions for improvement: 169
- Tennis (100; 1 Poor or Very Poor)
 - 51% (51) Good
 - 34% (34) Excellent
 - Suggestions for improvement: 52
- Equestrian Center (206; 3 Poor or Very Poor)
 - 62% (128) Good
 - 17% (35) Excellent
 - Suggestions for improvement: 72

Current Amenity Feedback: Quality

- Lake Lodge (279; 26 Poor or Very Poor)
 - 52% (146) Good
 - 32% (88) Average
 - Suggestions for improvement: 124
- Campground (44; 5 Poor or Very Poor)
 - 43% (19) Good
 - 27% (12) Average
 - Suggestions for improvement: 23

Current Amenities Quality Ratings Summary

- Number of total responses varies by amenity
- Amenities rated highest in quality (Excellent + Very Good)
 - Golf course (388): 88% (343)
 - Safety department (519): 85% (440)
 - Lake/Marina/Beaches (558): 81% (456)
- Amenities with the most low ratings (Poor + Very Poor)
 - Country Club restaurant/bar (510): 15% (79)
 - Lake Lodge (279): 10% (26)
- Amenities with the most suggestions for improvement
 - Country Club restaurant/bar: 321
 - Lake/Marina/Beaches: 312
- PML has many high quality amenities

Future Amenity Opinions: Current Needs

- Current amenities that **need the most development or improvement** (*multiple choices allowed; choices in random order*) (500)
 - 61% (305) Country Club restaurant and bar
 - 34% (169) Lake/Marina/Beaches
 - 19% (94) Lake Lodge
 - 19% (93) Other
 - 10% (52) Safety department

Future Amenity Opinions: Current Value

- Current amenities that **add the most economic value to your property** (*multiple choices allowed; choices in random order*) (544)
 - 84% (459) Lake/Marina/Beaches
 - 76% (412) Golf course
 - 44% (237) Country Club restaurant and bar
 - 33% (180) Safety department
 - 15% (79) Tennis

Future Amenity Opinions: Current Importance

- Current amenities that **are most important to your personal quality of life** (*multiple choices allowed; choices in random order*) (542)
 - 79% (430) Lake/Marina/Beaches
 - 49% (263) Golf course
 - 41% (223) Safety department
 - 38% (207) Country Club restaurant and bar
 - 16% (88) Other

Future Amenity Opinions: New

- **New amenity that you would like to see at PML**
(multiple choices allowed; choices in random order) (501)
 - 61% (303) Exercise facility/gym
 - 48% (239) Hiking trails and par course
 - 36% (180) Indoor swimming pool
 - 20% (101) Dog park
 - 20% (101) Other

Future Amenity Opinions: Assessments

- Acceptable annual assessment increase (536)
 - 55% (295) 10% to 20% (approx \$120 to \$240 per property)
 - 37% (200) No increase
 - 8% (41) 25% to 50% (approx \$250 to \$600 per property)
- Willingness to accept a long-term (10-20 year) special assessment (528)
 - 55% (289) Yes
 - 45% (239) No

Future Amenity Opinions Summary

- Existing amenities that need to be improved (500)
 - Country Club restaurant/bar: 61% (305)
 - Lake/Marina/Beaches: 34% (169)
- Most requested new amenities (501)
 - Exercise facility/gym: 61% (303)
 - Hiking trails: 48% (239)
 - Indoor swimming pool: 36% (180)
- Assessment increases seem acceptable to a majority although a large percentage wants no increase (536)
 - 10% to 20% increase: 55% (295)
 - No increase: 37% (200)

Lessons Learned

- Results have already proved useful
 - Amenity managers and PMLA BoD used input in preparing 2008 budgets
 - Results validated initial thinking of LRPC members
 - Good baseline for future survey activity
- **HOWEVER...**survey results do not indicate a mandate for any specific “plans of action”
 - Responses are likely to change based on costs of specific improvements
 - Priorities of any “plans of action” are not indicated

Next Steps

- Put summary report (and this presentation) of the complete survey results on PMLA website
- Conduct a shorter, more-focused survey on how to address the needs of the Country Club restaurant
- Develop proposed, specific “plans of action” for current and possible new amenities
- Present “plans of action” to PML property owners at town hall meetings in the spring/summer of 2008 to get property owner input and feedback
- Provide input to 2009 annual budget process

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