



Tahoe Donner 20 Year Plan Owner Research on Investment Priorities

Conducted for Tahoe Donner General Plan Committee

September 2015

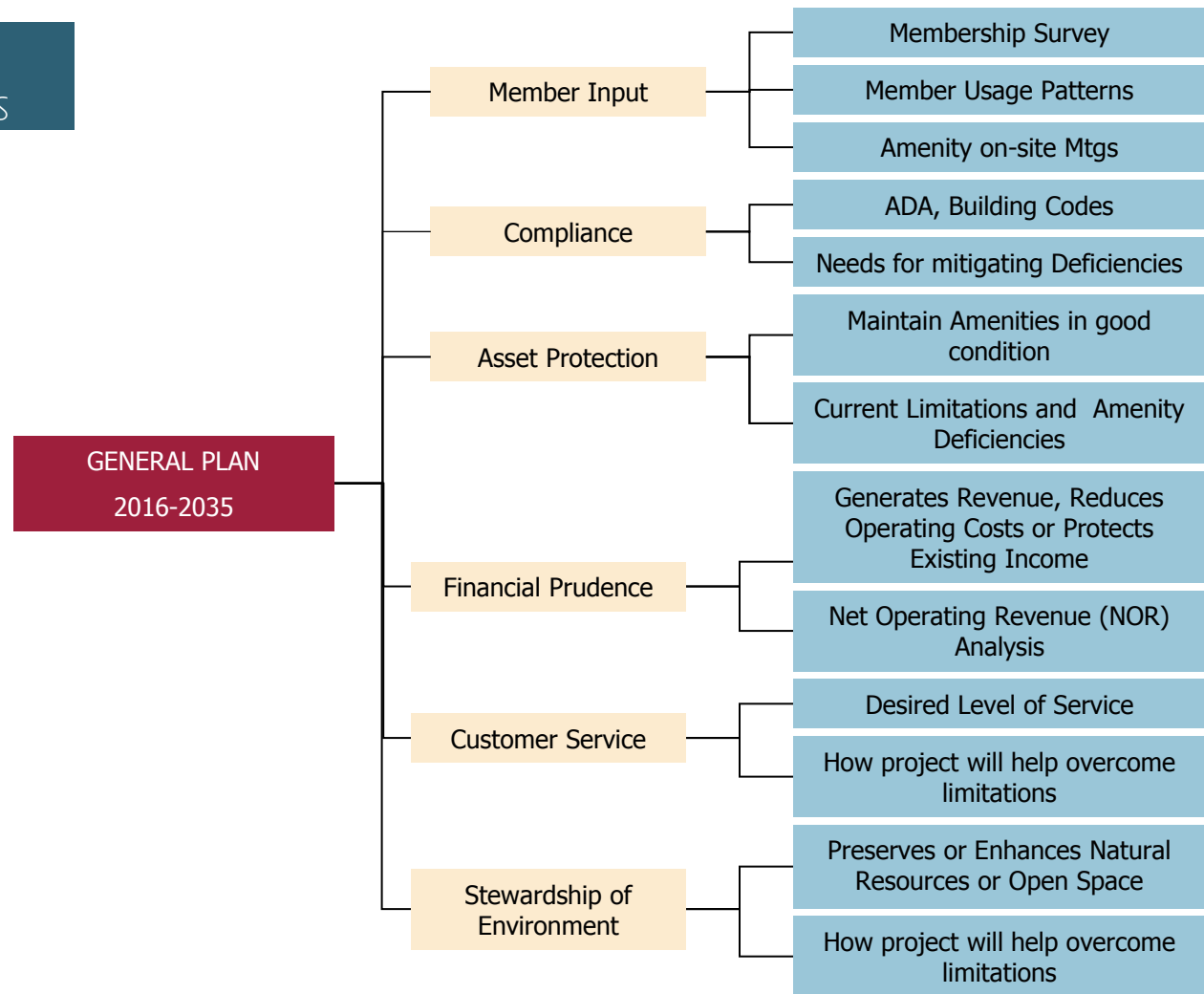


Purpose of Research

Survey Tahoe Donner homeowners, as a part of the General Plan Committee's (GPC) process, to make recommendations regarding future Development Fund project planning on the capital infrastructure wants and needs of our community.



Tahoe Donner General Plan Process



Methodology

- 10 minute online survey distributed by email
- Supplemented with iPad surveys conducted over several weekends at Tahoe Donner Events
- Prizes offered as an incentive to participate
- Large sample sizes achieved:

1,447

**Total
Interviews***

297

**On the
Hill**

1,150

**Off the
Hill**

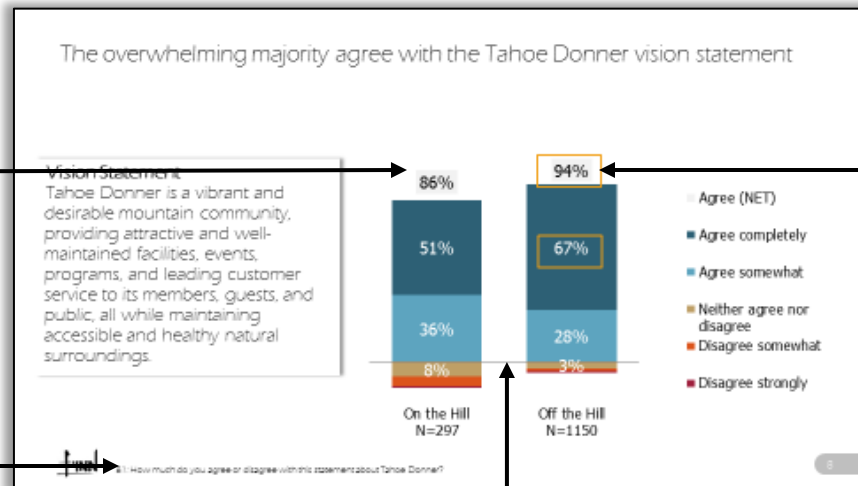


*Unique households. Duplicates from the same household were removed.

Tips for reading the report

Charts report percentages, unless otherwise noted

The survey question is included in the footnote on each page



Significant differences between On the Hill and Off the Hill are indicated by boxes

Most analysis compares On the Hill and Off the Hill groups.

Key Findings

1. **Tahoe Donner home owners heap high praise on the community, with the amenities playing a central role**
 - Strong agreement with the TD vision statement
 - Exceptionally high scores to Tahoe Donner's amenities (as a whole),
 - Amenities described as diverse, and having a positive staff
 - Amenities were reason for some to choose Tahoe Donner over other neighborhoods
 - On & Off the Hill rate the Assessment fees as a good value

2. **Strong desire to improve and enhance amenities, rather than adding more**
 - On & Off the Hill agree: Enhance rather than build more
 - Nature is as much a part of the Tahoe Donner experience as the Amenities, and efforts to preserve the natural setting are appreciated
 - A small faction of homeowners want minimal spending on amenities to merely maintain them. This group makes up about 1/5 of On the Hill, and less than 3% of total Tahoe Donner home owners
 - Although they are vocal, their investment priorities are consistent with the rest of Tahoe Donner owners

Top Investment Priorities

1. Invest / Protect Adjacent Rec. Open Spaces

- Solid winner – ahead of the pack

2. Build More Trails

- Solid 2nd place, with both On & Off the Hill

3. Conservation & Efficiency

- Water conservation & Alternative Energy Investments
- Alt Energy more important to On the Hill

4. Marina deck/seating/food, Trout Creek Fitness, Euer Valley, & Non-Weather Dependent Kids Activities make up the next tier of investment priorities

- Different Opinions for On & Off Hill groups
- Marina ranks very low among On the Hill
- Trout Creek ranks very high among On the Hill

Residents have opposing desires. On one hand they want to protect open spaces; while on the other, they want more trails for all types of activities. It is likely that they do not view trails as disturbing the natural setting, whereas something like a soccer field would be considered so.

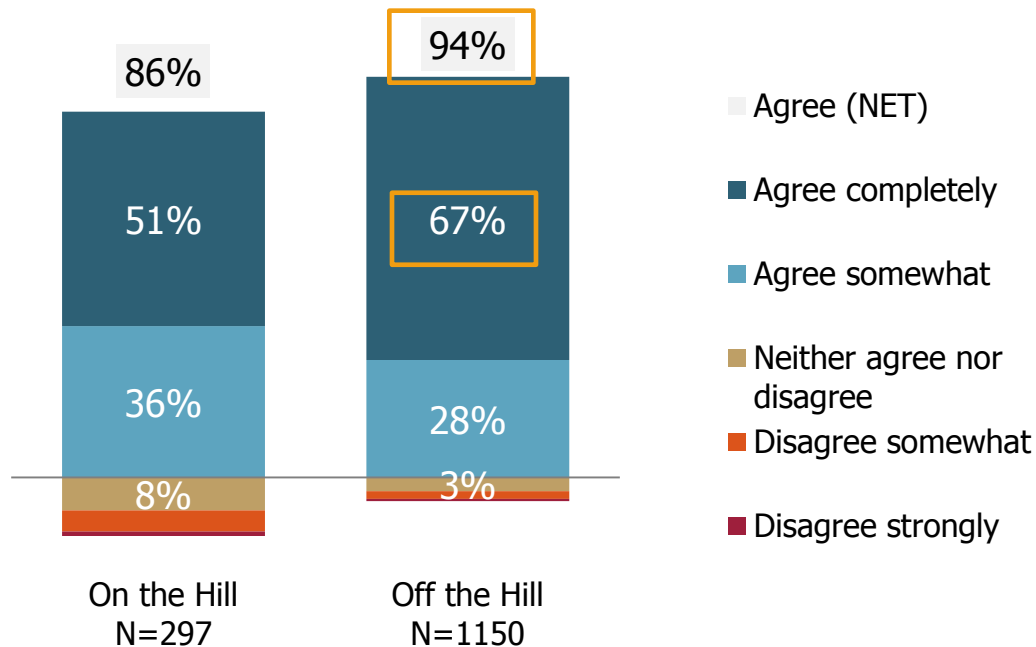


Attitudes Toward Tahoe Donner

The overwhelming majority agree with the Tahoe Donner vision statement

Vision Statement

Tahoe Donner is a vibrant and desirable mountain community, providing attractive and well-maintained facilities, events, programs, and leading customer service to its members, guests, and public, all while maintaining accessible and healthy natural surroundings.



What words in the vision statement are most important?

On the Hill

Tahoe Donner is a vibrant and desirable mountain community, providing attractive and well-maintained facilities, events, programs, and leading customer service to its members, guests, and public, all while maintaining accessible and healthy natural surroundings

Off the Hill

Tahoe Donner is a vibrant and desirable mountain community, providing attractive and well-maintained facilities, events, programs, and leading customer service to its members, guests, and public, all while maintaining accessible and healthy natural surroundings

Legend:



Net Promoter Score (NPS) – A method for measuring engagement

By asking one simple question — *How likely is it that you would recommend Tahoe Donner?*— we can identify three groups and get an overall measure of performance.

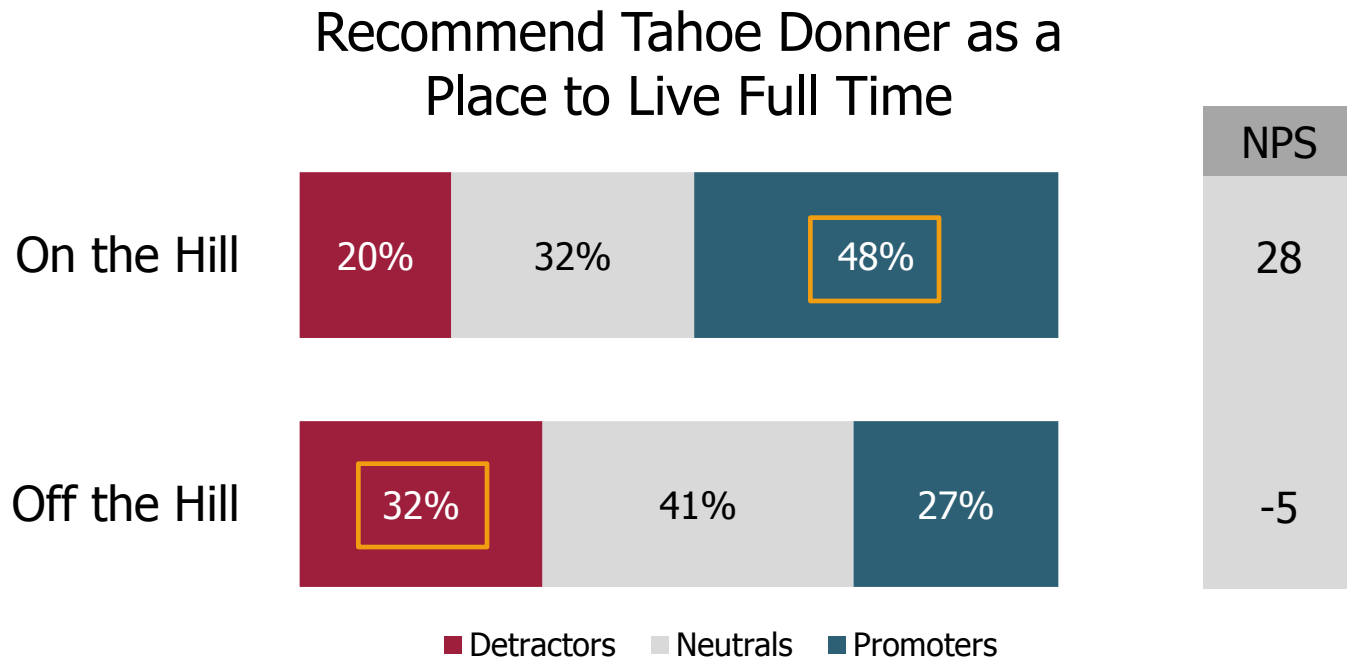
Homeowners respond to a 0-to-10 point rating scale and are categorized as follows:



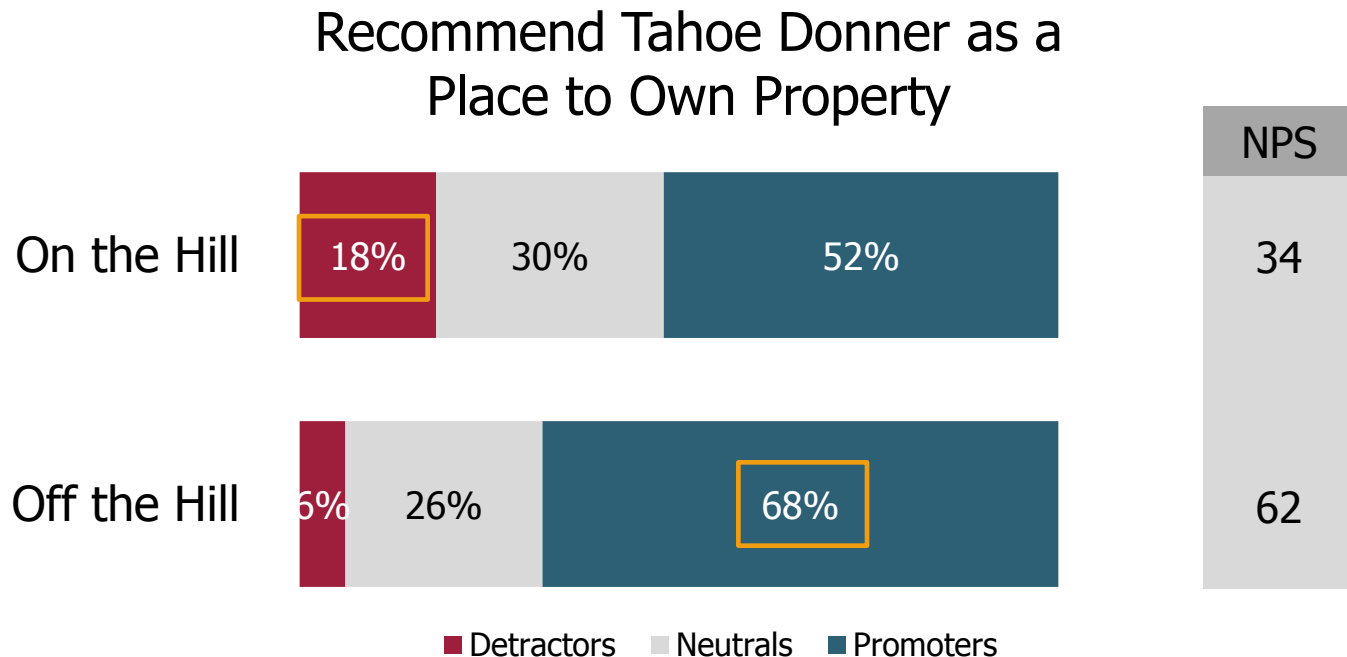
- **Promoters** (score 9-10) are loyal enthusiasts who will keep referring others
- **Passives** (score 7-8) are satisfied but unenthusiastic
- **Detractors** (score 0-6) are unhappy and can damage your reputation and impede growth through negative word-of-mouth.

To calculate NPS, take the percentage of customers who are Promoters and subtract the percentage who are Detractors. A positive score means there are more promoters than detractors.

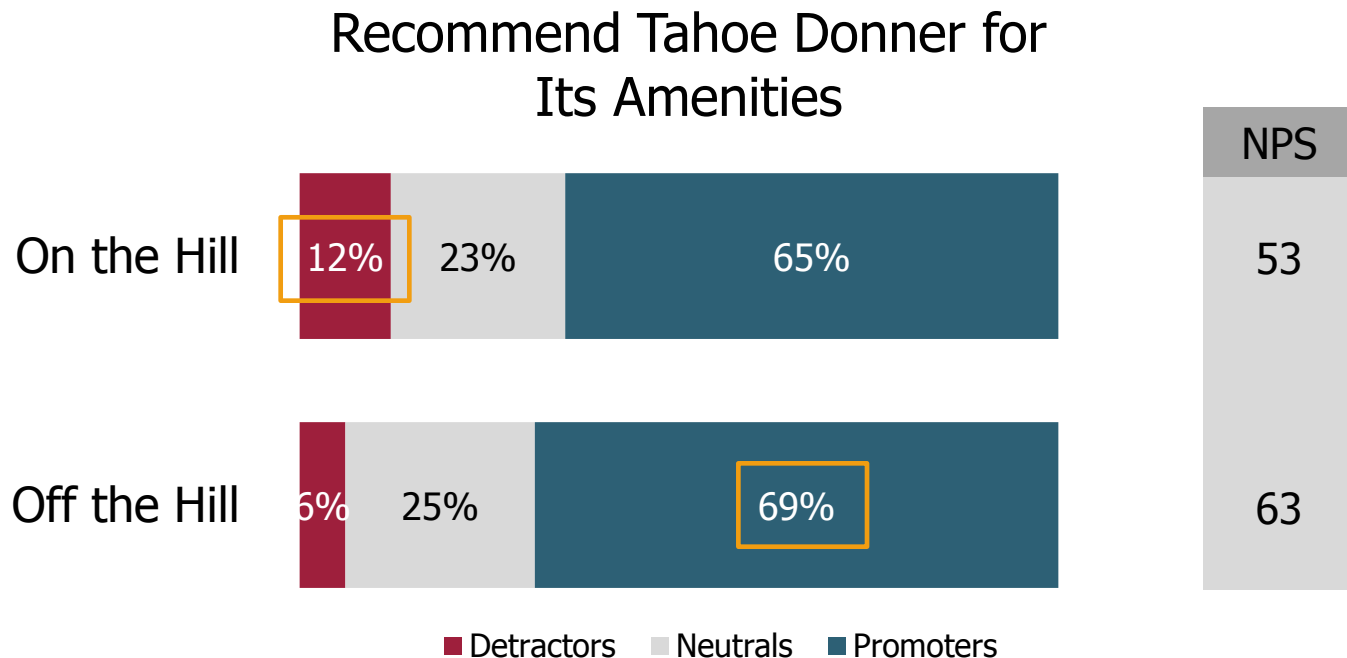
Not surprisingly, On vs. Off the Hill owners feel differently about Tahoe Donner as a full time place to live



Both groups are in agreement that Tahoe Donner is a good place to own property; however, just under 1 in 5 of those On the Hill rate as Detractors

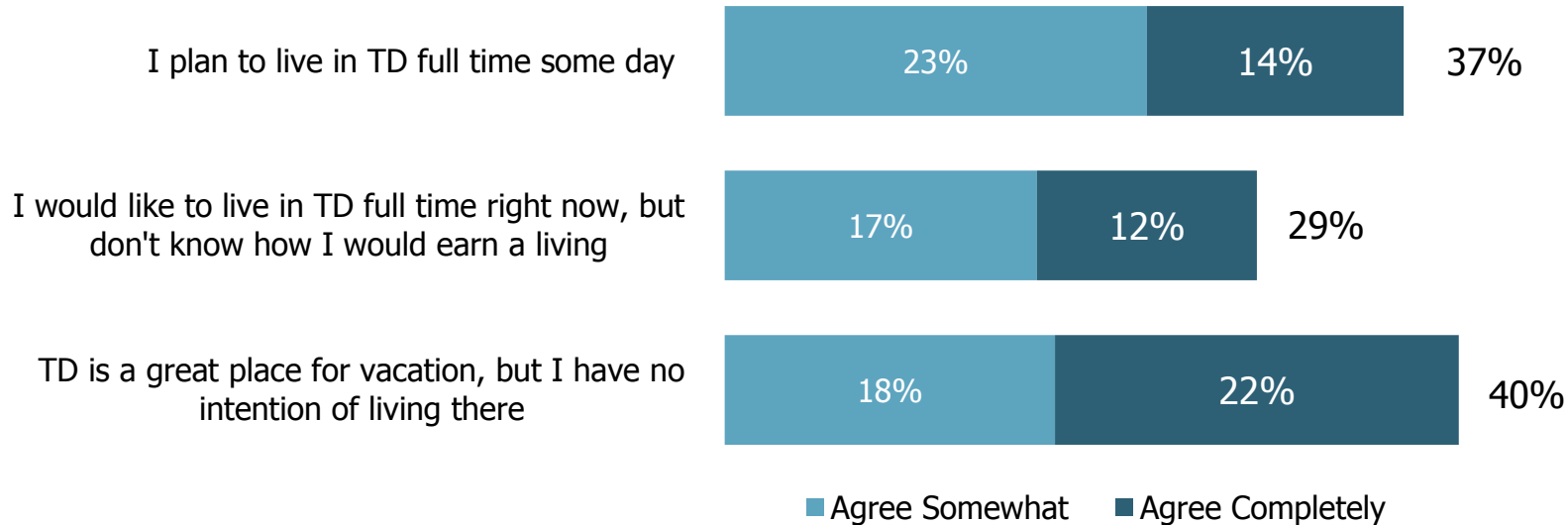


Amenities receive very high scores among both groups



Off the Hill are more likely to view Tahoe Donner as a place for vacation vs. a place they want to live permanently

Attitudes on Living Full Time in Tahoe Donner (Off the Hill)

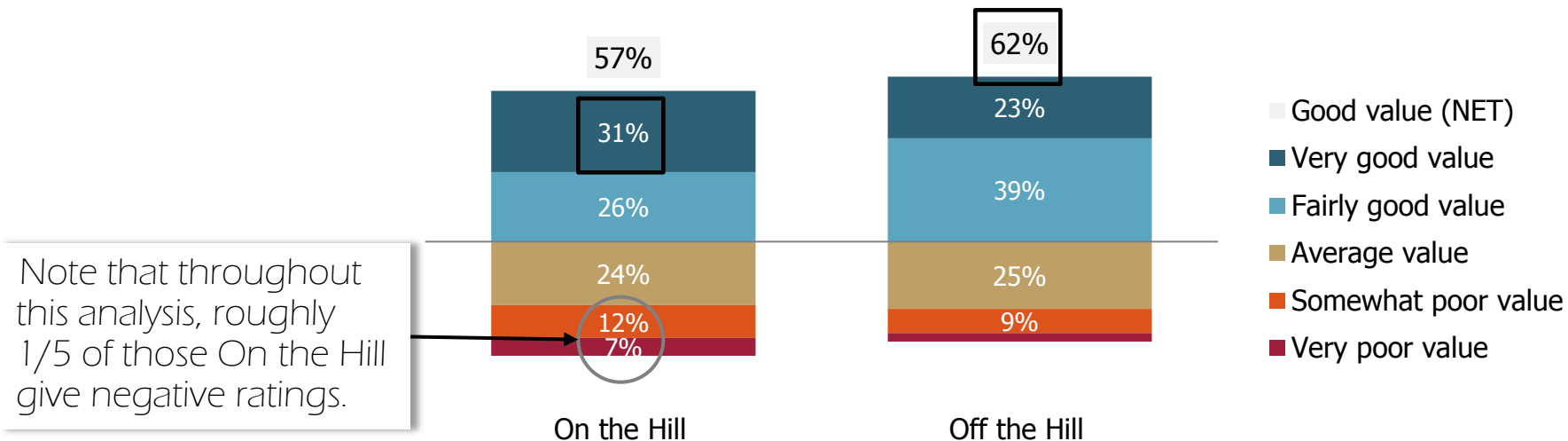


A wide-angle photograph of a snowy mountain slope. In the foreground, numerous ski tracks are visible in the snow. A chairlift system is running diagonally across the frame, with several chairs visible. The background features a line of evergreen trees and a clear blue sky with some light clouds. The overall scene is bright and sunny.

Attitudes about the Amenities

A majority in both groups feel the Annual Assessment is a good value

Value of Tahoe Donner Annual Assessment



Most home owners have positive things to say about the amenities

"It is nice to have fun places to go within
Tahoe Donner"

"The amenities are plenty, high quality, and best of all it seems the staff looks for ways every year to improve the experience at the amenities."

"We have been property owners for over 30 years. Our children have fond memories of many activity filled summers here now they are bringing their children to enjoy these same great facilities"

"Tahoe Donner has something for everyone"

"Outstanding diverse recreational opportunities. Enviably."

"The amenities are amazing. There is something for everyone and we actively use all of them."

"Because there are amenities, and great ones. I've seen some associations with rundown equipment, little or no staff. Just the basics. TD has the finest."

"Tahoe Donner offers a wide variety of activities no matter what the season"

"The amenities of TD are one reason that motivated us to buy there and not in nearby neighborhoods like Prosser"

Over 1,000 comments can be found in the raw data file from this research. The ratio of positive to negative comments was greater than 10 to 1.



There exists a small faction with negative perceptions about the amenities. Their concerns are predominantly about the costs

“We enjoy the amenities, but the golf course is a financial drain to the association. If there was no golf course I would rate it a 10.”

“Overall good amenities. Becoming too costly for home owners (in as much as we also pay HOA dues)”

“Overpriced for the most part. Too many wasteful improvements wanted by few.”

“They are very good but could be better. Some need upgrading/enlarging. Others need to pay their own way”

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On the Hill perceptions about Tahoe Donner Amenities

On the Hill Attitudes

Statement A

I believe amenities are important because they **improve property value**

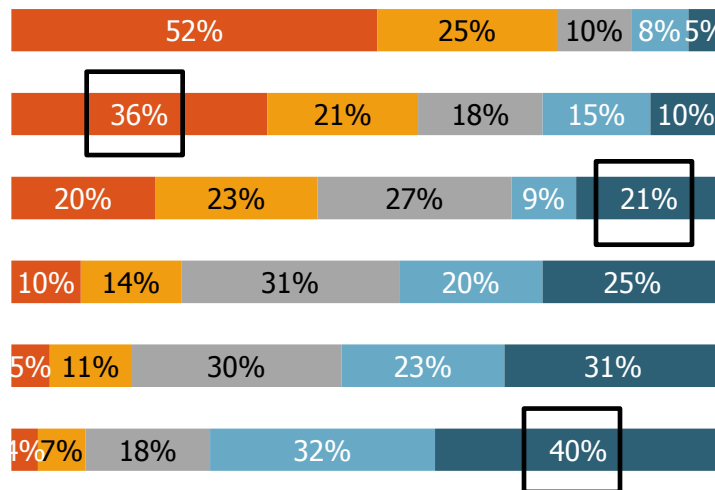
I would rather TD **preserve** recreational open spaces in their natural state

Tahoe Donner should be investing more to **enhance** existing amenities

More amenities should be **open to public** to help fund TD improvements

I would spend more time in Tahoe Donner if there were more amenities

I would like Tahoe Donner to **build more new amenities**



Statement B

I do not believe amenities improve my property value

I would rather Tahoe Donner **enhance** recreational open spaces

Tahoe Donner should invest **only to maintain** existing amenities

More amenities should be **exclusive** to Tahoe Donner members

Our amenities don't influence how much time I spend at Tahoe Donner

I would like TD to **focus more on improving** the amenities we have

■ Strongly agree with A ■ Somewhat agree with A ■ Both about the same
■ Somewhat agree with B ■ Strongly agree with B

Off the Hill perceptions about Tahoe Donner Amenities

Off the Hill Attitudes

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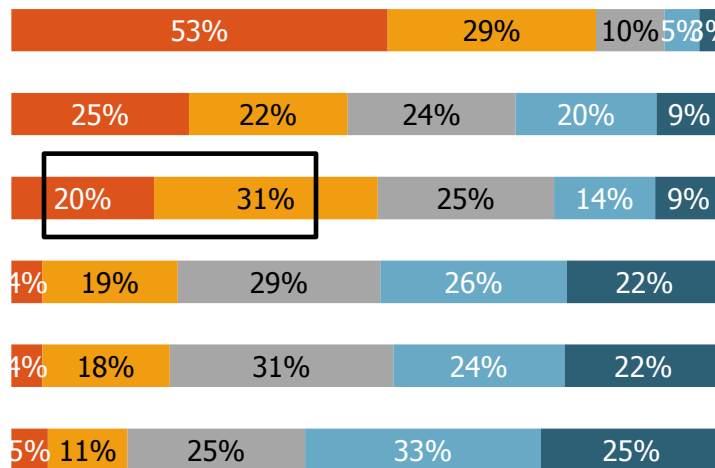
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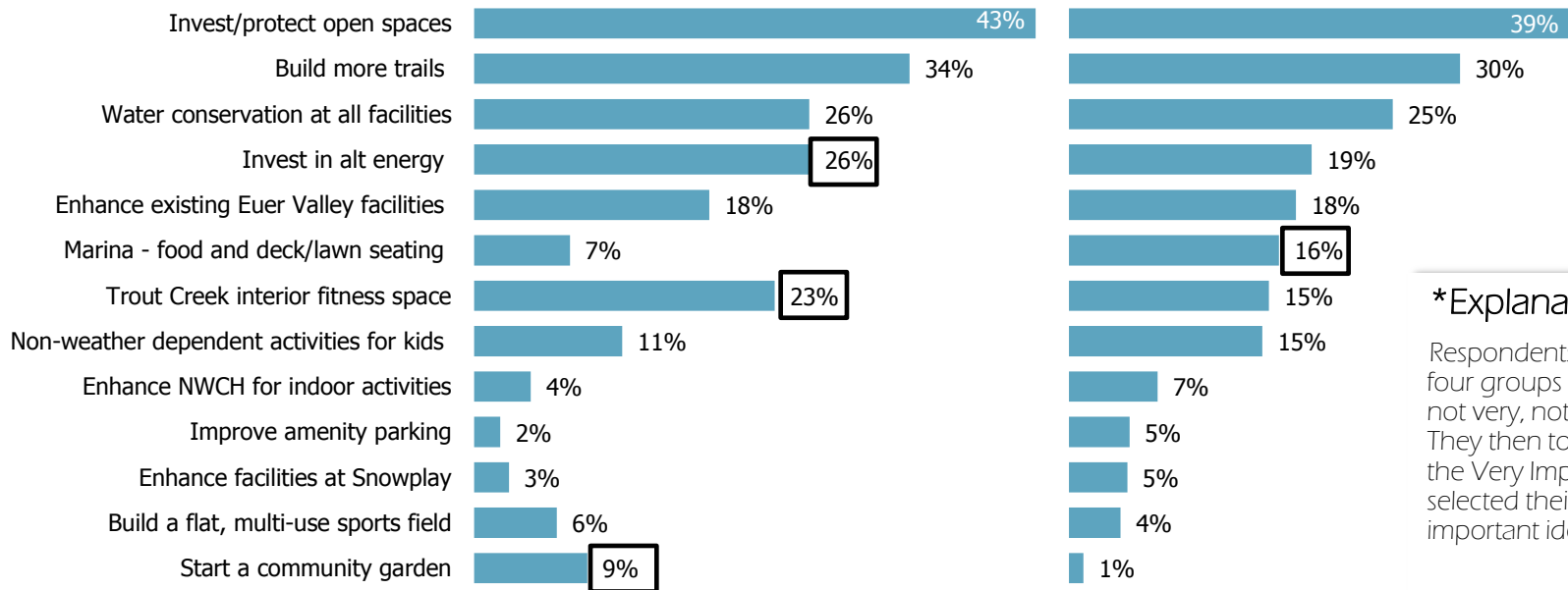
Investment Priorities

Investment Priorities

Based on Top 3 Picks*

On the Hill

Off the Hill

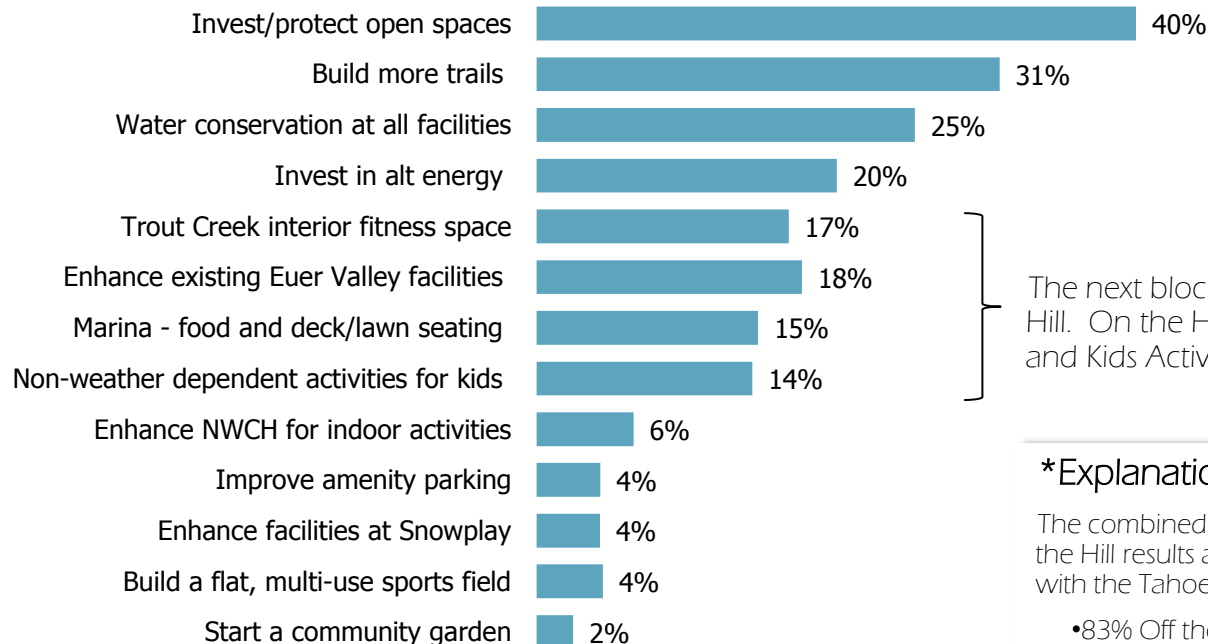


*Explanation

Respondents sorted ideas into four groups (very, somewhat, not very, not at all important). They then took the ideas from the Very Important bucket, and selected their top 3 most important ideas.

Investment Priorities: Combined On/Off the Hill Score

Combined Score*



Winner: Open spaces, followed ironically by wanting more trails.

The next block of 4 are a virtual tie amongst Off the Hill. On the Hill places lower importance on Marina and Kids Activities.

*Explanation

The combined score merges together On the Hill and Off the Hill results according to the size of these two groups with the Tahoe Donner community

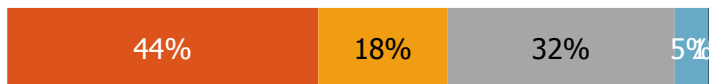
- 83% Off the Hill
- 17% On the Hill

Both On & Off the Hill strongly favor amenities that they can enjoy alone or with their families. There is a slight preference for summer (vs. winter) amenities.

Statement A

Amenities and activities that allow me to enjoy the mountains independently and with my family

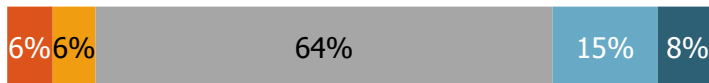
On the Hill



Statement B

Amenities and activities that allow me to interact socially and meet new people

Winter amenities



Summer amenities

Off the Hill

Amenities and activities that allow me to enjoy the mountains independently and with my family



Amenities and activities that allow me to interact socially and meet new people

Winter amenities



Summer amenities

■ A is much more important

■ A is a little bit more important

■ Both about the same

■ B is a little bit more important

■ B is much more important



Profile of Home Owners

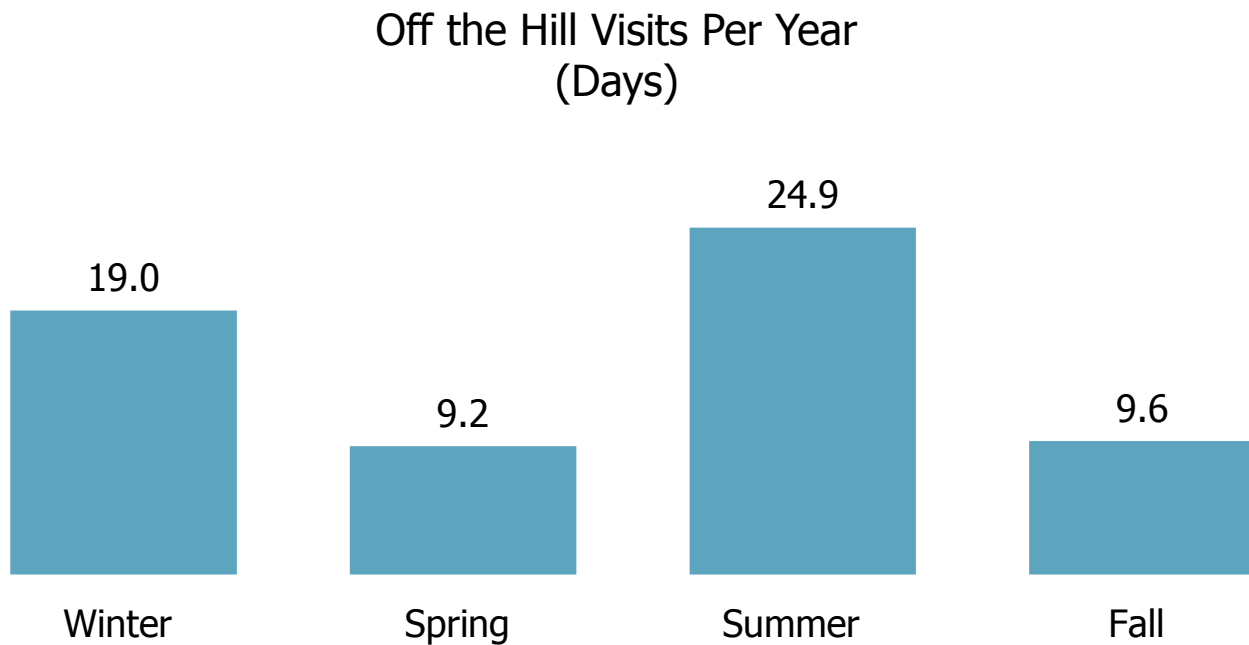
Similar Ages of On the Hill & Off the Hill

Your Age	On the Hill	Off the Hill
18 to 29	1%	--
30 to 39	8%	5%
40 to 49	17%	21%
50 to 59	30%	33%
60 to 69	30%	28%
70+	13%	13%
Mean	56.28	56.58

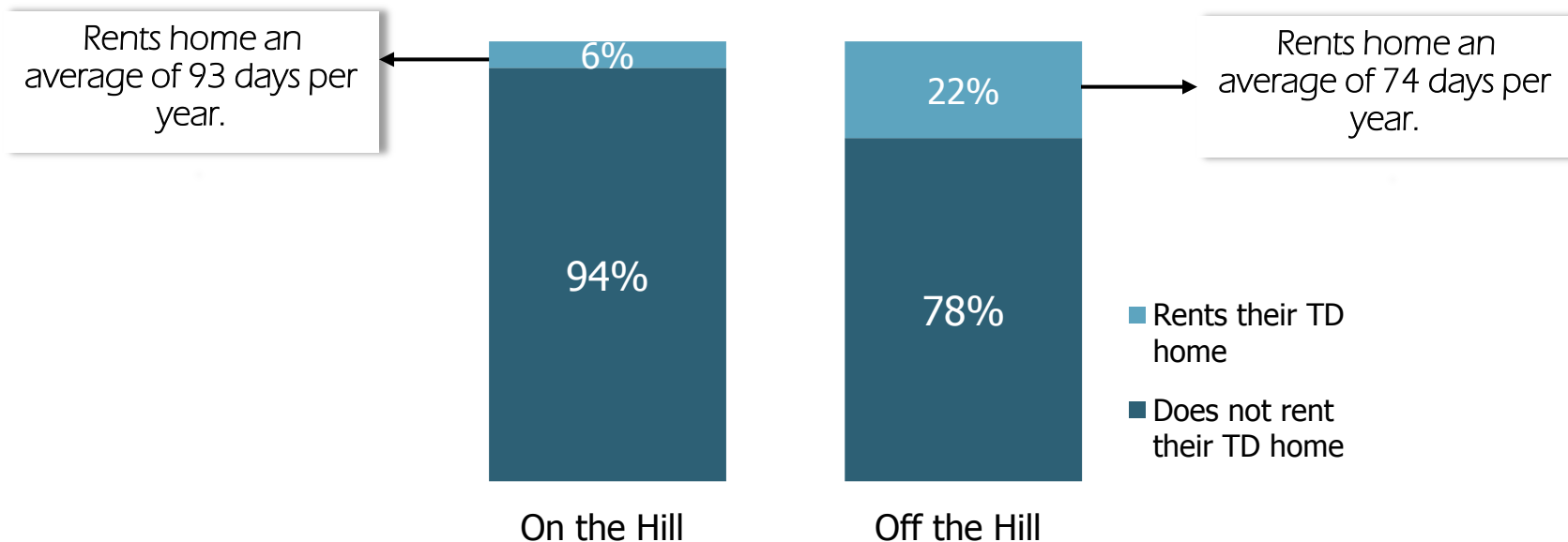
Off the Hill home owners are more likely to have young visitors.

Age of People at Your Home	On the Hill		
	Full Time	Part Time	Off the Hill
5 years and under	9%	9%	19%
Age 6 to 12	13%	14%	31%
Age 13 to 17	11%	10%	23%
Age 18 to 29	6%	32%	32%
Age 30 to 39	11%	34%	25%
Age 40 to 49	23%	25%	40%
Age 50 to 59	37%	21%	45%
Age 60 to 69	36%	8%	38%
Age 70 to 79	17%	10%	18%
Age 80 or over	1%	2%	3%

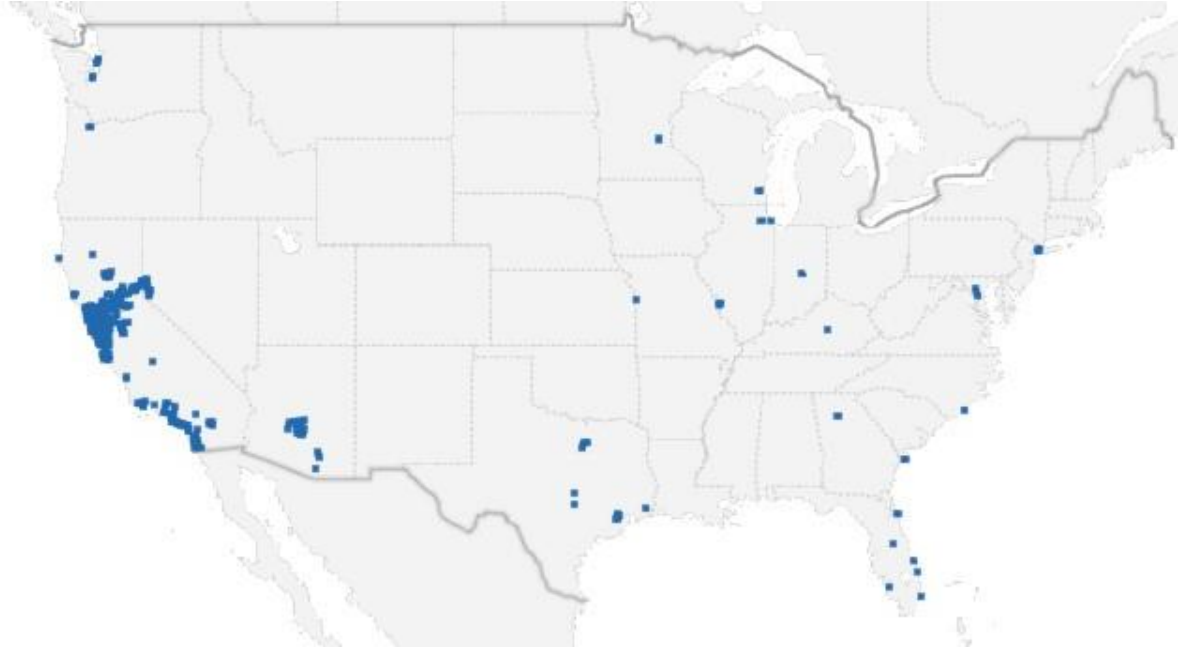
Days Visited Per Year



Rents Tahoe Donner Home



Off the Hill home owners are scattered about the country, although the majority are in Northern CA



Key Findings

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