



TAHOE DONNERSM

2022 Private Amenity Research
Conducted for Tahoe Donner General Management
July 2022

f'INN

Purpose of Research

Measure opinions among Tahoe Donner members to understand....

- Attitudes towards the Recreation Fee and private amenity access
- Preferences of priority for private amenity access
- Opportunities for improvement in the private amenity access policy



Methodology

- 20-minute online survey distributed by email
- Fieldwork was conducted June 20th to July 5th of 2022
- Sample consisted of members of the Tahoe Donner community
- A total of n=2,028 interviews were captured; after a weighting of the data, the total sample was reduced to n=1,817
- **Weighted sample is** distributed as follows:

1,817

**Total
Interviews***

416

**Full-time
Residents***

1,401

**Second
Homeowners***

- The Margin of Error for this research is $\pm 2.1\%$. This error range is narrower than usual in market research and signifies a strong sample size.

Key Findings

1. Owners want to feel prioritized in the community

- The lack of priority for owners and their families is a top concern across all members surveyed (53% extremely/moderately concerned), and is of even higher concern for people who are dissatisfied by the current access policy (64%).
- Owner prioritization/exclusivity is also one of the most important values members believe should be reflected in the community, with 76% indicating this is important to them.

2. Strong agreement on restrictions for short-term rental tenants

- There is a strong consensus that short-term rental tenants should have less access to private amenities than owners, owners' families, members' guests, and long-term rental tenants, with 79% of all members surveyed ranking short-term rental tenants as the lowest priority. Furthermore, 14% of members surveyed consider short-term rental tenants as part of the community.
- More than half of all members surveyed disagree with giving short-term rental tenants access to private amenities. Additionally, 21% of people who short-term rent their property indicated they believe short-term rental tenants do not have enough access to private amenities.
- Counter to attitudes about short-term rental tenants, 50% of members feel long-term tenants are part of the community and 73% believe they should have access to private amenities.

3. Adjusting the structure of the Recreation Fee is expected to increase interest

- There is promising interest in a per-person Recreation Fee (39% of all members surveyed are extremely/very interested), especially among those who are dissatisfied with the current amenity access policy (56% extremely/very interested).
- In moving away from the current structure of the Recreation Fee (\$395 for up to four people) and shifting to a per-person fee, the number of members who indicate they would not purchase a Recreation Fee decreases from 30% to 11% (before potential pricing is introduced).
- As the price of the per-person Recreation Fee increases, interest in purchasing declines. It is suggested to stay as close to the current pricing as possible.
- More than half of members surveyed (57%) would like amenity operating costs to be paid for by the people that use them, suggesting they would like this to be covered by Recreation Fee purchases and Daily Access Fees rather than the Annual Assessment.

Key Findings

4. Reduce overcrowding by providing owner exclusivity to the most popular private amenities

- Members show strong concern over non-members disrespecting the private amenities (63%) as well as overcrowding in general (56%), which could be avoided by implementing stronger safeguards and owner exclusivity.
- The Beach Club Marina has the highest expected use over the next 12 months (84%) while also being the amenity that most people have decreased their use of due to overcrowding (55%). Making the most popular private amenities exclusive to owners and their families is expected to reduce overcrowding while also providing the sense of priority/exclusivity that members are looking for.

5. Stronger pricing controls and restrictions are wanted to further reduce overcrowding

- Stronger non-member pricing controls to reduce overcrowding is the number one policy idea, accepted by 77% of members surveyed. Stronger non-member admission limits follows closely behind at 71%.
- Members are in strong agreement with the current policy that charges higher access rates to unaccompanied guests than guests accompanied by a member (64% agree). Additionally, the majority of members find it acceptable to implement unaccompanied guest blackout dates/times (63%).
- Similarly, there is high agreement with the idea of restricting non-member access to private amenities during peak times (64% agree) and increasing access fees for non-members during peak times (66%).

6. Increased pricing for members is not expected to be received well

- Increasing value for the money is the most important value members want to see reflected in the community (83%).
- Just under half (44%) indicate they would not be willing to pay more in access fees or the Annual Assessment to provide a less-crowded private amenity experience for members.
- When presented with the reality of increased member pricing to make up for lost revenue in restricting non-members, 43% indicate they would rather not limit access for non-members.

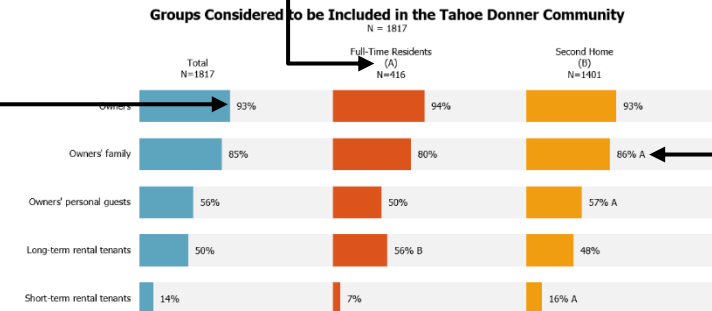
Tips for reading the report

Some analyses compares different groups. Note that columns in tables and charts are always labeled with a letter for statistical testing

Charts report percentages, unless otherwise noted

The survey question is included in the footnote on each page

Full-time residents believe long-term rental tenants are part of the community more than owners' guests. Short-term rental tenants are rarely considered to be part of the Tahoe Donner Community.



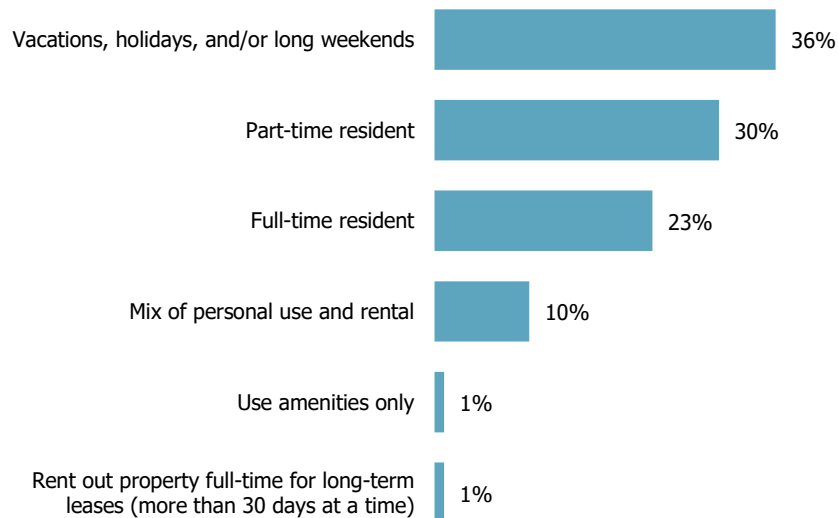
Significant differences between columns are indicated with a letter. In this example, the "A" means the figure in column B is significantly higher than the same figure in column A. All stat testing is done at the 95% confidence level.

Statistical significance means that if we were to conduct the same survey again, we can expect that number to be higher than the corresponding number 95% of the time.

Around one-fourth of Tahoe Donner members are full-time residents. Most owners share ownership with their spouse, while it is rare to have multiple families or extended family members on the deed. Nearly 40% have owned their home for 20+ years.

Usage of the Property

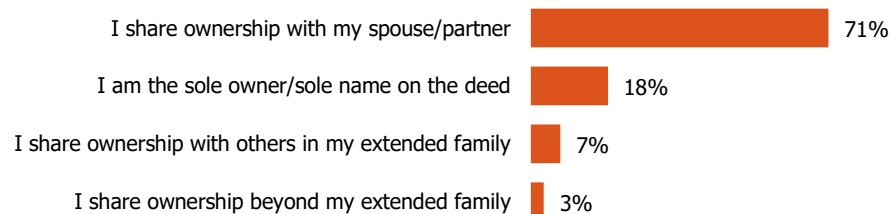
N = 1817



Type of Ownership

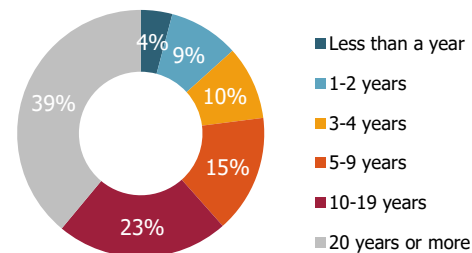
N = 1707

(Among those who indicated they are an owner)



Length of Ownership

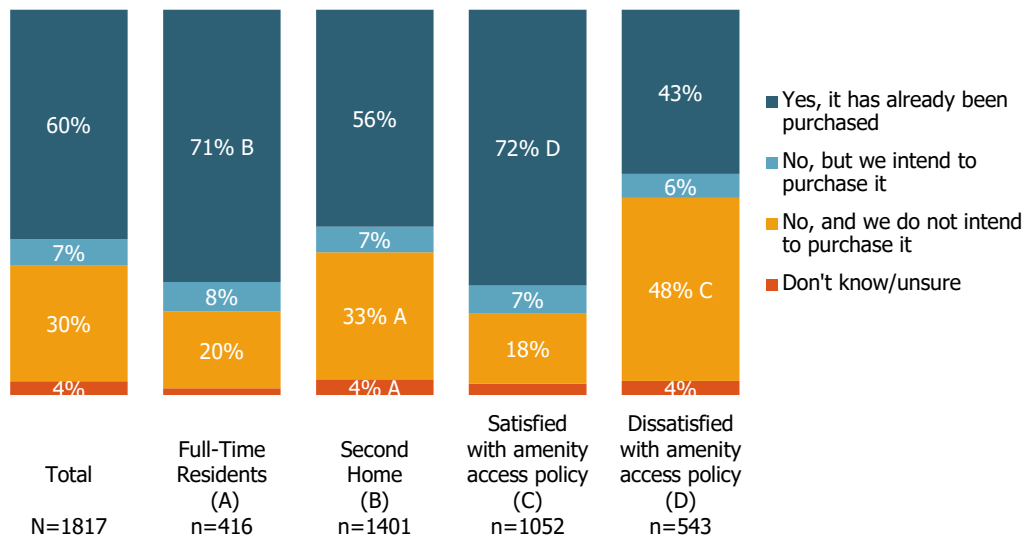
N = 1817



HomeUse: Which best describes YOUR use of your home(s) or property(ies) in Tahoe Donner?
Own: How would you describe the ownership of your Tahoe Donner property?
TimeOwn: How long have you or your family had property in Tahoe Donner?

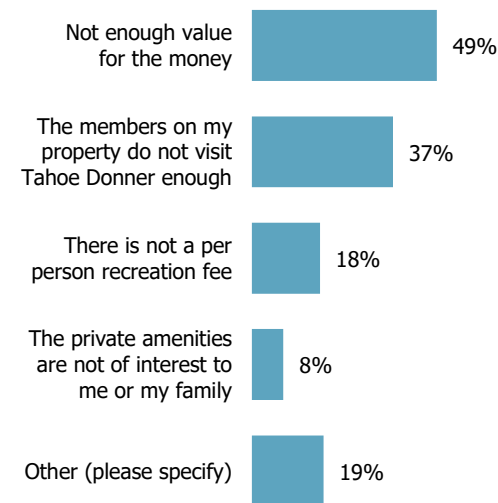
Most members have already purchased the 2022/23 Recreation Fee, with higher rates of purchase among full-time residents and those satisfied with the amenity access policy. Just under half of those who do not intend to purchase indicate low value perceptions.

2022/23 Recreation Fee Purchase Status



Reasons for Not Purchasing

N = 545
(Among those who do not intend to purchase)





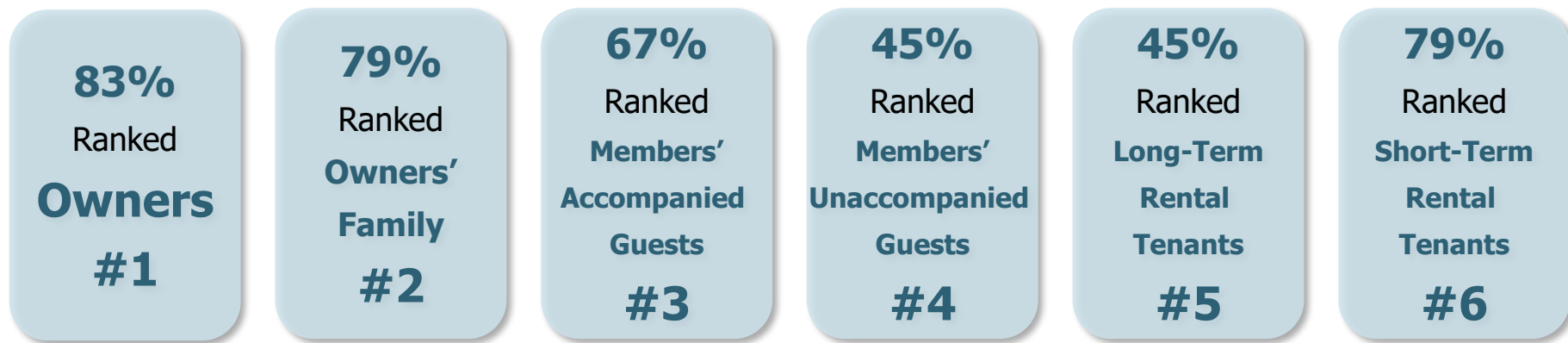
Views on the Tahoe Donner Community



Members believe that property owners and their families should have the highest priority for accessing private amenities, with rental tenants receiving the lowest priority. Only a small portion believe there should be no priority difference.

Ranking of Priority for Amenity Access

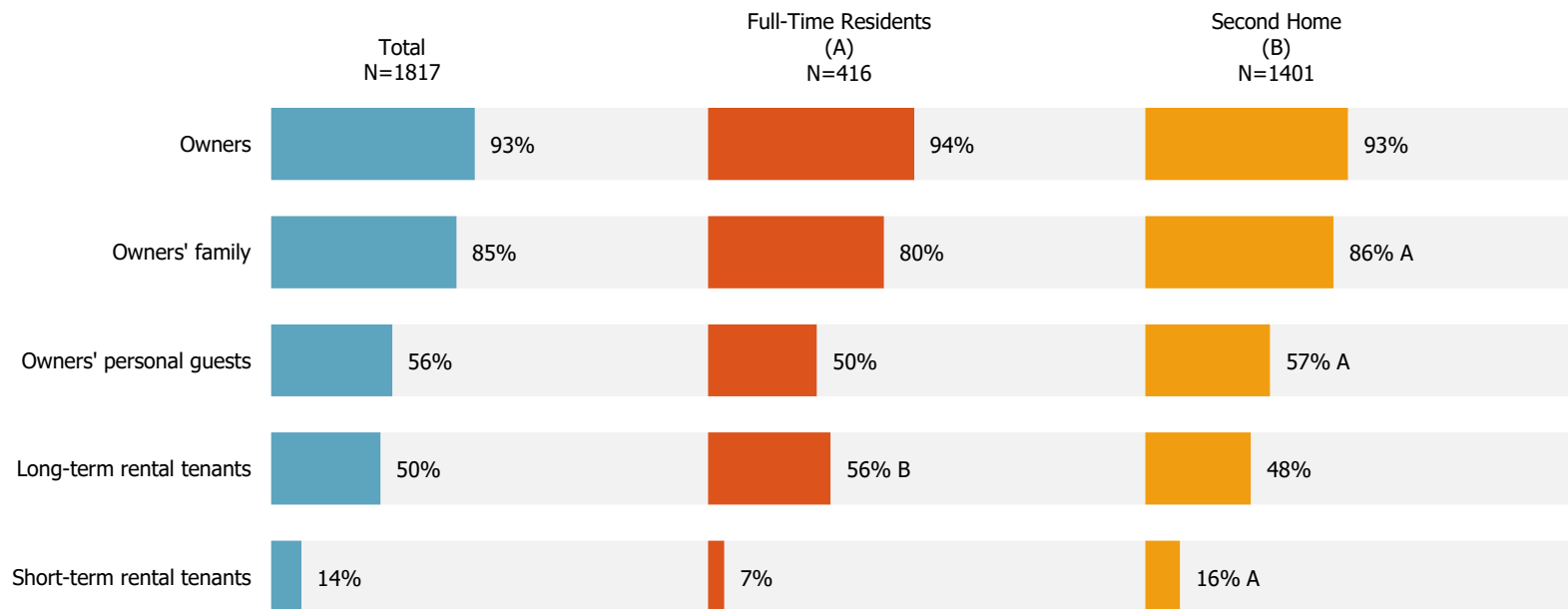
N = 1817



11% indicated there should be
no priority difference

Full-time residents believe long-term rental tenants are part of the community more than owners' guests. Short-term rental tenants are rarely considered to be part of the Tahoe Donner Community.

Groups Considered to be Included in the Tahoe Donner Community



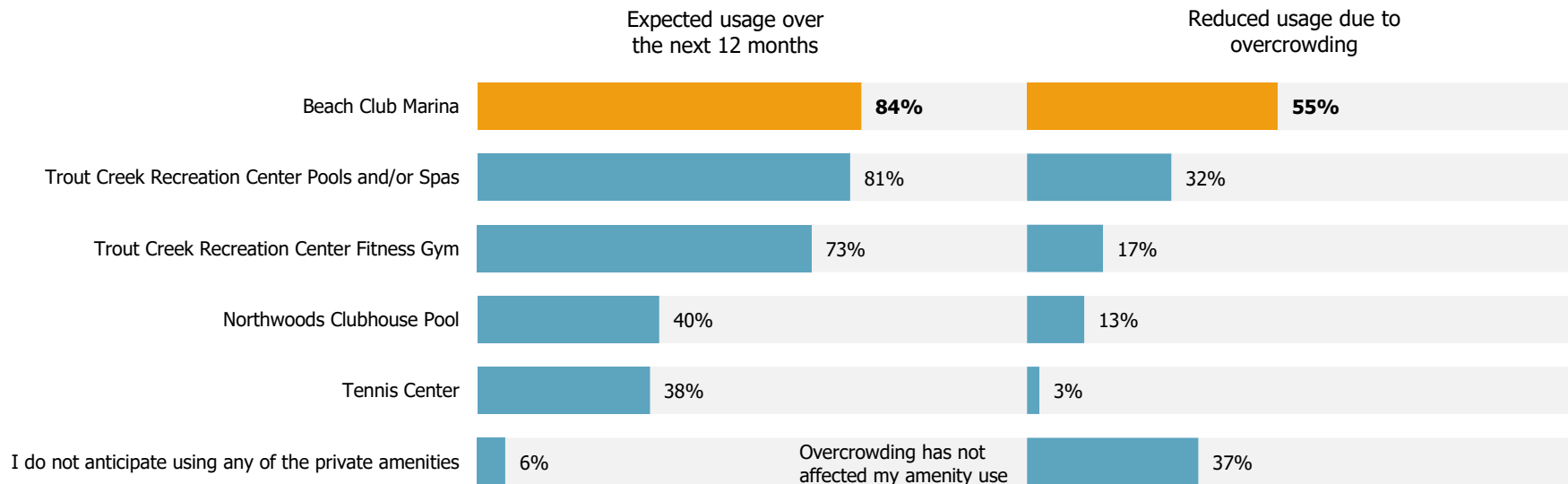
A wide-angle photograph of a bustling lakeside beach. In the foreground, a sandy beach is partially covered by a dark grey overlay containing the title text. Several yellow and grey kayaks are parked on the sand. The middle ground shows a large crowd of people, many sitting on towels or blankets, with colorful umbrellas scattered throughout. Some people are in the water, which is a deep blue. In the background, a dense forest of evergreen trees lines the shore, and a small white building is visible among the trees. Beyond the forest, rolling hills and mountains are visible under a clear blue sky.

Private Amenity Usage & Perceptions

The Beach Club Marina is the amenity with the highest expected usage, but also experiences the most reduced usage from overcrowding. This makes the Beach Club Marina a prime candidate for owner prioritization.

Use of Private Amenities

N = 1817



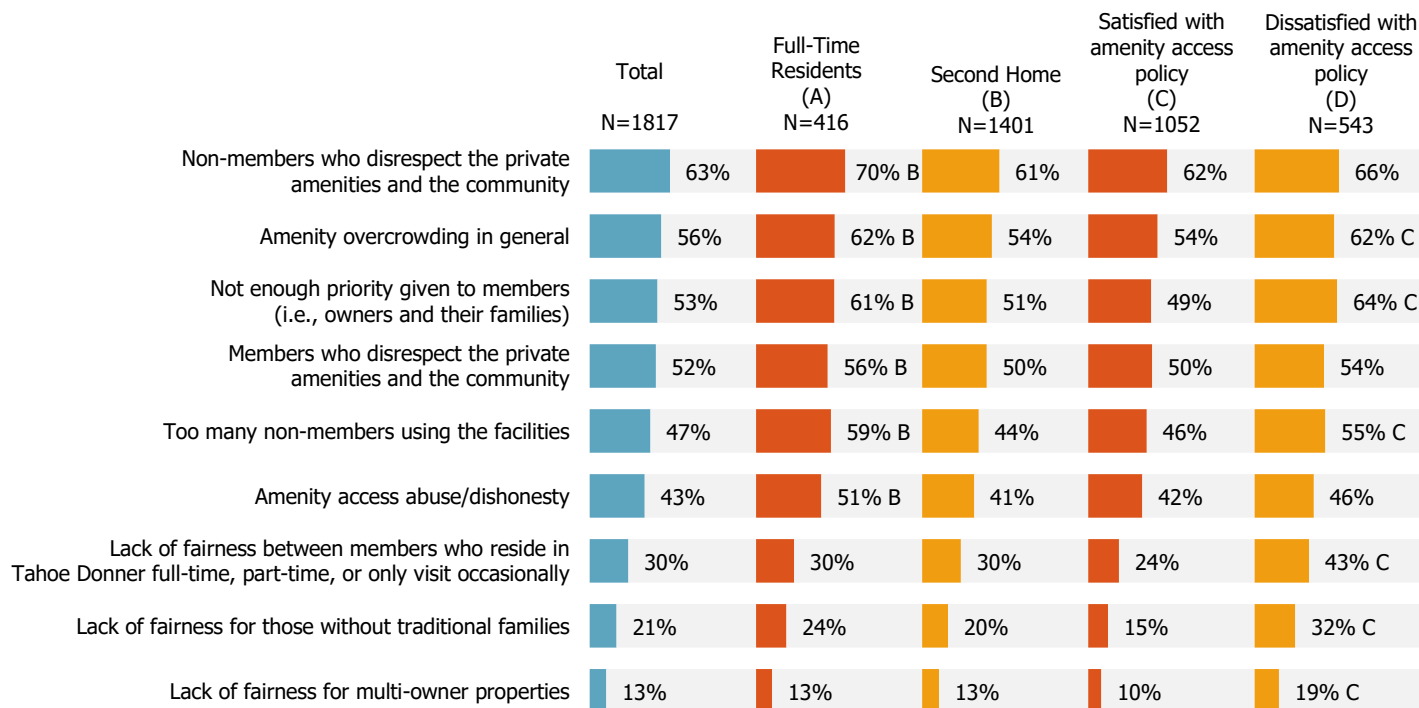
Top concerns include disrespect of the private amenities, overcrowding, and a lack of priority for members.

Non-members disrespecting the private amenities is the number one concern across all groups, with significantly higher concern among full-time residents.

Members who are dissatisfied with the current access policy rate a **lack of priority for members** as the second highest concern.

Full-time residents and those dissatisfied with the current access policy are significantly more concerned with **amenity overcrowding, lack of priority for members, and too many non-members using the private amenities** in comparison to second home owners and satisfied residents.

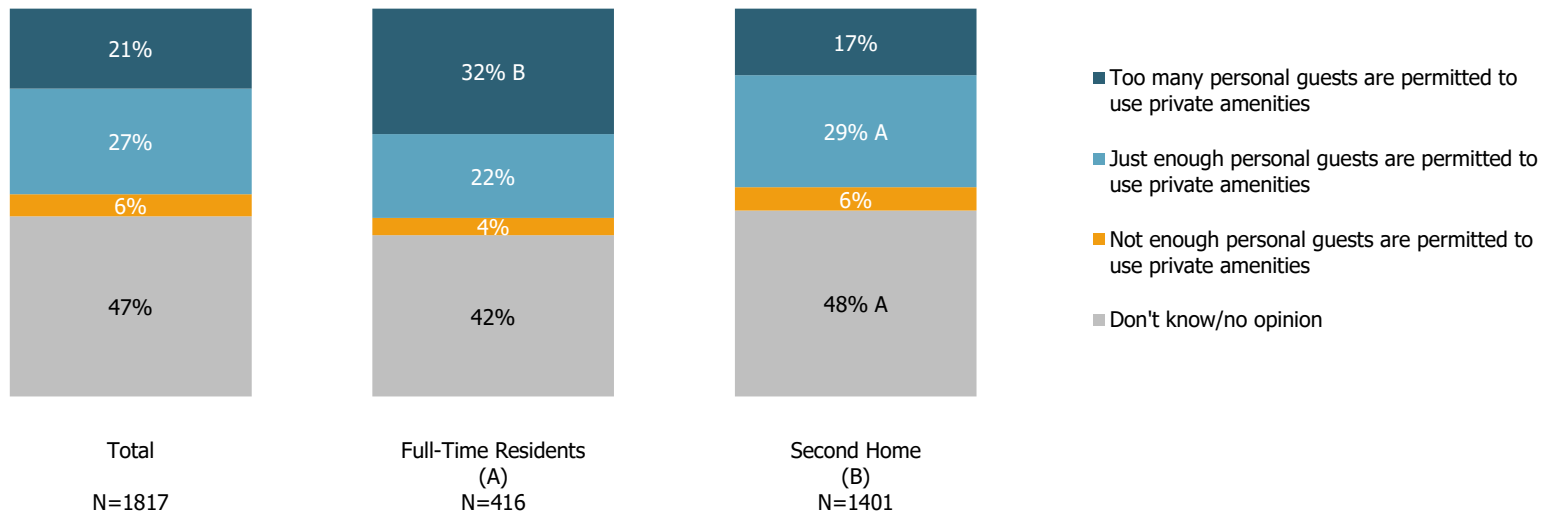
Private Amenity Concerns



Concerns: Thinking about the private amenities (Trout Creek Recreation Center Fitness and Pools, Northwoods Clubhouse Pool, Beach Club Marina, and Tennis Center), how concerned are you about the following? (Showing top 2 summary: Extremely/moderately concerned)

Overall, members are much more likely to feel too many personal guests are permitted to use the private amenities than not enough. Full time residents are significantly more likely to state there are too many personal guests permitted than second home owners.

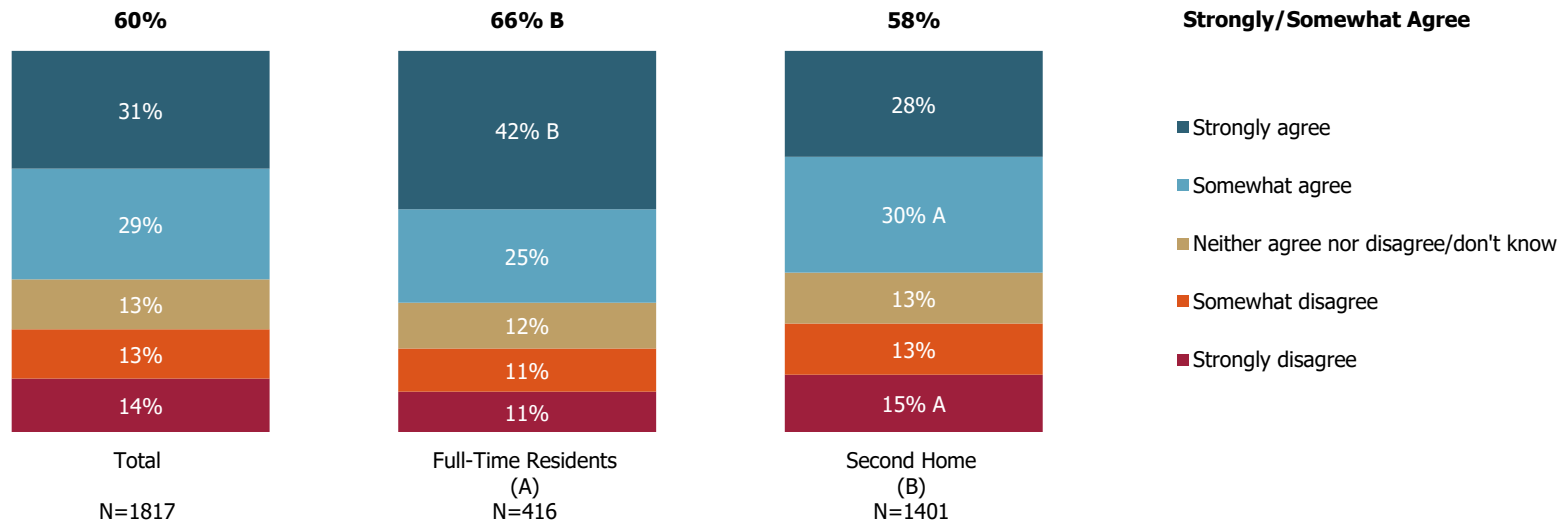
Views on the Number of Personal Guests Using the Private Amenities



More than half of all members surveyed believe unaccompanied guests should be charged higher access rates than guests accompanied by a member, which is consistent with the current access policy.

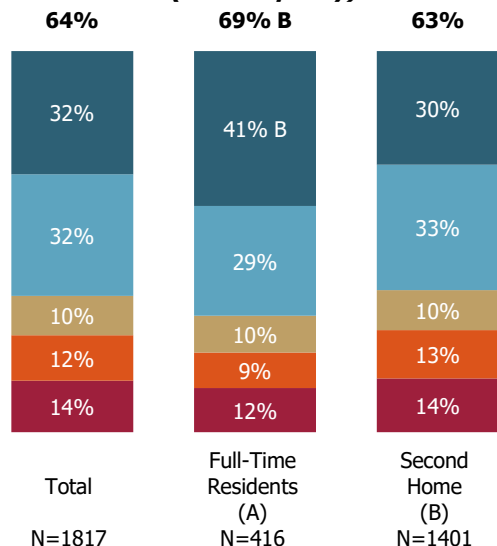
Agreement/Disagreement with the Following Statement:

Higher access rates should be charged for unaccompanied guests (with a guest card) over guests who are accompanied by a member

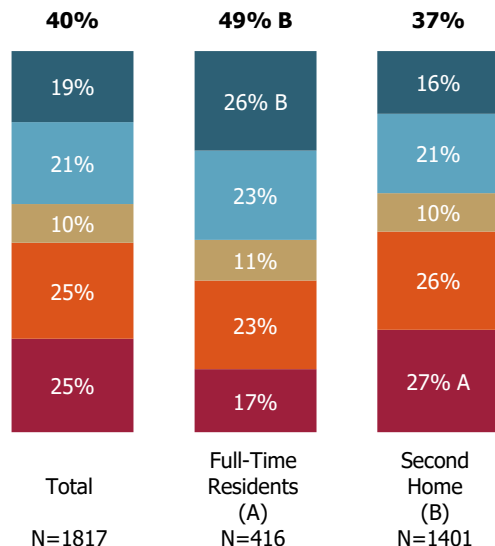


Members agree more with the current policy of charging unaccompanied guests more for amenity access than with requiring guests to be accompanied by a member to access private amenities. Second home owners are more likely to disagree with requiring guests to be accompanied.

Unaccompanied personal guests of members should pay more for amenity access than personal guests accompanied by members (current policy).



Personal guests of members should only be permitted into private amenities if they are accompanied by a Tahoe Donner member.

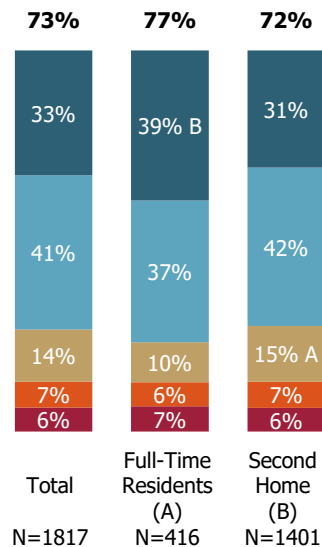


Strongly/Somewhat Agree

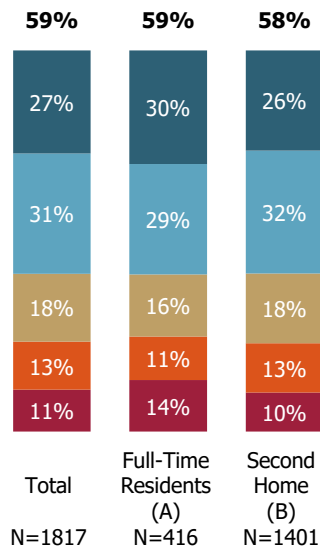
- Strongly agree
- Somewhat agree
- Neither agree nor disagree/don't know
- Somewhat disagree
- Strongly disagree

There is strong agreement that long-term rental tenants should have access to private amenities, and over half believe that amenity access for long-term renters should be at the discretion of the property owner.

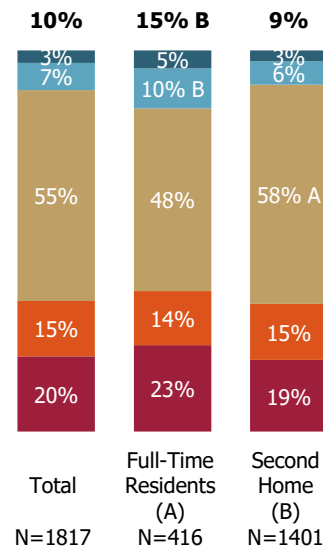
Long-term rental tenants should have access to Tahoe Donner's private amenities.



Amenity access privileges for long-term rental tenants should be at the discretion of the property owner.



Long-term rental tenants do not have enough access to private amenities.

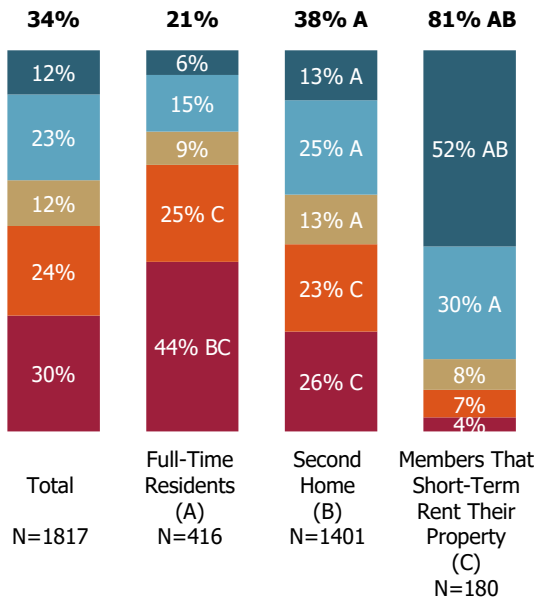


Strongly/Somewhat Agree

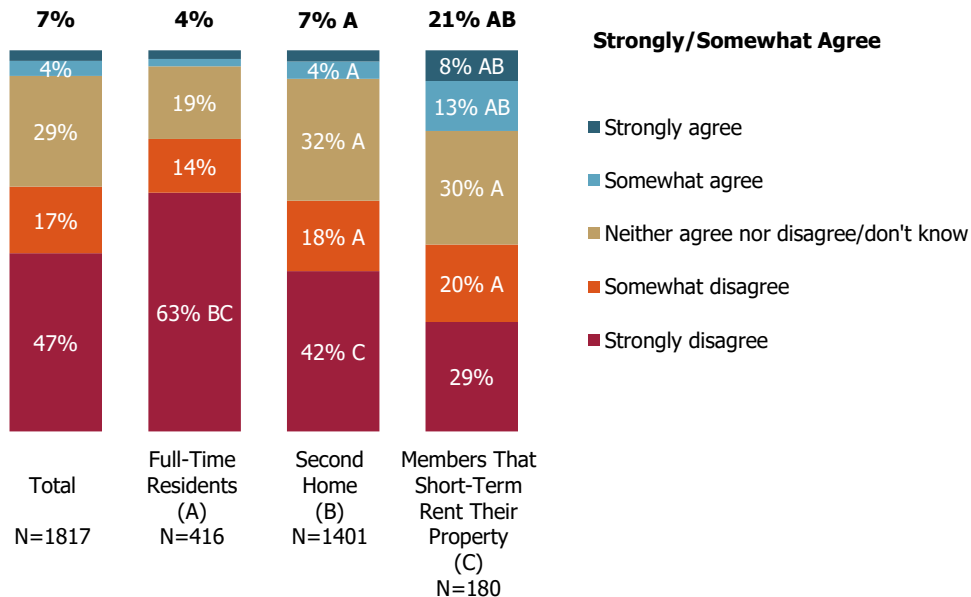
- Strongly agree
- Somewhat agree
- Neither agree nor disagree/don't know
- Somewhat disagree
- Strongly disagree

Overall, members are aligned with the idea that short-term rental tenants should not be given more access to private amenities.

Short-term rental tenants should have access to Tahoe Donner's private amenities.



Short-term rental tenants do not have enough access to private amenities.



Strongly/Somewhat Agree

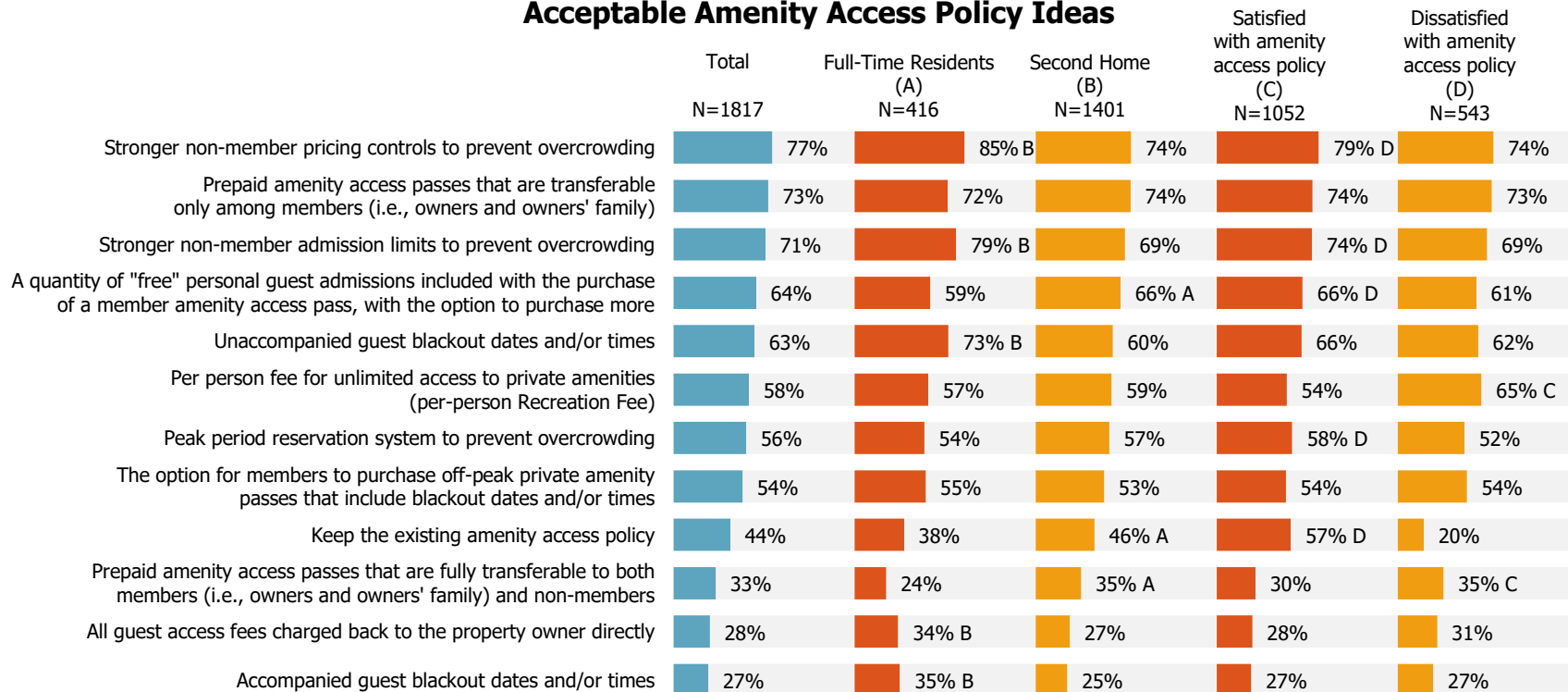
- Strongly agree
- Somewhat agree
- Neither agree nor disagree/don't know
- Somewhat disagree
- Strongly disagree



Ideal Private Amenity Policies/Improvements

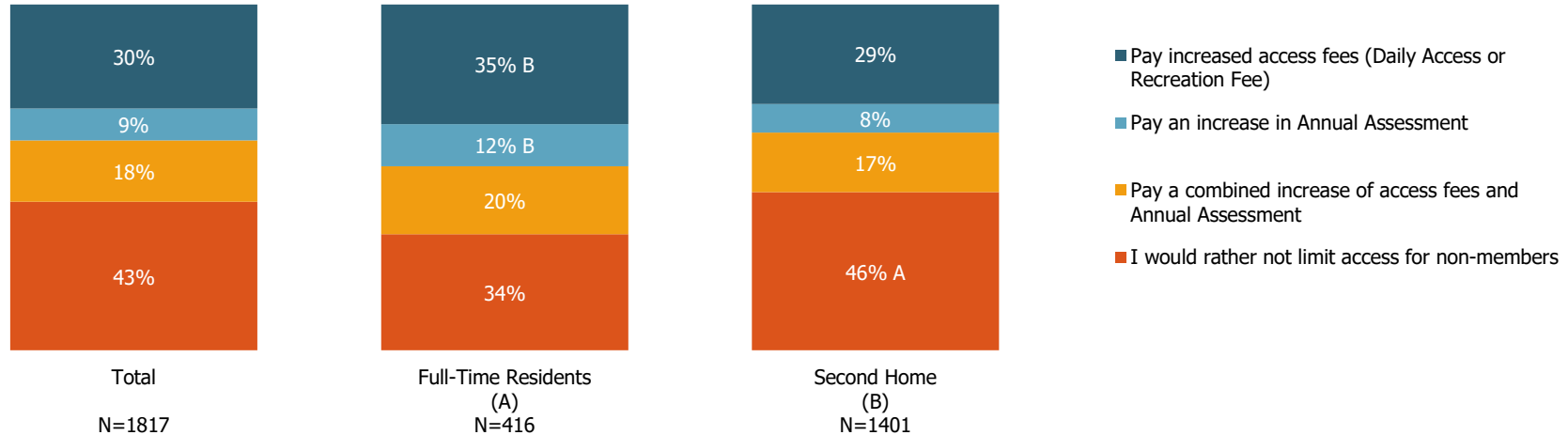
Implementing non-member pricing controls & limitations to reduce crowding is widely accepted, along with transferrable access passes (to members only). Dissatisfied residents are more likely to find a per-person Recreation Fee acceptable.

Acceptable Amenity Access Policy Ideas



A large portion of members mention they would rather not limit access to non-members when met with the reality that it would require a price increase. However, there is a stronger preference towards increasing access fees compared to increasing the Annual Assessment.

Willingness Among Members to Pay Higher Rates in Restricting Non-Member Access



Most importantly, members want to see increased value for their money. They also want stronger owner prioritization, safeguards against abuse of amenities, reduction in overcrowding, and a stronger sense of community.

Important Values to Reflect in the Amenity Access Policy

	Total N=1817	Full-Time Residents (A) N=416	Second Home (B) N=1401	Satisfied with amenity access policy (C) N=1052	Dissatisfied with amenity access policy (D) N=543
Increased value for your member dollar	83%	82%	84%	82%	86% C
Stronger safeguards against amenity access abuse/dishonesty	78%	77%	78%	80% D	74%
Stronger owner/owner family access priority/exclusivity	76%	77%	75%	76%	77%
Greater emphasis on reducing amenity overcrowding	74%	78% B	73%	76%	72%
Strengthened feeling of community in Tahoe Donner	73%	77% B	72%	75% D	70%
Increased exclusivity for member's amenity usage	62%	71% B	59%	64%	61%
Greater flexibility and more options	60%	54%	62% A	55%	70% C
Fairness of value between members who reside in Tahoe Donner full-time, part-time, or only visit occasionally	58%	48%	61% A	56%	61% C
Fairness of value for members without at least four family members	53%	57%	52%	48%	63% C
Generous accompanied non-member access privileges	41%	32%	43% A	42%	39%
Fairness of value for properties that are owned by multiple families	30%	26%	31%	28%	31%
Generous unaccompanied non-member access privileges	15%	9%	17% A	13%	18% C

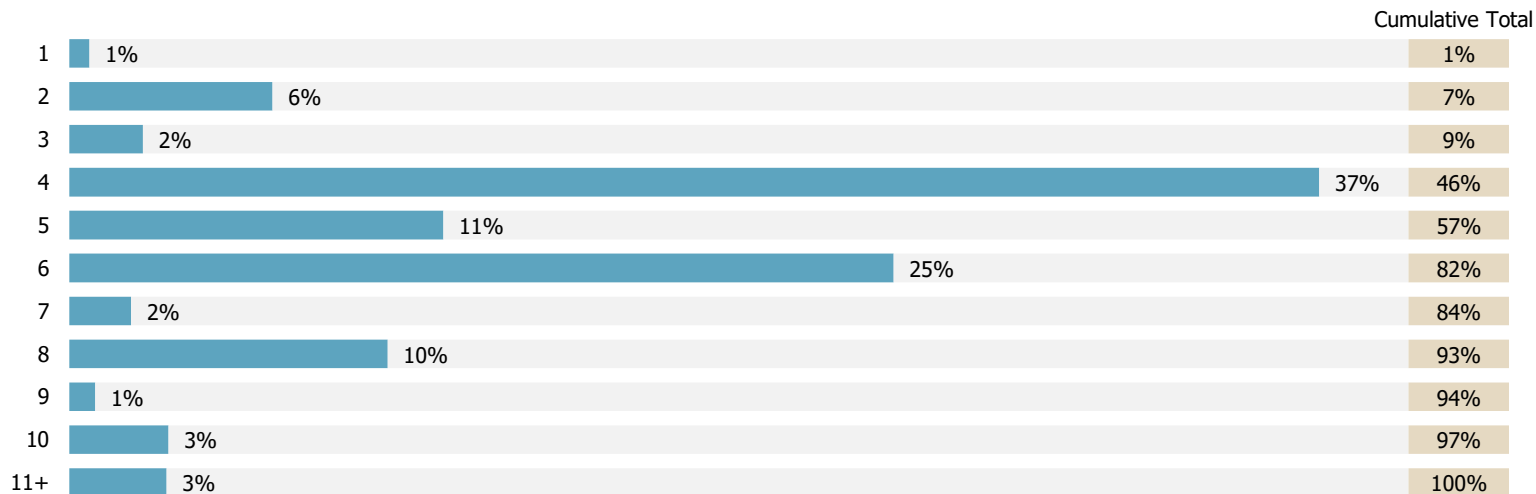


Values1: Of the values listed below, please indicate which are important and which are not important to see reflected in Tahoe Donner's amenity access policy. (Showing those selected as 'Important')

Almost half of all members surveyed are satisfied with four ID cards, and almost all (93%) are satisfied with eight. This is in line with the current allotment of ID cards for each property (including the four additional ID cards that can be purchased for a fee).

Desired Number of Photo ID Cards Per Property

N=1817



Average of 5 ID Cards Per Property

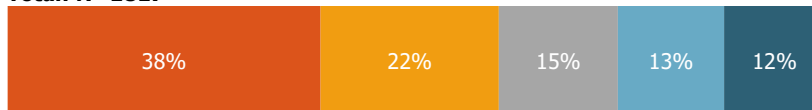


IDcards: Member amenity access photo ID cards are available to owners and their families. Ideally, how many member amenity access photo ID cards would you like to have associated with your or your family's property?

Members are in agreement that there should be a ceiling on the number of access cards available to any one property.

Attitudes Towards Placing a Ceiling on Photo ID Crads

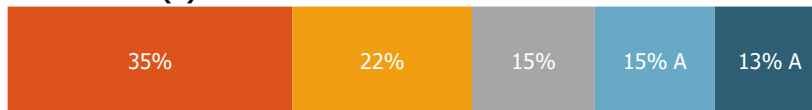
Total: N=1817



Full Time Residents (A): N=416



Second Home (B): N=1401



Strongly agree with A Somewhat agree with A Agree with both A and B about the same Somewhat agree with B Strongly agree with B

Statement A

There should be a ceiling on the number of member amenity access photo ID cards available to any one property.

Statement B

Property owners should be allowed to purchase as many member amenity access photo ID cards as needed.

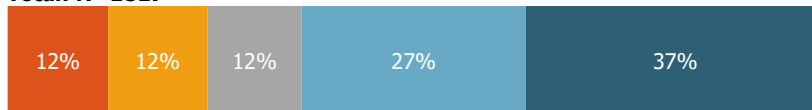
Members are in favor of changing the current policy to begin restricting non-member access to private amenities during peak times, this is especially true for full-time residents.

Attitudes Towards Restricting Non-Member Access During Peak Times

Statement A
Non-member access to private amenities should not be restricted during peak times (current policy).

Statement B
Non-member access to private amenities should be restricted during peak times.

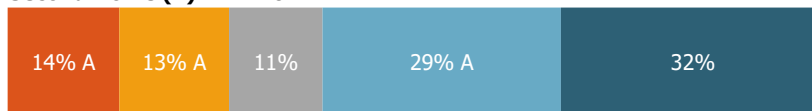
Total: N=1817



Full Time Residents (A): N=416



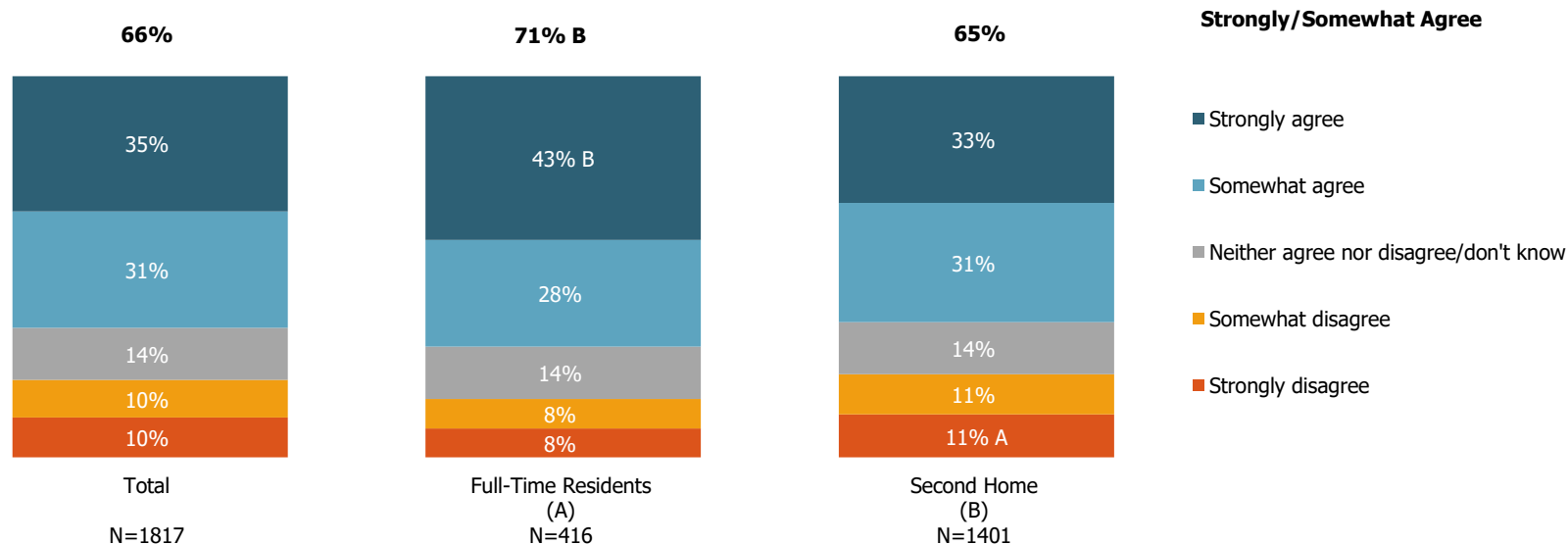
Second Home (B): N=1401



Strongly agree with A Somewhat agree with A Agree with both A and B about the same Somewhat agree with B Strongly agree with B

There is strong agreement overall to increase non-member access pricing during peak times, with higher rates of agreement among full-time residents.

Agreement/Disagreement with the Following Statement:
During peak days and/or times, non-member private amenity access pricing should be increased from normal rates.





Future Pricing Opportunities

Members are split between paying more for less crowded amenities and leaving things as they are, though there is a lean towards not wanting to pay more, especially among dissatisfied members.

Willingness to Pay Higher Rates for Less Crowded Amenities

Total: N=1817



Full Time Residents (A): N=416



Second Home (B): N=1401



Satisfied with amenity access policy (C): N=1052



Dissatisfied with amenity access policy (D): N=543



Strongly agree with A Somewhat agree with A Agree with both A and B about the same Somewhat agree with B Strongly agree with B

Statement A

I would be willing to pay more in access fees or my Annual Assessment to provide a less-crowded private amenity experience for Tahoe Donner members.

Statement B

I would not be willing to pay more in access fees or my Annual Assessment to provide a less-crowded private amenity experience for Tahoe Donner members.

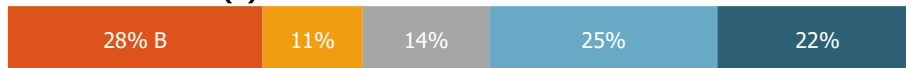
Across all members surveyed, there is a preference for amenity operating costs to be paid predominately by the people that use them instead of being spread across all members through the Annual Assessment.

Coverage of Amenity Operating Costs

Total: N=1817



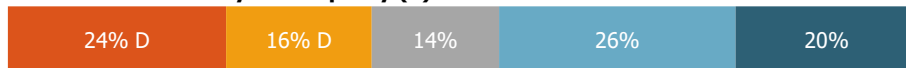
Full Time Residents (A): N=416



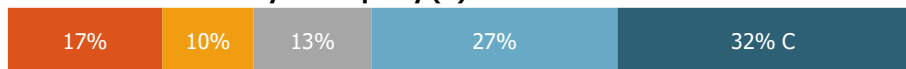
Second Home (B): N=1401



Satisfied with amenity access policy (C): N=1052



Dissatisfied with amenity access policy (D): N=543



Strongly agree with A Somewhat agree with A Agree with both A and B about the same Somewhat agree with B Strongly agree with B

Statement A

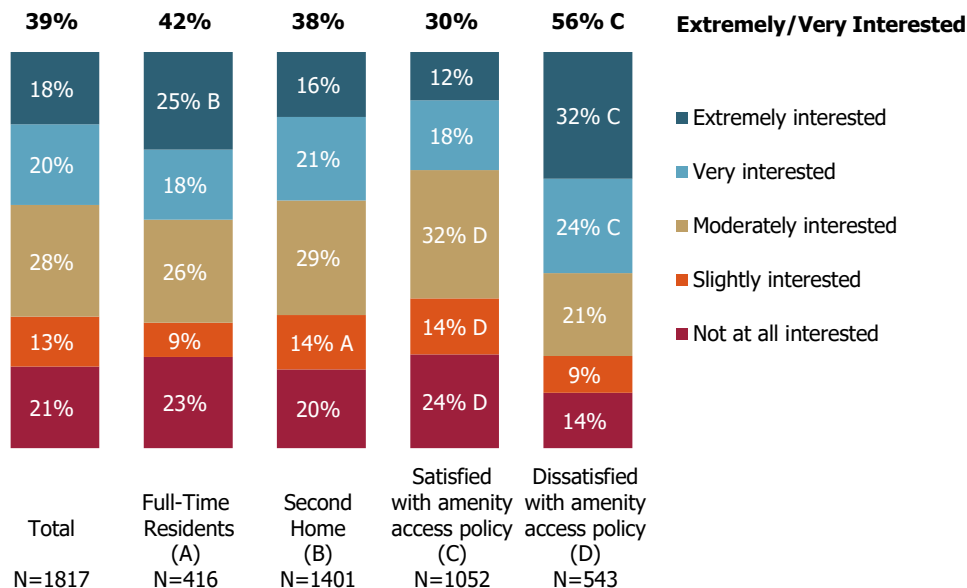
I would rather amenity operating costs be spread among all members through the Annual Assessment.

Statement B

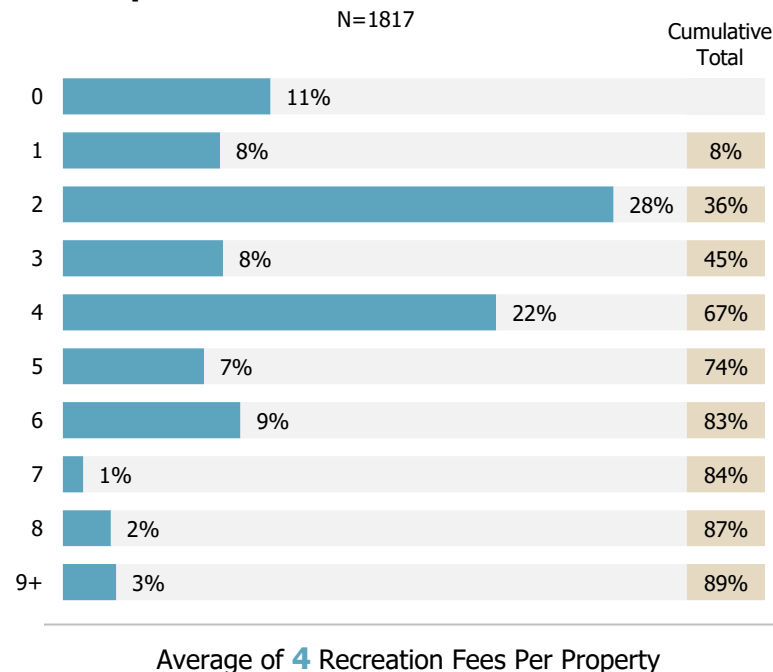
I would rather amenity operating costs be paid predominantly by the members that use them.

There is interest in a per-person Recreation Fee, especially among those dissatisfied with the current access policy. With a per-person fee, only 11% of all members surveyed indicate they would not buy any, compared to 30% with the current Recreation Fee structure.

Interest in a Per-Person Recreation Fee



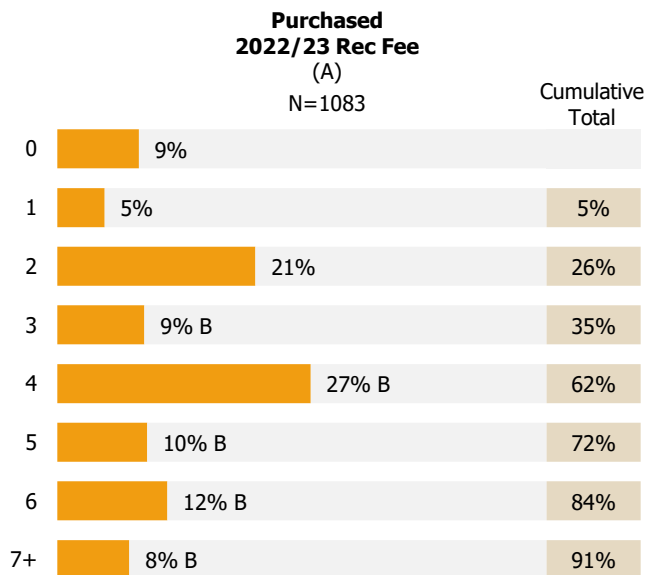
Expected Per-Person Fees Purchased



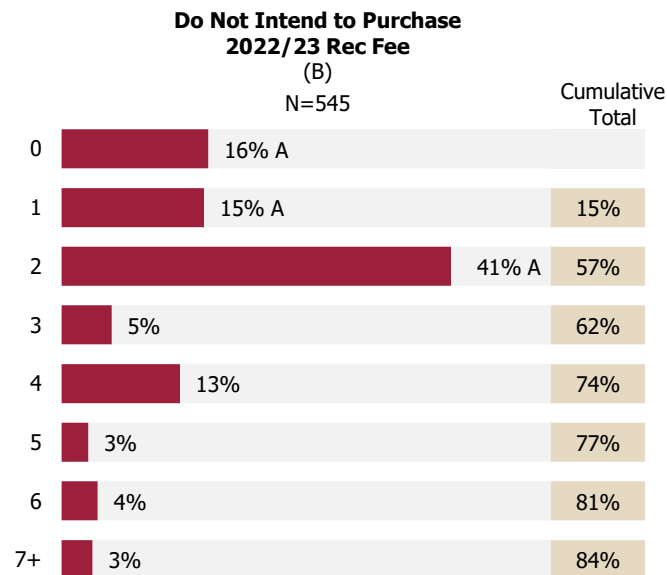
PerPerson: How interested would you be in a per-person Recreation Fee to access Tahoe Donner private amenities at a reasonable rate?
 PerPerson2: If Tahoe Donner offered a per-person Recreation Fee to access private amenities at a reasonable rate, how many would your family purchase?

Prior to introducing potential pricing, the majority of members who do not intend to purchase the 2022/23 Recreation Fee indicate they would purchase at least one per-person Recreation Fee, with more than 40% indicating they would purchase two.

Expected Per-Person Fees by Current Recreation Fee Purchases



Average of **5** Recreation Fees Per Property



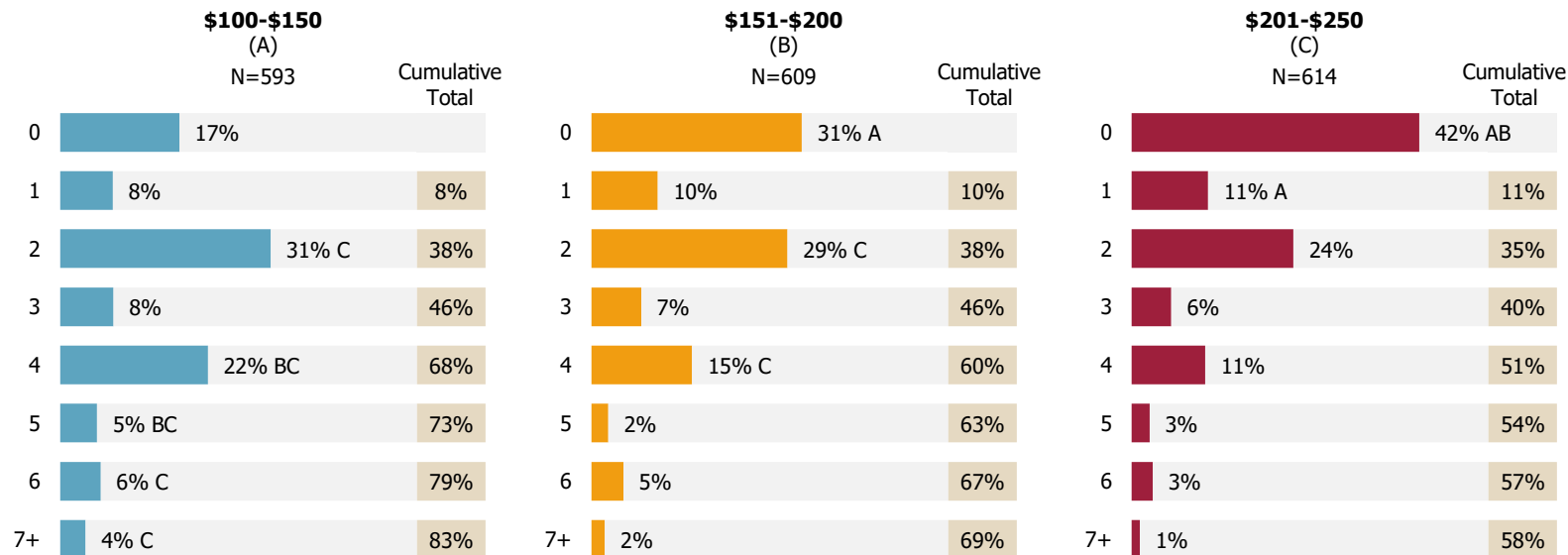
Average of **3** Recreation Fees Per Property



PerPerson2: If Tahoe Donner offered a per-person Recreation Fee to access private amenities at a reasonable rate, how many would your family purchase?

Members are significantly more likely to purchase a per-person Recreation Fee at the \$100-\$150 price point compared to \$151-\$200 or \$201-\$250.

Interest in a Per-Person Recreation Fee by Potential Price Points



Average of **4** Recreation Fees Per Property

Average of **3** Recreation Fees Per Property

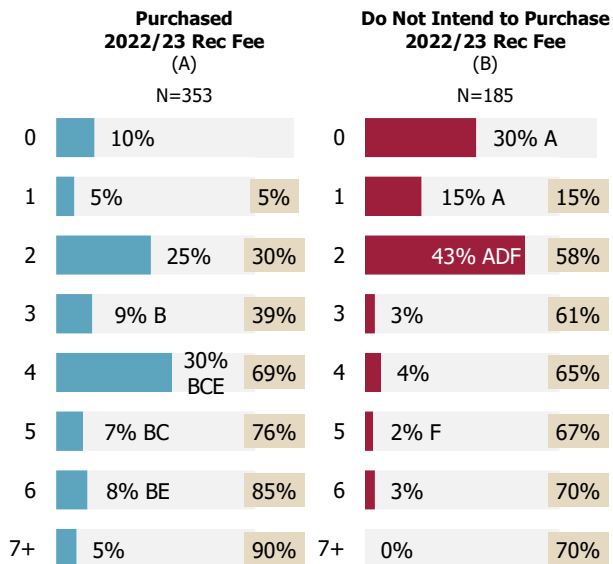
Average of **3** Recreation Fees Per Property



PerPerson3: If Tahoe Donner offered a per-person Recreation Fee to access private amenities at [\$100-\$150; \$151-\$200; \$201-\$250], how many would your family purchase?

When price is introduced, expected purchases among those who did not purchase the 2022/23 Recreation Fee declines more rapidly than those who already purchased the 2022/23 Recreation Fee.

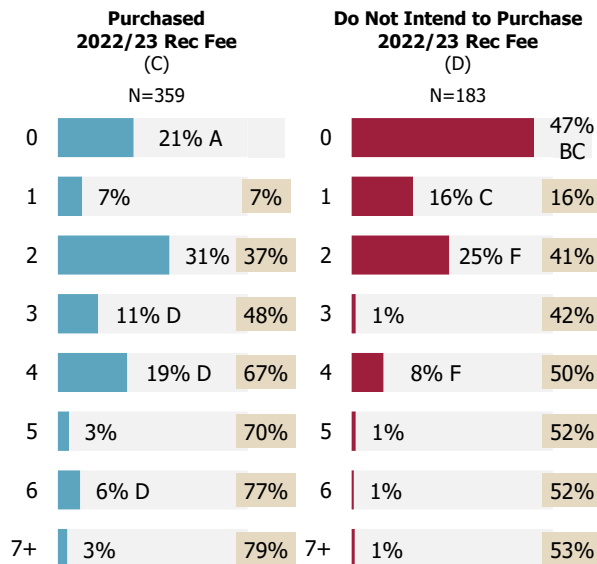
\$100-\$150



Average of 4 Per Property

Average of 3 Per Property

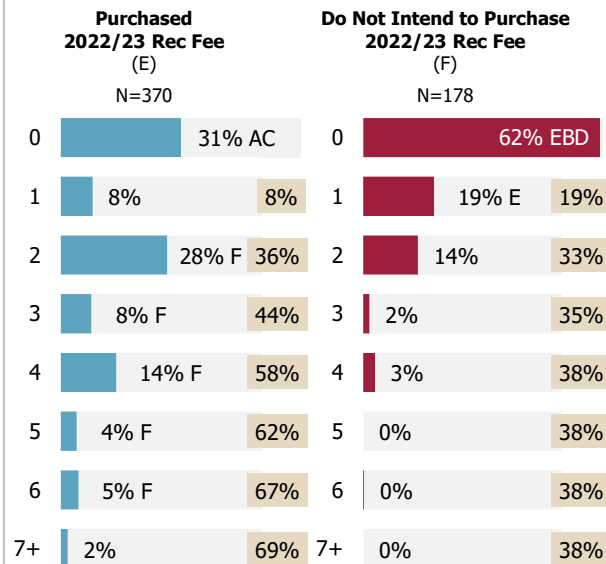
\$151-\$200



Average of 4 Per Property

Average of 2 Per Property

\$201-\$250



Average of 3 Per Property

Average of 2 Per Property

Cumulative Total



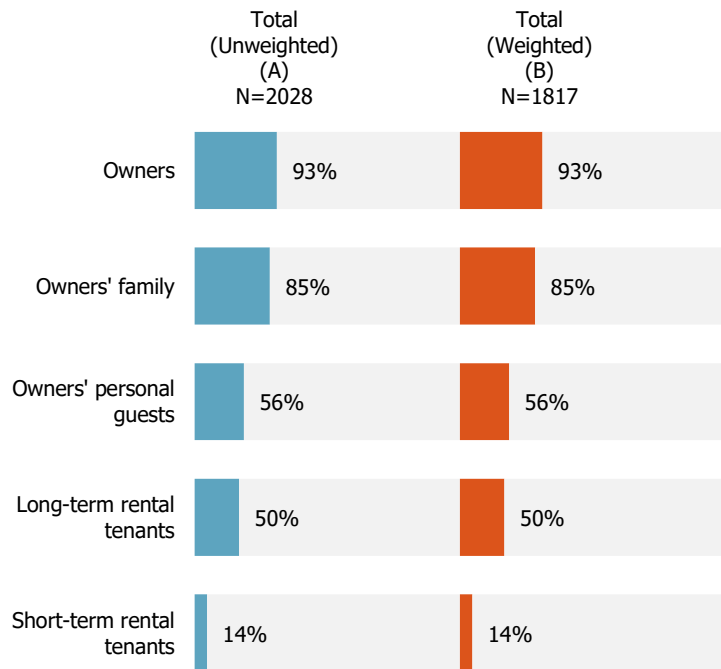
PerPerson3: If Tahoe Donner offered a per-person Recreation Fee to access private amenities at [pipe: PerPerson_RAND], how many would your family purchase?



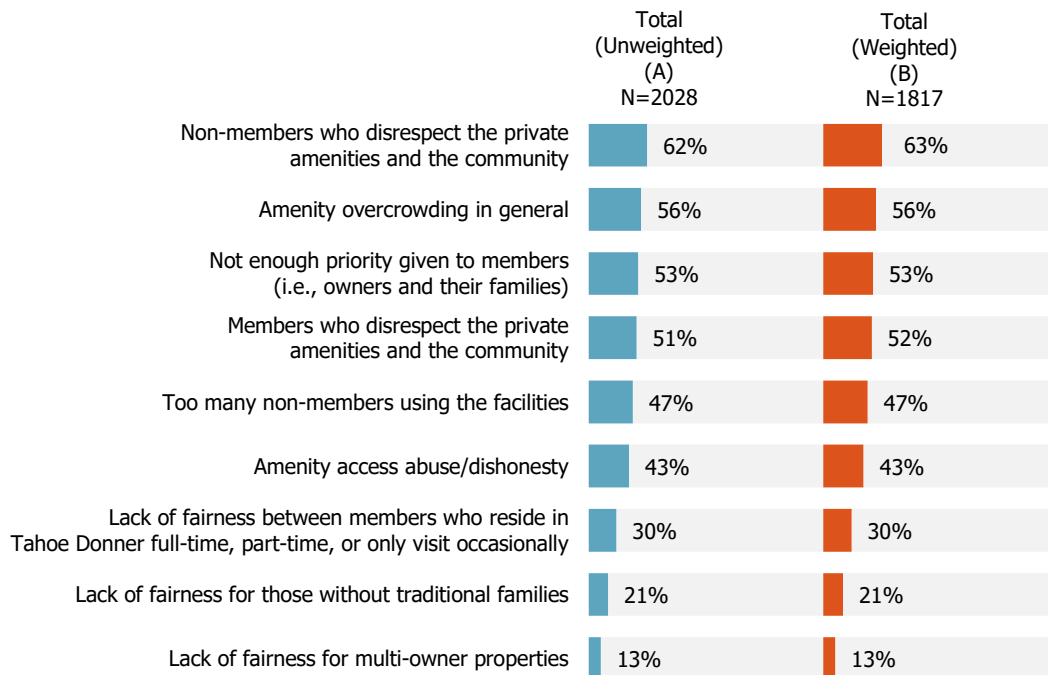
Appendix

Unweighted vs. Weighted Data

Groups Considered to be Included in the Tahoe Donner Community



Private Amenity Concerns



Community: Thinking about YOUR view of the Tahoe Donner community, which of the following groups do YOU consider to be part of the Tahoe Donner community?
 Concerns: Thinking about the private amenities (Trout Creek Recreation Center Fitness and Pools, Northwoods Clubhouse Pool, Beach Club Marina, and Tennis Center), how concerned are you about the following? (Showing top 2 summary: Extremely/moderately concerned)