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TAHOE DONNER SM

2023 Membership Research
Conducted for Tahoe Donner General Management
February 23rd, 2024



Purpose of Research

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

- New residents – who are they
- Property usage
- Member attitudes toward amenities
- Satisfaction and value of TD
- Opportunities for improvement



Methodology

- 20-minute online survey distributed by email
- Fieldwork conducted Dec. 4 to Dec. 26, 2023
- Sample consisted of owners (or family members of owners) or renters of a Tahoe Donner property
- **Sample is** distributed as follows:

1,484

**Total
Interviews***

429

**Permanent
Resident
Owners***

1,055

**Second
Homeowners***

147

**Past 2-Year
Owners &
Renters**

15

Renters
Low sample



Although responses are lower than past years, we are hitting a response rate of 13%. This is well above industry standard and reflects the strong engagement of the TD community.

*2021: 1879 total respondents, 485 permanent residents, 1394 second homeowners; 2019: 1590 total respondents, 254 permanent residents, 1318 second homeowners

Note: Margin of Errors – Total: 2.5%, Permanent Resident Owners: 4.7%, Second homeowners: 2.9%, Past 2-Year Owners & Renters: 8.1%

Tips for reading the report

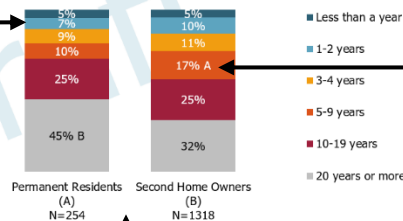
Charts report percentages, unless otherwise noted

The survey question is included in the footnote on each page

Over half of Tahoe Donner residents have owned the property for ten years or more

Permanent Residents have more longevity at the community with nearly half of them owning the property for 20 years or more.

Length of Ownership



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.

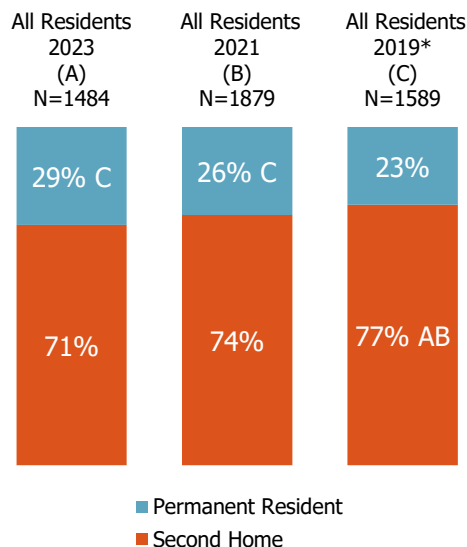
Some analyses compares Permanent Residents to Second Homeowners. Note that columns in tables and charts are always labeled with a letter for statistical testing



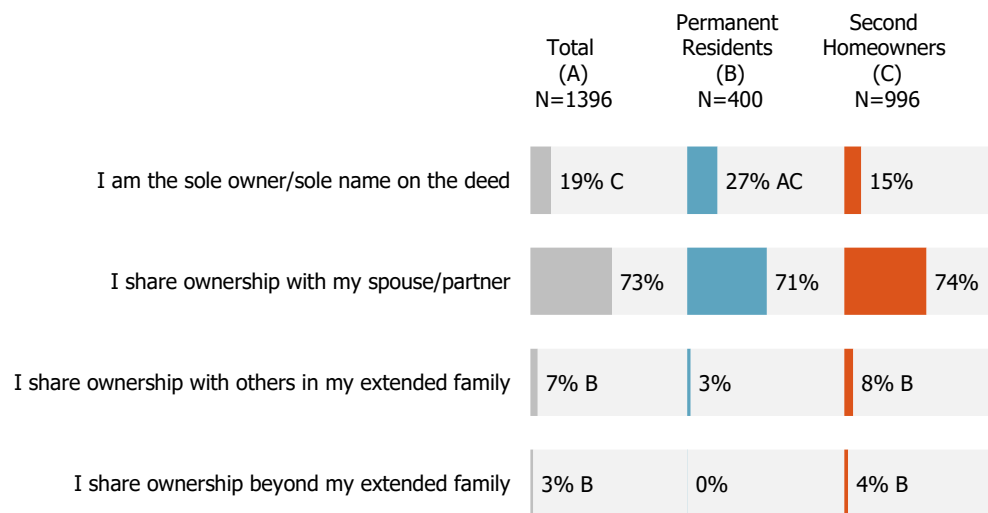
How has Property Use Changed at TD

There is an increase in the number of permanent residents at TD over the last 4 years. Consistent with past years, most share ownership with a spouse or partner.

Permanent vs. Second Home Residents



Description of Ownership (Among 2023 owners)



A4. Please enter the five-digit zip code of your primary residence.

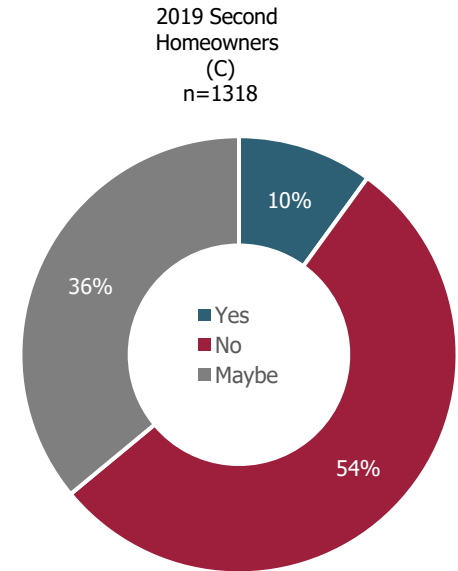
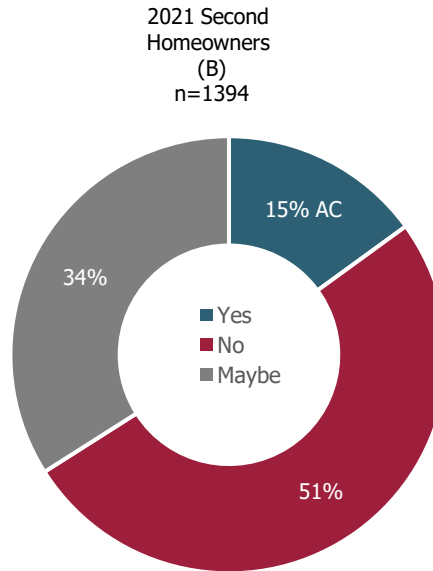
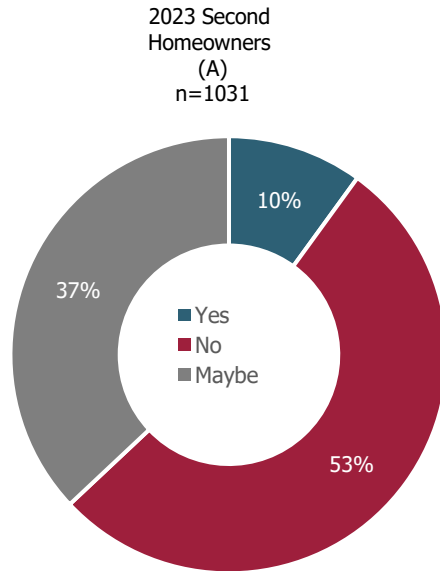
A7: How would you describe the ownership of your Tahoe Donner property(ies)?

Stat testing: A/B/C

Note: 2019 data reported was weighted to account for multiple respondents per property and to decrease weight of permanent residents. Shown here is unweighted to match 2023 and 2021.

There is a decline from 2021 in those intending on living in TD full-time in the future, back down to match 2019 levels.

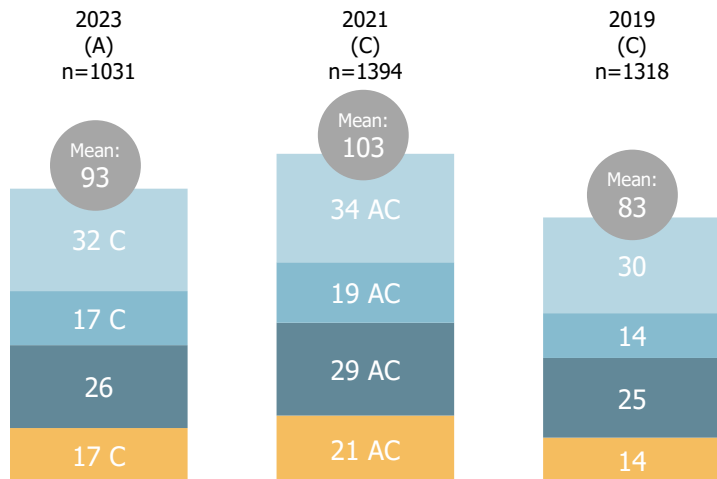
Future Plans to Live in Tahoe Donner Full-Time



The amount of time second homeowners are spending in TD is declining, down from an average 103 days in 2021 to 93 days in 2023. However, average days spent is still higher than pre-covid.

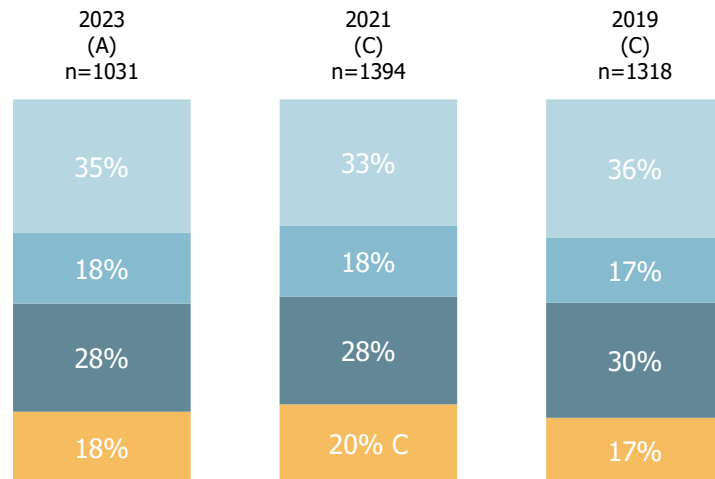
Time Spent at Tahoe Donner by Season (Mean Summary)

Number of Days (Among Second Homeowners)



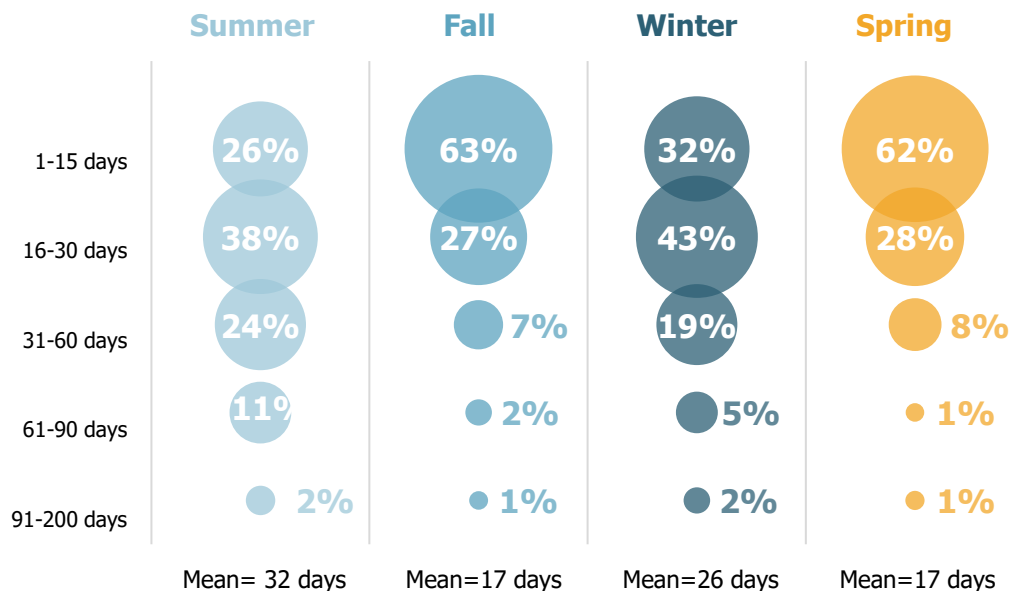
Summer
Fall
Winter
Spring

Percent of Days (Among Second Homeowners)



Consistent with years past, during fall/spring, most second homeowners only spend 1-2 weeks at their homes in TD; However, most spend two weeks or more in the summer/winter.

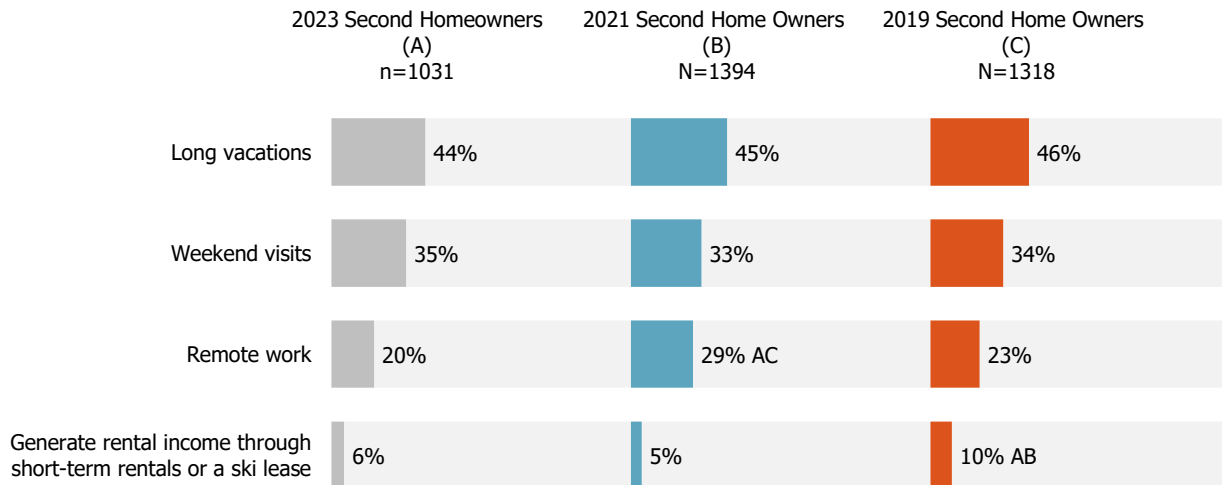
Number of Days (Claimed) Occupied by Season
(Among Second Homeowners)



Expected remote work is down back to 2019 levels. There are no significant changes year over year for expected vacation, weekend visits and STRs.

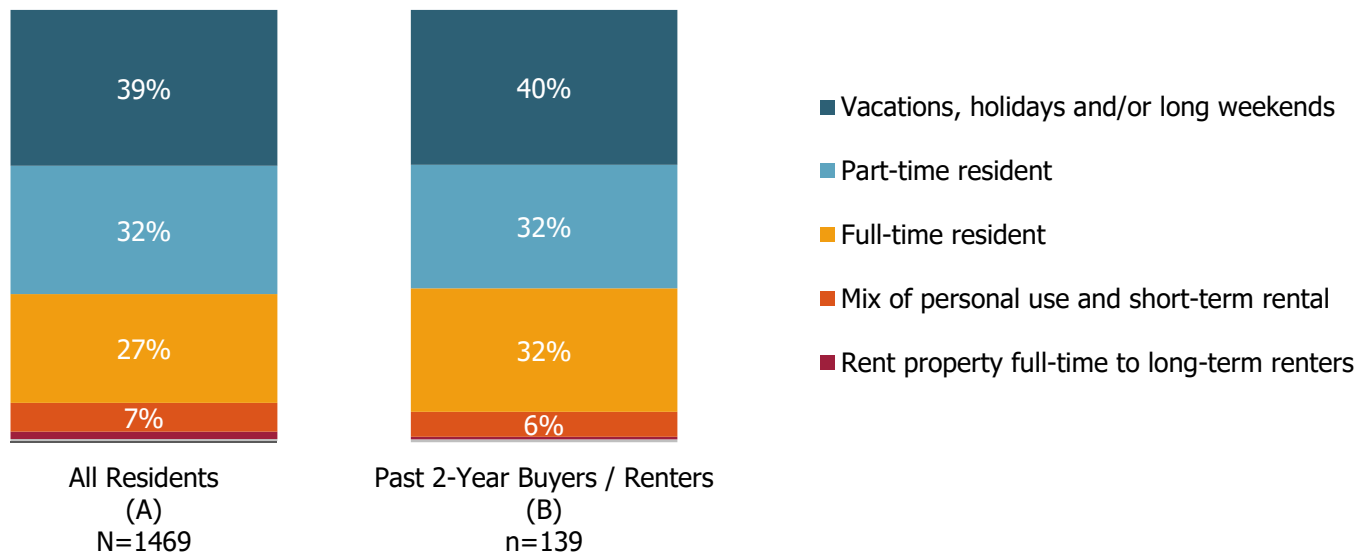
Expected Increase in Use of TD Property

(Top 2 shown: More often/Much more often)



Recent buyers and renters have similar intentions of how they plan on using their TD home.

Use of TD Home

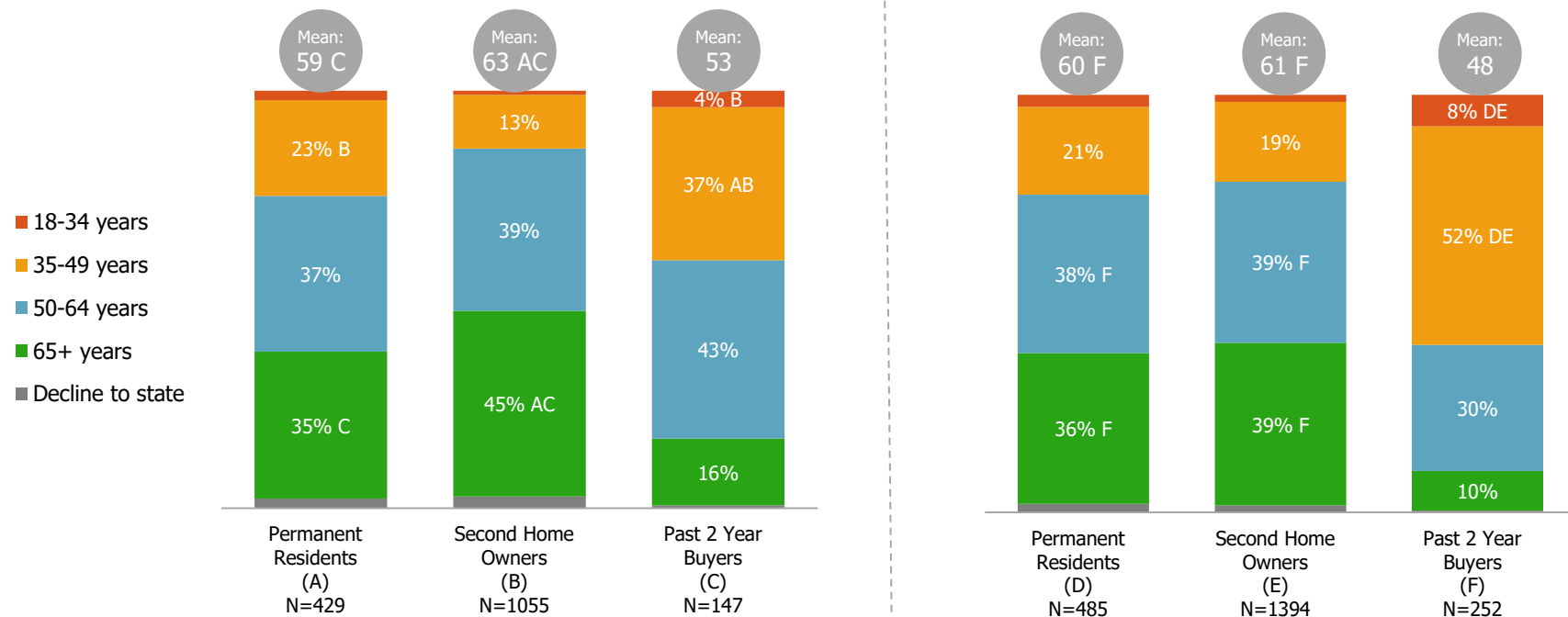


Like 2021, past 2-year buyers tend to be younger, with 41% being under the age of 50, compared to 25% of permanent residents.

Age of Owner

2023

2021



Demographics

	2023 Total Residents (A)	2021 Total Residents (B)	2023 Permanent Residents (C)	2021 Permanent Residents (D)	2023 Secondary Homeowners (E)	2021 Secondary Homeowners (F)
	N=1484	N=1879	N=429	N=485	N=1055	N=1394

Categories to describe TD Property

Retired	53% B	47%	42%	42%	57% F	48%
Work from Home	30%	33%	31%	33%	30%	33%
Empty nesters	39%	40%	27%	32%	44%	42%
Family with children	54%	59% A	24%	26%	66%	71% E
Young children (0-4)	19%	18%	9%	6%	23%	22%
School-age children (5-18)	35%	34%	15%	16%	43%	41%
Our adult children live at home with us	10%	11%	5%	5%	12%	13%
Locally employed – FT	8%	8%	17%	20%	4%	4%
Locally employed – seasonal / PT	6% B	3%	11% D	6%	3%	2%

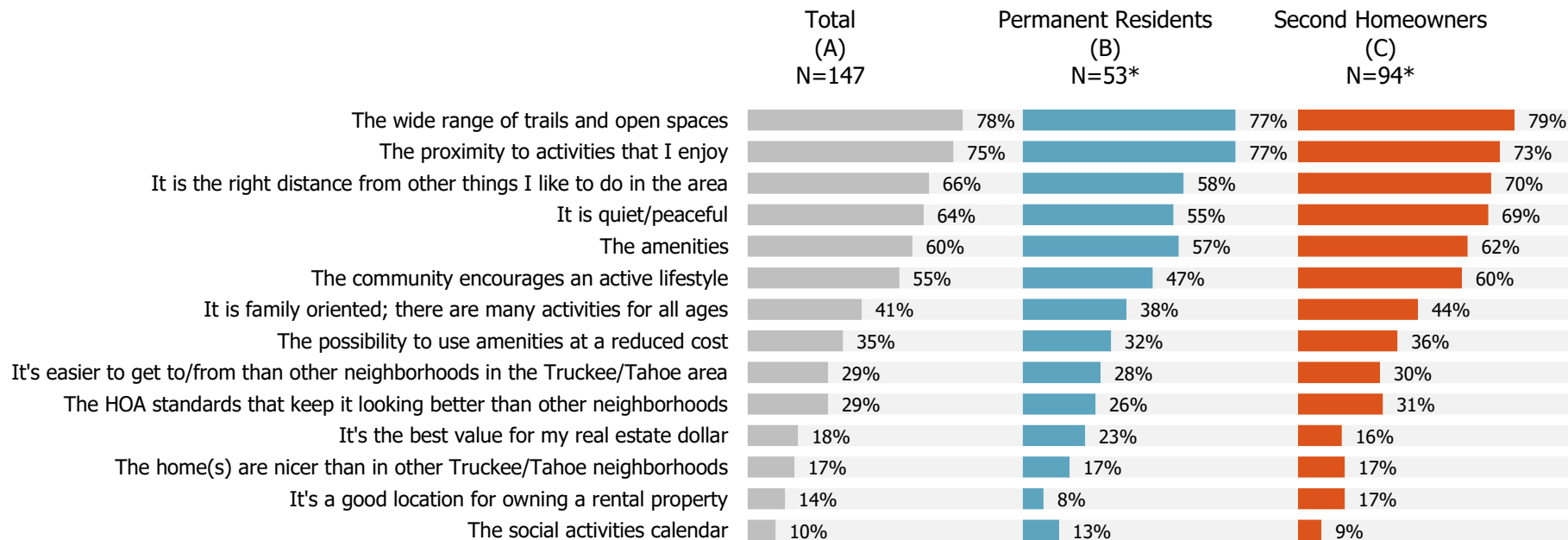


F5. Which of the following describe the [household who lives at] [people who visit] your Tahoe Donner property?
Stat testing: A/B, C/D, E/F

Consistent with years past, the strongest purchase motivators for recent buyers is TD's range of trails and proximity to activities they enjoy.

Reason for Buying Property in Tahoe Donner

(Among Past 2-year buyers)



A10: What were the main reasons you bought property in Tahoe Donner?

Among past 2-year buyers; Showing >10%

*Caution: Small base size (n<100)

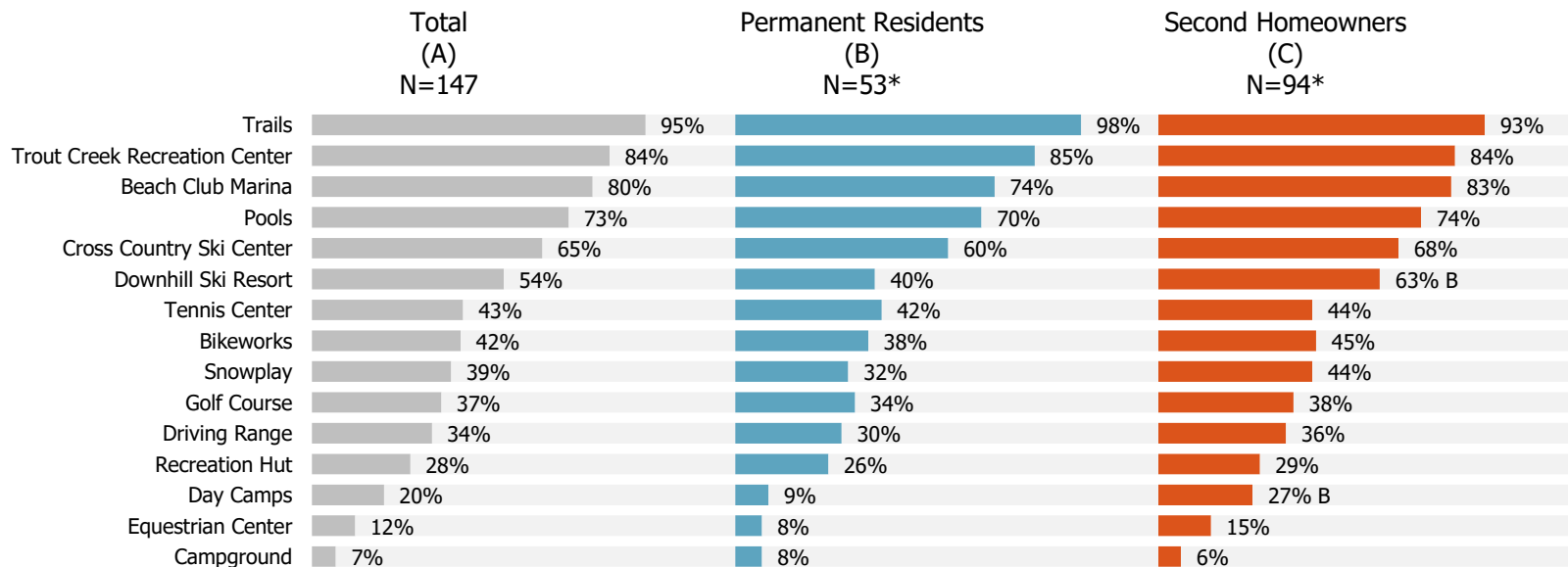
Stat testing: A/B/C



Every recent buyer plans to use TD amenities, with trails, rec center and beach club marina being the most popular.

Planned Use of Tahoe Donner Amenities

(Among Past 2-year buyers)




A11: What Tahoe Donner amenities do you intend to use?

Among past 2 year buyers

*Caution: Small base size ($n < 100$)

Stat testing: A/B/C





Amenity Usage & Perceptions

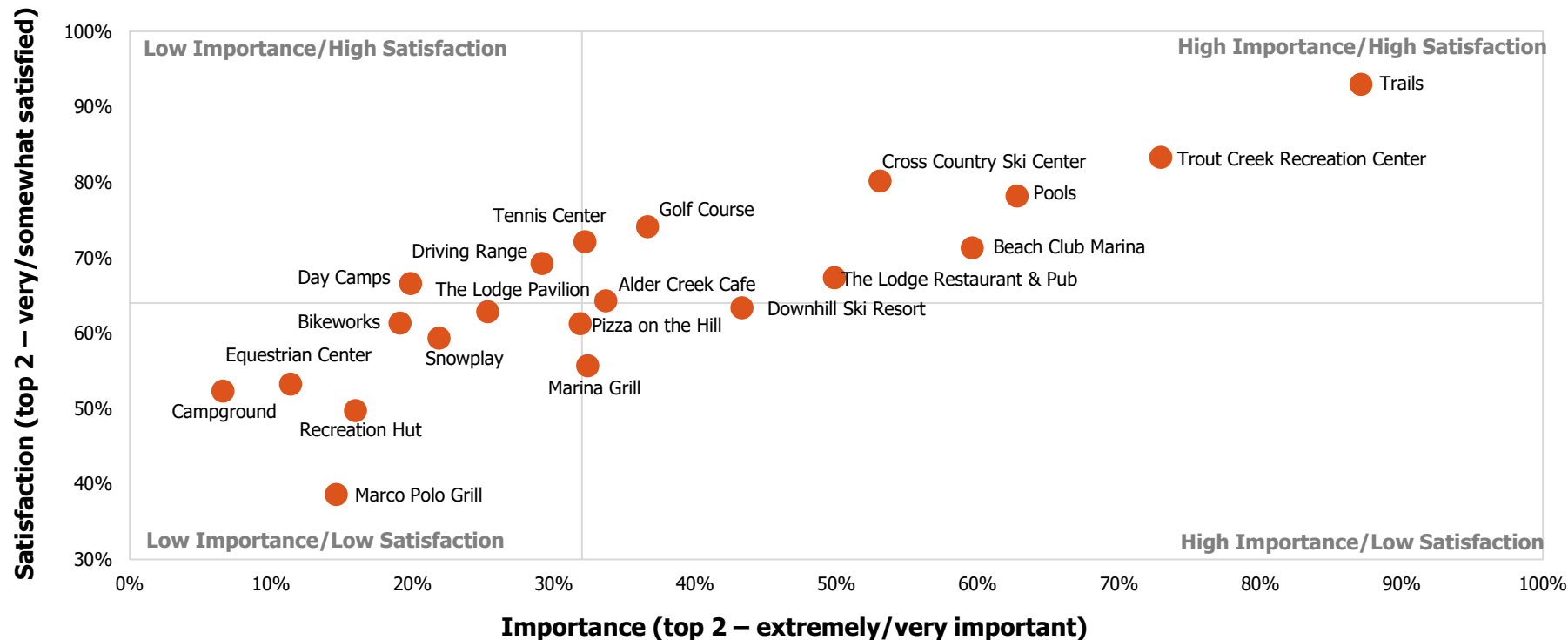
Amenities have been categorized into four groups according to their overall importance and satisfaction (among amenity users)

Satisfaction
(Top 2 – Very/Somewhat satisfied)

<p>Low Importance/High Satisfaction</p> <p>These amenities are considered less important to the community as a whole. This simply means that fewer members feel they are important, though they could be “very important” to fewer people. Satisfaction is high. Additional efforts to improve these amenities will not likely be as appreciated as efforts toward more important amenities.</p>	<p>High Importance/High Satisfaction</p> <p>These amenities are broadly regarded as important to the community. Satisfaction is high relative to other amenities, suggesting that resources, maintenance, service, etc. deployed to these amenities is being noticed and appreciated by TD members.</p>
<p>These amenities are considered less important and have lower satisfaction among users. Improvements to these amenities may be justified, but should be considered a lower priority than efforts toward more important amenities that fall short on satisfaction (lower right quadrant)</p> <p>Low Importance/Low Satisfaction</p>	<p>These amenities are broadly regarded as important to the community, but satisfaction is below average (65%). Look for areas to improve services or resources in these amenities to drive up satisfaction.</p> <p>High Importance/Low Satisfaction</p>

Importance
(Top 2 – Extremely/Very important)

Importance vs. Satisfaction – Detailed view



C6: How important are each of the following amenities to you? (asked of everyone, top 2 box on 5-pt importance scale plotted)
 C4: How satisfied are you with each of the following amenities? (asked of users of each amenity, top 2 box on 5-pt satisfaction scale plotted)
 Note: crosshairs (axes) are based on average scores for importance and satisfaction

Amenities classifications (among amenity users) - 2023

Satisfaction (top 2 – very/somewhat satisfied)

<p>Low Importance/High Satisfaction</p> <ul style="list-style-type: none"> • Driving range (Moved from Low Imp. / Low Sat) • Tennis center (on the border of high importance) • Day camps 	<p>High Importance/High Satisfaction</p> <ul style="list-style-type: none"> • Trails • Trout Creek • Pools • Marina • Xcountry Ski Center • The Lodge (Moved from High Imp. / Low Sat) • Golf Course
<ul style="list-style-type: none"> • Pizza on the hill (on the border of high importance) • The Lodge Pavilion* • Snowplay • Bikeworks (Moved from Low Imp. / High Sat) • Marco Polo Grill* • Rec Hut • Equestrian center • Campground (Moved from Low Imp. / High Sat) <p>Low Importance/Low Satisfaction</p>	<ul style="list-style-type: none"> • Downhill Ski Resort • Alder Creek Café (on the border of high satisfaction) • Marina Grill <p>High Importance/Low Satisfaction</p>

Importance (top 2 – extremely/very important)



C6: How important are each of the following amenities to you? (asked of everyone, top 2 box on 5-pt importance scale plotted)

C4: How satisfied are you with each of the following amenities? (asked of users of each amenity, top 2 box on 5-pt satisfaction scale plotted)

*New for 2023

[2021 For Comparison](#)

While importance held steady, amenity satisfaction scores dipped significantly. Declining value perceptions could potentially be weighing in.

All Tahoe Donner Residents 2023 N=1484 vs. 2021 N=1879	2023 Importance (A)	2021 Importance (B)	Importance Delta	2023 Satisfaction (C)	2021 Satisfaction (D)	Satisfaction Delta
Trails	87%	89%	-2%	93%	95% C	-2%
Trout Creek Recreation Center	73%	70%	3%	83%	87% C	-4%
Pools	63%	63%	0%	78%	85% C	-7%
Beach Club Marina	60%	60%	0%	71%	80% C	-9%
Cross Country Ski Center	53%	54%	-1%	80%	93%	-13%
The Lodge Restaurant & Pub	50%	52%	-2%	67%	78% C	-11%
Downhill Ski Resort	43%	43%	0%	63%	71% C	-7%
Golf Course	37%	40%	-3%	74%	90% C	-16%
Alder Creek Cafe	34%	33%	1%	64%	75% C	-11%
Marina Grill (Beach Club Marina)	32%	35%	-3%	56%	70% C	-14%
Tennis Center	32%	31%	1%	72%	87% C	-15%
Pizza on the Hill	32% B	25%	7%	61%	58%	3%
Driving Range	29%	31%	-2%	69%	75% C	-6%
The Lodge Pavilion (back patio area)*	25%	-	-	63%	-	-
Snowplay (tubing and sledding area)	22%	22%	0%	59%	66% C	-7%
Day Camps	20%	22%	-2%	67%	83% C	-17%
Bikeworks	19%	22% A	-3%	61%	85% C	-23%
Recreation Hut	16%	18%	-2%	50%	71% C	-21%
Marco Polo Grill (Trout Creek Pool)*	15%	-	-	39%	-	-
Equestrian Center	11%	14% A	-3%	53%	72% C	-19%
Campground	7%	8%	-1%	52%	80% C	-28%
Average	36%	37%	-1%	66%	78% C	-12%



C6: How important are each of the following amenities to you? (asked of everyone, top 2 box on 5-pt importance scale plotted)

C4: How satisfied are you with each of the following amenities? (asked of users of each amenity, top 2 box on 5-pt satisfaction scale plotted)

*New for 2023: Stat Testing: A/B.C/D

Those with kids in the household find more importance and are more satisfied with amenities such as the pools, beach club, Pizza on the Hill and day camps than those without kids in the home.

Kids in House vs. Not in House N=803 N=681	Kids in House Importance (Top 2) (A)	Kids not in House Importance (Top 2) (B)	Kids in House Satisfaction (Top 2) (C)	Kids not in House Satisfaction (Top 2) (D)
Trails	87%	87%	93%	93%
Trout Creek Recreation Center	73%	73%	84%	82%
Pools	71% B	53%	81% D	74%
Beach Club Marina	64% B	55%	74% D	68%
Cross Country Ski Center	52%	55%	79%	82%
The Lodge Restaurant & Pub	52% B	47%	70% D	64%
Downhill Ski Resort	49% B	36%	66% D	59%
Golf Course	38%	35%	74%	75%
Alder Creek Cafe	32%	35%	66%	62%
Marina Grill (Beach Club Marina)	38% B	26%	59% D	51%
Tennis Center	30%	34%	70%	74%
Pizza on the Hill	37% B	26%	64% D	58%
Driving Range	31%	27%	69%	70%
The Lodge Pavilion (back patio area)*	24%	27%	61%	65%
Snowplay (tubing and sledding area)	29% B	14%	63% D	51%
Day Camps	27% B	12%	70% D	50%
Bikeworks	21%	17%	64%	58%
Recreation Hut	17%	14%	52%	47%
Marco Polo Grill (Trout Creek Pool)*	18% B	11%	42% D	31%
Equestrian Center	12%	10%	53%	54%
Campground	7%	6%	50%	56%
Average	39%	33%	67%	63%



C6: How important are each of the following amenities to you? (asked of everyone, top 2 box on 5-pt importance scale plotted)

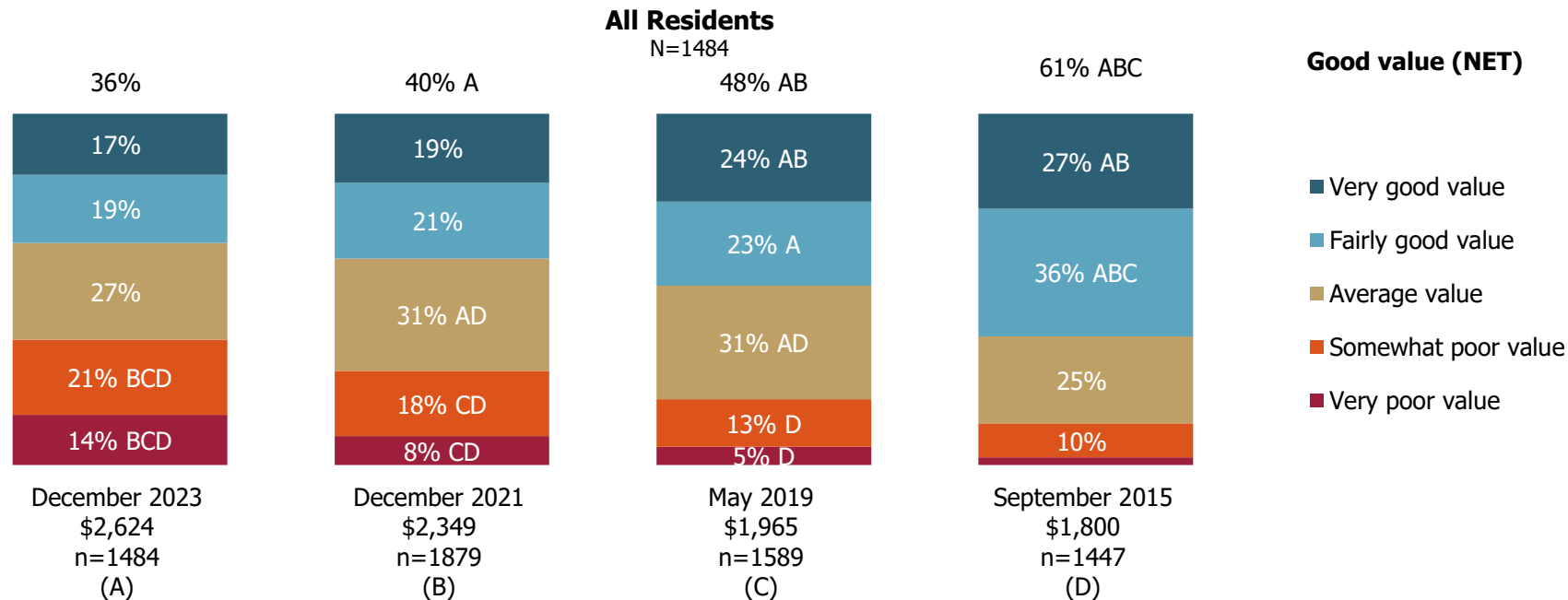
C4: How satisfied are you with each of the following amenities? (asked of users of each amenity, top 2 box on 5-pt satisfaction scale plotted)

*New for 2023: Stat testing: A/B, C/D

There are significantly more who find the value of Tahoe Donner Annual Assessment to be of very poor value than in years past.

F'inn has asked value perceptions using this same scale in over 1,000 studies. While we don't have norms specific to HOA fees, our benchmarks can help to interpret the strength of TD value perceptions. A top 2 box score above 56% is in the top 20% of F'inn's database, indicating very high value perceptions. A score under 40% is consider below average and a score below 32% places in the bottom 20%.

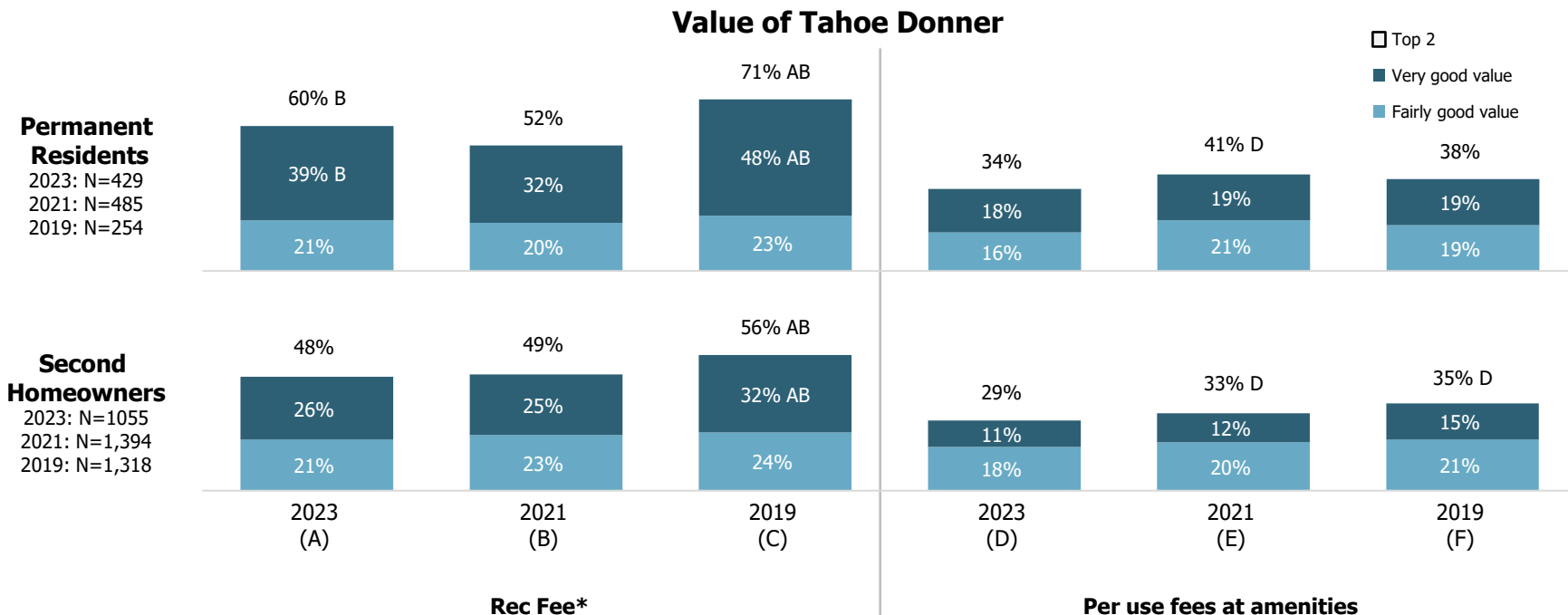
Value of Tahoe Donner Annual Assessment



C1: How do you feel about the value of each of the following?
Stat Testing: A/B/C/D

Value perceptions of Rec fees have increased since 2021 for permanent residents, and stay consistent for second homeowners, although still down significantly from 2019.

Finn has asked value perceptions using this same scale in over 1,000 studies. While we don't have norms specific to HOA fees, our benchmarks can help to interpret the strength of TD value perceptions. A top 2 box score above 56% is in the top 20% of Finn's database, indicating very high value perceptions. A score under 40% is consider below average and a score below 32% places in the bottom 20%.



C1: How do you feel about the value of each of the following?

*Rec fee cost: \$295 for up to two people, \$460 for all members in 2023, \$395 in 2021 for up to four people, \$290 in 2019

**Not asked in 2019

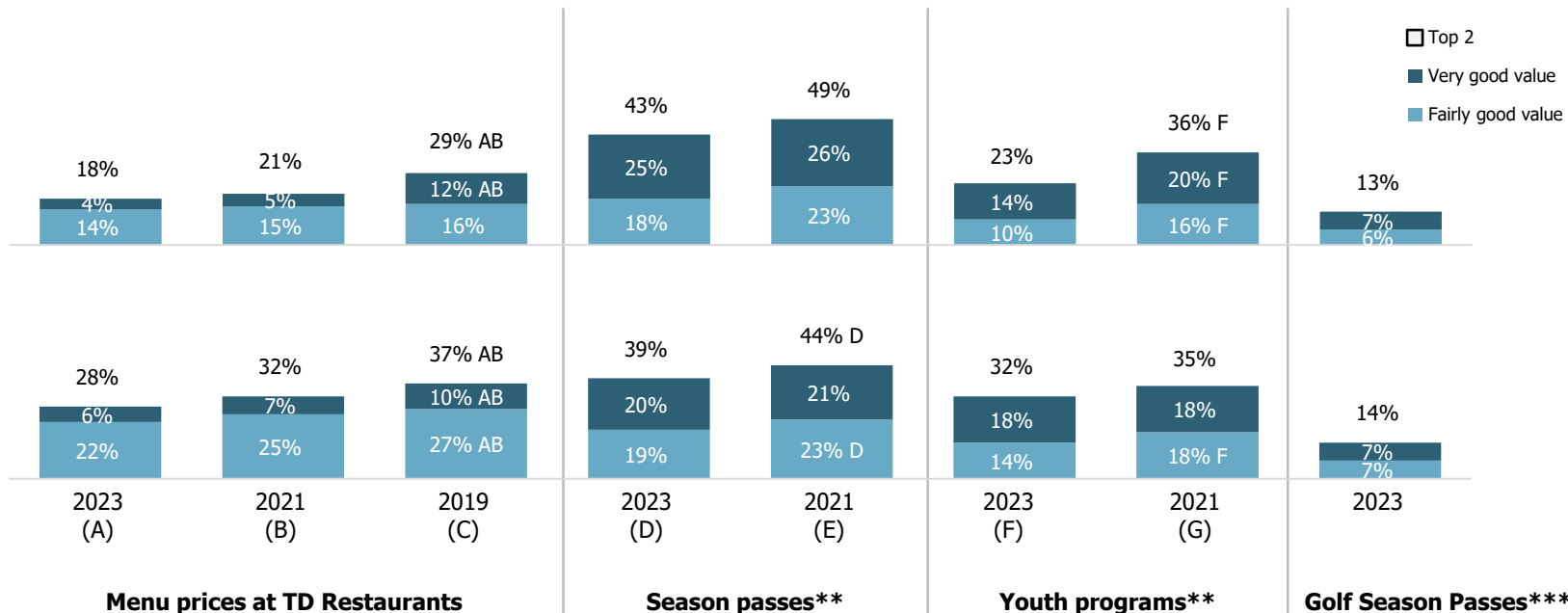
Stat testing: A/B/C, D/E/F

There is also a decline in value perception of menu prices since 2019. The value of season passes has declined for second homeowners, while youth programs value has decreased for permanent residents.

Value of Tahoe Donner

Permanent Residents

2023: N=429
2021: N=485
2019: N=254



Second Homeowners

2023: N=1055
2021: N=1,394
2019: N=1,318



C1: How do you feel about the value of each of the following?

Not asked in 2019, *New for 2023

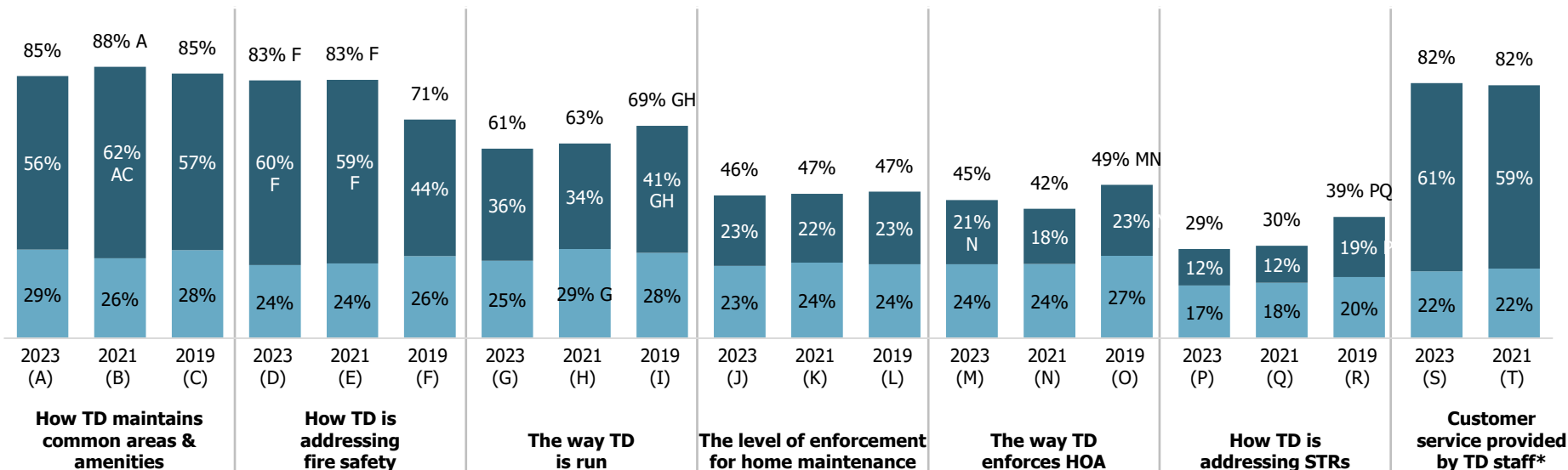
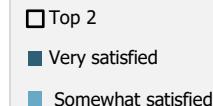
Stat testing: A/B/C, D/E, F/G

Member satisfaction has largely remained consistent since 2021. Satisfaction with how TD addresses fire safety and customer service remains high, however there is a dip in satisfaction of common area maintenance.

Member Satisfaction

All Residents

N=1484 (2023)
N=1879 (2021)
N=1589 (2019)



E1: How satisfied are you with...

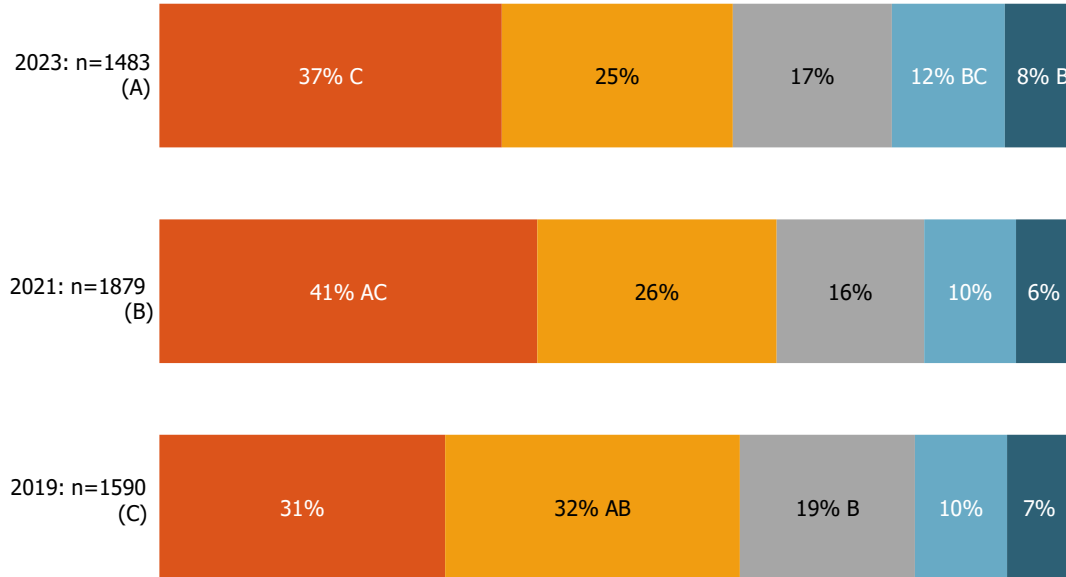
*Not asked in 2019

Stat testing: A/B/C,D/E/F,G/H/I/J,K/L,M/N/O,P/Q/R,S/T

More TD members still lean towards keeping amenities open rather than limiting to cut costs, however there are slightly more folks who would rather save maximum dollars than in 2021.

Funding of Amenities

All Residents



Statement B

Saving maximum dollars is more important than maximizing member access.

Statement A
Having amenities open to members is more important than cutting costs by limiting hours.

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



C7: Tahoe Donner amenities are funded through both the annual HOA assessment and user access fees. Please indicate how much you agree with statement A vs. statement B.
Stat testing: A/B/C

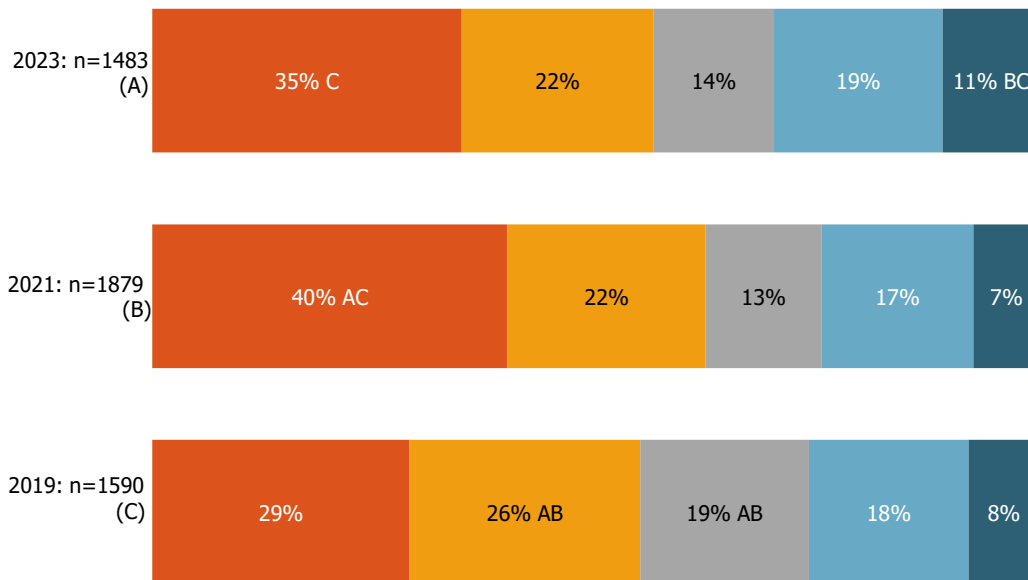
TD members skew toward keeping amenities open for flexibility, but this opinion has waned since 2021, with now more indicating that they would prefer to close amenities during off-peak periods.

Funding of Amenities

All Residents

Statement A
I would rather keep amenities open during off-peak periods so that I have greater flexibility to access amenities whenever I want.

Statement B
I would rather close amenities during off-peak periods to save on costs, even if it means I have less flexibility to access amenities*



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

C7: Tahoe Donner amenities are funded through both the annual HOA assessment and user access fees. Please indicate how much you agree with statement A vs. statement B.

*Added the phrase, "...to save on costs" in 2023

Stat testing: A/B/C

Trails are still a top priority for TD members, and some are looking to expand and increase signage. Some are concerned about pool overcrowding and the lack of shade. Declining food quality and lack of options is also a concern.

The Trails

Keep expanding the number of trails. Try to separate bikers from hikers.
Second Homeowner

Need more comprehensive trail maps (paper or downloadable on phone)...the maps on the trails and on phone are not comprehensive and it is fairly easy to take a wrong turn).
Second Homeowner

Trails need better signage. I routinely come across people on the trails that are lost or cannot find certain trails. My wife and I have occasionally found ourselves in the same situation.
Permanent Resident

Pool Area

The pools are crowded and always a little too cold. My kids can barely last 30 minutes before they need to get out. A waste at \$12 per visit.
Permanent Resident

I think the Northwoods pool could use more shade/umbrellas and chairs especially on busy holiday times.
Second Homeowner

Need another pool unless you are going to limit non owners during peak times. Also, food service at the pool takes way too long.
Second Homeowner

Food Quality & Prices

The food at Alder Creek used to be better, it would be great if the caliber could be closer to what it was pre-COVID. More family events at Alder Creek and POTH and Lodge please :)
Permanent Resident

Offer more plant-based options at your restaurants and focus on healthier food options such as seafood without heavy sauces, more dishes with tofu or beans. The plant-based options usually have no protein. We appreciated that they started offering Beyond Burgers at The Lodge!
Second Homeowner

The food too gourmet at Alder Creek and too expensive at The Lodge. Keep classes at Trout Creek free with paid Rec Fee.
Permanent Resident

The prices at the Lodge restaurant are way too overpriced. We end up going downtown Truckee restaurants instead.
Second Homeowner



The new ski lodge continues to be a polarizing project. Some are in favor of the upgrades, while others feel that only slight updates are necessary.

For the Lodge

Start the downhill project, building is old and not safe.

Permanent Resident

Replace the downhill building ASAP along the lines of the plans.

Second Homeowner

Hoping that the new Downhill Lodge will proceed and be AWESOME!

Second Homeowner

The downhill ski lodge REALLY needs the upgrade!

Permanent Resident

The Downhill Ski Lodge is completely unsatisfactory and I hope we are able to move forward with the new lodge quickly. Generally, I feel that TD staff and leadership do a great job of providing excellent quality and value for the services and amenities. Keep it up!

Permanent Resident

The upgraded downhill ski Lodge would be nice

Permanent Resident

Concerned about Lodge

Do not overbuild the downhill ski lodge. The proposal is too much money for the build. Offer recreation passes for 6 months intervals. Even if charging more for the 6 months covering the summer.

Second Homeowner

The existing downhill ski lodge proposal is absurd and way beyond the needs of the membership. Stop the proposed plan immediately and make a modest design that is commensurate with the needs of Tahoe Donner.

Permanent Resident

Do not waste money on an overly large new ski lodge -- just bring up to ADA and other minimal building codes.

Second Homeowner

Please do not spend so much money on refurbishing the downhill ski Lodge. Would be so much better spent elsewhere. Less time spent working on construction projects, which completely closed down aspects of an amenity, such as hot sauna, and steam bath. ...

Permanent Resident

The new ski hill lodge makes no financial sense.

Permanent Resident

I'm in the camp of not spending a lot of money on the downhill ski lodge revamp or redo. Tahoe Donner is not Vail; it's a family hill and doesn't need to be super expensive nor state of the art.

Permanent Resident



Value is also still questioned by some members. Some feel as though the value of the amenities and the fees associated do not align.

Value Concerns

Yearly fees are getting high for value provided...which I never thought I would say. Rec fee is fine as we are big users of the gym and happy with the renovations. Trails are amazing...just wish we could add new ones faster once we purchase the land. I don't understand why it takes years to happen.

Second Homeowner

There is a huge disparity in value of TD amenities, depending on whether you play golf or not. If you play golf, you get a screaming good deal. If you cross-country ski, you get royally screwed by your own home owners association.

Permanent Resident

Lower cost to use for members without rec passes and guests. It's too expensive to justify using the amenities.

Second Homeowner

I really enjoy all the amenities but I REALLY wish there was more value for the money of the cost of everything. For the cost of the xc passes to the day passes and the increased yearly annual assessment, cost that keeps going up is getting ridiculous. I don't think we need a new renovated ski chalet for the ski hill and I wish there was more trails bike and ski trails...

Permanent Resident

We use the Trout Creek and Marina facilities occasionally. We always bought the recreation fee until Covid when they gave no credit for fees paid with no facilities available. That made us look closer at our usage and decided that for the occasional brief use, there wasn't an appropriate value for the recreation fee.

Second Homeowner

The value of the amenities fees are reasonable for those of us who have paid the flat fee, but for guests (and a group of several guests) it can get pretty expensive.

Second Homeowner





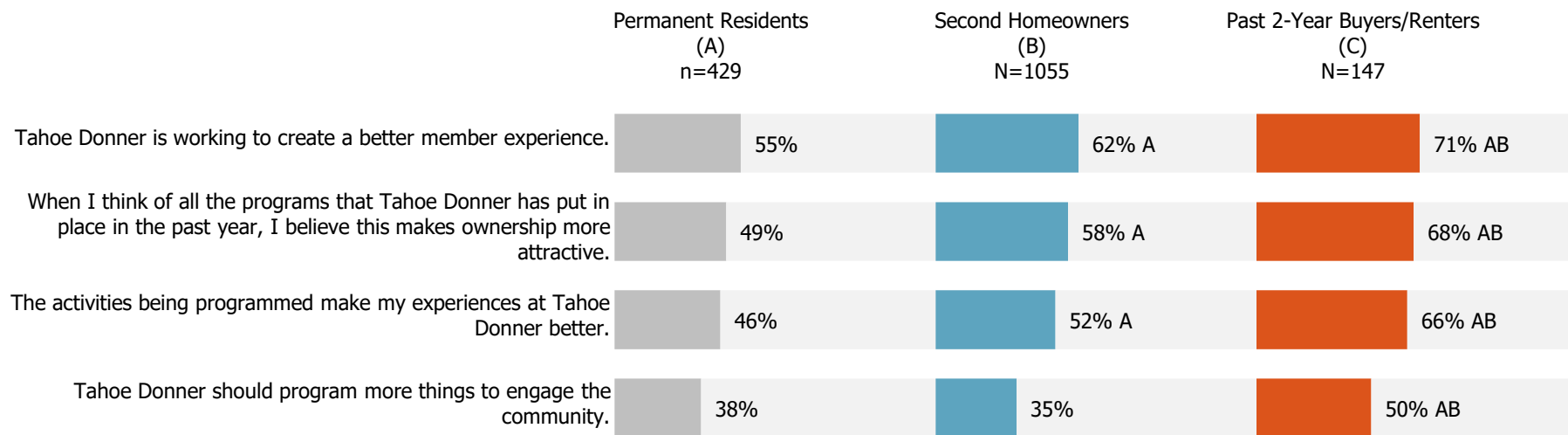
Community and Membership Engagement

Recent buyers have the strongest perceptions of TD across the board. Second homeowners have significantly higher perceptions of TD than permanent residents on nearly all measures.

New
for
2023

Perceptions of Tahoe Donner Programs

(Top 2 shown: Strongly/Somewhat Agree)

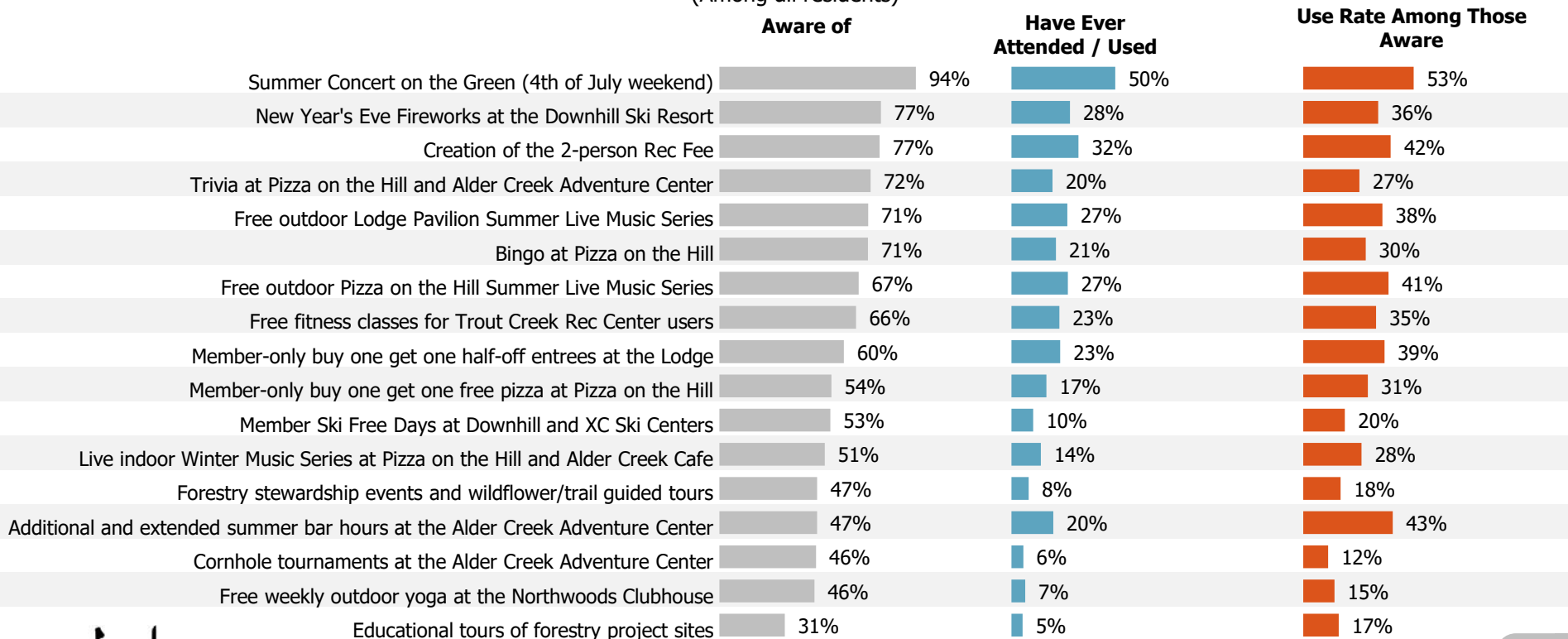


D1: Please indicate how much you agree or disagree with the following statements.
Stat testing: A/B/C

Summer concert on the green is the most popular program in the past year. Most residents are aware of the promotions, but usage and attendance fall in the 20% range on average. Additional and extended summer bar house is popular among those aware.

Past Year Promotion Familiarity

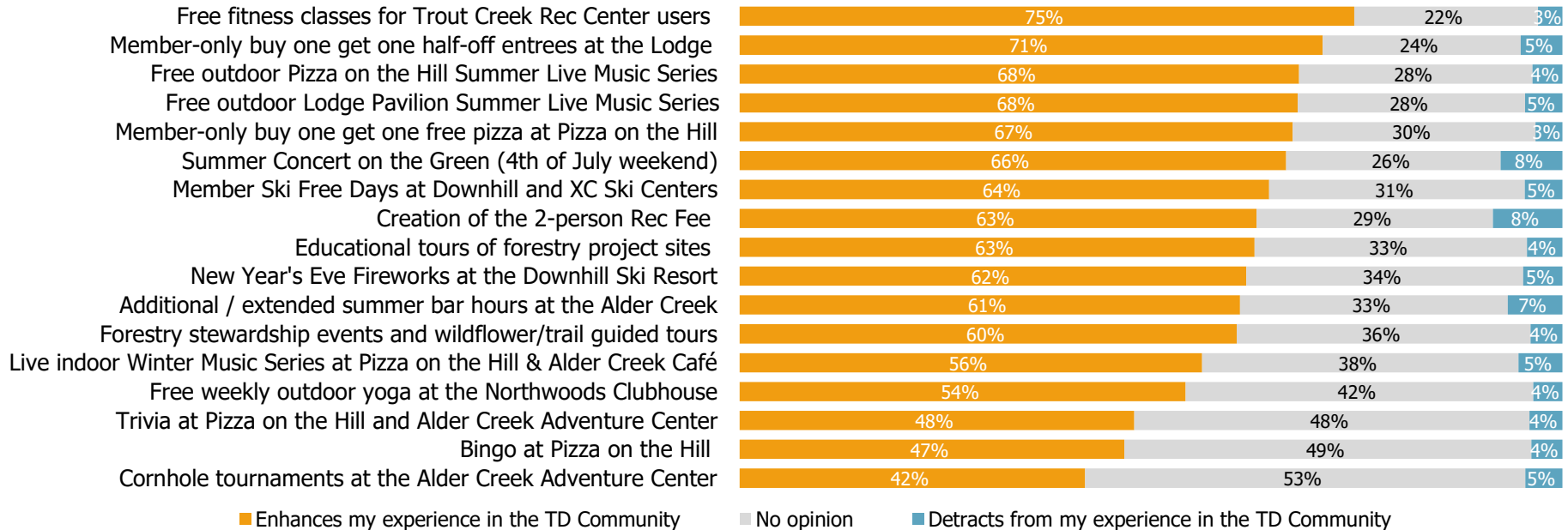
(Among all residents)



Overall, promotions and activities enhance the experience for TD members, and rarely detracts. Fitness classes at the rec center, food deals and live music are shown the most enthusiasm.

Promotion Enhancement or Detraction from TD Experience

(Among all residents aware of promotions)



Ideas for creating more community and enjoyment span from teen movie nights to more competitive sport opportunities.

Ideas for more community engagement

More opportunities to engage local youth/teens, like movie nights or opportunities to work / intern to get experience in the work force... like we have camp counselor training in the summer. Local teens could intern/work to help out as daycare providers at ski hill or gym. Our local teens need more things to do that give them experience and foster a sense of pride in community.

Second Homeowner

Consider more sports competitions/events, e.g. pickleball; bbq + music events at Northwoods, Adventure Center, and Marina, more talks/presentations, movie nights (indoor and outdoor).

Permanent Resident

Ice skating rink instead of all the flat sledding area at snowplay.

Permanent Resident

Just a Continued pursuit of current directions: live music options throughout summer, bingo and trivia are awesome too; great shoulder season deals at our restaurants...the opportunities available in the last year have been fantastic.

Permanent Resident

Increased Day Camps for kids (or more availability) - wasn't able to get in this year, despite being online and ready to book as soon as the booking opened. Organized camping event at the campground (with community activities, music, food).

Second Homeowner

Improve communication. This survey revealed to me that only certain events and programs get publicized widely while others do not.

Second Homeowner





CLUBHOUSE

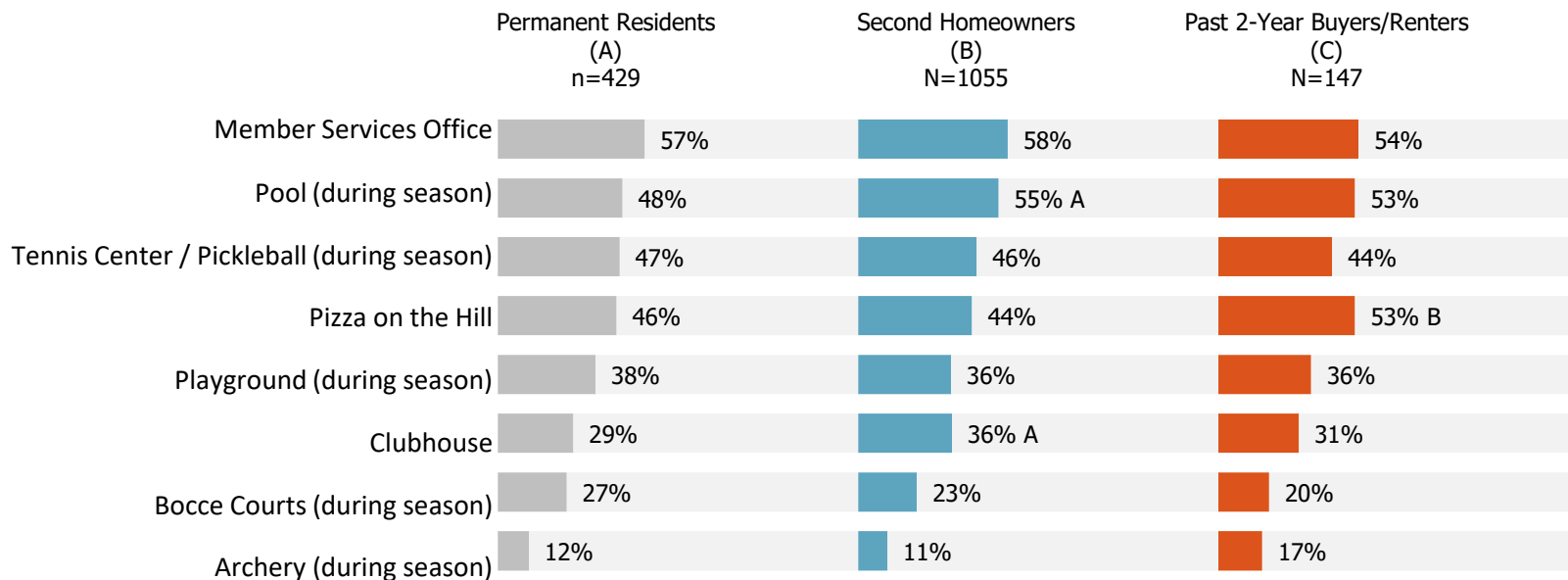
Northwoods Clubhouse Area

Aspects of the Northwoods Clubhouse that are most important to TD members include the Member Services Office, Pool and Tennis Center.

New
for
2023

Importance of Aspects of Northwoods Clubhouse

(Top 2 shown: Extremely/Very Important)

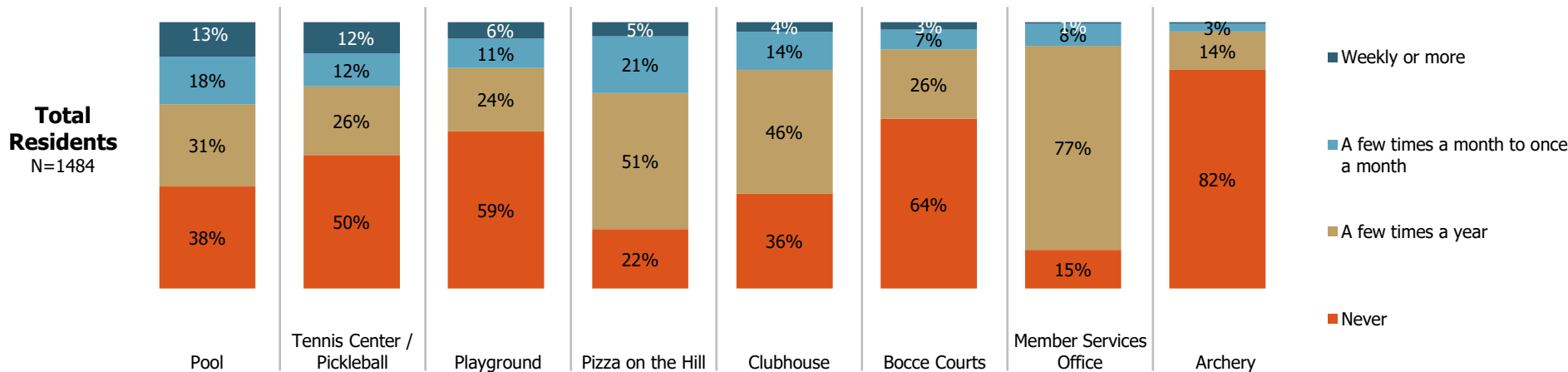


G1: How important is each of the following to you in the Northwoods Clubhouse area?
Stat testing: A/B/C

The pool and tennis center are the most frequently visited areas of the Clubhouse. Although many find the member services office to be important, most only go a few times a year.

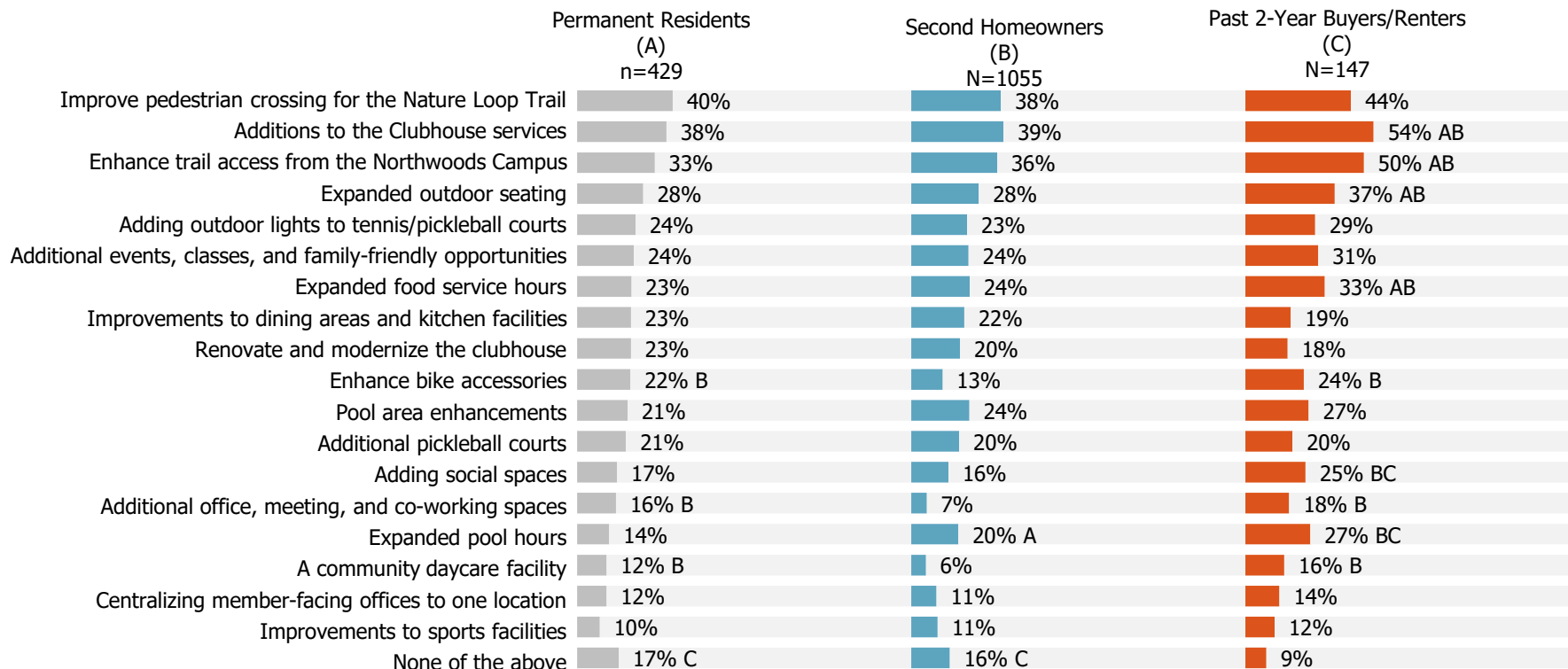
Frequency of Using Different Parts of Northwoods Clubhouse

(While amenities are in season)



Pedestrian crossing improvements, clubhouse additions and trail access are shown the most interest from the community; Recent buyers show stronger interest in improvements than other groups.

Interest in Improvements to the Northwoods Clubhouse Area



G3. Below are some suggestions we have received from the community on how to improve the Northwoods Clubhouse area. Which of the following are most interesting to you?

Stat testing: A/B/C; *Note: Only Showing >10%

Ideas for the Northwoods Clubhouse include developing private co-working spaces, game areas and extending hours.

Make a really open, inviting space for members to socialize, provide excellent beverages and workspace. Currently, it is dark and has an offensive odor.

Second Homeowner

More fitness classes before and after working hours vs. in the middle of the day.

Second Homeowner

Pickleball is given very little attention at the Tennis Center. It is not even mentioned on the sign. The courts are bad with dead spots on the dedicated courts. The temp courts on the tennis courts do not have adequate separation to prevent balls from going all over. The management is hostile to Pickleball and does not know much about it.

Second Homeowner

Extend hours and season for the pool; allow off-season access/use of the clubhouse.

Permanent Resident

Shared office space, game area (billiards, foosball), enhance movie viewing area, stage with appropriate seating, enhanced outdoor seating, more accessible clubhouse 24x7 for members with self-serve snack and beverage options, outdoor ice skating (if possible).

Permanent Resident

It would be nice to have more private co-working spaces and coffee/breakfast options.

Permanent Resident

Develop a larger outdoor area, play field where families can come and picnic, gather and kids can play ball games.

Second Homeowner



An aerial night photograph of a large outdoor event, likely a concert or festival. A stage with a blue roof and purple lighting is on the left, with a large crowd of people gathered in front of it. The crowd extends across a grassy field towards the right. Several cars are parked in a lot on the left, and more vehicles are visible on the right side of the image. The background is dark with some trees and a line of lights in the distance.

Key Findings

Key Findings

1. Time spent at TD has decreased among second homeowners since 2021, but the threat of overcrowding continues

- Second homeowners are spending less time in TD now than in 2021 (average of 92 days/yr. vs. 103 in 2021), however this is still elevated compared to pre-covid (average of 83 days/yr. in 2019).
- There is a decrease in second homeowners who intend on living in TD fulltime in the future (10% in 2023 vs. 15% in 2021).
- In the open ends, many cite issues with overcrowded amenities during peak seasons, particularly citing non-owners & guests as an issue.

2. Recent buyers (past 2 years) share similar demographics with existing members, yet have significantly stronger perceptions of TD management

- New buyers continue to skew younger, with 41% being under then age of 50. However, they are a bit older than those recent 2021 buyers, where 60% were under 50.
- As seen in 2021, recent buyers were motivated to buy in TD because of trails (78%), proximity to things they enjoy (75%) and quiet/peacefulness (64%). Every new buyer also plans on using an amenity at some point.
- Recent buyers share significantly stronger sentiment towards TD management vs. primary and second homeowners, with 71% strongly or somewhat agreeing that TD is working to make a better member experience (vs. 55% of primary and 62% of second homeowners).

3. All amenities have been categorized according to importance and satisfaction, and most placements have stayed relatively the same since 2021. Satisfaction rates, however, are in decline.

- The Lodge and Driving range saw increases compared to 2021 in importance and satisfaction placements, respectively. Bikeworks and the Campground both fell below the median on satisfaction, placing them in the low quadrant of importance and satisfaction.
- There are declining rates of satisfaction, while importance has held steady to 2021 rates. Lower value perceptions could play into declining satisfaction with amenities.

Key Findings

4. Value perceptions of annual assessment fees still in decline, however rec fees see significant boost

- Value of annual assessment declined vs. 2015 among residents.
- Rec fee value perception has increased since 2019 among permanent residents and held consistent for second homeowners. This could be in part because of the creation of the 2-person rec fee, which 77% indicate awareness of, and 32% claim to have used. Per use fees for amenities, however, see a decline in value perceptions for both parties.
- There is still a preference towards keeping amenities open rather than cutting costs, however those in the cost cutting camp have increased significantly since 2021.
- In the open-ended feedback, many express that the expense of bringing guests or buying passes is not worth the value.

5. Ski Lodge rebuild is still a hot button issue

- TD members continue to vocalize their opinions for or against the lodge rebuilding project, even though this was not the focus of the survey
- Those for the project feel as though the ski lodge is in desperate need for an upgrade, while those against feel it is a waste of money. Given the decline in value perceptions across the board, many of those opposed may tie this directly to their evaluations of the annual assessment.

Key Findings

6. Most claim to be familiar with a wide variety of promotions and updates from the past year, but attendance is low

- Many members claim to be aware of a wide variety of updates and promotions including Summer Concert on the Green (94%), New Year's Eve Fireworks (77%) and Creation of the 2-person rec fee (77%). However, actual attendance and usage drops, with promotions seeing on average a 20% attendance or usage rate.
- Summer concert on the green is the most popular program from the past year.
- Most express that promotions and programs do enhance their experience in the community, particularly free fitness classes, food deals and live music.

7. Important aspects of the Northwoods Clubhouse are the Member Services Office, Pool & Tennis Center

- The most frequented locations of the Northwoods Clubhouse (during the seasons they're available) include the pool and tennis center. The member services office is an important aspect to the clubhouse but is visited only a few times a year by a majority of members.
- The improvements that generate the most interest include the pedestrian crossing, adding additional services such as coffee bars and other shops & enhancing trail access. Recent buyers indicate stronger interest in these updates than primary or second homeowners.



Appendix

Amenity scores details among all residents

All Tahoe Donner Residents N=1484	Importance (Top 2)	Satisfaction (Top 2)	Past 12 mo. use	Mean times used/yr.
Trails	87%	93%	95%	27.5
Trout Creek Recreation Center	73%	83%	85%	21.8
Pools	63%	78%	78%	13.7
Beach Club Marina	60%	71%	79%	10.0
Cross Country Ski Center	53%	80%	55%	14.5
The Lodge Restaurant & Pub	50%	67%	82%	7.3
Downhill Ski Resort	43%	63%	59%	7.2
Golf Course	37%	74%	43%	8.2
Alder Creek Cafe	34%	64%	72%	6.1
Marina Grill (Beach Club Marina)	32%	56%	62%	6.2
Tennis Center	32%	72%	38%	10.6
Pizza on the Hill	32%	61%	71%	5.3
Driving Range	29%	69%	45%	8.1
The Lodge Pavilion (back patio area)	25%	63%	54%	4.7
Snowplay (tubing and sledding area)	22%	59%	41%	3.1
Day Camps	20%	67%	15%	6.1
Bikeworks	19%	61%	33%	3.8
Recreation Hut	16%	50%	33%	3.6
Marco Polo Grill (Trout Creek Pool)	15%	39%	35%	3.6
Equestrian Center	11%	53%	14%	3.9
Campground	7%	52%	6%	2.3
Average	36%	66%	52%	8.5

Amenity scores details among primary residents

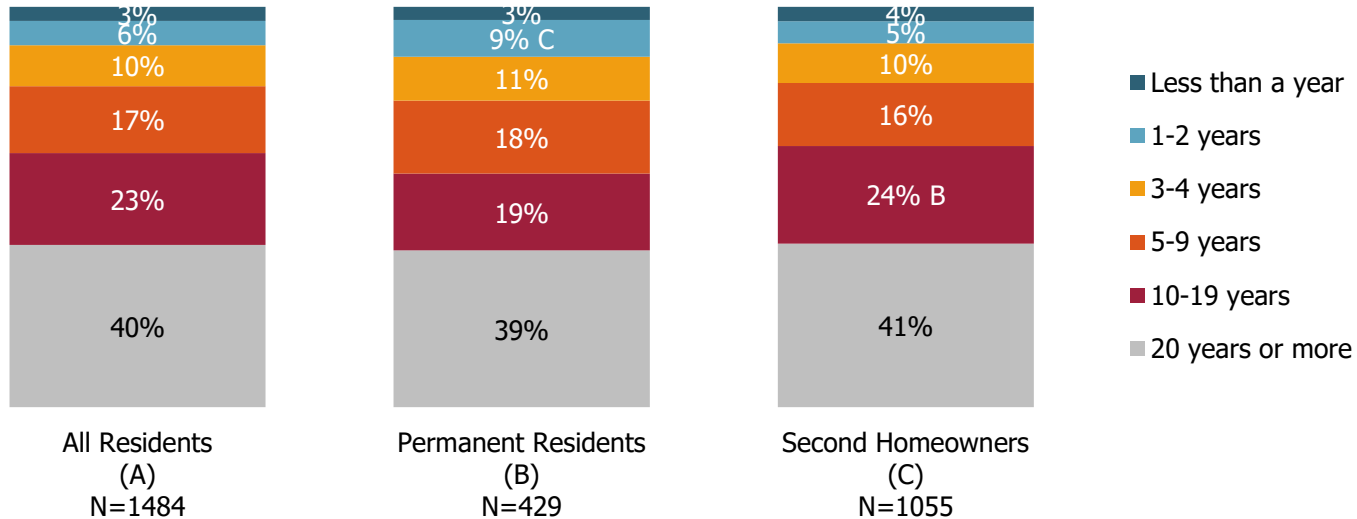
Primary Residents N=429	Importance (Top 2)	Satisfaction (Top 2)	Past 12 mo. use	Mean times used/yr.
Trails	90%	93%	96%	38.6
Trout Creek Recreation Center	77%	82%	87%	31.7
Cross Country Ski Center	62%	84%	64%	24.6
Pools	61%	76%	77%	18.0
Beach Club Marina	56%	69%	77%	11.4
The Lodge Restaurant & Pub	42%	55%	81%	8.2
Downhill Ski Resort	38%	61%	56%	8.8
Alder Creek Cafe	36%	65%	75%	8.6
Tennis Center	32%	69%	37%	13.3
Pizza on the Hill	31%	58%	70%	6.8
Golf Course	28%	67%	37%	10.6
The Lodge Pavilion (back patio area)	27%	61%	57%	5.5
Marina Grill (Beach Club Marina)	26%	48%	58%	7.1
Driving Range	24%	64%	39%	9.3
Bikeworks	20%	59%	32%	5.0
Day Camps	19%	60%	10%	4.7
Snowplay (tubing and sledding area)	17%	53%	33%	2.8
Recreation Hut	16%	49%	30%	4.0
Marco Polo Grill (Trout Creek Pool)	12%	33%	26%	3.2
Equestrian Center	8%	51%	10%	4.1
Campground	7%	55%	7%	1.5
Average	35%	62%	50%	10.8

Amenity score details among second homeowners

Second homeowners N=1055	Importance (Top 2)	Satisfaction (Top 2)	Past 12 mo. use	Mean times used/yr.
Trails	86%	93%	95%	22.9
Trout Creek Recreation Center	71%	84%	84%	17.8
Pools	64%	79%	78%	12.0
Beach Club Marina	61%	72%	80%	9.5
The Lodge Restaurant & Pub	53%	73%	82%	6.9
Cross Country Ski Center	50%	78%	51%	9.9
Downhill Ski Resort	45%	64%	60%	6.6
Golf Course	40%	76%	46%	7.4
Marina Grill (Beach Club Marina)	35%	59%	64%	5.9
Alder Creek Cafe	33%	64%	71%	5.1
Tennis Center	32%	73%	38%	9.5
Pizza on the Hill	32%	63%	71%	4.7
Driving Range	31%	71%	47%	7.8
The Lodge Pavilion (back patio area)	25%	63%	53%	4.4
Snowplay (tubing and sledding area)	24%	61%	43%	3.2
Day Camps	20%	68%	17%	6.5
Bikeworks	19%	62%	33%	3.4
Recreation Hut	16%	50%	34%	3.5
Marco Polo Grill (Trout Creek Pool)	16%	40%	39%	3.7
Equestrian Center	13%	54%	15%	3.9
Campground	7%	51%	6%	2.6
Average	37%	67%	53%	7.5

Length of ownership

Length of Ownership



Amenities classifications (among amenity users) - 2021

Satisfaction (top 2 – very/somewhat satisfied)

<p>Low Importance/High Satisfaction</p> <ul style="list-style-type: none"> • Tennis Center (on the border of high importance) • Bikeworks • Day Camps • Campground 	<p>High Importance/High Satisfaction</p> <ul style="list-style-type: none"> • Trails • Trout Creek • Xcountry Ski Center • Pools • Marina • Golf Course
<ul style="list-style-type: none"> • Driving range (on the border of high importance) • Equestrian Center • Recreation Hut • Tee Nine Grill • Snowplay • Pizza on the Hill <p>Low Importance/Low Satisfaction</p>	<ul style="list-style-type: none"> • The Lodge (on the border of high satisfaction) • Alder Creek Café (on the border of high importance) • Downhill Ski Resort • Marina Grill <p>High Importance/Low Satisfaction</p>

Importance (top 2 – extremely/very important)

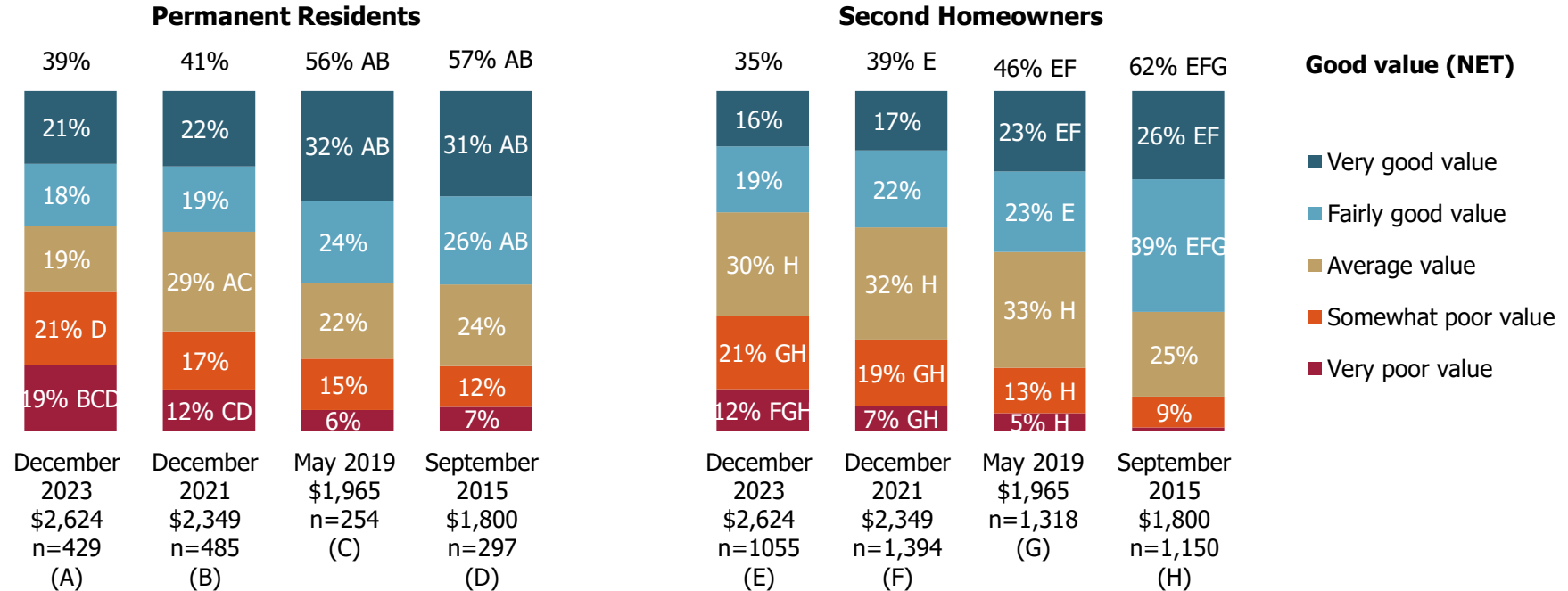


C6: How important are each of the following amenities to you? (asked of everyone, top 2 box on 5-pt importance scale plotted)
 C4: How satisfied are you with each of the following amenities? (asked of users of each amenity, top 2 box on 5-pt satisfaction scale plotted)
[2023 for comparison](#)

Value of TD Annual Assessment x Resident Type

F'inn has asked value perceptions using this same scale in over 1,000 studies. While we don't have norms specific to HOA fees, our benchmarks can help to interpret the strength of TD value perceptions. A top 2 box score above 56% is in the top 20% of F'inn's database, indicating very high value perceptions. A score under 40% is consider below average and a score below 32% places in the bottom 20%.

Value of Tahoe Donner Annual Assessment



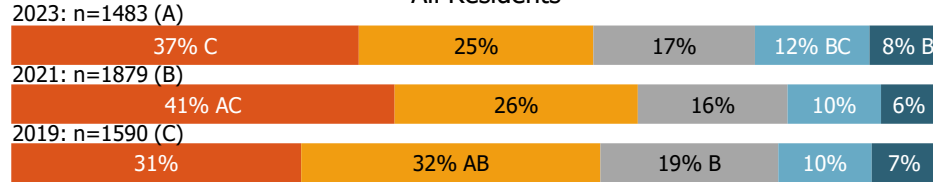
C1: How do you feel about the value of each of the following?
Stat Testing: A/B/C/D, E/F/G/H

Funding of Amenities x Resident Type

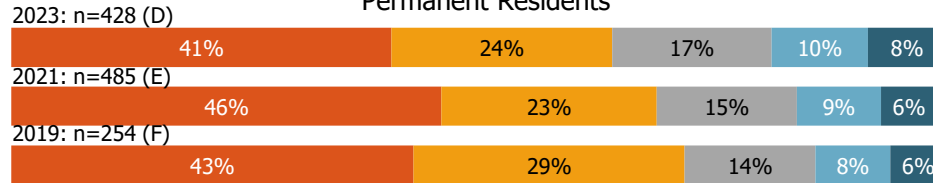
Statement A
Having amenities
open to members is
more important than
cutting costs by
limiting hours.

Funding of Amenities

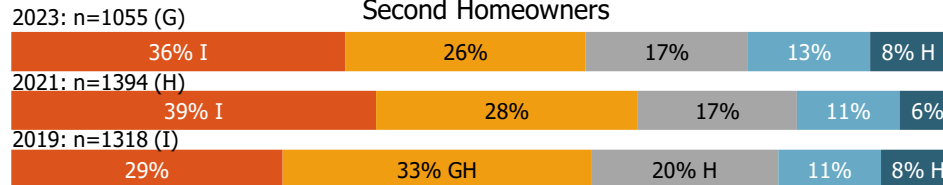
All Residents



Permanent Residents



Second Homeowners



Statement B
Saving maximum
dollars is more
important than
maximizing member
access.

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

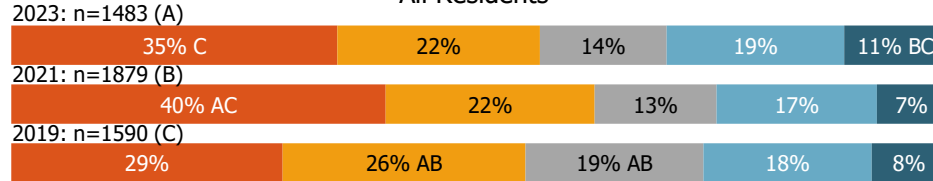
C7: Tahoe Donner amenities are funded through both the annual HOA assessment and user access fees. Please indicate how much you agree with statement A vs. statement B.

Stat testing: A/B/C, D/E/F, G/H/I

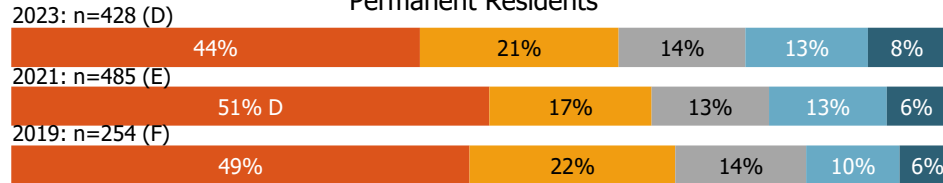
Funding of Amenities x Resident Type

Funding of Amenities

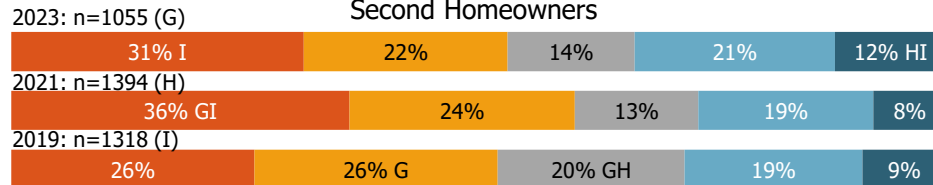
All Residents



Permanent Residents



Second Homeowners



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

C7: Tahoe Donner amenities are funded through both the annual HOA assessment and user access fees. Please indicate how much you agree with statement A vs. statement B.

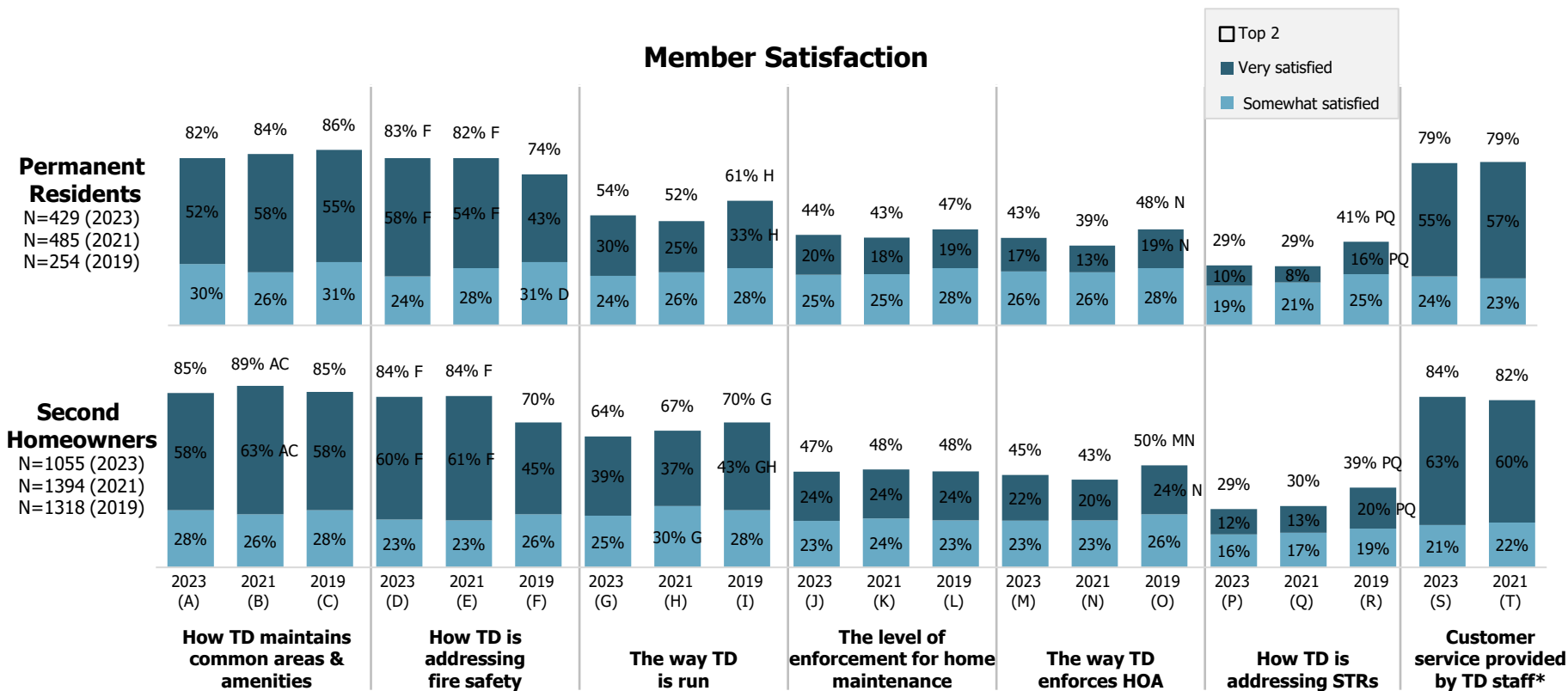
*Added the phrase, "...to save on costs" in 2023

Stat testing: A/B/C, D/E/F, G/H/I

Statement A
I would rather keep amenities open during off-peak periods so that I have greater flexibility to access amenities whenever I want.

Statement B
I would rather close amenities during off-peak periods to save on costs, even if it means I have less flexibility to access amenities*

Member satisfaction x Resident Type



E1: How satisfied are you with...

*Not asked in 2019

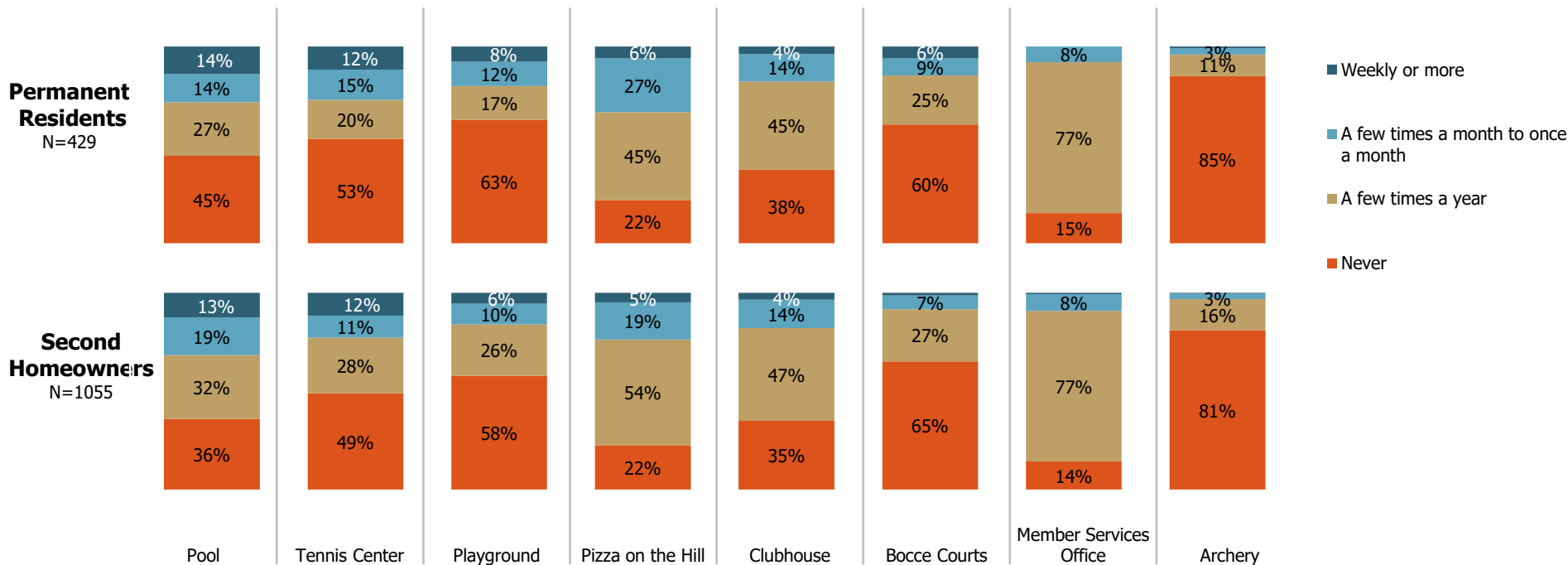
Stat testing: A/B/C,D/E/F,G/H/I,J/K/L,M/N/O,P/Q/R,S/T



Frequency of Using Parts of Northwoods Clubhouse x Resident Type

Frequency of Using Different Parts of Northwoods Clubhouse

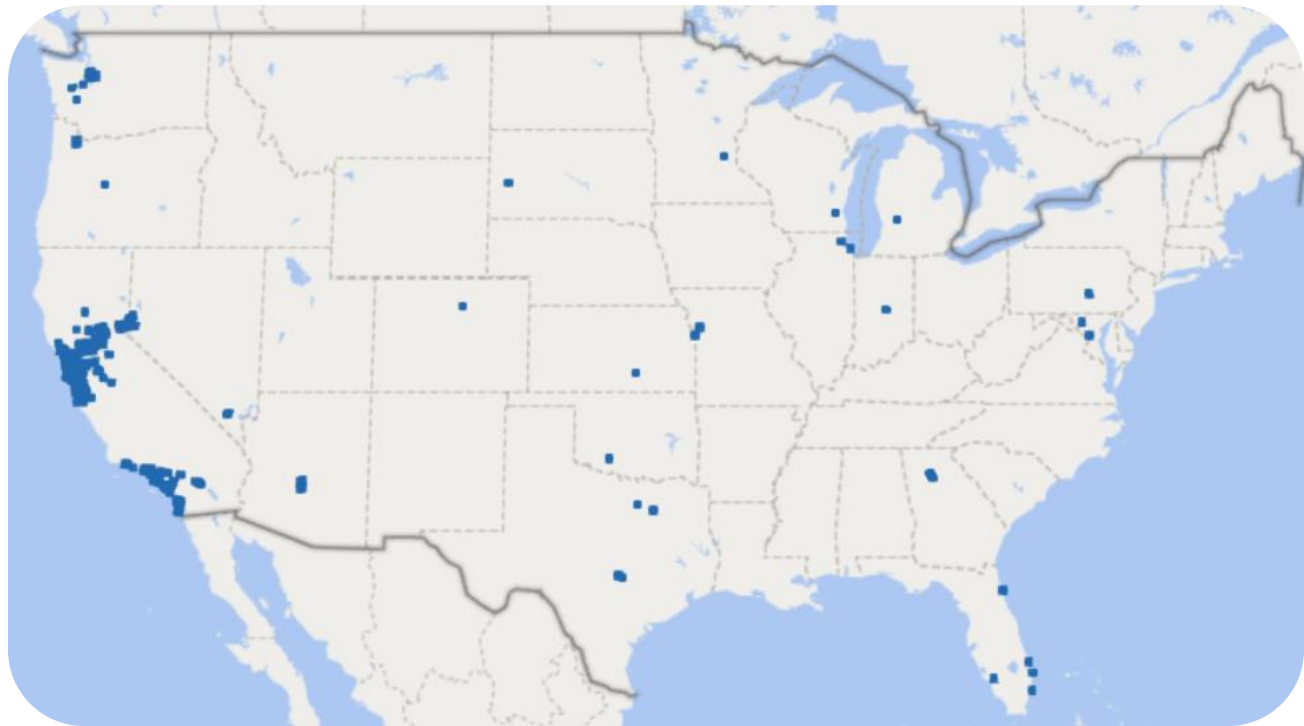
(While amenities are in season)



As seen in 2021, most second homeowners claim the Bay Area as their primary residence, and 85% are based in either the Bay Area or the Northern Central Valley.

Primary residence

Bay Area Metro	65%
Sac/Central Valley	20%
Out of state	6%
SoCal	4%
Nevada*	3%
Central/Costal CA	2%
Tahoe/Truckee	1%



Age of TD Visitors

Age of TD Visitors

