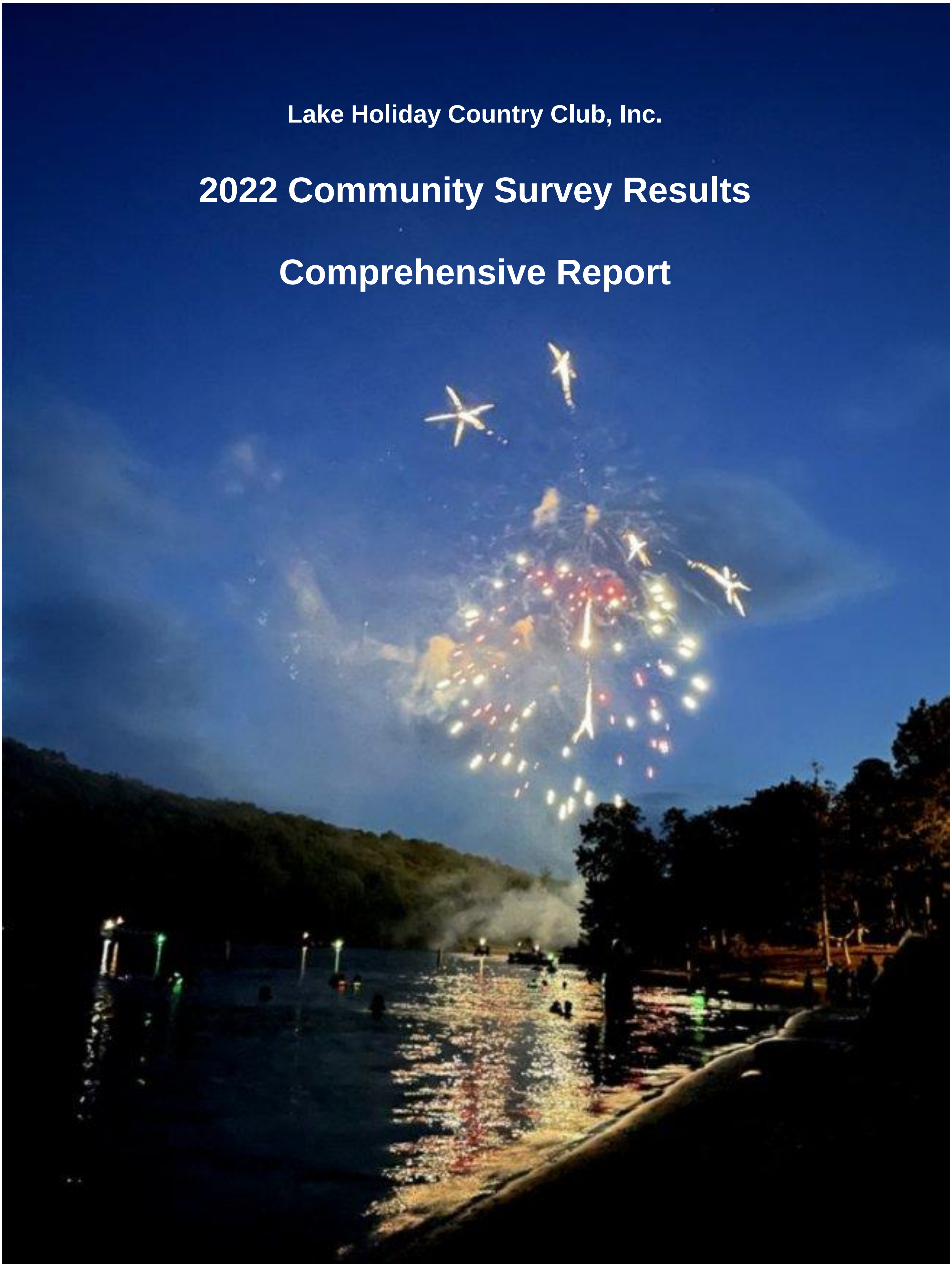
Lake Holiday Country Club, Inc.

2022 Community Survey Results

Comprehensive Report



Lake Holiday Country Club: 2022 Community Survey

Table of Contents

Methodology

A database was developed from internal LHCC resources to include voting residents and other individuals who have a current mailing address at LHCC. After an initial list was created, we also merged a file being kept by LHCC staff to identify new names who were subsequently sent an invitation.

A total of 2,021 individuals were initially contacted, intentionally including multiple contacts per address or lot to maximize our likelihood of receiving a response from the household. The first personalized invitation was emailed on June 16, followed by reminder messages sent to non-respondents on June 22, June 28, and July 5. The initial deadline for response was July 1 and was extended to July 8, which was communicated to residents in the second reminder message. A gift card was awarded to four randomly-selected survey participants at the end of the survey fieldwork.

Once data collection was closed, we determined that the final audience consisted of 1,442 unique households. A total of 80 records were undeliverable, 54 individuals opted out of participation by clicking an unsubscribe link in their messages, we deleted 357 individual records when someone else from their household answered the survey, and 88 other records represented duplicate contacts within a non-responding household.

A total of 595 responses were received, including 518 completed surveys and another 77 surveys that were incomplete but included in the final results because the survey was long and many of the latter included quite a bit of data as well. During the detailed data hygiene process, we found that 21 responses were actually duplicates within a household, as the software apparently restored deleted records if the recipient tried to use that unique survey link.

The 42 responses were matched with their other record in the household and merged, which was generally easy because one person would often start a survey then realize that the household already answered; in a few cases we merged individual data points to reflect cumulative household behavior and to average between divergent ratings and other attitudinal measures.

The end result was a database of 574 unique households, which represented 42% of total households. This participation rate compares favorably to past surveys, which consisted of 374 unique responses in 2017, 334 in 2014, and 364 in 2008.

Executive Summary

The Lake Holiday Country Club 2022 Survey was conducted June 16-July 8 by a research consultant working under the direction of the Master Planning Committee on behalf of the Board of Directors. Its purpose was to gather data that could assist the Master Planning Committee in making recommendations and inform the Board of Directors when making decisions about needs and priorities of Association members with respect to community resources.

Parts of the survey were designed to provide clarification or validate results from earlier surveys, and parts were designed to address emerging or potential issues and opportunities. A questionnaire was administered online using KeySurvey software. This tool controlled for the display of certain questions based on previous responses, but most participants answered all 51 questions. A total of 595 completed surveys were received from adult individuals within Association member households asked to respond on behalf of all household members. Given a high participation rate (42% of unique households), we assume the sample is representative of the community and accurately represents the behaviors, opinions, and preferences of households.

Profile—73% are full-time and 11% part-time owner/residents, 13% are lot owners, 4% are non-resident owners. The household generally has at least one member working (64%) while 38% have retired member(s). Mean household size is 2.8 people, with 9% single-person, 48% two-, and 43% three or more person households. Participants have a median of 8 years in LHCC, with only 8% present less than one year, 33% 1-5 years, and at the other extreme, 17% with more than 20 years.

Community Annual Events— Past attendance is highest for July 3rd Fireworks (85%), July 4th Boat Parade (54%), and Memorial Day Event (51%). Predicted future attendance is highest for July 3rd Fireworks (60%).

Concentrated Attendance Patterns—Past and planned future attendance is highly concentrated with a segment of the community. Past attendance shows 21% each participated in 0 or 1-2 events, while 33% did 3-5, and 25% 6 or more. Anticipated attendance shows 22% each reporting planning to do 0 or 1-2 events, while 26% plan to do 3-5, and 30% plan to do 6 or more. This means that the 30% who plan to attend 6+ events would account for 65% of all participation in LHCC events, while the 48% who plan to do 1-5 events account for the remaining 35% of attendance, if of course they make good on their plans. Effective event promotion will require some effort to 1) convert some who intend to do nothing, 2) "upgrade" those who plan to attend a few things, and 3) cultivate and cater to the smaller audience who comprise most of the normal attendance.

Past/Future Attendance/Retention—Owner/residents report attending an average 4.6 of annual events in the past, and non-owner/residents reported 3.3. Anticipated future attendance is higher, at 5.0 events, but predicted retention of past attendees is somewhat low, ranging from a high of 52% planning to attend Labor Day and July 3rd Fireworks again, to a low of 28% planning to attend NYE Social again.

Events/Clubs—Food trucks (91%) have near-universal participation, while highest past participation for other activities includes Movies on the Beach (25%), Ladies' (22%) and Men's Coffee (12%), and Sunset Social (18%). Movies on the Beach (50%) and Sunset Social (32%) have high predicted rates of growth. Retention in this category varies between 57 for Mahjong down to 25% for Strength, Stretch and Balance.

Potential Activities—There is great interest, with a mean of 4.9 activities checked by owner/residents. Most popular include food for sale (61%) and more adults-only events (51%), but at least 40% are also interested in free movies for adults (at Club House/Beach), more outdoor and indoor seasonal adult activities, free adults-only events such as Entertainment/DJ/Dancing, CPR/Basic Life Support, and Advanced First Aid training class.

Lake Activities—60% own at least one boat, with 40% owning powered and 37% a non-powered boat. Only 19% identify as weekend boaters. The most common seasonal activities include cruising at almost 20 times a summer, swimming at a beach 12 times, and using a trailer to take their powered boat to the ramp 9.6 times. Typical wait times for a boat ramp is fewer than 15 minutes on weekdays, with many reporting 15–30-minute waits on weekends, and some seeing 30–45-minute waits on weekend afternoons and holiday weekends. If more marina slips were available, 10% would rent a slip who currently use the ramp each time, and 13% would purchase a boat if they could rent a slip. If more canoe/kayak storage ramps were available, 15% would rent one instead of storing elsewhere, and 10% would buy a canoe/kayak if they could rent a rack.

Facility Use--The clubhouse is used by 68%, most often for various LHCC social events and the Fitness Center, while almost 20% occasional rent it for private events and 12% use it for LHCC clubs.

Capital Investment Priorities—Clubhouse Parking Lot Expansion and gravel walking/biking path trail completion (3.4 each) are the highest priorities, followed by many equal options—Country Club Park Playground Equipment (3.1), Beach III Road and Beach Area Grading/Gravel, Country Club Park and Beach II Pavilions, and Tot Lot Swings (3.0 each). In the longer term, a trail on the common area that circumnavigates the lake (3.7) is the highest priority, while enhanced small pond areas (3.1) and a manufactured building (2.9).

Assessment Increases—Only 11% would definitely or probably, and 16% would definitely not support an increase in assessments, while between these extremes, 24% would probably not unless it was for a very important improvement, and 47% maybe would, depending on the improvement.

Satisfaction—58% feel their assessments are just about right for the amenities. Most of the rest feel dues are somewhat (25%) or much too high (12%) for the amenities, while 4% feel dues are lower for the amenities.

Enforcement of Non-Resident Use—About half are either extremely (30%) or very concerned (21%) with non-residents using amenities, while 27% are somewhat, 11% are not very, and 6% are not concerned at all. Those who are concerned are split, 45% each, between taking enforcement/additional access control measures right away, or to study the matter before taking action to enforce/limit access.

Communications—LHCC is rated highly for activities/special events and alerts (4.1 average score for each), and lower for community issues (3.6). Most participants welcome additional emails concerning community activities/meetings, and 52% welcome a new online discussion forum for members only (without anonymous input). Most (65%) want Board meetings live streamed and recorded, while 25% are somewhat supportive or am not opposed if others want it. The most common news sources for LHCC information are the unofficial "Lake Holiday Families" and official Facebook pages, while 44% report visiting the official website several times per month.

Security/Safety/Services—Gate entry control (3.45 average score) is rated excellent/good by 55%. Everything else is rated much lower in security category. Road speed control (3.0) is rated average while Vandalism Prevention and Roving/Foot Patrol (2.5) are lower. Road snow removal/deicing (3.9), road and beach maintenance, and safety services (3.7 each), and safety (3.7) are highly rated, trash facility (3.15) lower.

Office Administration—Features are rated much higher, particularly friendliness (4.3), professionalism (4.2), convenient office location (4.1), availability by email and telephone, timeliness of response and availability by telephone (4.0 each), and availability in person (3.9).

Restaurant—Only 19% would support construction of a restaurant with a special assessment to cover construction costs, and 12% would pay increased monthly dues on a continual basis to cover operational costs for utilities. More would prefer a family casual format ($15-$35/person) than would prefer fast casual or more upscale combined. If a restaurant was established, 52% support serving alcohol.

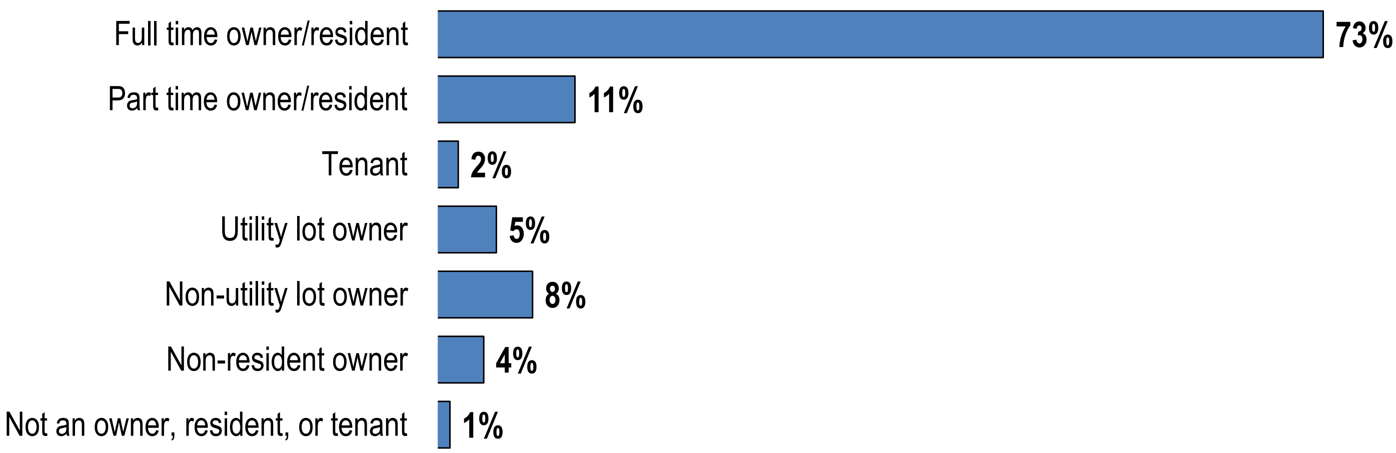
Policies/Vendors—67% support a restriction so that only one member per lot owned can be on the Board at any one time; 7% say no and 27% have no opinion. 51% would be interested in joining others to get a vendor to provide fiber optic, while only 15% said no and 34% have no opinion.

Potential Volunteers—12% indicated interest within their household to become a volunteer in LHCC, while 75% were not interested and 13% currently volunteer.

Profile: Residential Status

The majority of survey participants are full time owner/residents (73%) while another 11% are part-time owner/residents.

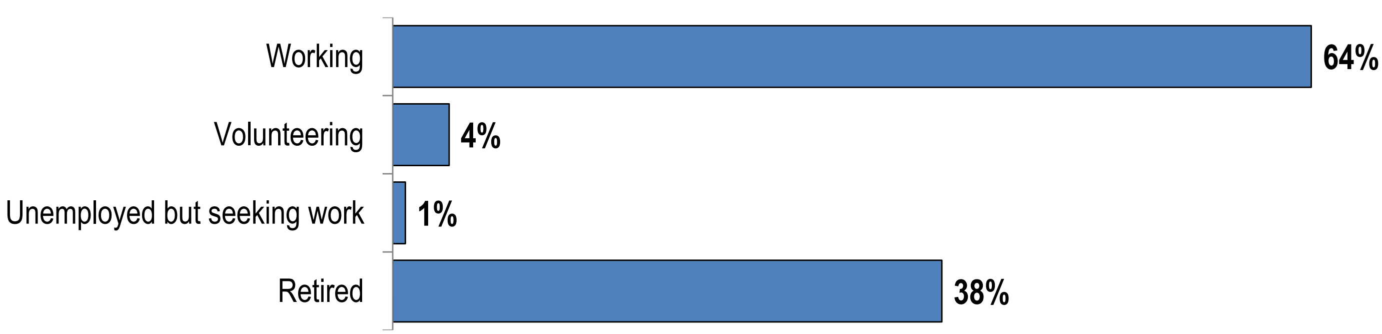
- Another 13% are utility lot owners, split between utility (5%) and non-utility (8%), while 2% are tenants and 4% are non-resident owners.
- Despite the data-mining methods used to develop the list of invitees, or perhaps because of them, only 1% starting the survey were not current owners, residents, or tenants; they were led to the end of the survey for being out of scope.



Employment Status

While a majority of survey participants are working (64%), another 38% report being retired, and 5% are either volunteering or unemployed and seeking work. (Although this was a multiple choice-question, only 7% checked a second option.)

- One interesting finding appears in comparing owner/residents (full-time or part-time) to all others.
- The former category (N=480) is of course the majority of participants, so their responses generally resemble the overall community in the survey. Non-resident owners, non-utility and utility lot owners, and tenants combined are a smaller segment (N=94).
- The non-owner/residents are considerably more likely to be working (78%) or unemployed (3%) and less likely to be retired (22%), compared to the owner/resident segment (61%, 0%, and 41%, respectively).



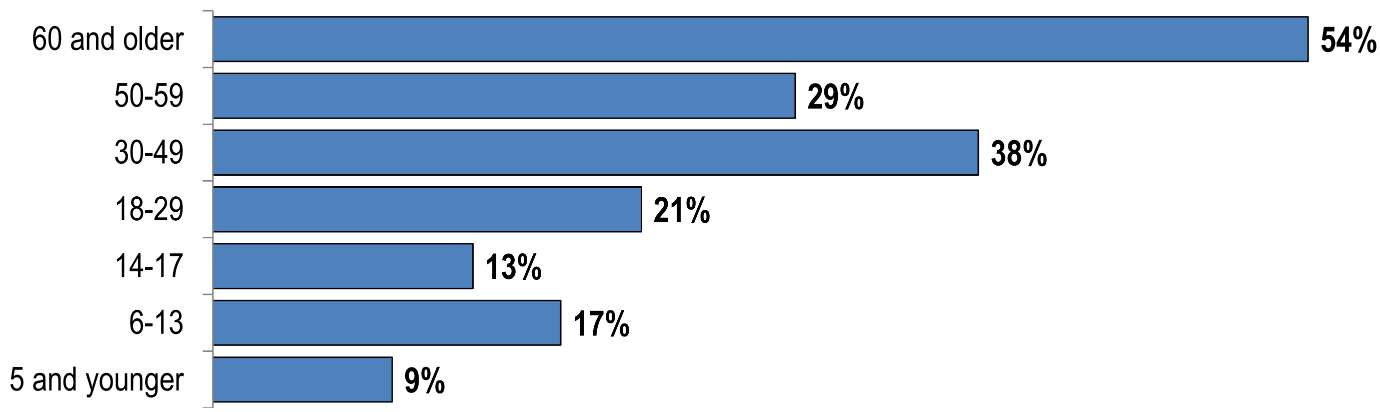
Household Age Range

Survey participants indicated the age range(s) represented within their household.

- A majority (54%) report the presence of at least one individual aged 60 or older, while 29% report someone 50-59, 38% someone 30-49, and 21% someone 18-29 years of age.
- Naturally, far fewer homes have at least one person younger than 18: 13% have someone 14-17, 17% someone 6-13, and 9% have someone 5 years old or younger.
- Combining the data shows that 29% overall have someone younger than 18 in the household; 27% of owner/residents and 41% of non-owner/residents.

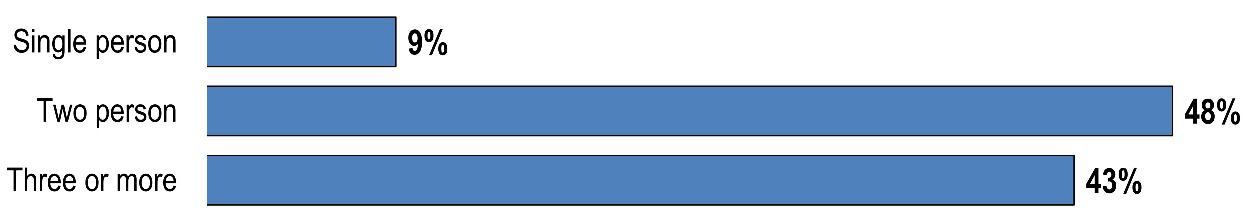
Survey participants indicated having a mean total of 2.8 people in their household.

- Those who indicate having someone in the age range indicate a mean of 1.3 to 1.7 individuals in that age range.
- For those who are in the oldest three age ranges, these averages imply to us the presence of a large number of married/domestic partner couples; in the younger age ranges, it implies a mix of childless households and other households who have several children, sometimes spread over two of the three age ranges for minors.



To make this a little more meaningful, we analyzed specific responses more to determine that 9% of households are single-person, 48% have exactly two people, and 43% have three or more residents.

- The owner/resident segment has fewer households with three or more (41%) and more with two (49%) or one person (10%) compared to non-owner/residents (55%, 39%, and 6%, respectively).

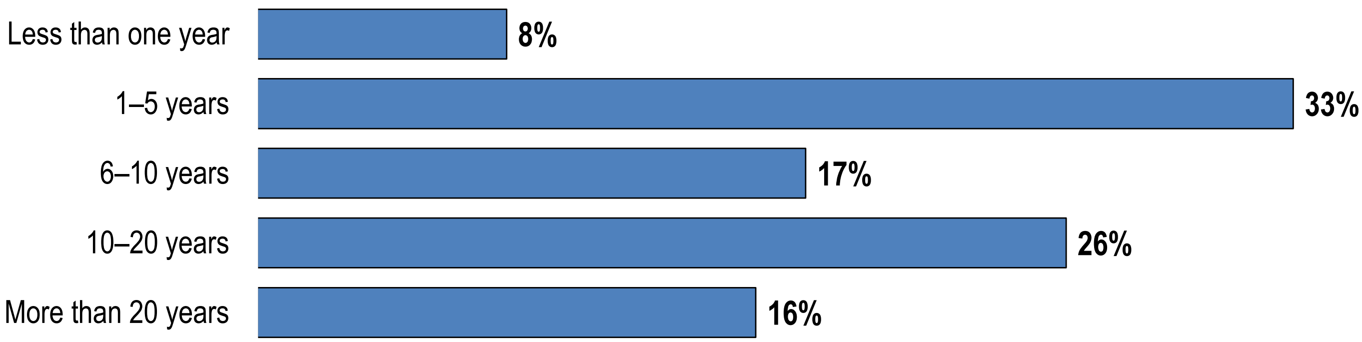


The apparent age of the head of household is generally 60 or older (62%), inferring from the data regarding number of individuals in each age range in each household. The head is either 50-59 (18%) or 30-49 (19%) with just 1% probably headed by someone younger than 30.

Length of Time as LHCC Resident-Lot Owner or Renter

Survey participants report a median of 8 years of owning a lot or living in Lake Holiday.

- While only 8% have owned or lived in LHCC for less than one year, 33% have done so for 1-5 years, 17% for 6-10, 26% for 10-20 years, and 16% have for more than 20 years.
- Non-owner/residents have less time in place, as 13% have owned for less than a year and 37% for 1-5 years, compared to 7% and 32% of owner/residents.
- Owner/residents are slightly more likely to have 20 years owned/lived in LHCC (16% compared to 14%), and are somewhat more likely to have 10-20 years (27%) or 6-10 years (18%) than non-owner/residents at 21% and 15%, respectively.



There may be some implications lurking behind these demographics. Several things we saw in the survey comments showed that non-owners still feel like stakeholders, and they often expressed regret for not being able to participate in more activities. Being somewhat newer to LHCC but still with many long-term owners means that they don't want to feel like second-class citizens, even if their relationship is closer with boating and other lake recreation than with aspects of the community tied closer to social activities.

Comparisons to Universe and Over Time

The actual overall profile of homes today consists of 958 lots with homes, 162 lots with utilities, and 382 lots without utilities.

- The response categories in the survey are not completely comparable, but 433 full-time and 68 part-time owner/residents in the raw data implies a 52% participation rate.
- This rate increases to 55% if we include the 22 non-resident owners; coupled with 11 total tenant responses, the results underrepresent renters, but we lack a figure for the proportion of homes rented.
- In contrast, the response rate among utility lot owners (N=28) is much lower at 17.3%, and among non-utility lot owners (N=45), the response rate is 11.8%. This seems logical, given that a homeowner/resident is probably more of an emotional stakeholder in the community to a degree that lot owners may not be.

The response profile is very stable compared to 2017 results.

- The 2022 survey shows a slight shift of one percentage point fewer of full-time owner/residents and lot owners, four points fewer part-time owners, one point more tenants, and 4% who answered a new option for non-resident owners.
- Size of household added two points more who were each in single-person or 3+ person households, while the two-person household decreased by 4 points.
- The age ranges represented within households shows a 3-point decrease in those 60 or older, with a one-point increase in 50–59-year-olds, a one-point decrease in 30–49-year-olds, and a 4-point increase in 18–29-year-olds.

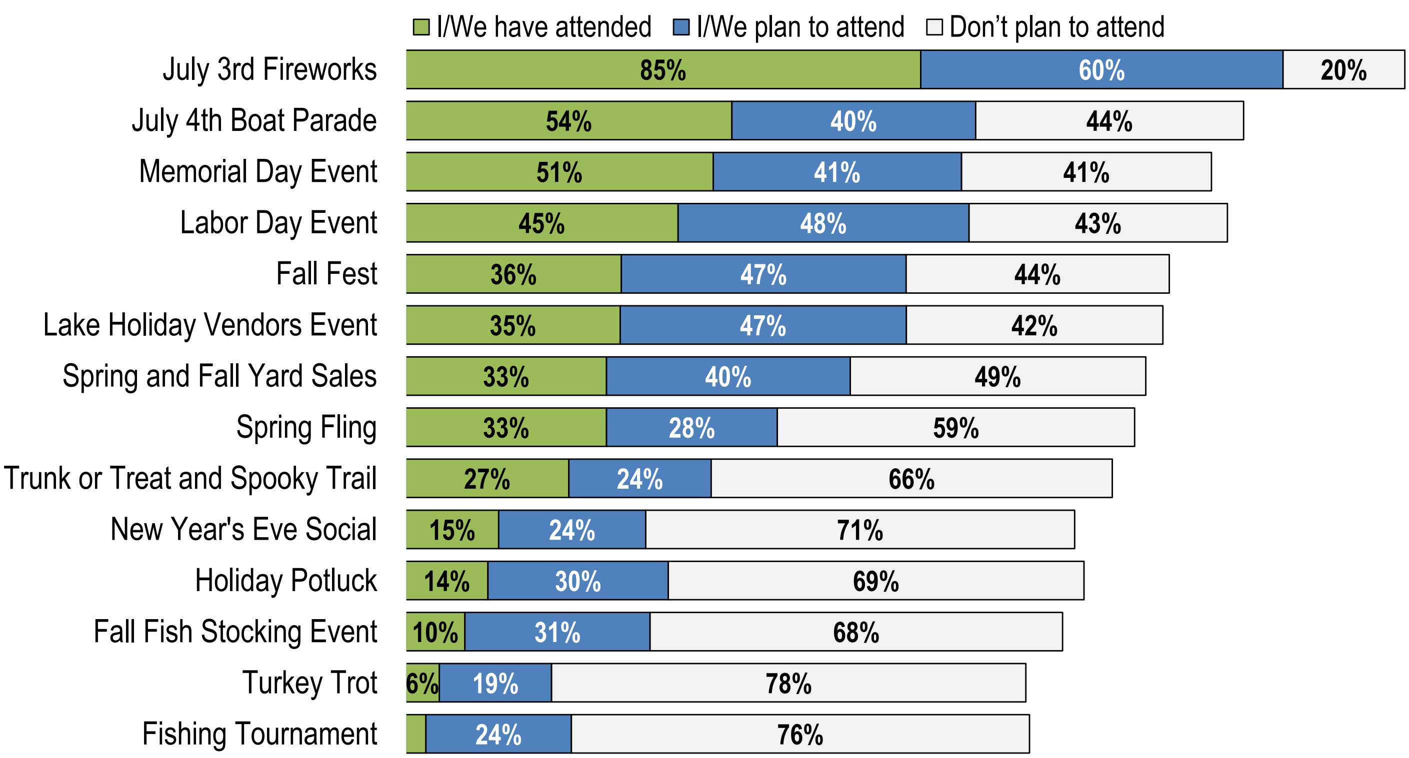
Attendance and Interest in LHCC Community Events

Annual Events

Community annual events examined in the survey showed that 21% each participated in none or 1-2 event, while 33% participated in 3-5, and 25% participated in 6 or more. Owner/residents (4.6) report an average of 1.3 more activities than non-owner/residents (3.3).

Past attendance is far higher for July 3rd Fireworks (85%) than for any other activities.

- Two others, the July 4th Boat Parade (54%) and Memorial Day Event (51%) have a majority with a history of attending at least once.
- Labor Day Event (45%) is an event with almost half attending, while Fall Fest (36%), Lake Holiday Vendors Event (35%), Spring Fling and Spring and Fall Yard Sales (33% each) are reported by at least one-third.
- Other than Trunk or Treat and Spooky Trail (27%), no other activity has more than 15% participation.
- While similar proportions within each segment participate in July 3rd and Labor Day, and Fishing Tournament among the less-attended events, the attendance of non-owner/residents is about 60% that of owner/residents for Fall Fest, Spring & Fall Yard Sales, and Trunk or Treat; and is lower for Holiday Potluck, Fall Fish Stocking, and New Year's Eve Social.



Anticipated future attendance is slightly higher in the aggregate compared to past attendance—a mean of 5.0 activities and roughly equal between non and owner/residents.

- There is no clear, prevalent event among these, as July 3rd Fireworks has 60% who plan to attend and another 20% who do not plan to. The matrix format was used to simplify response and was labeled as a multiple response question; we will assume here that the other 20% do not know their future plans.
- No other event has a majority who plan future attendance, subject to the caveat that five activities have fewer than 90% giving a yes/no response for future attendance and only five have at least 95% responding.
- Other activities with close to half planning future attendance include the Labor Day Event, Lake Holiday Vendors Event, and Fall Fest (47%-48% each).

- Spring & Fall Yard Sales, July 4th Boat Parade, and Memorial Day Event (40%-41% each) fall into a second tier of planned use. Fall Fish Stocking Event, Holiday Potluck, and Spring Fling (28%-31% each) fall into a third tier.
- The bottom rung of anticipated attendance includes New Year's Eve Social, Trunk or Treat and Spooky Trail, and Fishing Tournament (24% each), and Turkey Trot (19%).

Calculating a ratio of planned to actual past attendance shows the following predicted patterns:

- Far higher participation in the Fishing Tournament (24% planned to 3% past), Fall Fish Stocking Event (31% to 10%), Turkey Trot (19% to 6%), and Holiday Potluck (30% to 14%), each with at least twice as many planning to participate in the future.
- Higher participation in predicted for the New Year's Eve Social, Lake Holiday Vendors Event, Fall Fest, Spring and Fall Yard Sales. Each have between 20% and 60% more future attendance compared to past.
- Lower participation is predicated for the Trunk or Treat and Spooky Trail, Spring Fling, Memorial Day Event, the July 4th and July 3rd Boat Parade and Fireworks.
- The latter have 25% and 30% fewer planning future participation compared to the number who have attended in the past, suggesting that many of the open-ended comments about crowding and parking are deterring many from continuing a past tradition.

Analysis by Segment

Comparing expected future attendance by segment shows that non-owner/residents are much more likely on a percentage basis than owner/residents to plan to attend the Fishing Tournament and Stocking Event.

- A higher proportion of them also plan to attend Turkey Trot, Memorial Day Event, and Trunk or Treat.
- Fewer non-owner/residents plan to participate in the Spring/Fall Yard Sales, NYE Social, Spring Fling, Lake Holiday Vendors Event, Holiday Potluck, and July 4th Boat Parade.
- Many of these levels match the past participation profile of non-owner/residents, and none are strikingly different, as the proportion who plan participation is within 10% to 25% of what owners/residents report.

Activity Retention Rates

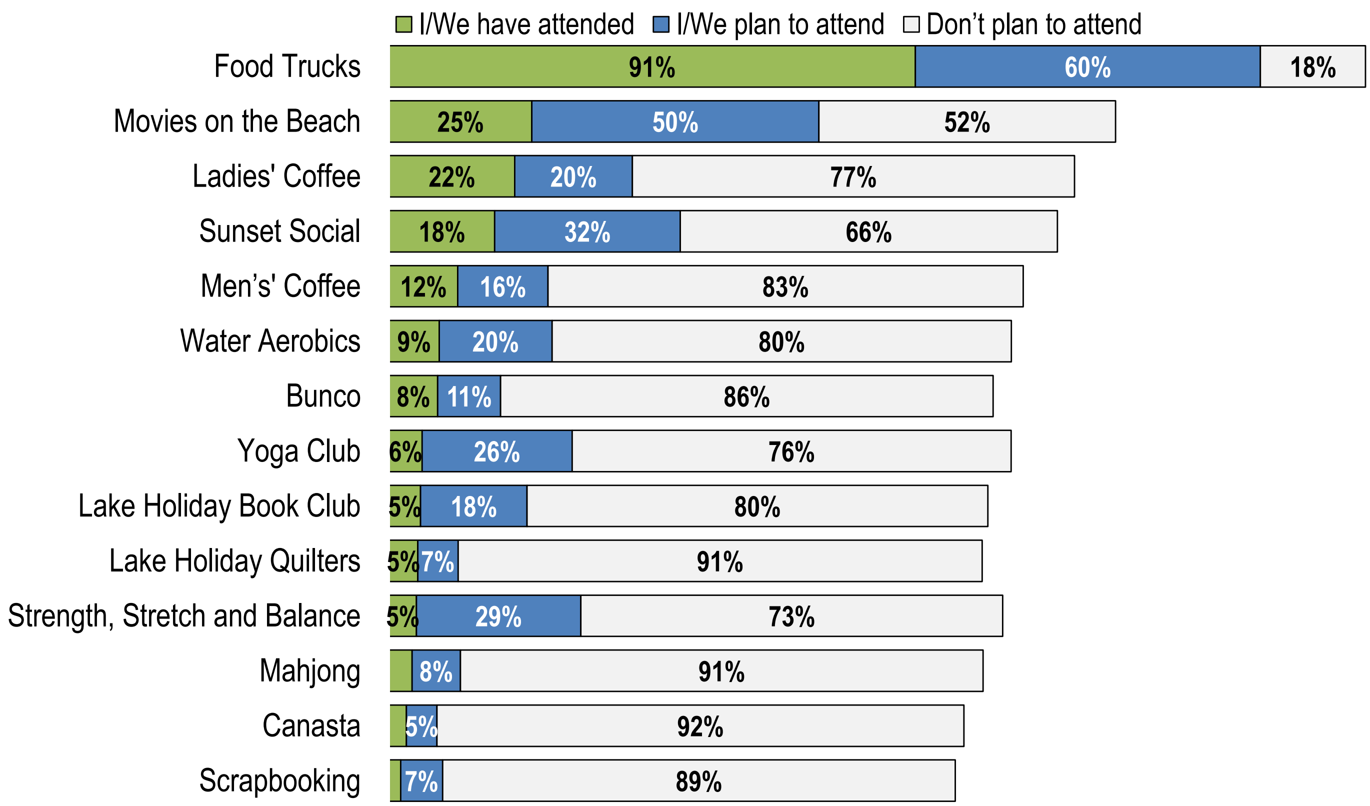
A comparison of the first two items in each row, past attendance and planned future attendance, suggests that repeat attendance may be quite low.

- For Labor Day Event and July 3rd Fireworks, 52% with past attendance plan to again.
- The repeat rates are lower for Holiday Potluck (50%), Turkey Trot and July 4th Boat Parade (47% each), Fall Fest (46%), Fall Fish Stocking Event (45%), LH Vendors Event (44%), and Memorial Day Event (43%).
- They are 40% or lower for Fishing Tournament and Trunk or Treat and Spooky Trail (40% each), Spring & Fall Yard Sales (39%), and particularly Spring Fling (33%) and New Year's Eve Social (28%).
- These findings seem somewhat jarring as we would have expected, given the concentration of participation, that there would also be a relatively high past-to-future predicted repeat rate. We may want to analyze this in the context of quality/satisfaction ratings addressed later in the survey.

Events/Clubs

By far the highest proportion of past attendees among various events/clubs is food trucks (91%).

- The other activities with some use include Movies on the Beach (25%), Ladies' (22%) and Men's Coffee (12%), and Sunset Social (18%).
- All other activities have between 2% and 9% participation, with Water Aerobics and Bunco (8%-9%) at the high end of this scale.
- By segment, owner/residents report more average aggregate attendance (2.2) compared to non-owner/residents (1.4), or a mean of 1.3 non-food truck events among owner/residents to 0.5 among non.
- While there is relatively little difference between the proportion who have attended during the Food Trucks and Movies on the Beach, non-owner/resident participation is about half that of owner/residents for Water Aerobics and Strength, Stretch and Balance; is about 40% for Yoga Club and Sunset Social; and is about 20% the proportion for Ladies' and Men's Coffee compared to owner/residents. Their participation is none for the other events/clubs.



Predicted use shows a pattern very similar to that of annual events in that many more plan to do things than have done them in the past.

- The average aggregate is 3.2 among owner/residents and 2.5 among non, or about one higher than reported for past participation.
- Events/clubs with the highest ratios of planned to actual past participation include Strength, Stretch and Balance (29% planned to 5% past), Yoga Club (26% to 6%), and Water Aerobics (20% to 9%).
- However, they are not all physical activities with higher anticipated participation—Scrapbooking (7% planned to 2% past), Book Club (18% to 5%), Mahjong (8% to 4%) and Canasta (5% to 3%) generally have lower historical use and some potential growth. Quilters, Men's Coffee, and Bunco have some increase predicted from their historical levels as well.
- Among more commonly-reported activities, Movies on the Beach (50% planned to 25% past) and Sunset Social (32% to 18%) have substantial predicted growth based on these survey results.

- For this question, most activities are far closer to 100% between the “plan to attend” and “don’t” responses—almost all have +/- 4% of all responding, except for food trucks which interestingly has only 78% answering the question and presumably 22% unsure.

Analysis by Segment

- By segment, owner/residents are more likely than non- to plan attendance at many activities, including Ladies' Coffee, Scrapbooking, and Book Club; and particularly Yoga Club, Canasta, Bunco, Water Aerobics, Strength/Stretch/Balance, and Quilters for which owner/residents are more likely to plan attendance.
- However, there are also some activities that non-owner/residents are more likely to do in the future, including Movies on the Beach (60% of non- compared to 48%) and Men’s Coffee (18% to 15%).
- Slightly more non-owner/residents also plan to participate in Mahjong, Food Trucks, and Sunset Social.

Activity Retention Rates

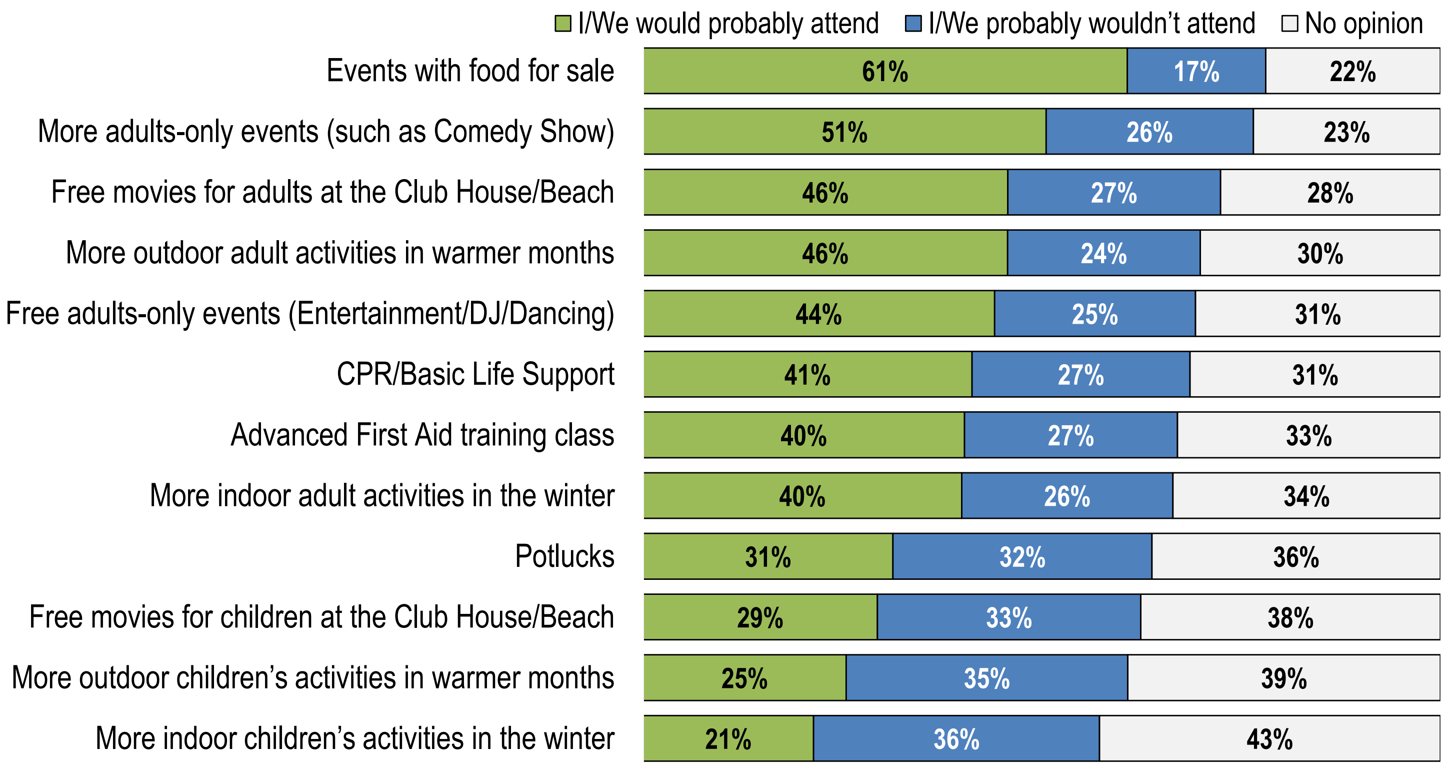
A comparison of past attendance and planned future attendance suggests low repeat participation.

- Mahjong (57%), LH Quilters (54%), Food Trucks (52%), and Scrapbooking (50%) have the highest planned retention rate.
- Ladies’ Coffee and Movies on the Beach (48% each), LH Book Club (47%), Men’s Coffee (46%), and Yoga Club (44%) have somewhat lower proportions of past participants planning to attend again.
- There is another cluster around 40%, for Sunset Social (41%), Bunco (40%), Water Aerobics (39%), Canasta (38%), and Strength, Stretch and Balance (25%) has a very low anticipated repeat rate.
- These low rates tell perhaps “half the story” if we seek to predict or explain future participation, since there is always some recycling in participation to be expected, and many planning future participation lack a prior history with each event.

Interest in Potential Additional Activities

A third question in this area addressed interest in future activities without a participation history.

- As a single-choice question, events with food for sale (61%) and more adults-only events such as Comedy Show (51%) have a majority show would probably attend.
- Many others cluster with at least 40% indicating interest, including free movies for adults at the Club House/Beach and more outdoor adult activities in warmer months (46% each), free adults-only events such as Entertainment/DJ/Dancing (44%), CPR/Basic Life Support (41%), Advanced First Aid training class (40%) and more indoor adult activities in the winter (40% each).
- There is less interest in Potlucks (31%), free movies for children at the Club House/Beach (29%), more outdoor children's activities in warmer months (25%) and indoor activities in the winter (21%).
- It should also be noted that there is the potential for more participation than the level indicated here. A substantial proportion, ranging from 22%-43% per activity, indicate having no opinion.
- While it may be a foregone conclusion that they are as unlikely as the proportion who probably wouldn't attend, given that the proportion with no opinion outnumber those who say they probably won't attend for almost every activity, it suggests that LHCC over time has some opportunity through program design and communications to draw some of the reticent units in the community.



By segment, non-residents/owners indicate somewhat less interest, an aggregate average of 3.8 activities, compared to 4.9 activities among owner/residents.

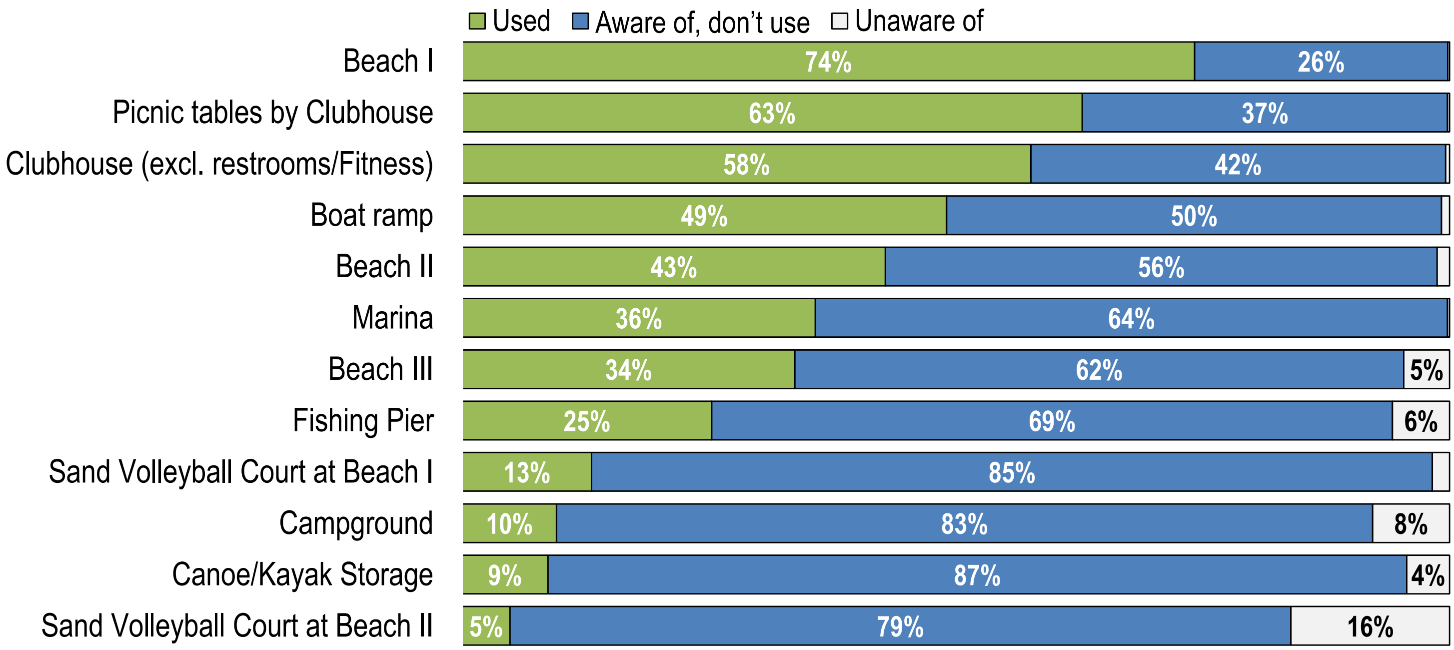
- Owners are at least 30% more likely to attend events with food for sale, CPR/Basic Like Support and Advanced First Aid training, free movies and more indoor adult activities for adults. They are also more likely to be interested in free and more outdoor adults-only events, outdoor adult activities, and potlucks.
- Non-owner/residents are more likely to participate in more indoor and outdoor children's activities.

LHCC Community Amenities: Use/Awareness

Lakeside Features

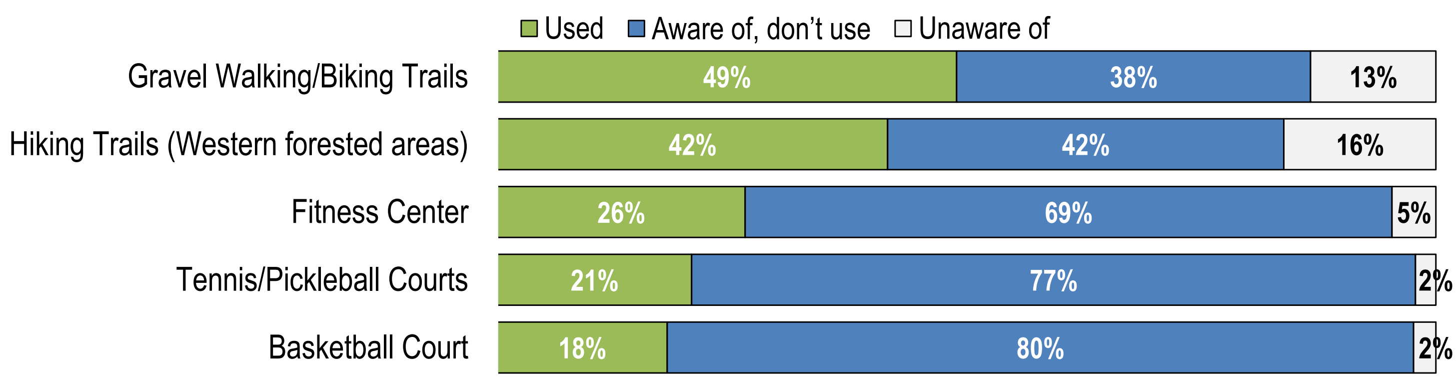
Beach I (74%), picnic tables by the Clubhouse (63%) and the Clubhouse excluding restrooms and Fitness Center (58%) are the lakeside features used by the largest proportion of survey participants.

- Almost half have used the boat ramp (49%) and Beach II (43%), while fewer report having used the Marina (36%), Beach III (34%), or the fishing pier (25%).
- Usage is lowest for the Sand Volleyball Courts at Beach I (13%) and II (5%), the campground (10%), and Canoe/Kayak Storage (9%).



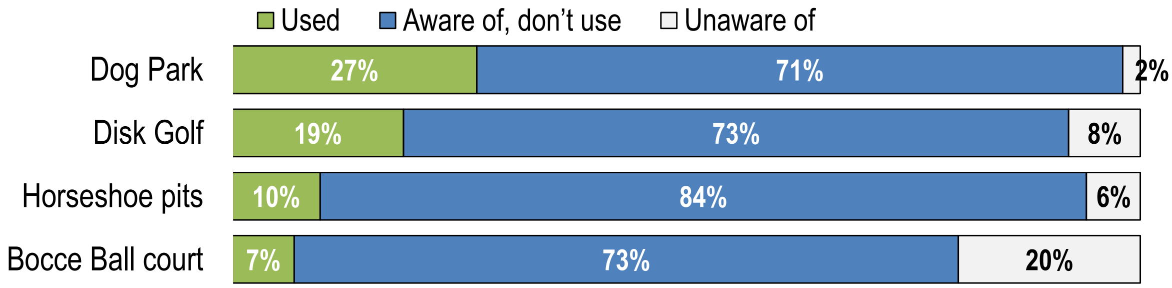
Athletic Facilities

- Gravel Walking/Biking Trails along the old golf course (49%) and Hiking Trails (42%) are used by a substantial number.
- The Fitness Center (26%), Tennis/Pickleball (21%) and Basketball Courts (18%) have less use.

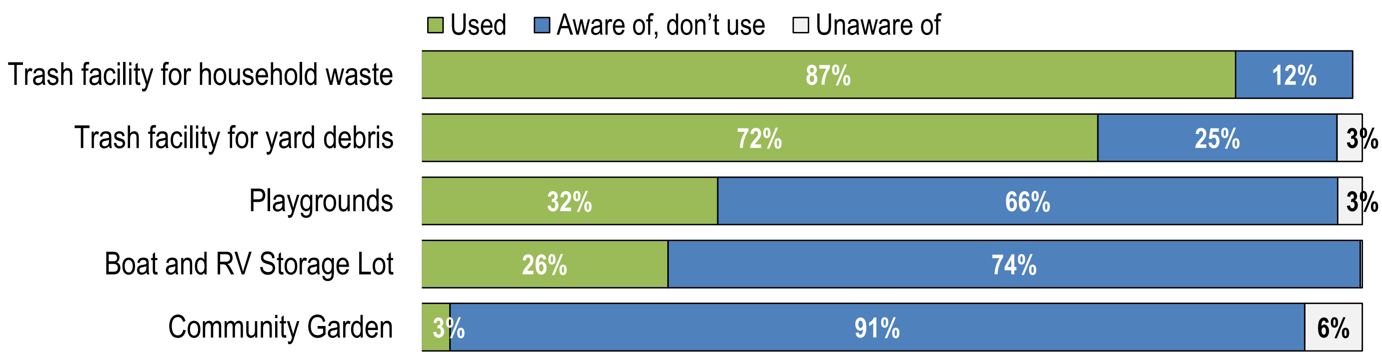


Country Club Park & Other

At the Country Club Park, the Dog Park (27%) and Disk Golf (19%) have the highest levels of use, while the horseshoe pits (10%) and Bocce Ball court (7%) have less use.



Among all amenities, the trash facility for household waste (87%) and trash facility for yard debris (72%) have far higher levels of use. The playgrounds (32%) and Boat and RV Storage Lot (26%) have somewhat lower use, and Community Garden (3%) has very few users.



Among all amenities, low awareness is never a primary contributor to non-use.

- Across all amenities, only the Bocce Ball court (20%), Sand Volleyball Court at Beach II and Hiking Trails in the Western forested areas (16% each) have a substantial number who indicate they are unaware rather than are aware of and don't use.
- Gravel walking trails at the old golf course (13%), the campground and disk golf (8% each), fishing pier, community garden, and horseshoe pits (6% each), Beach III (5%), playgrounds and trash facility for yard debris (3% each), and dog park, tennis/pickleball and basketball courts (2% each) round out the amenities with more than just one or two survey participants who are unaware.

By segment, the campground (20% non- compared to 8% among owner/residents), marina (48% to 34%), and Beach II Sand Volleyball Court (7% to 5%) have the highest ratio of non- owner/resident use compared to owner/residents.

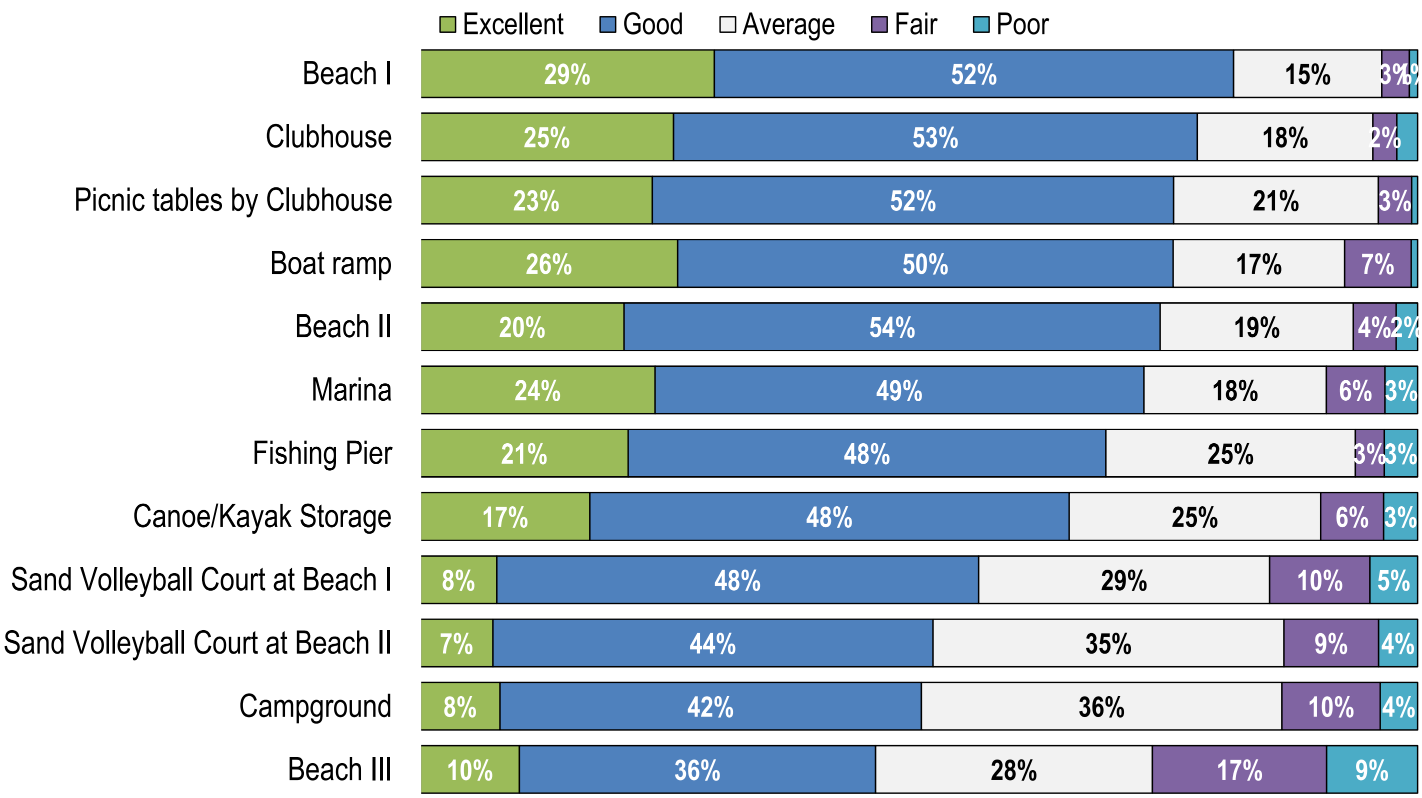
- Beach II (48% to 42%), boat ramp (56% to 48%), and picnic tables by the Clubhouse (68% to 62%) also have higher use among non-owner/residents.
- In contrast, the horseshoe pits, courts (Beach I Sand Volleyball, Bocce Ball, Tennis/Pickleball, and Basketball), and trash facilities all have use among owner/residents that is twice to three times as high.
- Owner/residents are also report considerably higher use of the Fitness Center, trails, disk golf and Dog Park.

LHCC Community Amenities: Rating Based on Experiences or Impressions

Lakeside Features

The top-rated lakeside feature is Beach I, rated 4.07 on a 5-point scale. This reflected about half rating it good, almost 30% excellent, and most of the remainder rating it average.

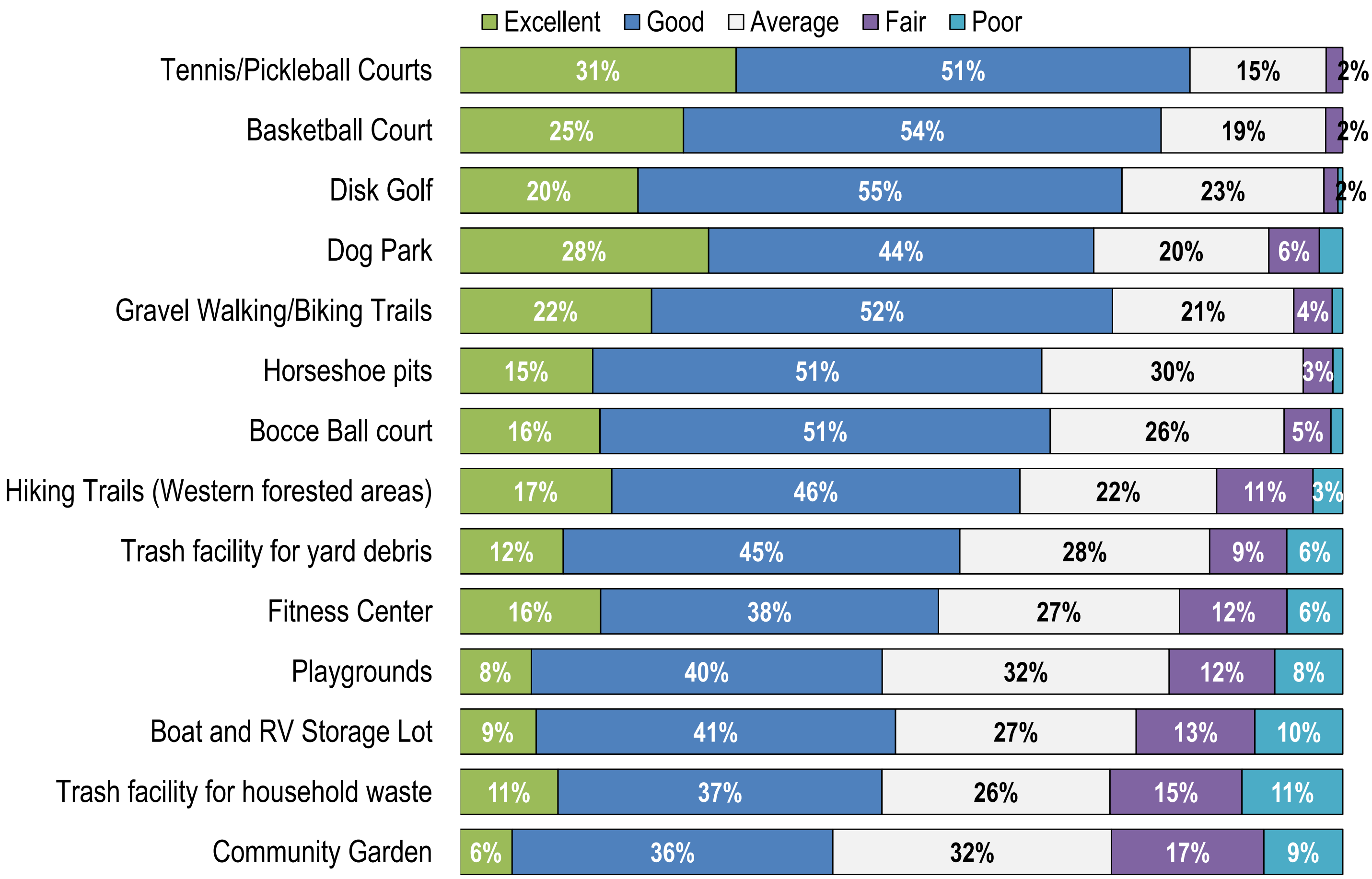
- In descending order, ratings are slightly lower for the Clubhouse excluding restrooms & Fitness Center (3.97), Picnic tables by Clubhouse (3.94), boat ramp (3.93), Beach II (3.86), Marina (3.84), and Fishing Pier (3.80).
- The lowest-rated are canoe/kayak storage (3.69), Sand Volleyball Courts at Beach I (3.44) and II (3.41), the Campground (3.41), and Beach III (3.20).
- These average about a 3.7 score with under 18% excellent and 48% good for each service, so they are respectable scores for quality. The lowest-rated show a declining number who regard them good or excellent, and more growth among those rating fair or poor with a fairly constant number who rate them average.



Athletic Facilities/Country Club Park/Other

Among other amenities, the highest rated are the Tennis/Pickleball (4.12) and Basketball Courts (4.03).

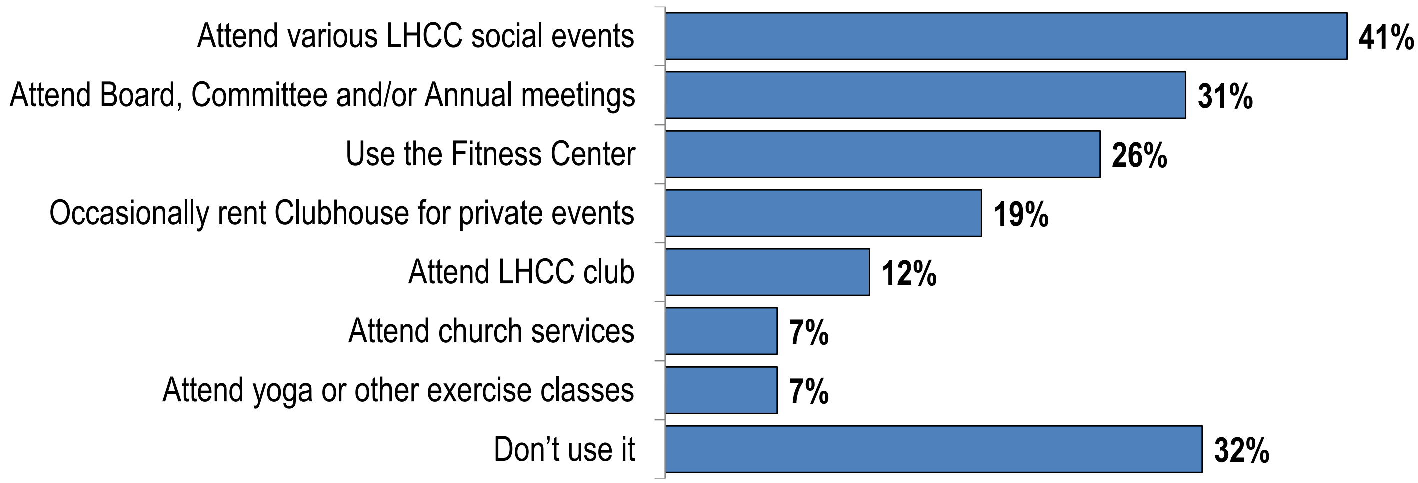
- Disk Golf (3.93) and Dog Park (3.89) are the highest-rated features of Country Club Park, while the Gravel Walking/Biking Trails along the old golf course (3.89) has a similar rating.
- Horseshoe pits and Bocce Ball court (3.75 each) and Hiking Trails in our western forested areas (3.63) have slightly lower scores.
- Trash facility for yard debris (3.47), Fitness Center (3.45), playgrounds (3.29), Boat and RV Storage Lot (3.25), trash facility for household waste (3.21), and the Community Garden (3.13) are rated lowest.
- These average about a 3.7 score with under 18% excellent and 48% good for each service, so they are respectable scores for quality. The lowest-rated show a declining number who regard them good or excellent, and more growth among those rating fair or poor with a fairly constant number who rate them average.



Ways the Clubhouse Property is Used

A majority of survey participants (68%) have used the Clubhouse property.

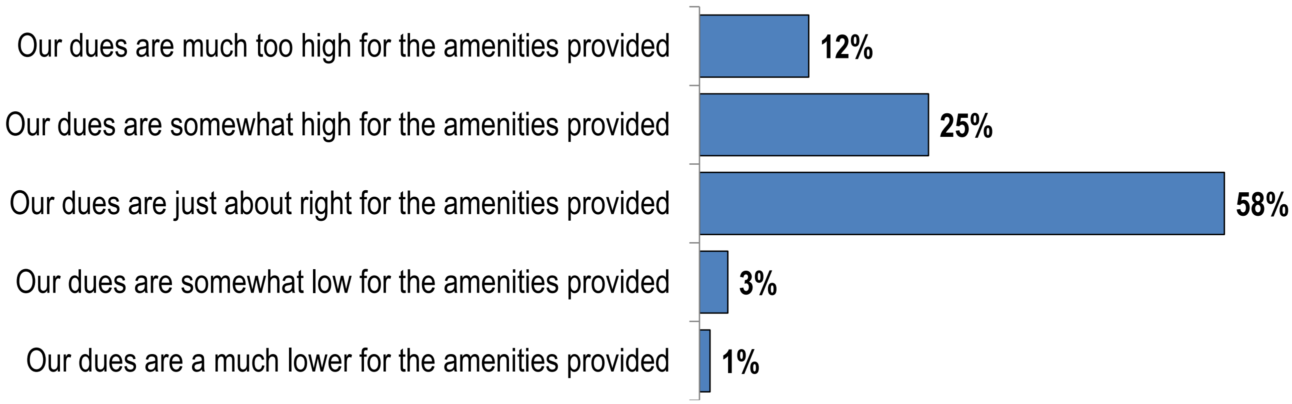
- They are most likely to use it to attend various LHCC social events (31%), use the Fitness Center (26%), occasionally rent it for private events (19%), attend an LHCC club (12%) or either attend church services or yoga/other exercise classes (7% each).



Satisfaction with the Value of Amenities Offered

When asked to indicate how satisfied they are with the value of amenities offered, as provided by their assessments, a majority (58%) indicate that they are just about right for the amenities provided.

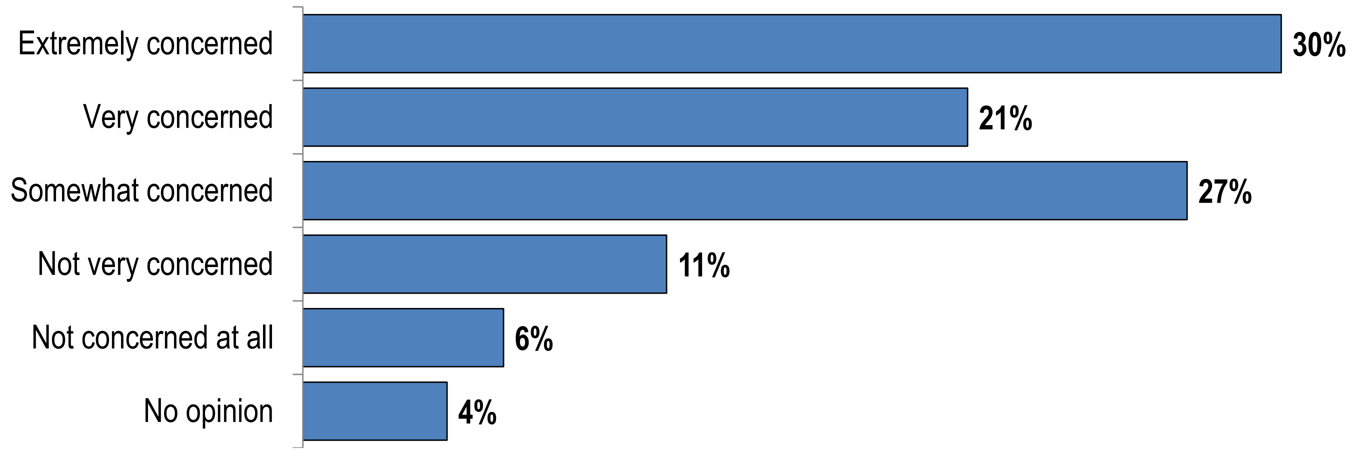
- Among the remainder, most feel that dues are either somewhat high (25%) or much too high (12%) for the amenities provided, with only 4% combined feeling that dues are somewhat or much lower.
- Survey participants are conveying a message to some degree, to rein in additional spending particularly when positioned as the direct basis of funding new/additional services.



- Owner/residents have 56% who feel dues are about right, while 27% feel they are somewhat high and 12% much too high, and 5% feel they are too low, with a net -34% feeling dues are high rather than low.
- Non owner/residents have 71% feeling they are about right, and 29% feel they are high (net -29%).
- Using this net metric to examine attitudes toward dues shows that households with employed individuals (-44%), 1 person (-38%) or 3+ person (-40%), with a head under 50 (-55%), and/or have children (-44%) are the most sensitive regarding the dues-amenities relationship.
- This also correlates strongly with their support for an increase in assessments (-72%) and to a lesser extent that they have sufficient opportunity to give the Board input on issues they address (-58%).
- Segments with the most positive attitudes toward the dues-amenities relationship include households that are not working (-17%), have a head over 60 (-23%), have 10-20 years of residency (-24%), definitely or probably would support an increase in assessments (-12%), and feel they have sufficient opportunity to give Board input (-18%).
- Households with 2 people (-26%) and/or do not have children (-29%) have a somewhat more negative perception that is still more positive than their counterparts in other households.

Concern with Non-Residents using LHCC Amenities

When asked their concern with non-residents using amenities, particularly Beach 1, survey participants indicate a reasonably high level: about half are either extremely (30%) or very concerned (21%), while 27% are somewhat, 11% are not very, and 6% are not concerned at all. On a 5-point scale, there is an average score of 3.60, which we can use to easily compare attitudes across segments.

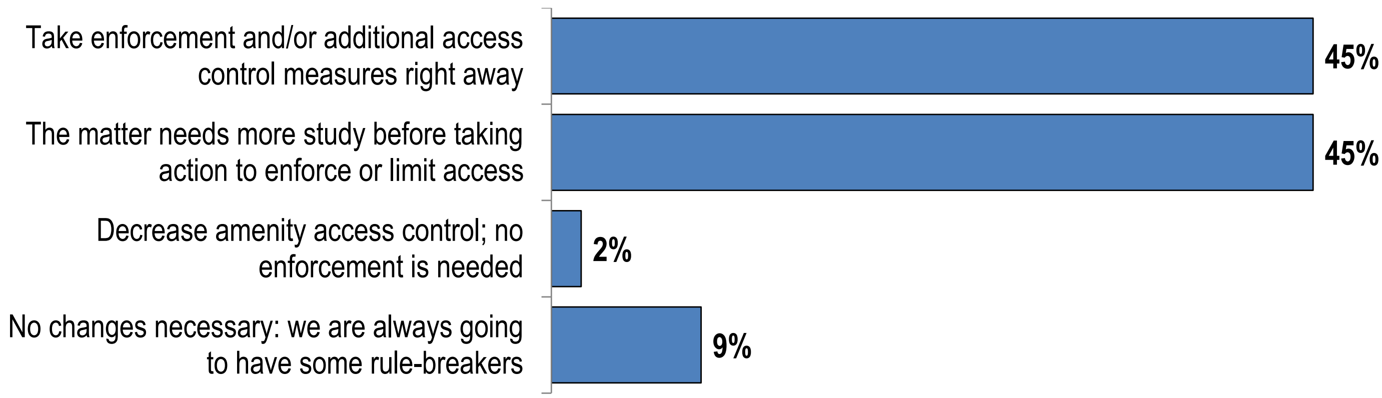


- Owner/residents (3.71) are much more concerned than non-owner/residents (2.89).
- Those who express greater concern include households that are not working (3.77), single- (3.79) and 2-person (3.72), a head of 60 or older (3.74), without children (3.70), with 6-20 years in LHCC (3.78), who feel dues are much too high (3.79) or somewhat low (4.31), would definitely/probably support an assessment increase (3.98), and who responded to the invitation (3.80).
- Lower concern is expressed by those in households that are working (3.49), have 3+ people (3.41), a head under 50 (3.39), 1-5 years (3.40) or more than 20 years in residence (3.55), feel dues are about right (3.57) or somewhat high (3.50), would definitely not support assessment increases (3.46).
- These scores generally demonstrate that larger households with children are less concerned but particularly those who do not reside on-site feel less concern in general (and may themselves identify as “non-residents.”)

Enforcement and Access to our Amenities

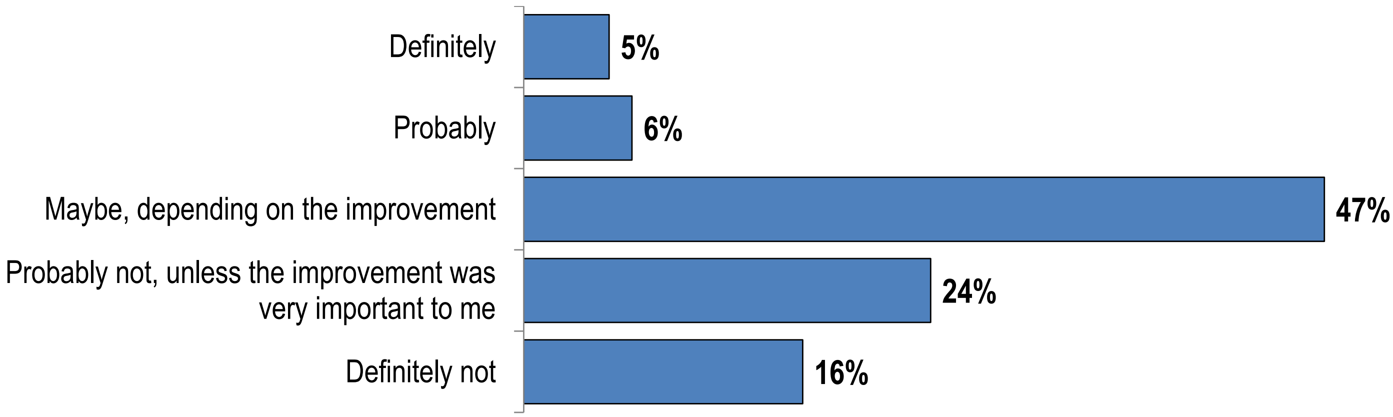
Those who expressed concern (extremely, very, or somewhat) in the previous question were asked to summarize their feelings regarding changes in enforcement and access to amenities.

- They are evenly split between taking enforcement and/or additional access control measures right away or that the matter needs more study before taking action to enforce or limit access, with 45% each.
- Only 2% of those with concerns want decreased amenity access control without enforcement, and 9% feel there are no changes necessary.
- By segment, single-person (16%) or working households (29%), those in residence more than 20 years (15%), and/or who definitely do not support increased dues (17%) each have a more passive net perception, subtracting those who want less or no enforcement from those who want more immediately (compared to a 34% overall net score).
- In contrast, 2-person households (41%) or those headed by someone 60 or older (39%), those with 1-5 years of residency (42%), and/or who definitely/ probably would support increased assessments (54%), or who answered later reminders (40%) are more likely to support immediate action.
- It appears that those who want immediate measures have a willingness to pay for increased amenities (including greater enforcement) and the survey results may under-state support for this action to some degree due to mild response bias.



Support an Increase in Assessments

A small proportion of survey participants (11%) would definitely or probably support an increase in assessments for new amenities or improvements to the community.

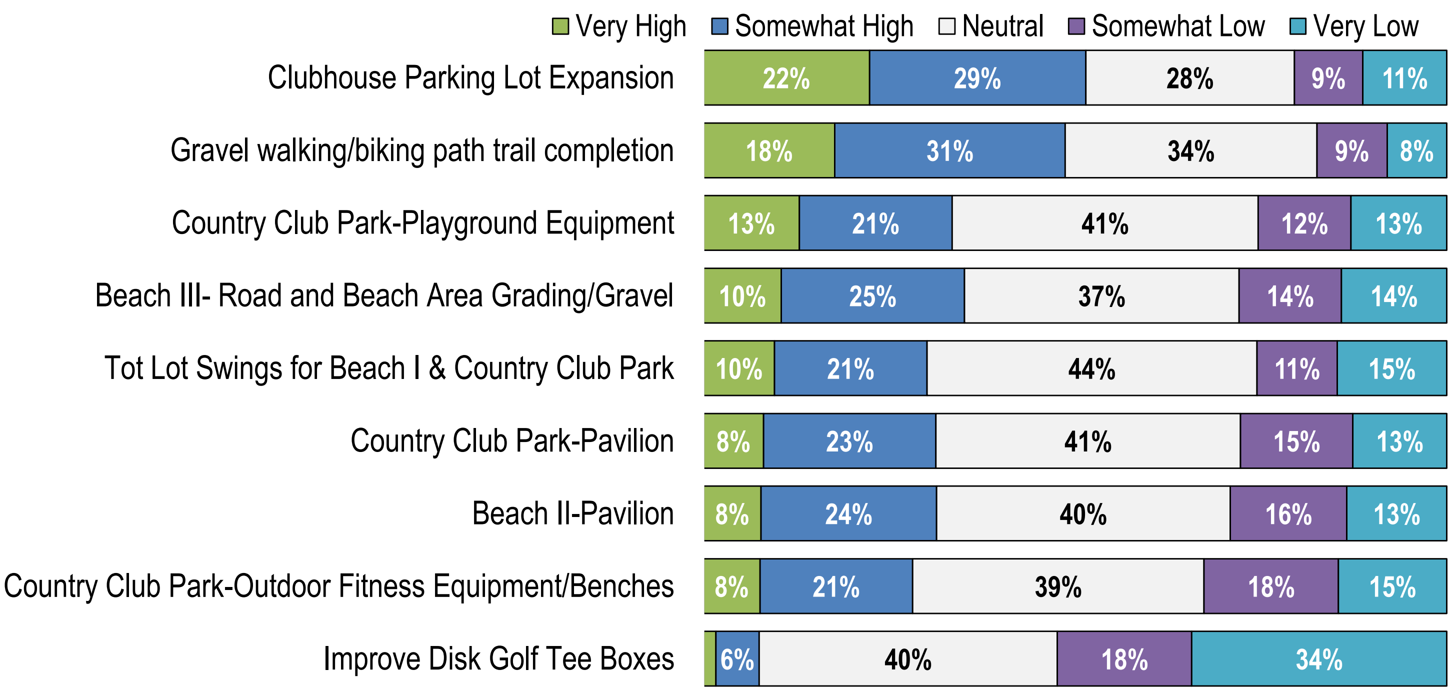


- However, almost half (47%) say maybe, depending on the improvement; 24% say probably not, unless the improvement was very important to them, and 16% say definitely not.
- Although it was an option, only 1% have no opinion on this pivotal issue.
- The average score for support on a 5-point scale (where 5="definitely") was 2.59.
- By segment, the score was higher among owner/residents (2.62) than non-owner/residents (2.41).
- Naturally, those who feel dues are already much too high for the amenities provided (1.89) have a much lower score than those who feel dues are somewhat high (2.38), about right (2.78), or somewhat low (3.87).
- Demographics most supportive of more dues include those with 1-5 years (2.72) and 6-10 years (2.75) in residence and with children (2.72). Single person (2.32), households headed by someone 60 or older (2.55), and living in LHCC 20+ years (2.29) are less supportive of dues increases.
- Early respondents answering the invitation (2.77) had greater support for increased assessments, suggesting a slight response bias toward supporting more dues.

Capital Improvement Plan: Prioritize Current Items

In descending order, using an average score on a 5-point scale to take into account the proportion who regard them as being of high, neutral, or lower priority, the two clear highest priorities are Clubhouse Parking Lot Expansion (3.42) and the gravel walking/biking path trail completion (3.41).

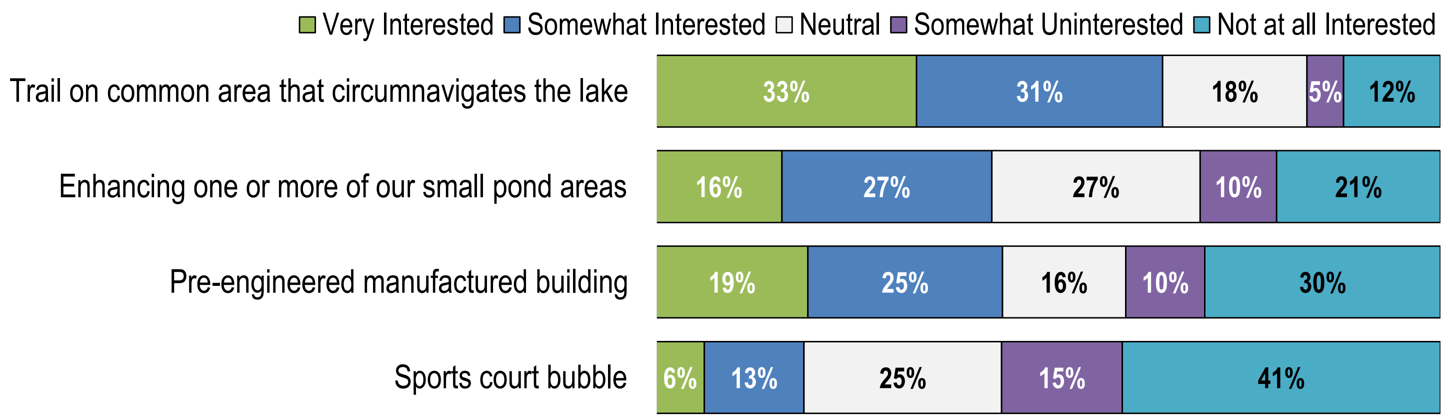
- They have considerably higher scores than the other items, yet only 22% and 18% who rate them very high priority, on a question that oddly had almost exactly one person rating something “very high” and two people rating something “somewhat high” across the community.
- So, if these were rated highest by 40%, almost all other options had between 8%-13% each rating those options very high, above all other options.
- Sticking with the average scores shows that there is a relatively tight cluster of five other potential priorities—Country Club Park-Playground Equipment (3.08), Beach III- Road and Beach Area Grading/Gravel (3.03), Country Club Park-Pavilion and Tot Lot Swings for Beach I & Country Club Park (2.99 each), Beach II-Pavilion (2.97).
- Country Club Park-Outdoor Fitness Equipment/Benches (2.89) is rated slightly lower, while there is little support to improve Disk Golf Tee Boxes (2.22).



Interest in Long-Term Capital Improvement Plan Projects

Among several possible long-term Capital Improvement Plan projects, a trail on the common area that circumnavigates the lake (3.68) is the clear favorite, with about one-third each very or somewhat interested.

- Enhancing one or more of our small pond areas (3.07) and a pre-engineered manufactured building (2.93) are rated slightly lower, with about 45% very or somewhat interested, and about 30% and 40%, respectively, rating them lower than neutral.
- The one project with clearly limited interest is the sports court bubble over basketball, tennis/pickle ball courts (2.28), with approximately 20% very or somewhat interested, 25% neutral, and a majority somewhat uninterested or not at all interested.



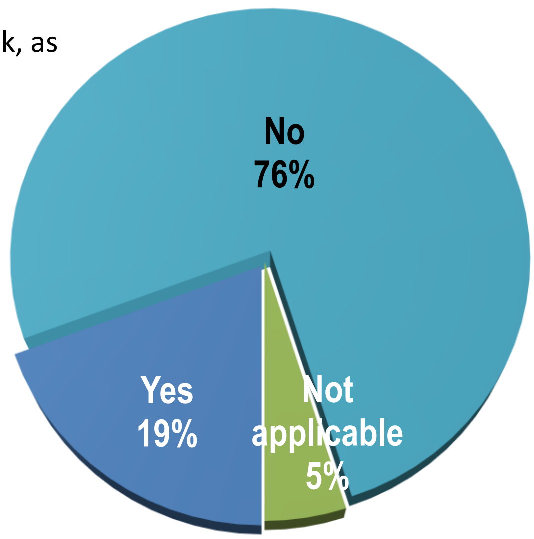
Lake Activities & Marina Use

Types of Boat(s) You Own

Overall, 60% of survey participants own at least one boat, with 40% of the total owning a powered and 37% owning a non-powered boat.

Weekend Boater Only

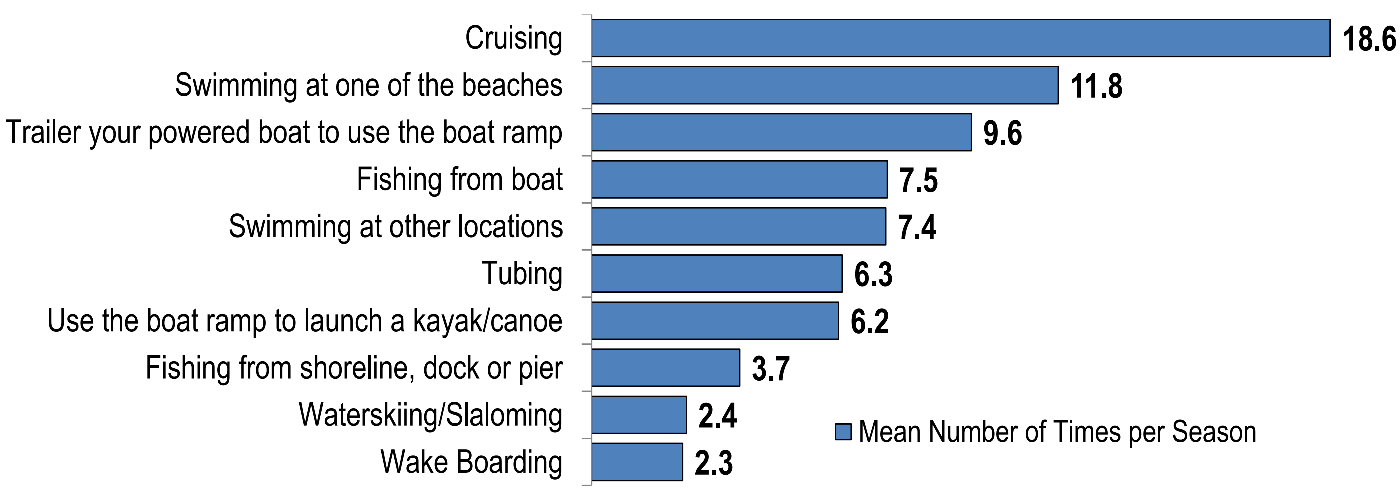
Those who do own a boat generally use their boats through the week, as 76% are not and 19% are weekend boaters, with another 5% saying that it's not applicable.



Activities Engaged in, Times per Summer Season

Those who own a boat report considerable use. (Although the survey specified "per week" many responses were clearly much higher and we recoded clear per week responses to cover a full summer in our approximation.)

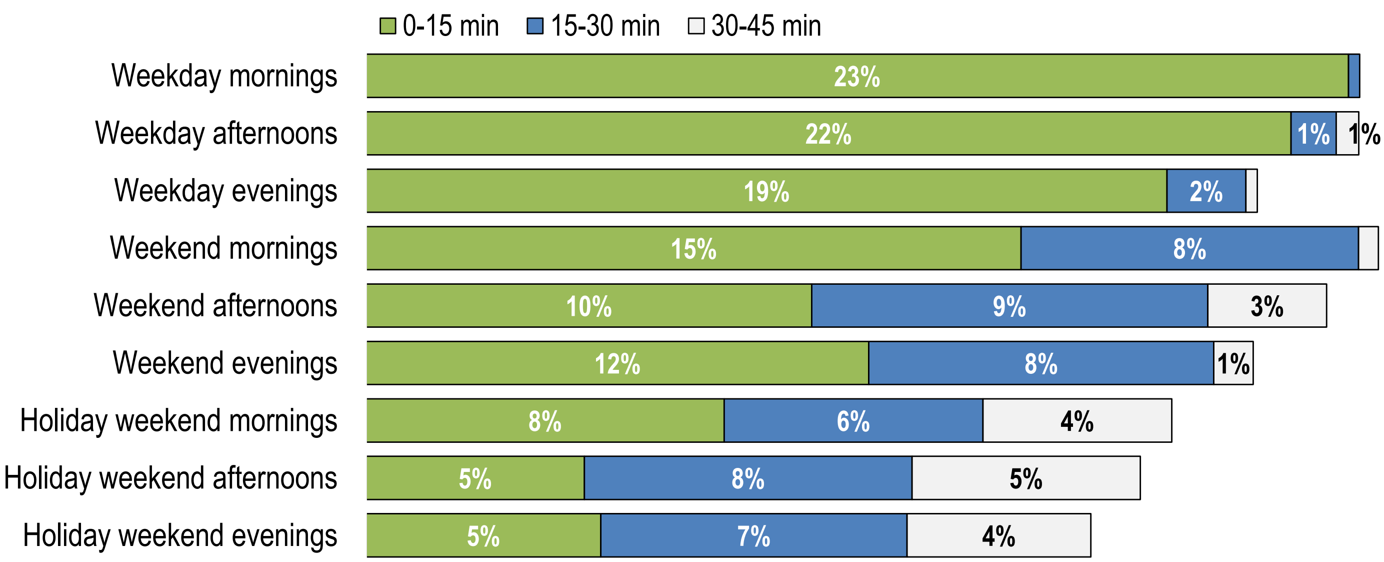
- Use most frequently includes cruising, almost 20 times a summer, swimming at a beach almost 12 times, and using a trailer to take their powered boat to the boat ramp 9.6 times.
- Fishing from their boat, swimming at other locations, tubing, and using a boat ramp to launch a kayak or canoe each occur between 6-8 times a summer. Other fishing (3.7), waterskiing/slaloming, and wake boarding (2.3-2.4 times) each occur more rarely. Blank responses were coded as zero to ensure the averages accurately reflect behavior.



Typical Boat Ramp Wait Time in the Summer

The typical wait time for a boat ramp is generally short, with almost all boat owners reporting that it is fewer than 15 minutes on weekday mornings, afternoons, and evenings.

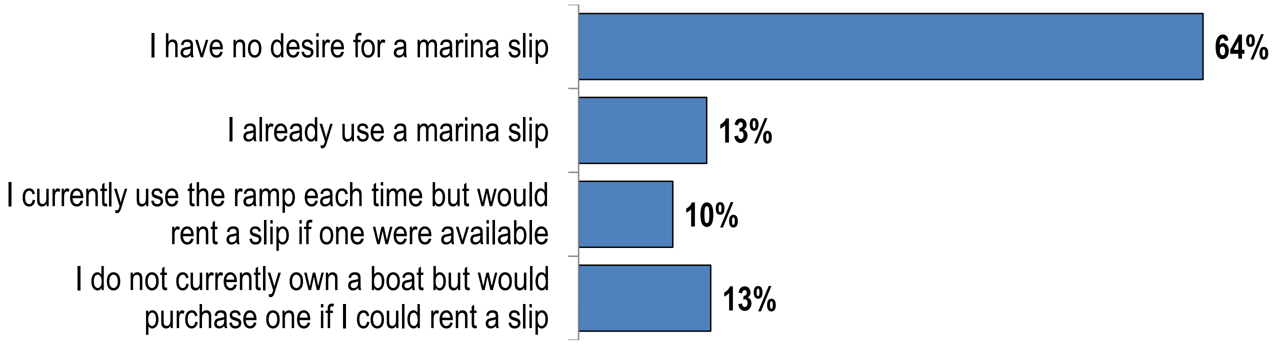
- On weekends, the ratio shifts so that, although two-third of users still wait fewer than 15 minutes in the morning, slightly more wait 15 minutes or longer in the afternoon, and the wait lessens again somewhat in the evening.
- On holiday weekends, 15-30 minutes is the more common wait on afternoons and evenings, with almost one-third reporting a wait of 30-45 minutes all day.
- The chart below shows the actual percentage of survey participants responding for each time slot, rather than adjusting them to add to 100% so we can also show what proportion of boaters are active in each of the nine day/time ranges.



Marina Slips/Storage Rack Availability

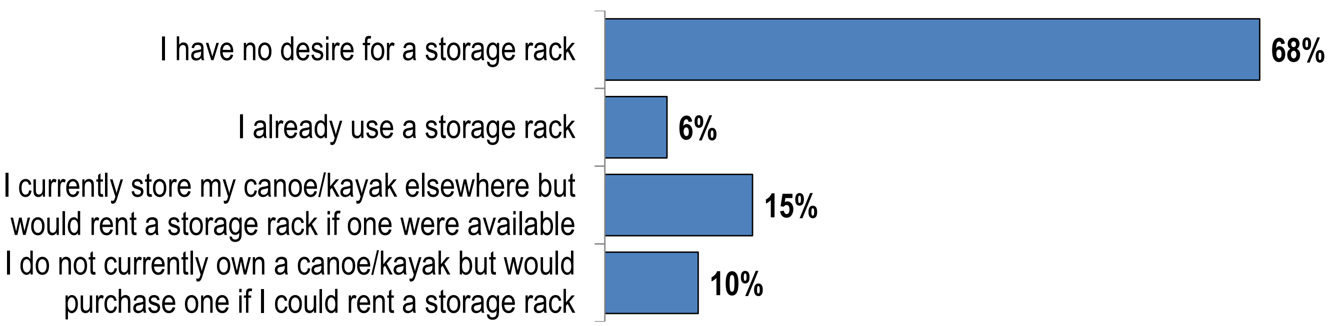
All survey participants were asked to indicate which statements accurately reflect their feelings regarding the availability of marina slips and a canoe/kayak storage rack.

- Given the prior boating profile it makes sense that a substantial majority (64%) have no desire for a marina slip, and some already use a slip (13%) or would rent one if available after using the ramp each time (10%).
- Another 13% do not own a boat but would buy one if they could rent and use a slip.



In comparison, slightly more have no desire for a canoe/kayak storage ramp.

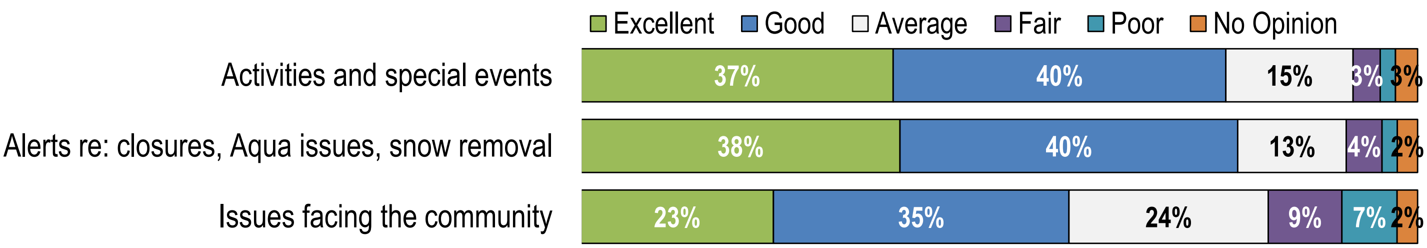
- Demand for a storage rack rental is higher (15%) among individuals who store them elsewhere, while current use is lower (6%) and so is interest in buying one if they could rent a rack (10%).



Lake Holiday Association Communications

LHCC communications are rated equally well for activities and special events and alerts, at 4.10 each.

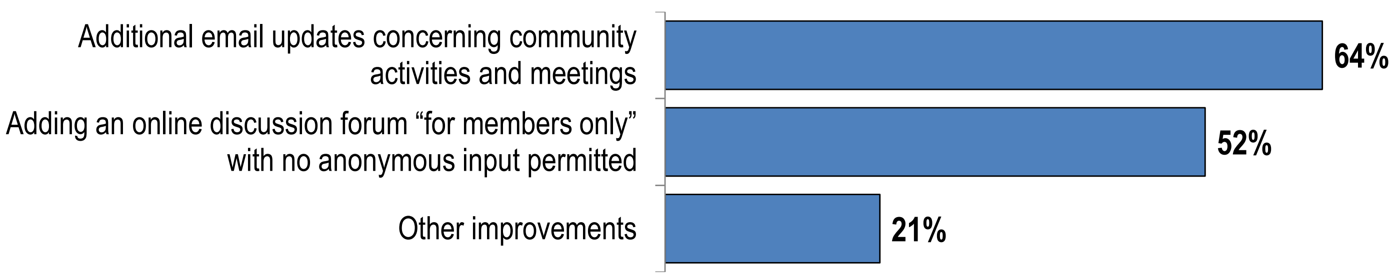
- Almost 80% of survey participants rate both excellent or good, while slightly under rate it average or lower, with very few having no opinion.
- LHCC is rated lower for issues facing the community (3.61) with 35% rating it good, and similar numbers rating it excellent (23%) or average (24%) and 16% rate it fair or poor.



New or Improved Features

Although the area of communications is already rated highly, 64% of survey participants would welcome additional email updates concerning community activities and meetings.

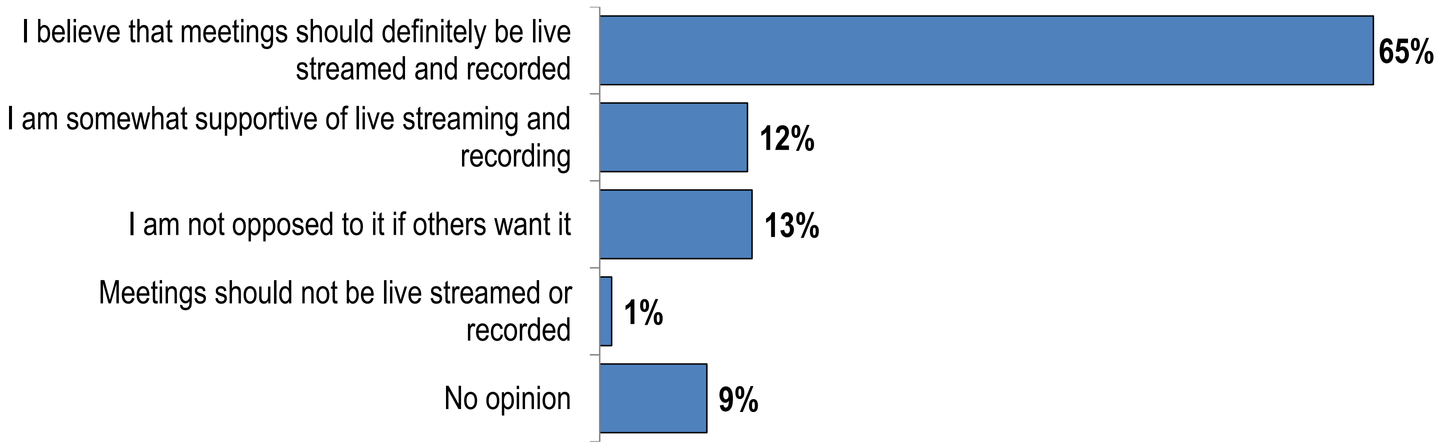
- In part to improve quality of issue-related communications, 52% would welcome adding an online discussion forum for members only, with no anonymous input.
- Other improvements were suggested by 21%, which appear in the Appendix of this report.



Live Streaming the Board Meetings and Making Recordings

A strong majority (65%) believe that Board meetings should definitely be live streamed and recorded.

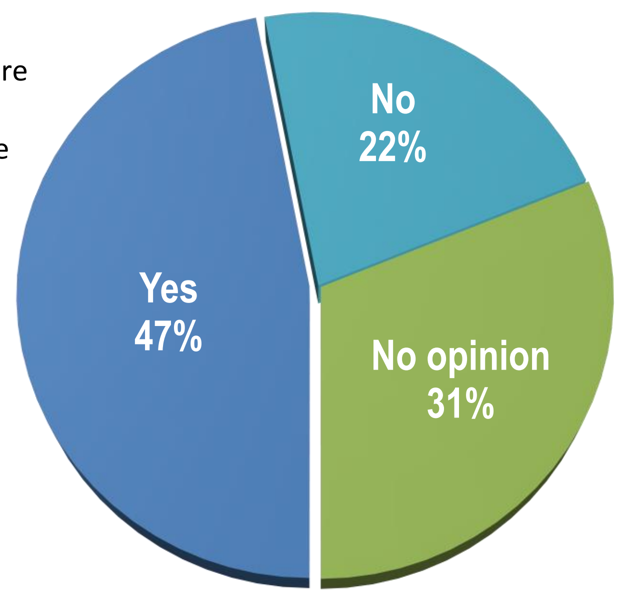
- In comparison, only 25% express a lower level of support—being somewhat supportive or not being opposed it others want it. Only 1% are opposed to live streaming or recording while another 9% have no opinion.



Sufficient Opportunity to Give the Board Input

One of the more critical aspects of communications to measure was "the two-way street"—determining how community members feel in terms of having sufficient opportunity to give the Board input regarding issues that they are addressing.

- Interestingly, 47% responded yes and 22% said no, with another 31% having no opinion.
- The good news is that almost 70% of those who have an opinion feel that they have sufficient input, but on the other hand, the sheer number with no opinion is interesting as is the phenomenon of having just under half feeling what we at least regard as enfranchised.

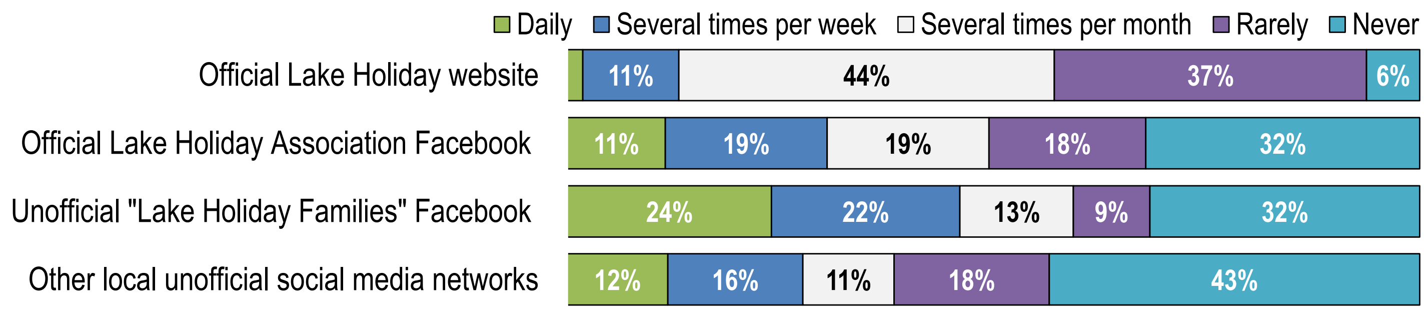


- By segment, the proportion who feel they have sufficient opportunity are more concentrated among households who are not working (61%), have a head 60 or older (54%), and no children (52%), and those who feel that dues are just about right (57%) or somewhat low (75%).
- Those who are least likely to indicate yes (to account for the fact we don't know quite how to interpret "no opinion" include non-resident/owners (38%), employed (39%), households with 3+ people (39%), heads under 50 (33%) and/or kids (33%).
- Also, those who feel dues are much too high (21%) or somewhat high (35%) and would definitely not support increased assessments (30%) are less likely to feel they have sufficient opportunity for input.
- Interestingly, the response varies only slightly by years of residency and what effort they answered, so there is consistency in this perception over the years and no apparent bias in the response.

Use of News Sources for Lake Holiday Information

The highest use reported for the four sources of information is one of the less-formal, as the unofficial "Lake Holiday Families" Facebook has almost half reporting visits/use daily or several times a week.

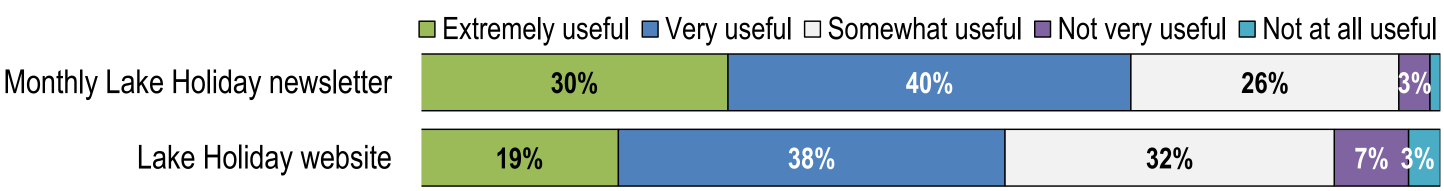
- In contrast, the official Facebook page has 30% who visit at least several times a week and another 19% who visit several times per month. There are 32% who don't use each Facebook page.
- Usage is lower for any other unofficial social media, yet almost 30% also visit them at least several times a week and 11% visit several times per month.
- The official website has a core audience of 13% who visit it at least several times a week, but usage is far more often several times a month (44%) or rarely (37%) and it definitely reaches an audience that social media cannot, with only 6% indicate they never visit it.



Usefulness/Quality

Consequently, the usefulness of the website is rated somewhat low, an average score of 3.63 on a 5-point scale.

- This reflects considerably more survey participants rating it somewhat useful (32%) than extremely useful (19%) and the most common response being somewhat useful (38%). Only 10% rate it lower, but overall, this is a somewhat utilitarian "report card"—not excellent, but competent in relaying necessary and timely information.
- The monthly newsletter is rated considerably higher at 3.95, with 40% rating it very useful and a substantial shift to extremely useful (30%) and away from somewhat useful (26%) or lower (4%).

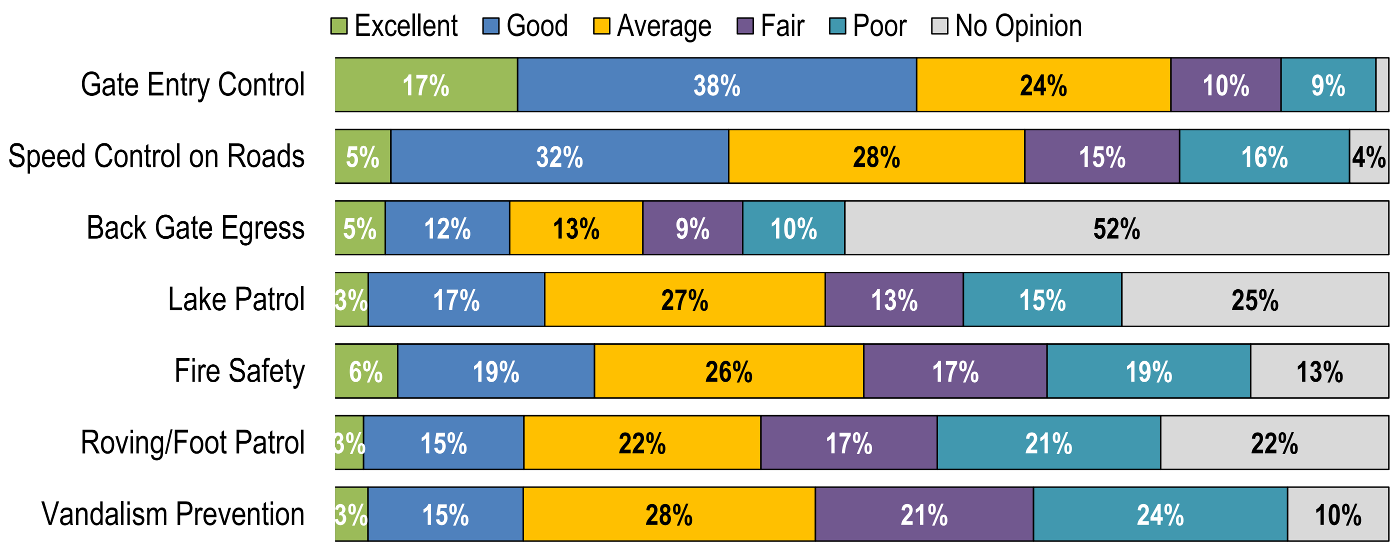


Security, Services, Safety, and Administration

Effectiveness of Security

The highest-rated aspect of LHCC safety is the gate entry control (3.45), which has an average rating roughly between good and average (62% combined), due to slightly more survey participants rating it fair or poor combined (19%) than who regard it as excellent (17%).

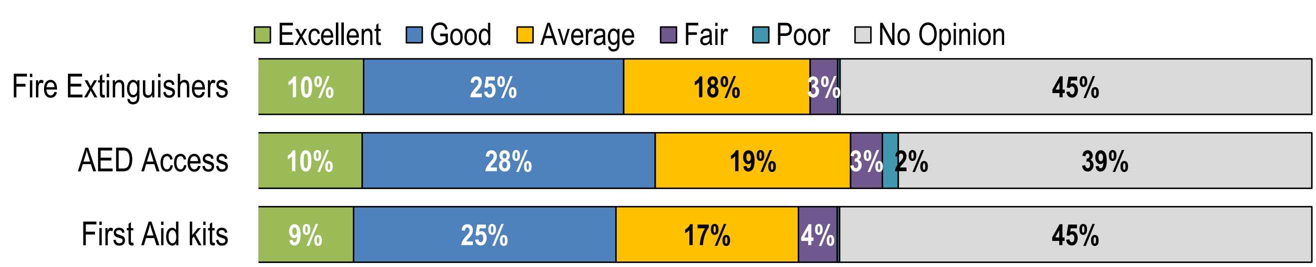
- Speed control on roads (2.96) has the second-highest rating, with 60% rating it good or average, but only 5% excellent and 31% fair or poor.
- Back Gate Egress (2.85) has about half who have no opinion and do not use.
- Lake Patrol (2.73) and Fire Safety (2.71) have similar ratings and the former has a small proportion with no opinion. Roving/Foot Patrol (2.51) and Vandalism Prevention (2.47) are rated lowest with even a higher proportion rating them fair or poor (38% and 45%, respectively) and fewer than 20% rating them excellent or good.



Effectiveness of Safety

The three aspects of LHCC safety are rated higher and almost identically, including fire extinguishers (3.75), first aid kits (3.71), and AED Access (3.68).

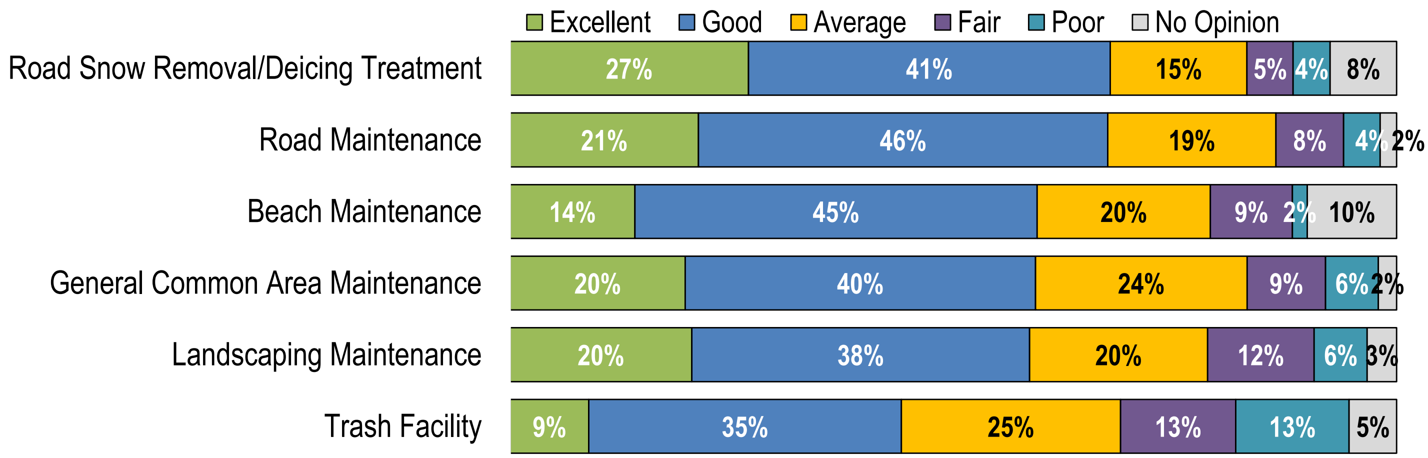
- Each has 9%-10% rating them excellent, 25%-28% good, and 17%-19% average with some variance in a relatively high proportion who have no opinion. This seems normal since most of us don't have brushes with circumstances that actually require deployment of security equipment.



Effectiveness of Services

In contrast, LHCC services are also highly-rated with almost all opinions held are at least average and very few have no opinion.

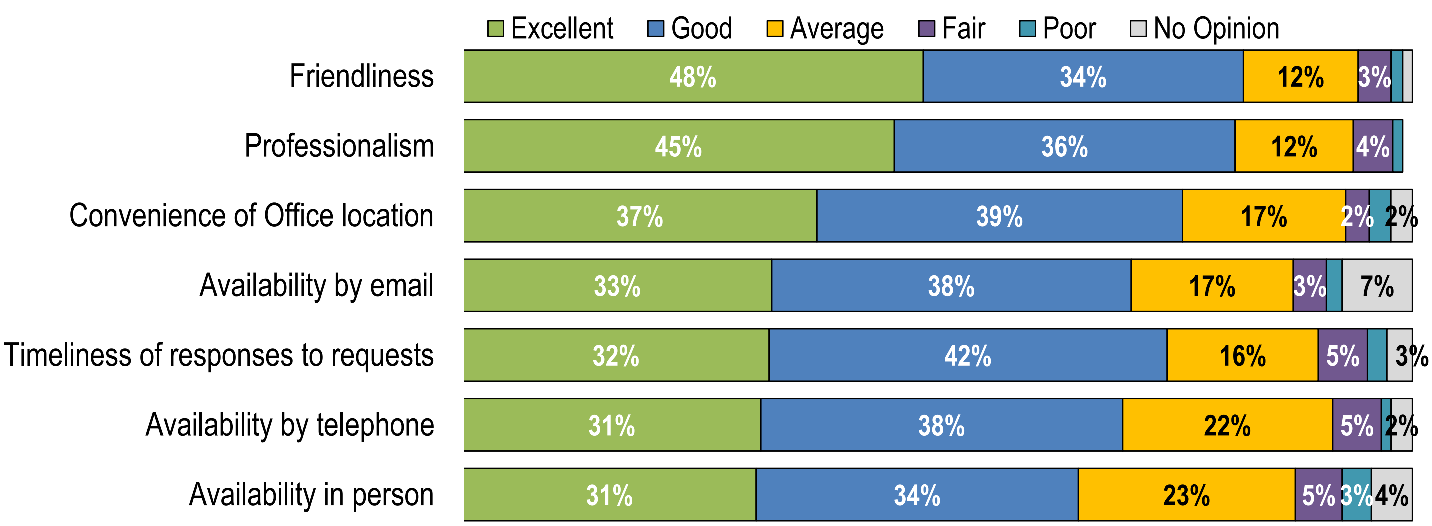
- Road snow removal or deicing treatment (3.88), and road (3.74) and beach maintenance (3.68) are rated highly. They have 27%, 21%, and 14%, respectively rating them excellent, with about 40% or more rating them good, and 15%-20% rating them average.
- General common area (3.59) and landscaping maintenance (3.57) are rated somewhat lower, due primarily to a higher proportion, 18% and 15% respectively, rating them fair or poor.
- The trash facility (3.15) is the one exception, rated much lower with only 9% rating it excellent and 35% good, with 25% average and 26% fair or poor.



Effectiveness of Office Administration

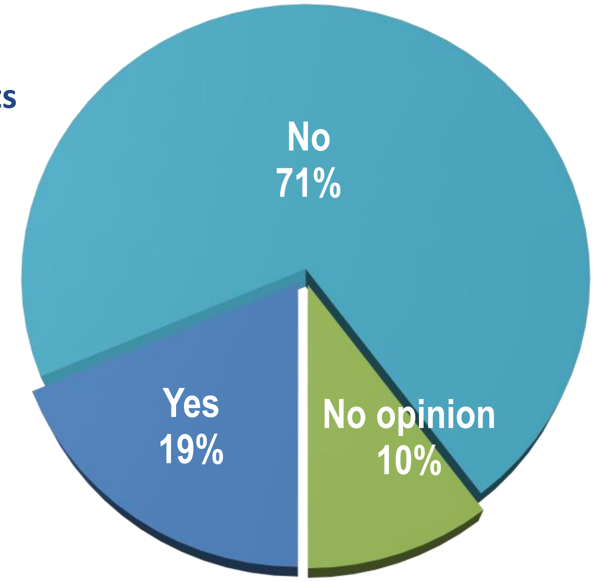
Within this section, office administration has the highest ratings. Friendliness (4.26) and professionalism (4.22) are rated highest, with almost half rating them excellent, 12% each rating them average, and most of the remainder rating them good.

- Various dimensions of access are all rated similarly with convenience of office location (4.08), availability by email (4.04), and timeliness of responses to requests (4.00) rated slightly higher, and availability by telephone (3.96) or in person (3.88) slightly lower.
- The final four each have about one-third rating them excellent, more rating them good, and fewer rating them average 5%-8% each rating them fair or poor.



Restaurant at Lake Holiday

Paying Special Assessment to Cover Construction Costs

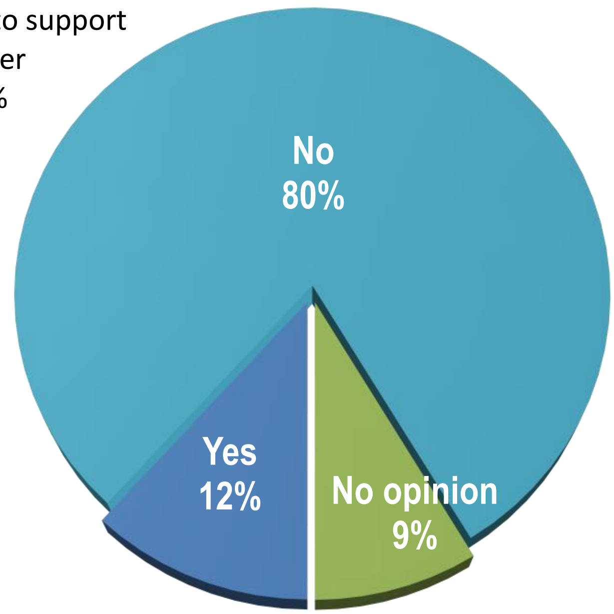


This is a somewhat predictable finding given previous responses to the survey, but a large majority (71%) of survey participants are unwilling to support the construction of a restaurant at Lake Holiday by paying a special assessment to cover the construction costs.

- Only 19% indicated yes to the question and 10% had no opinion. Open-ended questions featured much more elaborate responses to the idea.

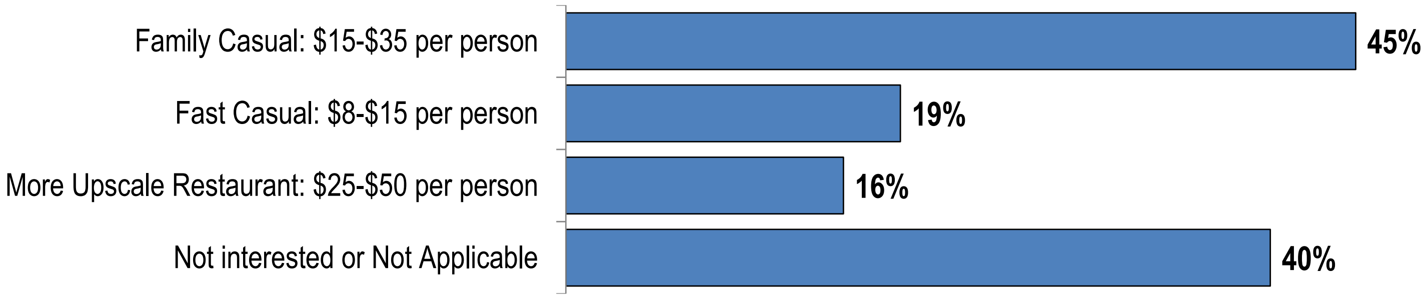
Paying Increased Monthly Dues

There is a somewhat more negative response to the separate question of whether, if a restaurant were to be established within Lake Holiday, if they as a homeowner, would be willing to support it by paying increased monthly dues on a continual basis to cover operational costs for utilities. In a sense it is surprising that 12% say yes and 9% have no opinion.



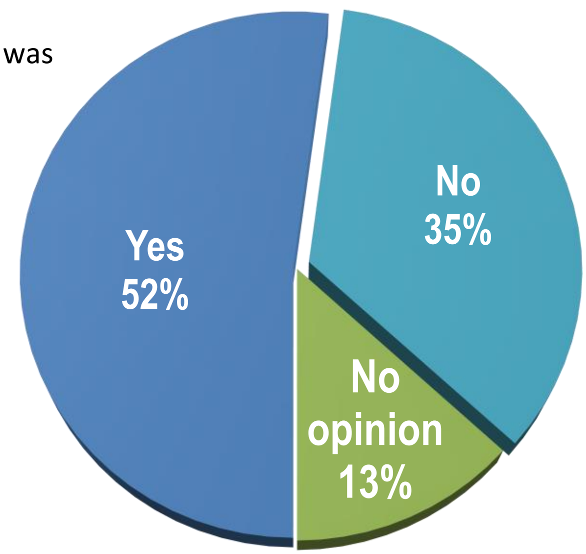
Type of Dining Experience of Interest

If a restaurant were to be established within Lake Holiday, survey participants are most likely to say that they would prefer a family casual (45%) rather than the extremes of a lower-priced fast casual format (19%) or a more upscale format (16%). Some indicated multiple formats would be preferred, as another 40% indicate no interest or that it is not applicable.



Support the Serving of Alcohol

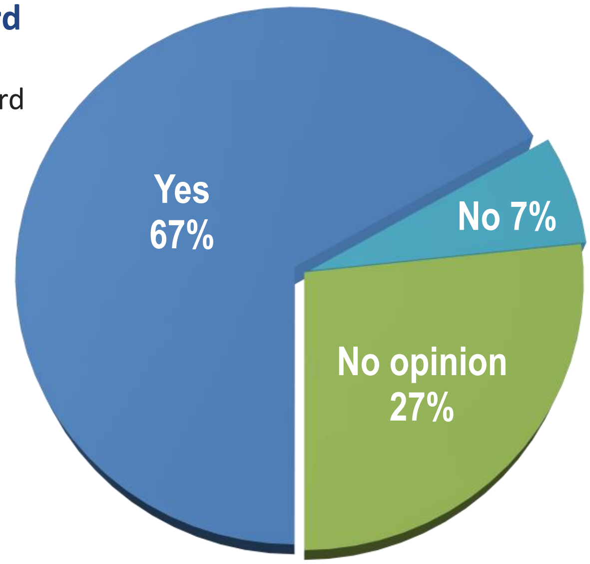
Roughly half (52%) would support serving alcohol, if a restaurant was to be established within Lake Holiday. Another 35% would not support it, with 13% having no opinion.



Bylaws Revision: One Member Per Owned Lot on Board

A long question informed survey participants that membership recently voted for a Bylaws change to reduce the number of Board members to nine. During annual elections for the Board, members can only submit one vote per lot owned. The question was "Should we revise Bylaws to reflect a similar restriction, so that only one member per lot owned can be on the Board at any one time?"

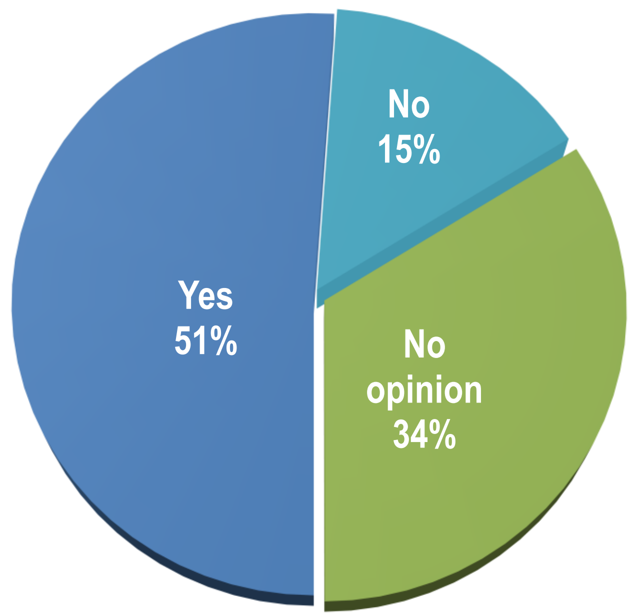
- The answer was a clear, unequivocal yes, with 67% indicating this and another 27% expressing no opinion. Only 7% said no.



Vendor to Provide Fiber Optic Service

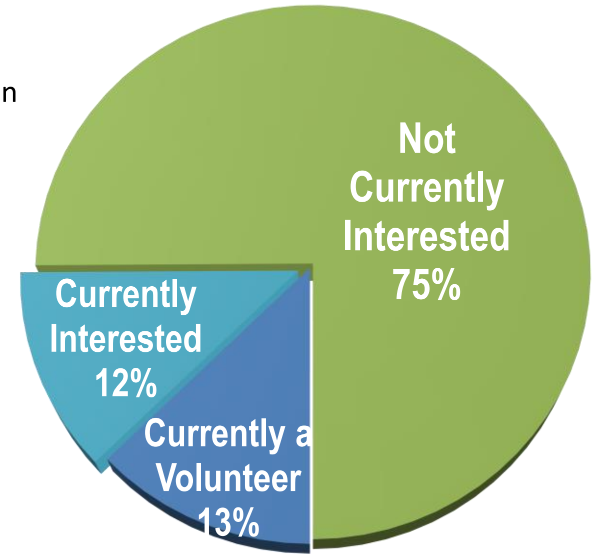
Another long question noted that it has been suggested that LHCC try to bring fiber optic services (internet and TV) to Lake Holiday, and would they be interested in joining with others in the community to get a vendor to provide fiber optic services.

- This question had about one-half check the positive option, while 15% said no and another 34% had no opinion.
- This may be an area that requires more public education, particularly if the half who would adopt (or whatever this dwindles to, based on final price) is needed for a break-even service.



Participating in LHCC Volunteer Opportunities

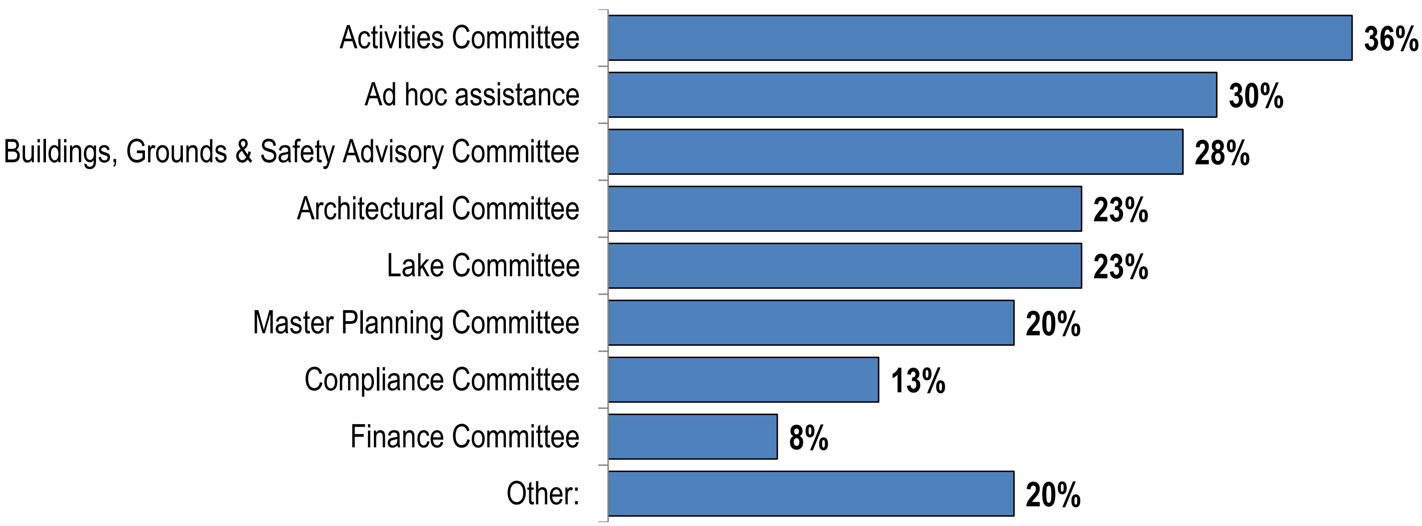
When asked if they or someone in their household are interested in learning more about LHCC volunteer opportunities, 12% indicated an interest, while a large majority (75%) were not currently interested, and 13% are currently volunteering.



Interested in Learning More

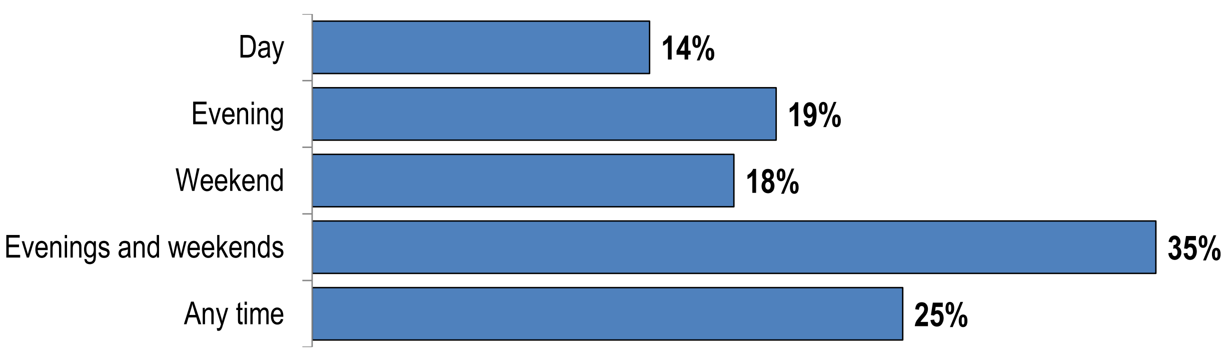
The most common areas that survey participants were interest in learning more about are the Activities (36%) and Buildings, Grounds & Safety Advisory Committees (28%), and ad hoc assistance (30%).

- Similar, smaller numbers are interested in the Architectural, Lake (23% each) and Master Planning Committees (20%) while 13% were interested in the Compliance and 8% in the Finance Committee.
- Of course, these proportions are based on the small number who indicated current interest, so at most these results reflect 4.5% of survey participants.



Time you would Participate in LHCC Volunteer Opportunities

If they are able to volunteer on a committee or in other ways, the most common time that works for them would be evenings/weekends (35%) while another 25% could meet anytime. Between 14%-18% indicated a preference for weekends or evenings, or daytime only.



2022 Lake Holiday Country Club Survey Background

Every five-years the Master Planning Committee (MPC) conducts a survey on behalf of the Lake Holiday Country Club (LHCC) Board of Directors.

The purpose of the survey is to gather data to assist the LHCC's Board, Master Planning and other Committees in assessing priorities of association members and tenants regarding community resources, and identifying potential new projects that if approved, would require Capital Improvement Plan (CIP) funding.

Sections of the survey were designed to gather demographics, clarify results from previous surveys, and assess emerging or potential issues and opportunities facing the community.

The 2022 survey was conducted June 16-July 8 and was open to association owner and tenant respondents, and was administered by a 3rd-party consultant, Whorton Research. We appreciate everyone who took the time to take the survey.

How the View the Survey Results:

The 2022 Community Survey results were briefed by Kevin Whorton, Whorton Research, at the August 23, 2022 LHCC Board of Directors meeting here: https://www.youtube.com/channel/UCDbcSlj9lCAxuMEaY6qMEKA (listed as "LHCC Committees' Zoom Meeting 2:25:13). The survey briefing begins at 6:22 and concludes at 1:06:54.

Special thanks to the 2022 Survey Task Team, including project lead, Betka Hardgrave, and team members Dave Buermeyer, Michele Bradshaw, Beth Harrington, Cathy Melcher, Pat Majewski and John Stover, and our survey firm, Whorton Research.

Photo Credit: Cover photo by Cathy Melcher, used with permission.