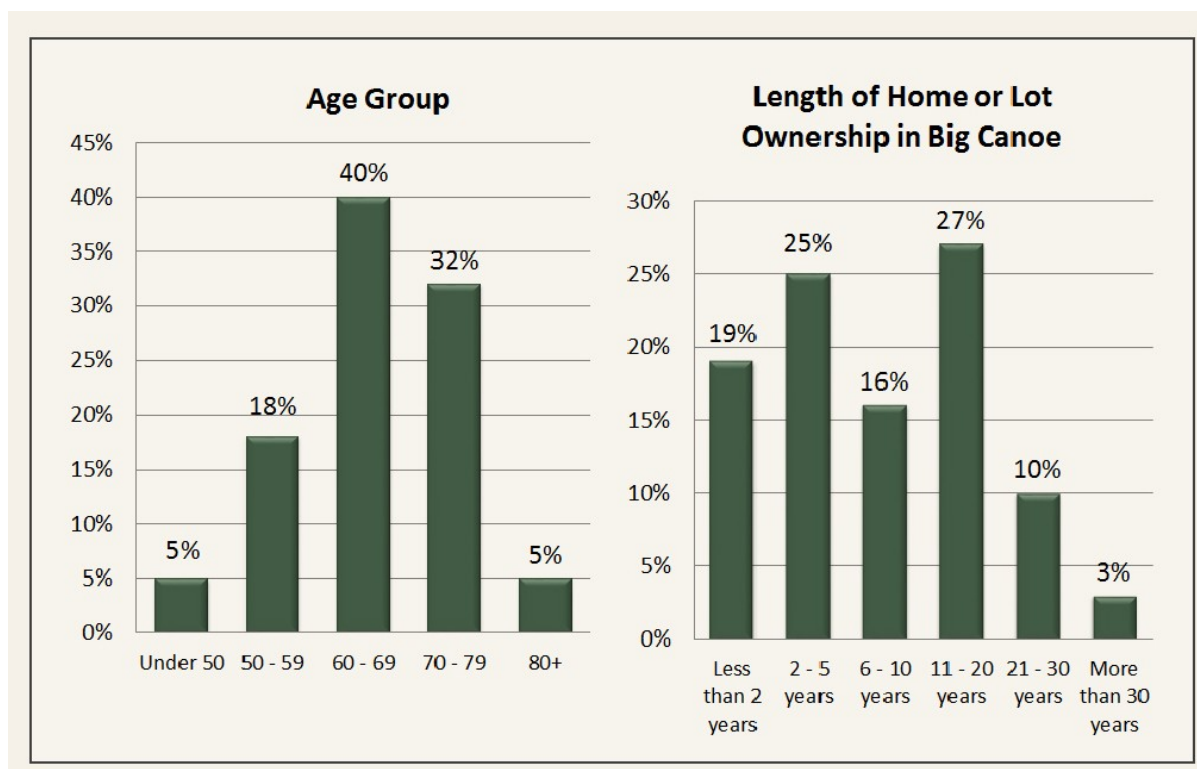


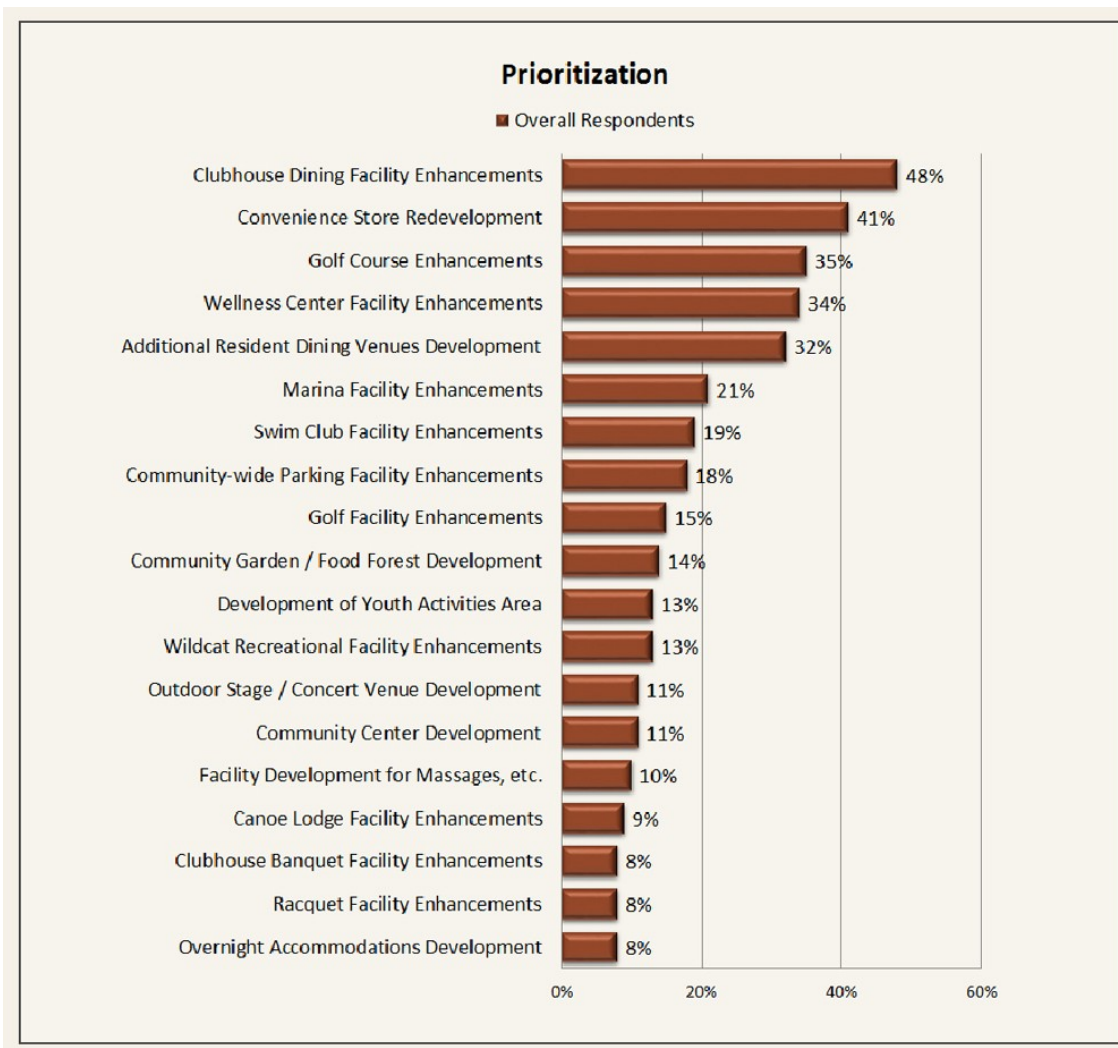
Long-Range Master Plan survey results summary

In the summer of 2018, the Big Canoe POA engaged Chambers to assist our Community in reviewing our ongoing comprehensive master planning efforts as we look to the future. Chambers input is but one component to the overall planning effort underway, and their findings and recommendations are being reviewed by the Long Range Planning and Finance Committees to ensure that the final plan is in keeping with Big Canoe's mission and vision. Chambers results will become but a part of the overall community master plan that is being continuously updated. We are first and foremost, a unique mountain community with terrific amenities. We are NOT a resort and this survey was not initiated to change or influence that. Initially, Chambers held several Focus Group meetings to obtain firsthand feedback on how residents currently utilize community facilities, as well as how they believe each could be improved in the future. Recently, property owners were asked for their input in the form of a comprehensive electronic facilities planning survey. The questions in this survey were a direct result of the Focus Groups, with the intention of helping determine how to continually improve the overall experience at Big Canoe for existing and new property owners. While resident priorities are a key component to our facilities planning efforts, we must also balance industry trends, operational needs, required maintenance, and the financial threshold of our Community throughout this process. The following pages illustrate some of the key highlights of the facilities planning survey results.

RESPONDENT DEMOGRAPHICS



The survey was sent to all property owners for their completion. A total of 1,858 surveys were returned from 1,350 unique lot numbers, resulting in 40% of all property owners responding to the survey. The survey responses were cross-tabulated based upon age, lot-only versus dwelling, tenure in BC, etc., which is extremely valuable in analyzing the results and studying usage and needs of various resident segments. We received an excellent cross-representation of residents across all age groups and length of residency at Big Canoe. When asked about their satisfaction with the Community, 87% of respondents indicated they are either "very satisfied" or "satisfied" with their current community experience.



SUMMARY

Let's start with the finish – what did the survey tell us? Following this is more specific explanations by amenity which will provide further insight and details. Overall, in summary and across all amenity user groups, the enhancements that Big Canoe property owners feel are top priority are:

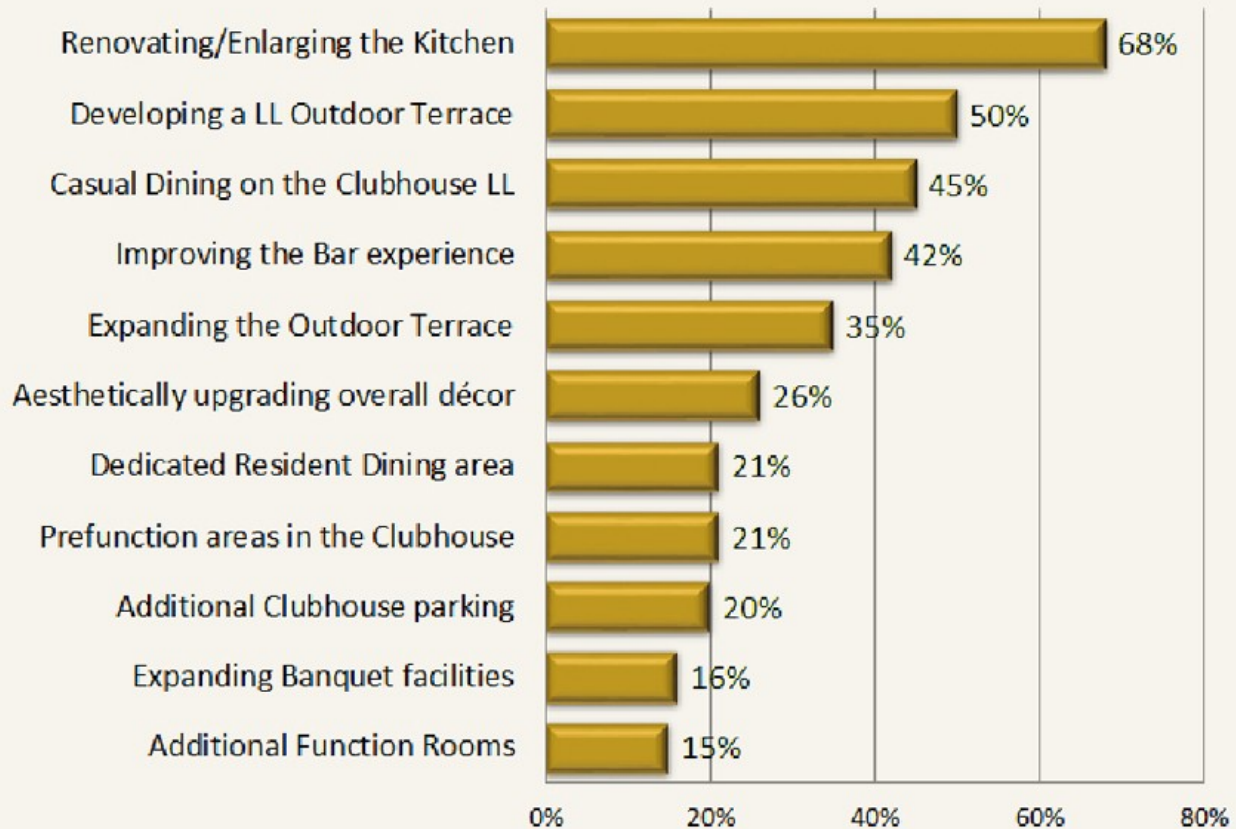
- Clubhouse Dining Facility enhancements (48%)
- Convenience Store redevelopment (41%)*
- Golf course enhancements (35%)
- Wellness Center upgrades (34%)
- Additional resident dining venues (32%)

While the order of these top five priorities may have changed based on various demographics, clubhouse dining facilities remained the highest priority, with the other four improvements to follow. The prioritization of other potential enhancements is shown in the chart at right.

**NOTE - Chambers included a convenience store concept into their survey inquiry as this is sometimes an amenity offered in clubs across the country. They are typically subsidized by the owners association because there is seldom enough population to support a for-profit operation. While approximately 50% of our current population were not here when the owner of the Foothills IGA operated a general store in the village core, it never made a profit. There simply are not enough people inside the gates to support any type of traditional retail.*

Clubhouse Enhancements

Overall Respondents



CLUBHOUSE ENHANCEMENTS

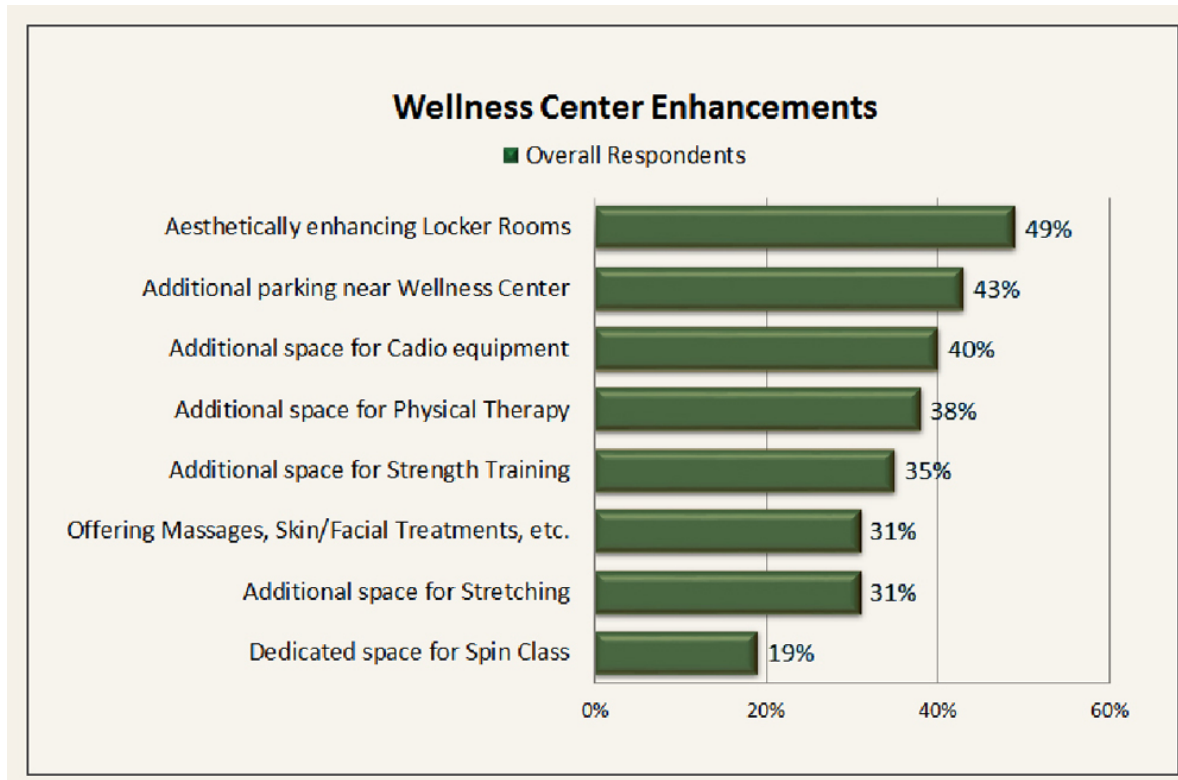
Property owners were asked to indicate how important they feel various potential facility enhancements are on a scale of 1.0 (Very Unimportant) to 5.0 (Very Important). The key points from this effort are as follows:

- 68% of respondents wish to renovate and enlarge the kitchen facilities to provide improved menu offerings
- 50% suggest developing an outdoor terrace off the lower level of the Clubhouse
- 45% thought developing a casual dining venue on the lower level of the Clubhouse was important
- 42% believe we should provide an improved bar experience.

The importance of additional potential enhancements can be seen on the chart above. While all resident input is crucial to our overall planning efforts, it is important that we study the interests of those who have purchased a home/lot at Big Canoe most recently as they are the best indicators of the needs of prospective residents in the coming years. The enhancements that are most important to respondents who have been residents of the Community for less than two years mirror those outlined above. The Board and Long Range Planning Committee will continue to study all feedback throughout the ongoing planning efforts.

GOLF EXPERIENCE ENHANCEMENTS

Overall, 42% of survey respondents have utilized the golf facilities in the past year—46% are Golf Club members and 54% pay per round of golf. Golfers were asked to indicate the level of importance of potential course enhancements on the same 1.0-5.0 scale as above. Fifty-two percent (52%) of golfers revealed that enhancing Duffers for an improved Turn experience and additional menu capabilities is the most important upgrade, including 62% of residents who have been at Big Canoe for less than two years, and 70% of those who visit Duffers frequently.



WELLNESS CENTER ENHANCEMENTS

Overall, 63% of survey respondents have utilized the Wellness Center in the past year—70% are Wellness members and 30% pay per use. Key areas for improvement were identified as follows:

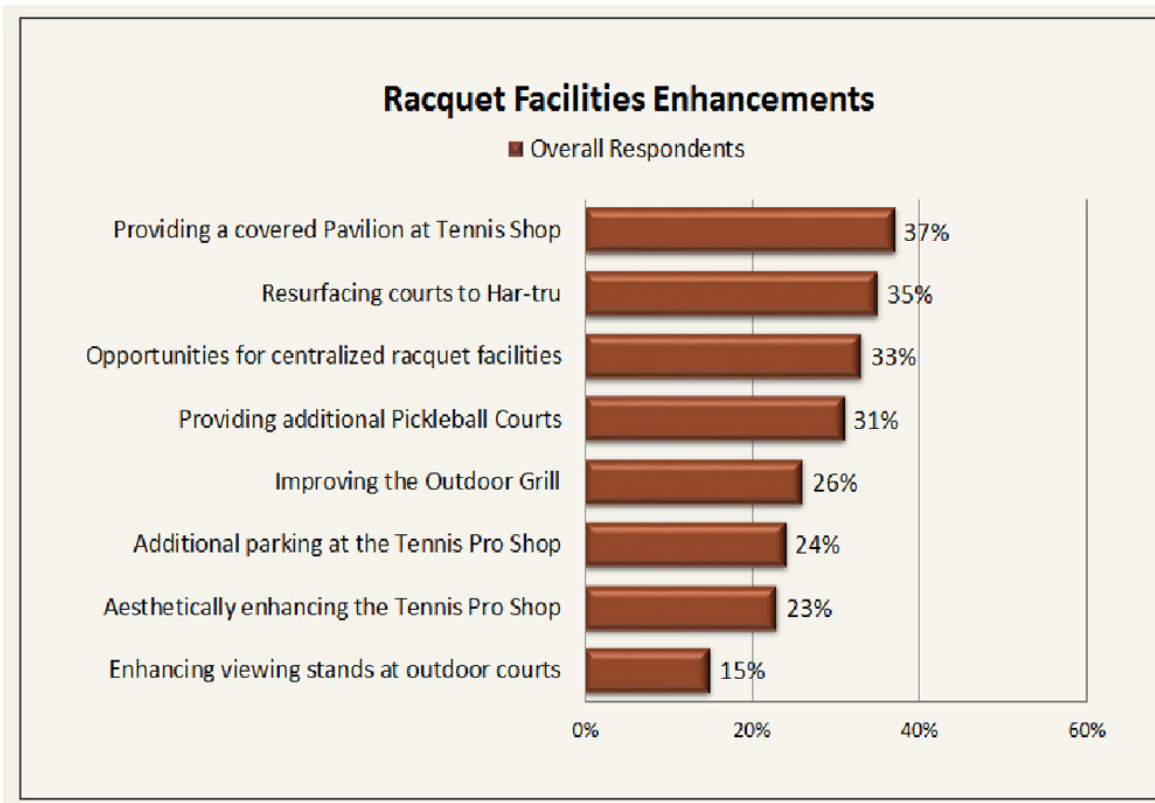
- 49% mentioned the importance of aesthetically enhancing the Locker Rooms
- 43% of users indicated additional parking was important
- 40% wanted additional cardio space
- 38% would like to see additional physical therapy space, including 70% of those over age 70.

SWIMMING EXPERIENCE ENHANCEMENTS

Fifty-seven percent (57%) of respondents indicated they have utilized the Swimming Facilities in the past year. Areas for improvement included:

- 54% indicated providing additional shade at the Pool as the most important enhancement
- 50% wanted additional parking near the Swim Club
- 49% believe the kitchen facility should be renovated and enlarged
- 46% suggested renovating the changing rooms/restrooms.

Residents who have moved to BC in the last two years expressed a stronger (53%) desire for an adult cabana bar area than did the overall membership (35%). Again, this speaks to potential new residents.



RACQUET FACILITIES ENHANCEMENTS

Overall, 18% of respondents have utilized the Racquet Facilities in the past year. The survey revealed the following:

- 37% indicated that providing a covered pavilion-type structure at the Tennis Shop was either important or very important
- 35% of overall respondents indicated resurfacing the current Clay-tec courts to Har-tru as important
- 33% suggested investigating the possibility of centralized racquet facilities with both indoor and outdoor courts in close proximity to each other
- 31% want additional Pickle ball Courts

Other elements respondents believed were important to enhance can be seen in the chart above.

WILDCAT FACILITIES ENHANCEMENTS

Sixty-two percent (62%) of respondents indicated they have utilized the Wildcat Facilities in the past year. As to potential enhancements to these facilities:

- 37% of respondents indicated providing additional shade at the Pool to be most important
- 31% of overall respondents, and 47% of respondents who have been a resident for less than two years, indicated the importance of developing an ultra-casual sports bar-themed dining area near the Pool and an additional dining venue
- 22% recommend potential enhancements to the current Pavilion and restroom facilities
- 19% believe we should enhance the Bocce courts with shade pavilions
- 14% would like to see a Croquet Lawn

MARINA ENHANCEMENTS

Overall, 73% of respondents have utilized the Marina in the past year. The single most desired upgrade to the marina (51%) is providing additional parking at the Marina. In addition:

- 33% of overall respondents indicated additional pontoon boat rentals to be important
- 26% wish to expand the number of docks for additional slip capacity for rentals and/or resident boats.

OTHER POTENTIAL ENHANCEMENTS

Residents were then asked to provide input on various other potential enhancements for the Community. Overall, 61% of respondents indicated the importance of recreating the General Store for quick prepared foods, daily essentials, etc., including 77% of those who spend weekends or vacation at Big Canoe. Residents also expressed interest in developing an improved community Post Office (54%), offering additional community-owned dining venues within Big Canoe (42%), enhancing the Canoe Lodge at Sconti Lake as a meeting/event space (39%), developing a Community Center for additional meeting rooms, card playing, etc. (33%), and providing a youth activity room for children (29%).

CURRENT AND FUTURE RESIDENT USAGE

Finally, to assist in managing the community's facilities into the future, the survey asked which improvements they feel would have the greatest impact on Big Canoe's ability to attract new residents and increase current owner usage. The top four follow, with the complete list in the adjoining Prioritization chart.

- 61% of respondents revealed that they believe Clubhouse dining Facility enhancements would have the greatest impact on the Club's ability to attract new residents
- 55% reported a Convenience Store as their second priority
- 50% then indicated additional resident dining venues
- 47% thought enhancing the Wellness Center to be next

NEXT STEPS

We would like to thank everyone who responded to the survey. Your input is critical to our future planning for the Big Canoe community. We are in the process of reviewing the full survey findings, which will help guide us in our continued planning efforts as we strive to maintain and improve the overall Community experience. Please understand that no decisions have been made at this time with regard to significant facilities enhancements. This survey has served as a method for residents to provide feedback about your Community experience to help maintain and enhance the community we all love. Please know that we will continue to keep you involved and informed as we progress through the planning process.