

Review of Facilities Planning Survey Results





Facilities Planning Survey Process

- Based on the POA's discussions to date regarding the development of a Long Range Plan, a Survey was developed to gather input from community on the various improvements discussed and priorities for implementation
- The survey was emailed to all Residents for their completion.
- 1,858 Surveys were returned from 1,350 unique lot numbers resulting in 40% of the overall Property Owners responding to the survey.
- Given this response, there is a 95% confidence level that if every Resident responded to the Survey, we would be within ± 2.2%.



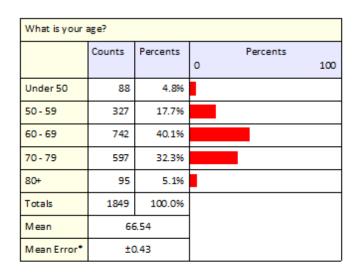
Survey Process

- The Facilities Planning Survey results deliverables include:
 - A Key Point Summary including Chambers in depth demographical analysis along
 - A quantitative Executive Summary
 - A 199-page compilation of Resident Write-In Comments cross tabulated by Age Group
 - 149 pages of Demographic Analysis including 189 charts across
 34 unique questions
 - Total Report is 511 Pages of Charts, Comments and Analysis

Which of the following most closely matches your Big Canoe residency status?

Which of the following most closely matches your Big Canoe residency status?						
	Counts	Percents	Percents 0 10	0		
Full time Resident and only home	1182	63.8%				
Weekend / vacation home	338	18.3%				
Primary home but own other home(s)	192	10.4%				
Lot owner	52	2.896				
Rent to others	27	1.5%				
Other	61	3.3%				
Totals	1852	100.0%				
Freq Error*	±2.2%					

What is your age?



Which of the following most closely matches your Big Canoe residency status?

	Overall		Residency Status									Employm	atus			AgeGroup								
			Full time Resident only hom	and	Weekend		Primary h but own home(s)		Lot owne	er	Other		Retired / not work		Employed	d full-	Employed part-time		Under 60)	60 - 69		70+	
	1	858	63.8%,	1182	18.3%,	338	10.4%,	192	2.89	6, 52	4.8%	, 88	62.6%, 1	1158	26.3%,	487	11.0%,	204	22.4%,	415	40.1%,	742	37.4%,	, 692
Which of the following most closely matches your Big Canoe residency status?																								
Full time Resident and only home	63.8%	1182	100.0%	1182	0.0%	0	0.0%	0	0.0%	0	0.0%	0	69.9%	807	49.9%	243	64.0%	130	51.4%	213	65.1%	482	69.8%	482
Weekend / vacation home	18.3%	338	0.0%	0	100.0%	338	0.0%	0	0.0%	0	0.0%	0	13.1%	151	30.4%	148	18.2%	37	31.6%	131	17.7%	131	10.9%	75
Primary home but own other home(s)	10.4%	192	0.0%	0	0.0%	0	100.0%	192	0.0%	0	0.0%	0	10.8%	125	9.0%	44	10.3%	21	7.7%	32	10.0%	74	12.4%	86
Lot owner	2.8%	52	0.0%	0	0.0%	0	0.0%	0	100.0%	52	0.0%	0	2.2%	25	4.5%	22	2.5%	5	3.9%	16	2.3%	17	2.7%	19
Rent to others	1.5%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	30.7%	27	1.0%	11	3.1%	15	0.5%	1	2.2%	9	1.8%	13	0.7%	5
Other	3.3%	61	0.0%	0	0.0%	0	0.0%	0	0.0%	0	69.3%	61	3.1%	36	3.1%	15	4.4%	9	3.1%	13	3.1%	23	3.5%	24
Totals	100.0%	1852	100.0%	1182	100.0%	338	100.0%	192	100.0%	52	100.0%	88	100.0%	1155	100.0%	487	100.0%	203	100.0%	414	100.0%	740	100.0%	691
Freq Error*	±	2.2%	:	0.0%	4	£0.0%	2	0.0%	4	±0.0%	±	9.8%	4	2.7%	4	4.5%	4	6.7%	4	4.9%	2	3.5%	4	±3.5%

^{*} Note: Frequency error covers 95% of distribution.

	Overall Length of Property Ownership in Big Canoe							Anticipated years remaining at Big Canoe														
			Less than years	2	2 - 5 year	'S	6 - 10 ye	ars	11 - 20 ye	ears	21+ year	S	5 years o	r less	6 - 10 yea	ers	11 - 15 ye	ears	16 - 20 y	ears	More that	in 20
	18	858	19.1%,	353	24.8%,	457	16.6%,	306	26.7%,	492	12.8%,	236	14.6%,	268	23.6%,	434	19.2%,	354	16.8%,	310	25.8%,	474
Which of the following most closely matches your Big Canoe residency status?																						
Full time Resident and only home	63.8% 1	1182	58.5%	206	65.4%	298	62.2%	189	68.7%	338	61.0%	144	60.4%	162	67.1%	291	66.2%	233	68.0%	210	59.2%	280
Weekend / vacation home	18.3%	338	23.3%	82	18.2%	83	20.4%	62	15.0%	74	14.4%	34	14.6%	39	17.1%	74	18.5%	65	15.2%	47	23.5%	111
Primary home but own other home(s)	10.4%	192	9.9%	35	9.6%	44	11.8%	36	9.1%	45	13.1%	31	11.9%	32	9.7%	42	10.8%	38	10.7%	33	8.7%	41
Lot owner	2.8%	52	3.4%	12	1.1%	5	1.3%	4	3.0%	15	6.8%	16	6.7%	18	0.7%	3	0.9%	3	2.6%	8	4.0%	19
Rent to others	1.5%	27	0.6%	2	1.5%	7	1.3%	4	2.0%	10	1.7%	4	1.5%	4	1.8%	8	2.0%	7	1.3%	4	0.8%	4
Other	3.3%	61	4.3%	15	4.2%	19	3.0%	9	2.0%	10	3.0%	7	4.9%	13	3.7%	16	1.7%	6	2.3%	7	3.8%	18
Totals	100.0% 1	1852	100.0%	352	100.0%	456	100.0%	304	100.0%	492	100.0%	236	100.0%	268	100.0%	434	100.0%	352	100.0%	309	100.0%	473
Freq Error*	±2	2.2%	±	5.3%	5	4.5%	3	5.6%	3	4.2%	3	£6.3%	±	6.0%	±	4.5%	±	5.0%	5	5.3%	1	4.5%

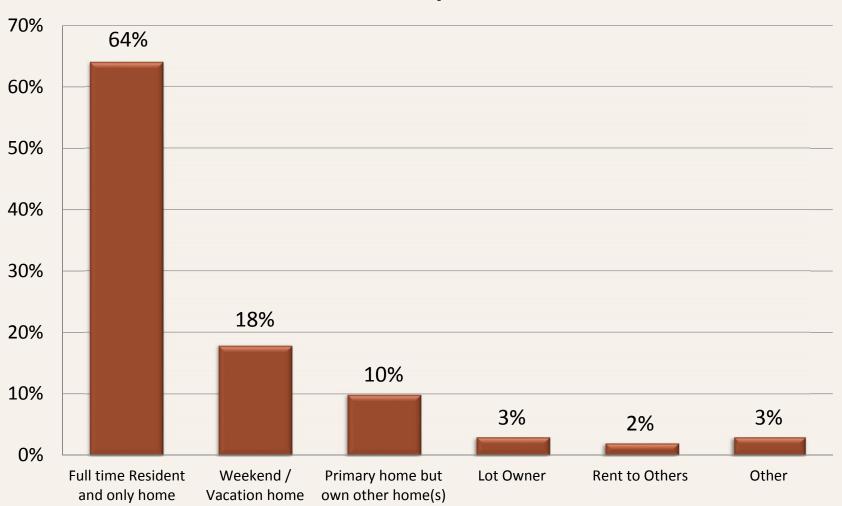
^{*} Note: Frequency error covers 95% of distribution.

Respondent Analysis



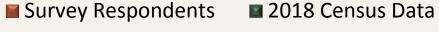


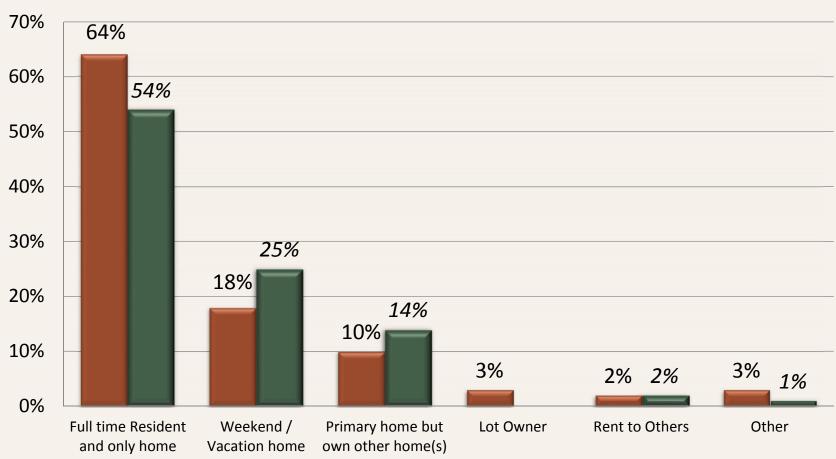
Residency Status





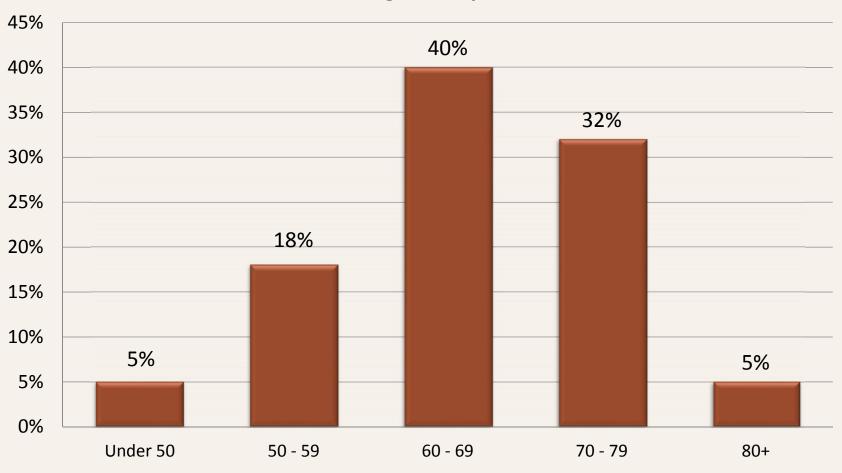
Residency Status







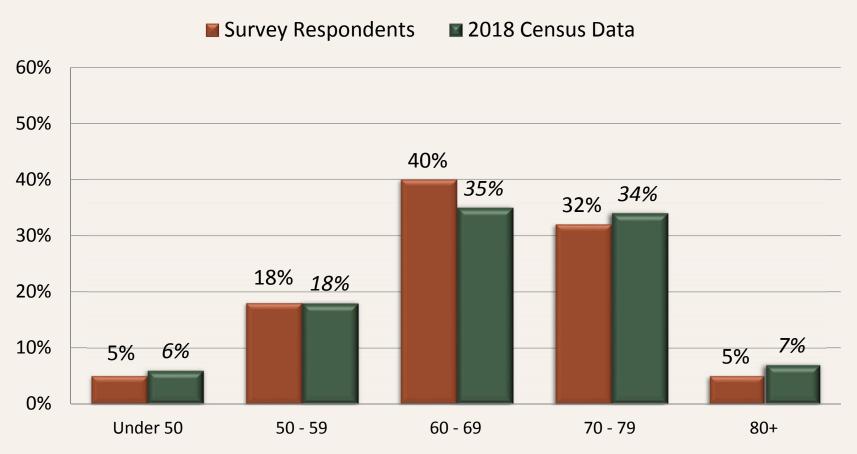




Average Age of Survey Respondents = 66.5 Years Old



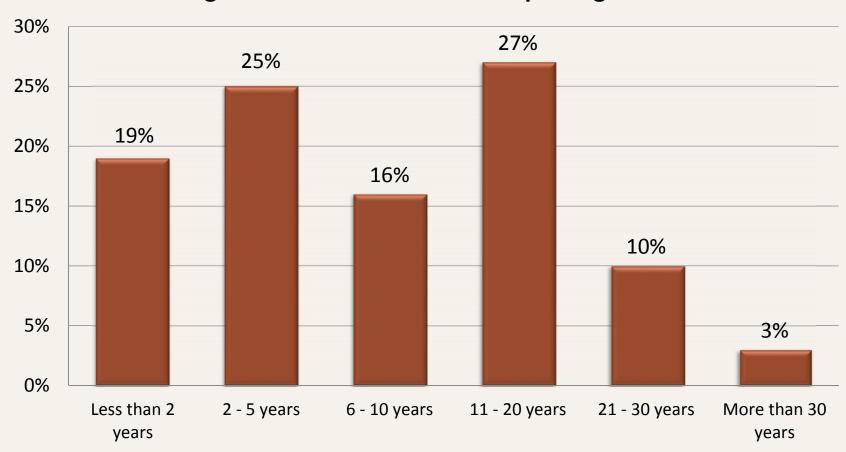
Age Group



Average Age of Survey Respondents = 66.5 Years Old Mean Age of 2018 Census Data = 66.5 Years Old



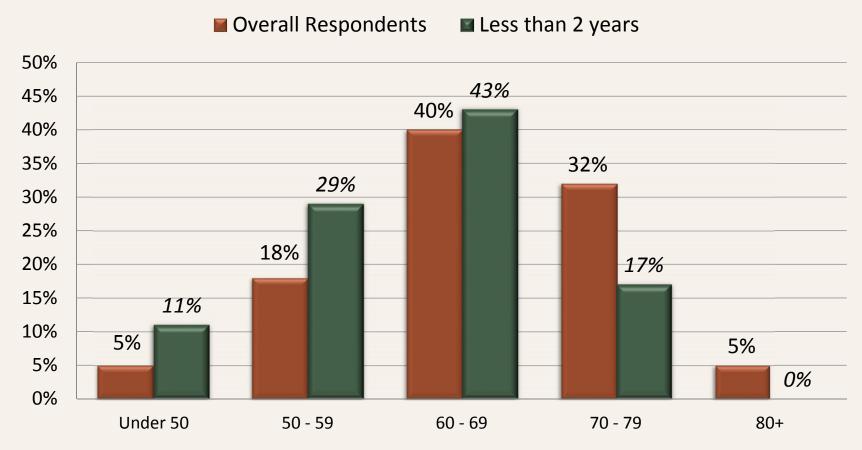
Length of Home or Lot Ownership in Big Canoe



Average Length of Survey Respondents = 9.9 Years Mean Length of 2018 Census Data = 10.3 Years



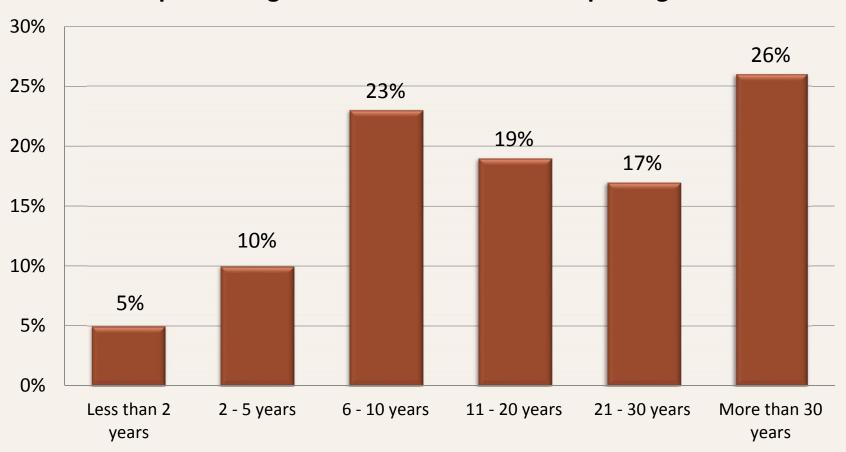
Age Group



Average Age of Overall Respondents = 66.5 Years Old Average Age of Purchasers within Last 2 years = 61.7 Years Old

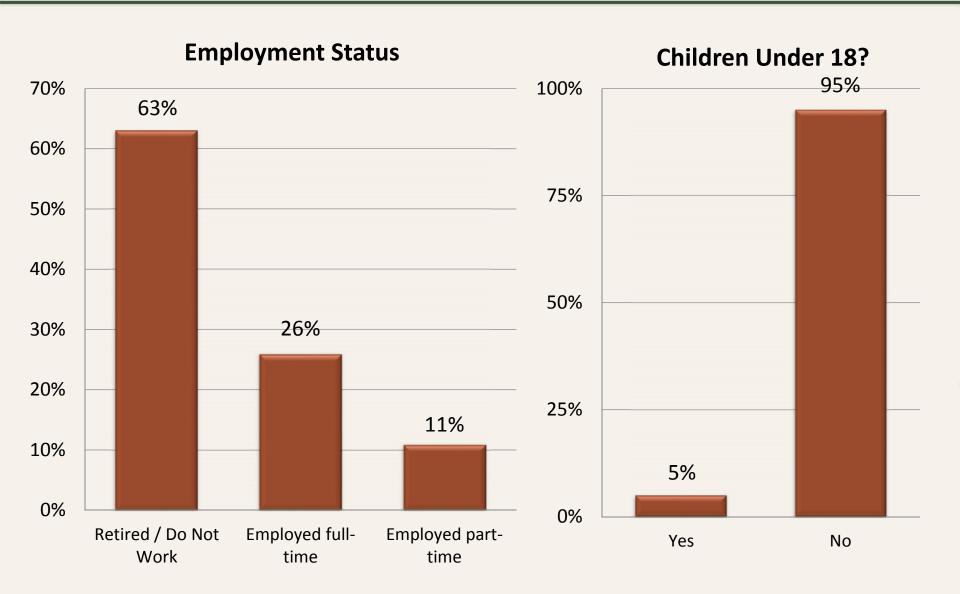


Anticipated Length of Home or Lot Ownership in Big Canoe



Average Length of Survey Respondents = 14.3 Years







Overall Satisfaction

Overall, how satisfied are you with your experience in Big Canoe?

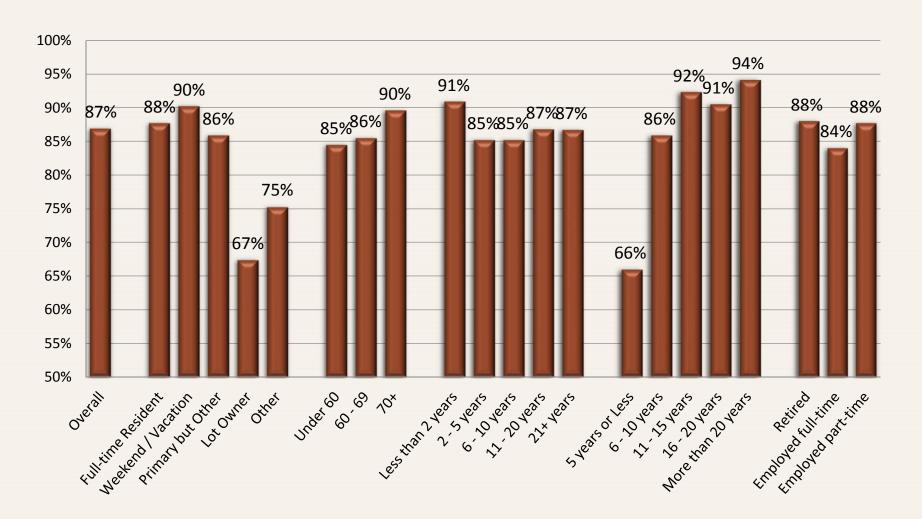
Overall Satisfaction	Big Canoe	Other Clubs / Communities **
Very Satisfied	41%	39%
Satisfied	46%	50%
Neutral	9%	8%
Dissatisfied	3%*	2%
Very Dissatisfied	1%*	1%

^{*}Sixty-six (66) Respondents indicated their dissatisfaction

^{**} Based on industry statistics of 107 country clubs surveyed

Overall, how satisfied are you with your experience in Big Canoe?

■ % indicating Very Satisfied or Satisfied



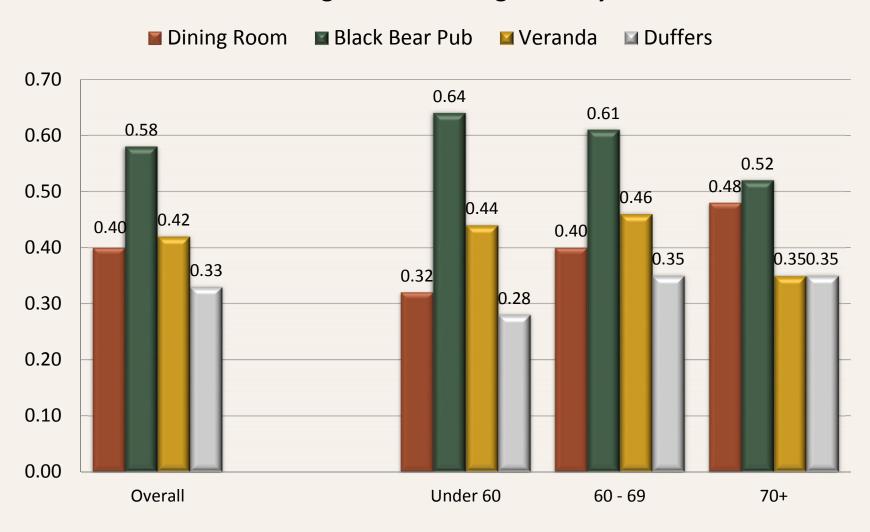
Clubhouse Facilities Usage and Potential Enhancements





Clubhouse Dining Facility Usage

Clubhouse Dining Venue's Average Weekly Utilization

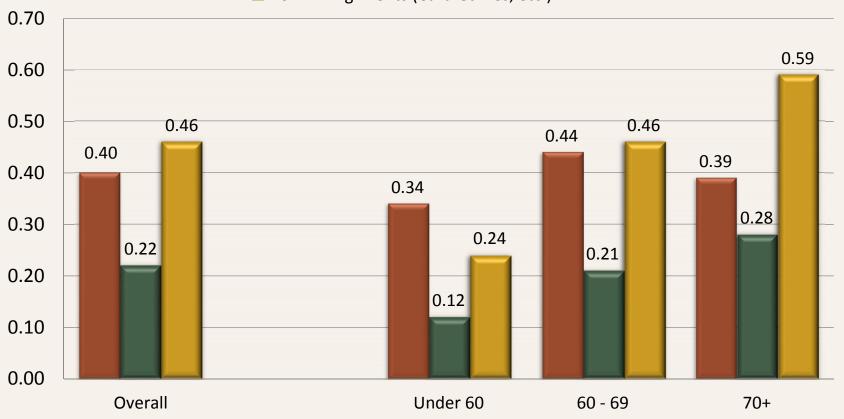




Clubhouse Function Facility Usage

Clubhouse Organized Events Average Monthly Utilization

- Themed Resident Events (Trivia Night, etc.)
- Private Group Functions / Events
- Non-Dining Events (Card Games, etc.)

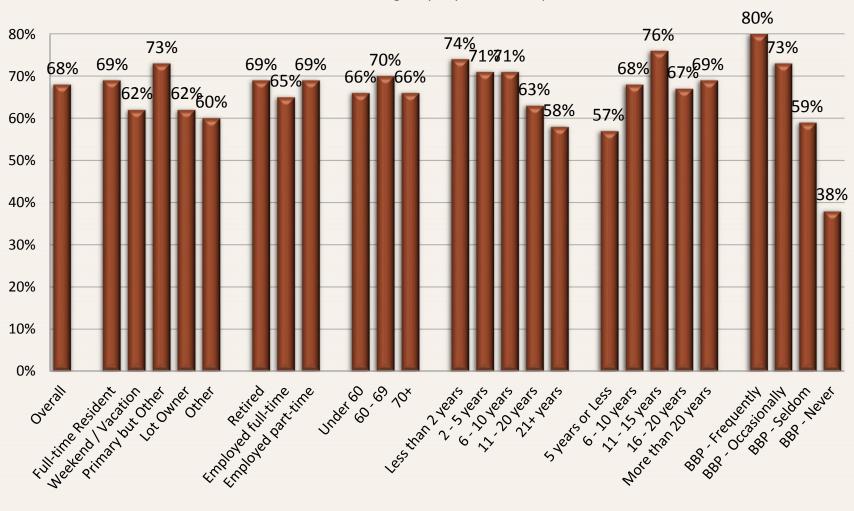




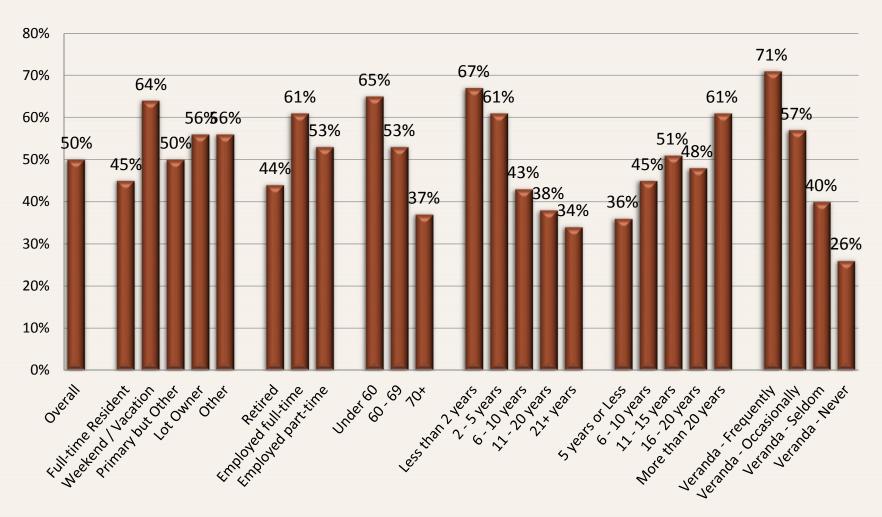
Potential Clubhouse Facility Enhancements

- Residents were asked to indicate the importance of various potential enhancements to the Clubhouse Facilities
- These questions were asked on a Scale of 5 (Very Important)
 to 1 (Very Unimportant)
- The statistics on the following slides represent Respondents who indicated Very Important and Important. The reciprocal of these statistics represent Respondents who indicated Neutral, Unimportant or Very Unimportant.

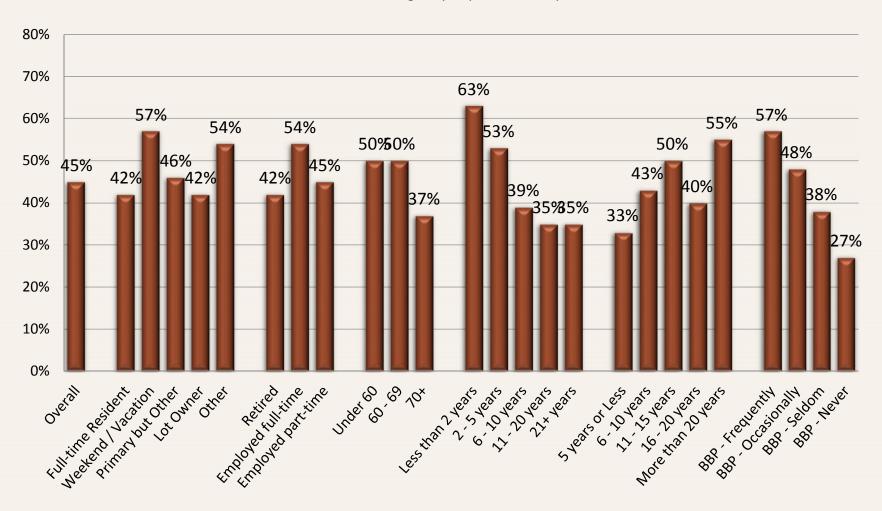
Renovating and enlarging the Kitchen facilities to provide improved menu offerings and enhanced service efficiencies



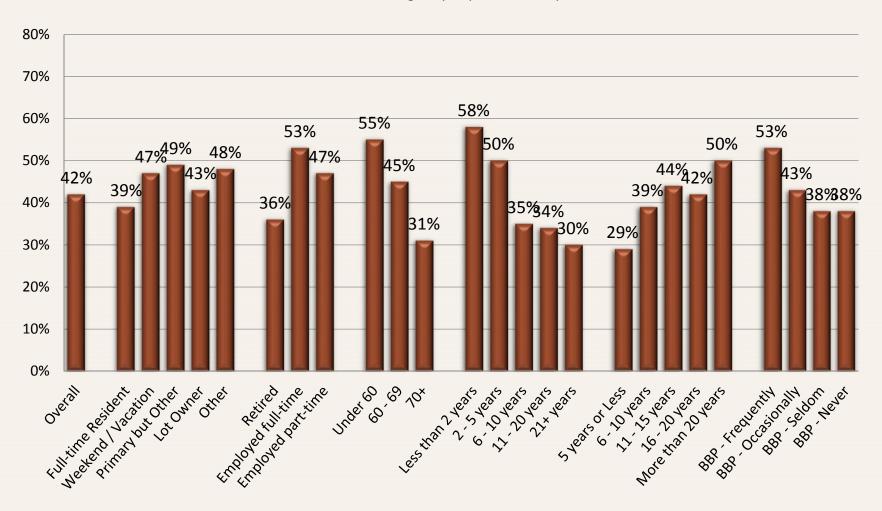
Developing an outdoor terrace off the Lower Level of the Clubhouse for enhanced indoor / outdoor connection to the dining facilities



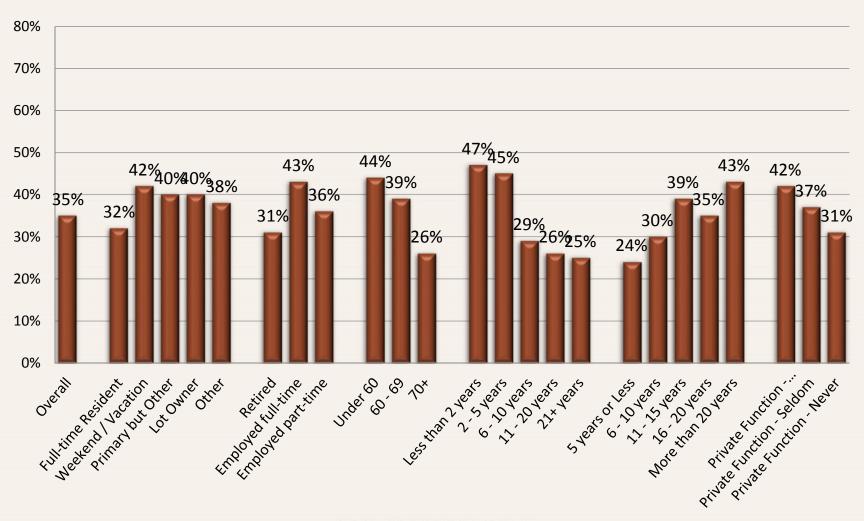
Developing a casual dining venue on the lower level of the Clubhouse with views of the Lake and golf course



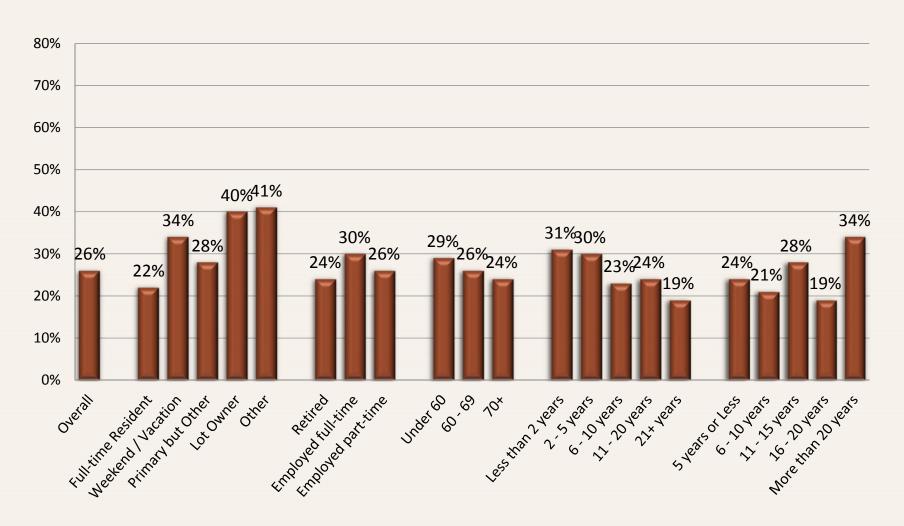
Providing an improved Bar experience with TV's, lounge seating for enhanced socialization



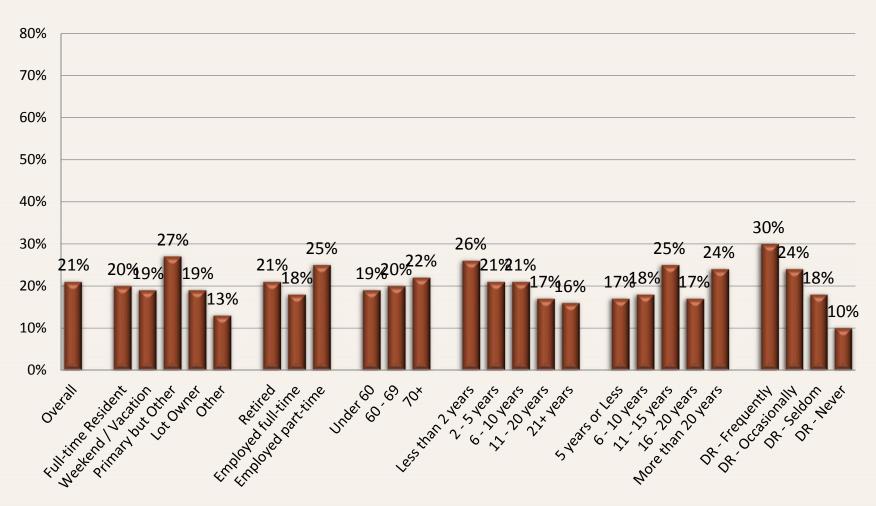
Developing an expanded outdoor terrace off the dining room / banquet rooms



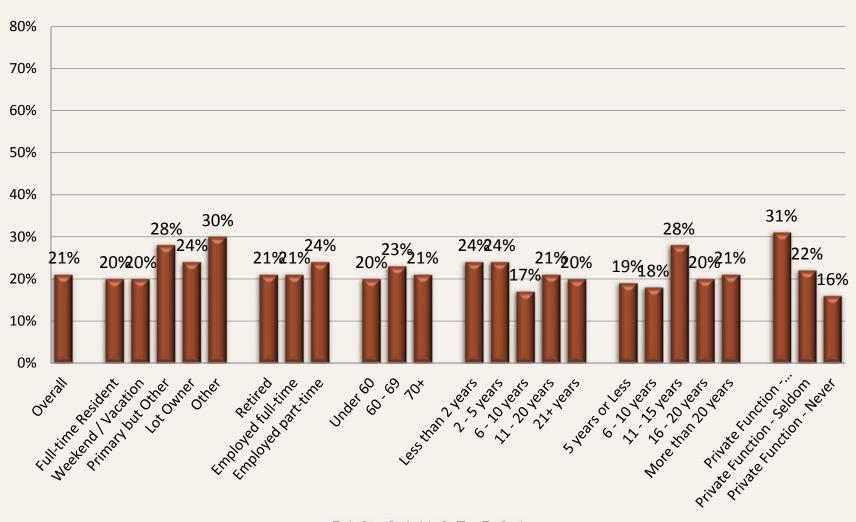
Aesthetically upgrading the overall décor / furnishings



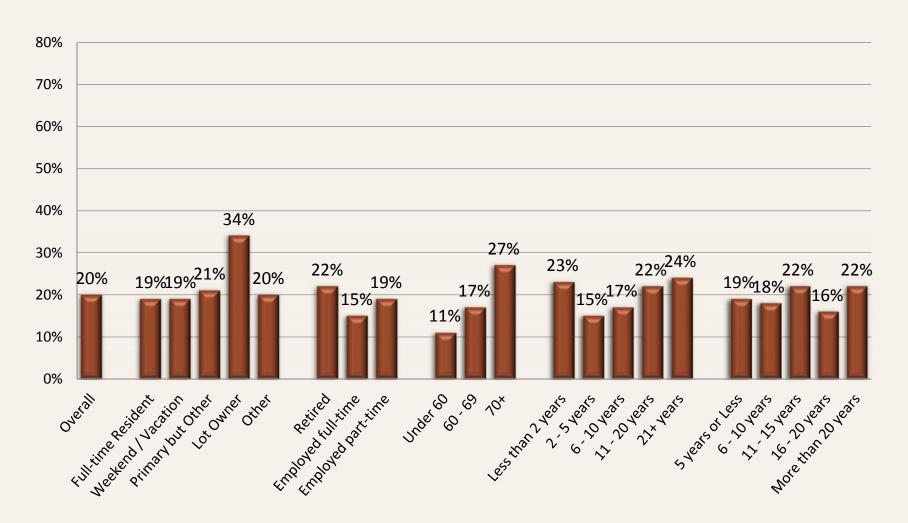
Providing a dedicated Resident dining area, separate from the current Dining / Function rooms



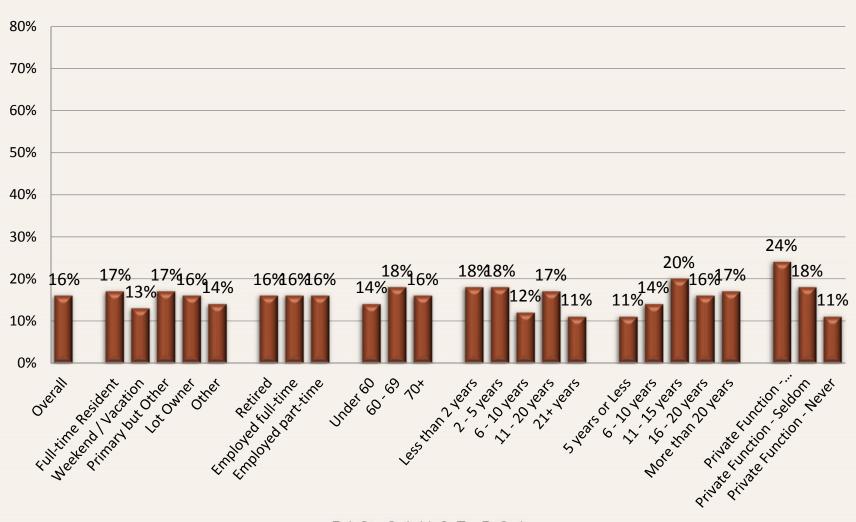
Developing other areas for Pre-function within the Clubhouse for cocktails / gathering area prior to an event



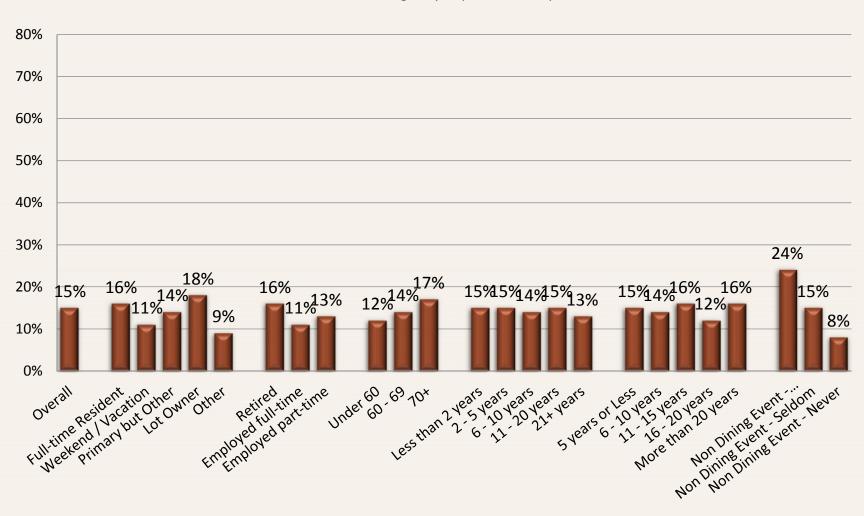
Providing additional parking at the Clubhouse



Expanding the Banquet facilities to provide additional capacity for Resident / Private functions and events



Developing additional small function rooms / card playing rooms within the Clubhouse



Golf Course Usage and Potential Enhancements





Golf Usage

Have you and / or your family utilized the Golf Course Facilities in the past year?

Utilization	Overall Respondents
Yes	42%
No	58%

Which statement most accurately describes your usage of the Golf Facilities

	Overall Respondents
I am a Golf Club Member	46%
I pay per round of Golf	54%

How many rounds did you play at Big Canoe in the past year?

	Rounds	Handicap
Golf Club Member	49 Rounds	19.5
Pay per Round	9 Rounds	19.2



Golf Usage

Have you invited a guest play the Golf Course within the past year?

	Overall Respondents
Yes	66%
No	34%

How do you feel about the current guest fee rate?

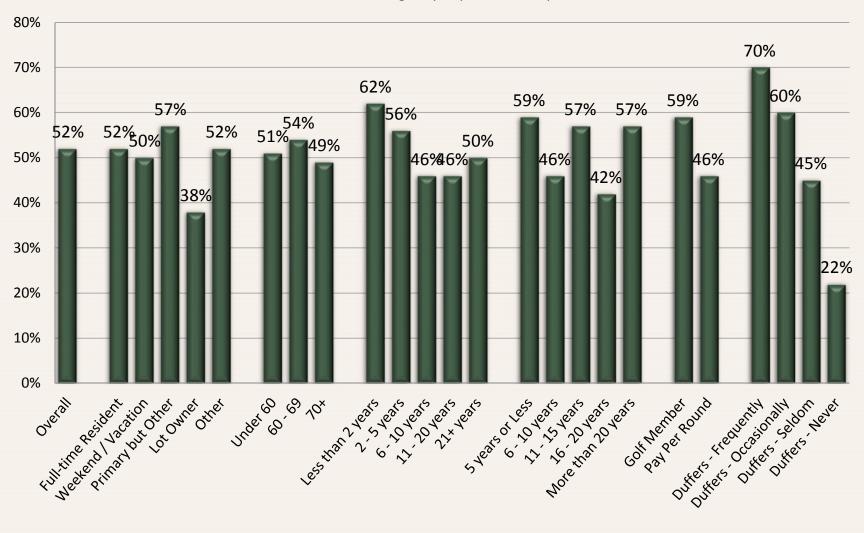
	Overall Respondents
Too Low	4%
Just Right	59%
Too high	37%



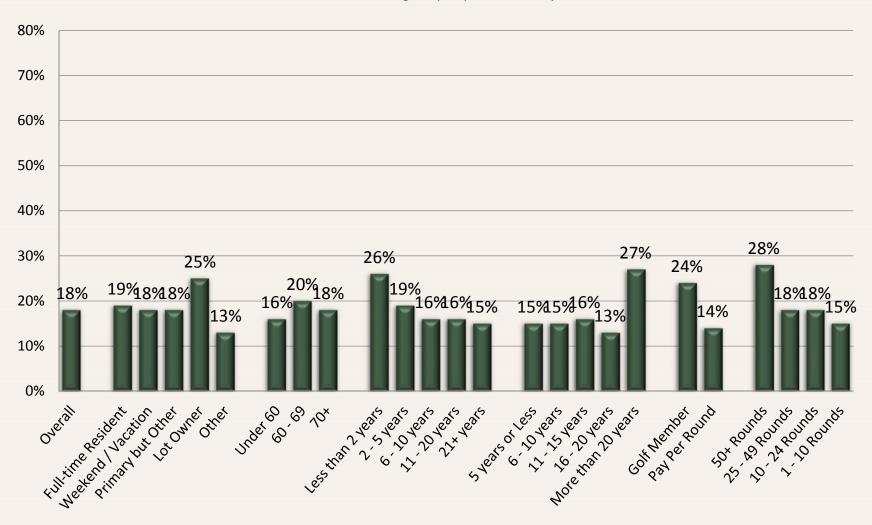
Potential Golf Enhancements

- Residents were asked to indicate the importance of various potential enhancements to the Golf Facilities
- These questions were asked on a Scale of 5 (Very Important)
 to 1 (Very Unimportant)
- The statistics on the following slides represent Respondents who indicated Very Important and Important. The reciprocal of these statistics represent Respondents who indicated Neutral, Unimportant or Very Unimportant.

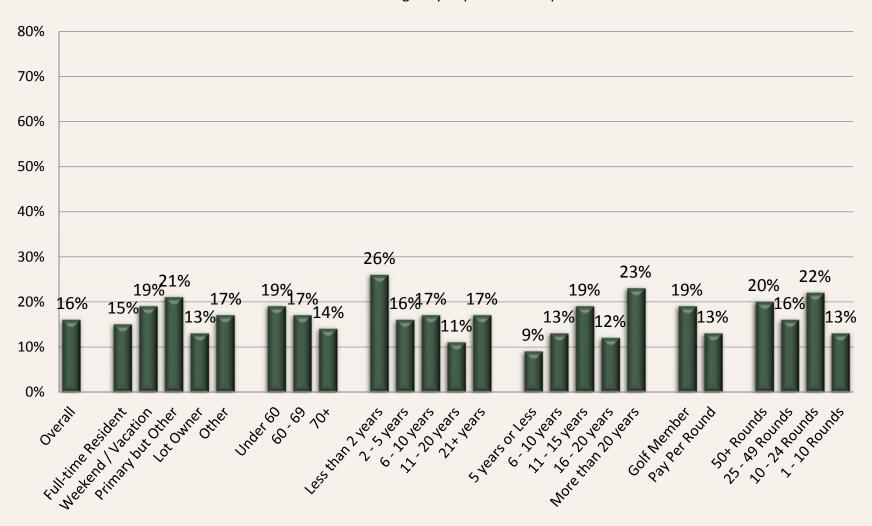
Enhancing Duffers (Golfers Turn) for an improved atmosphere and additional menu capabilities



Enhancing the Pro Shop Facility



Enhancing the Locker Room facilities



Wellness Center Usage and Potential Enhancements





Wellness Center Facilities Usage

Have you and / or your family utilized the Wellness Center Facilities in the past year?

Utilization	Overall Respondents
Yes	63%
No	37%

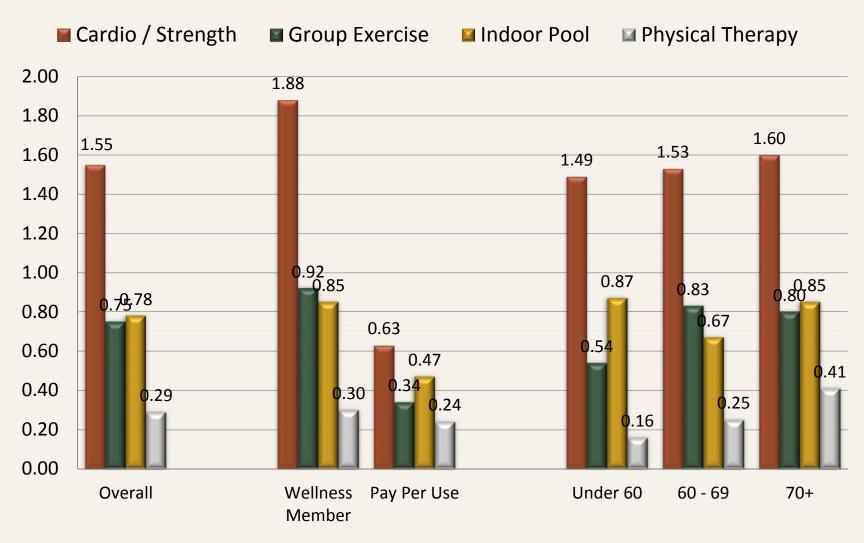
Which statement most accurately describes your usage of the Wellness Center Facilities

	Overall Respondents
I am a Wellness Member	70%
I pay per use of the Center	30%



Wellness Center Facilities Usage

Wellness Center Facilities Average Weekly Utilization

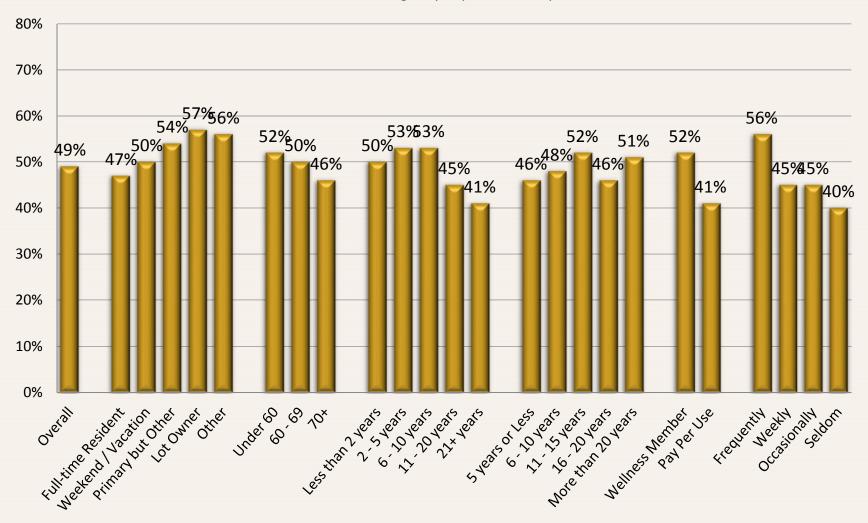




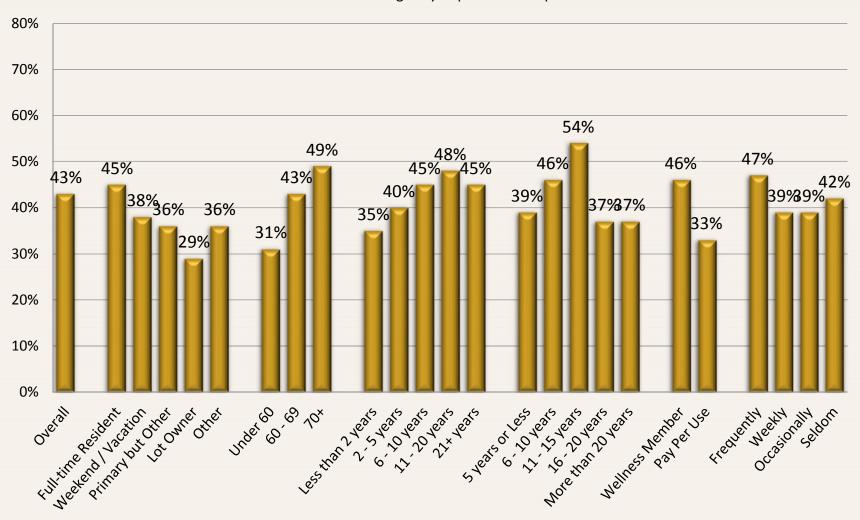
Potential Wellness Center Enhancements

- Residents were asked to indicate the importance of various potential enhancements to the Wellness Center Facilities
- These questions were asked on a Scale of 5 (Very Important)
 to 1 (Very Unimportant)
- The statistics on the following slides represent Respondents who indicated Very Important and Important. The reciprocal of these statistics represent Respondents who indicated Neutral, Unimportant or Very Unimportant.

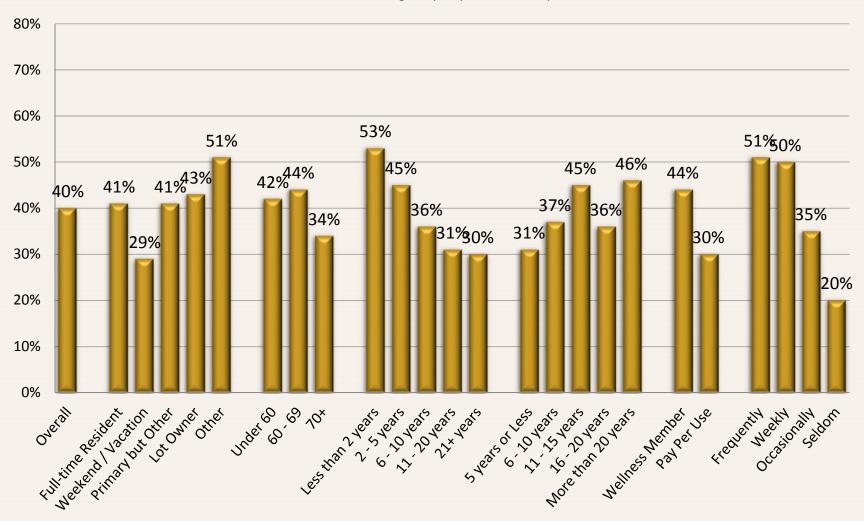
Aesthetically enhancing the Locker Room Facilities



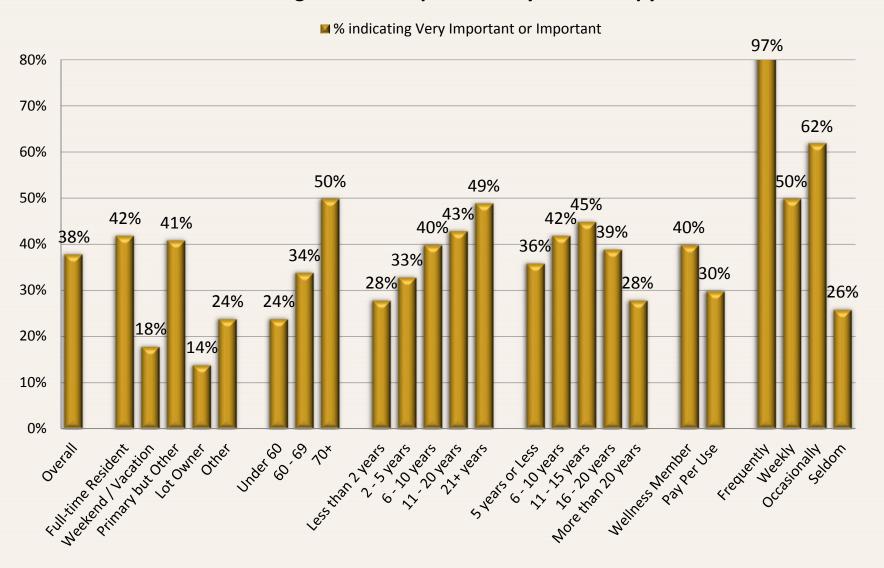
Providing additional parking in close proximity to the Wellness Center



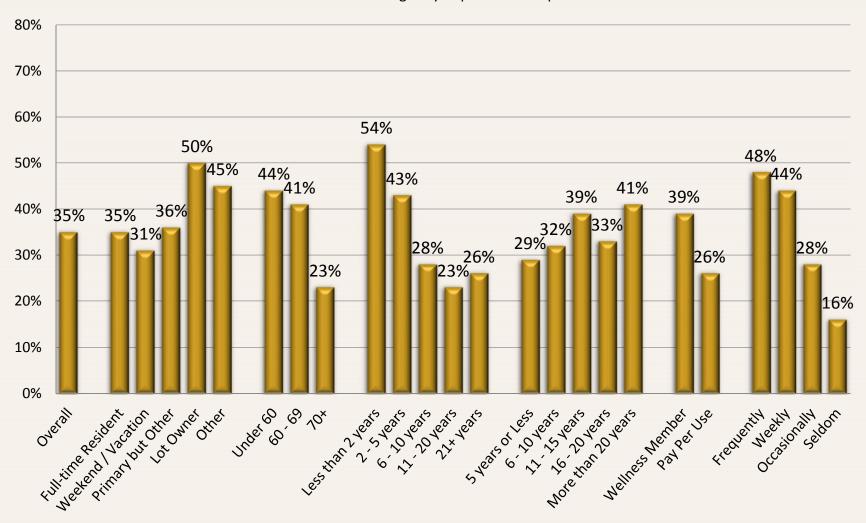
Providing additional space for Cardio equipment



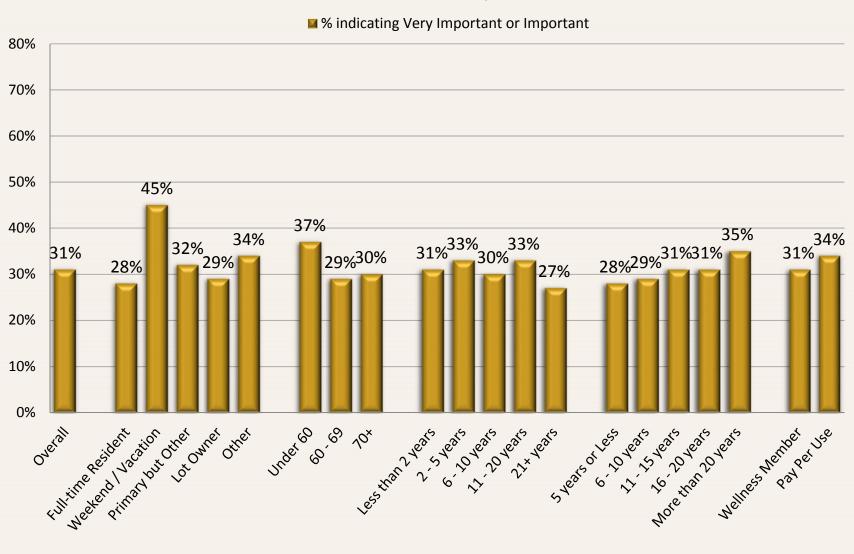
Providing additional space for Physical Therapy



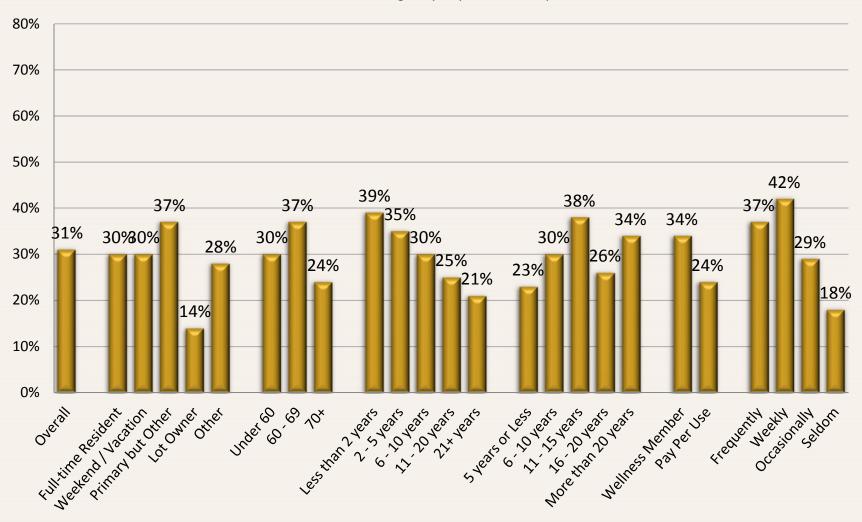
Providing additional space for Strength Training Equipment



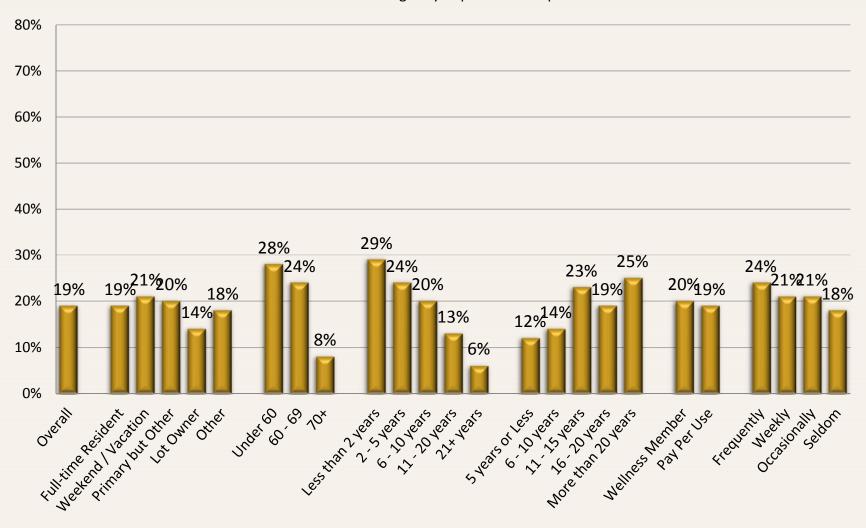
Developing a facility for enhanced offerings such as massages, skin / facial treatments, etc.



Providing additional space for stretching and warm-up / cool down area



Providing dedicated space for Spin Class



Swim Club Usage and Potential Enhancements



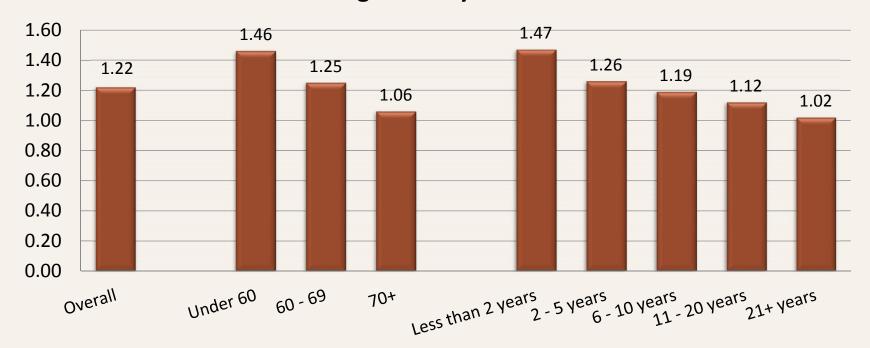


Swim Club Usage

Have you and / or your family utilized the Swim Club Facilities in the past year?

Utilization	Overall Respondents
Yes	57%
No	43%

Swim Club Average Weekly Utilization in Season



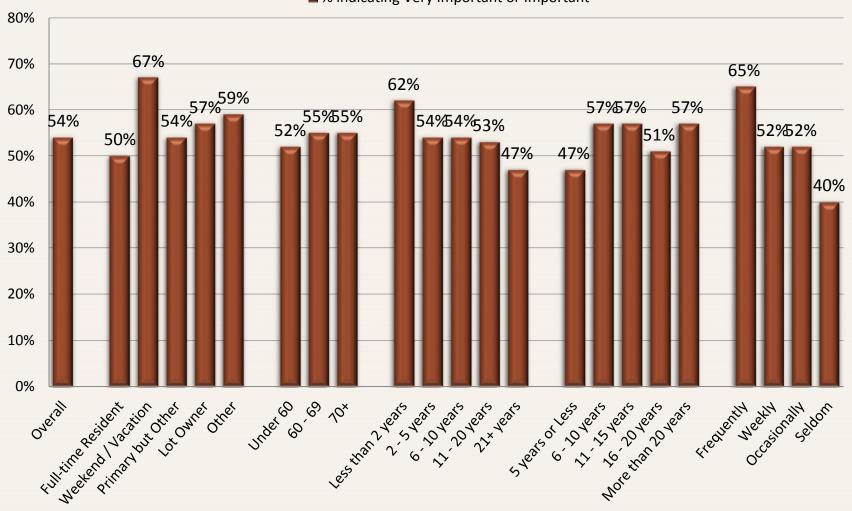
BIG CANOE POA



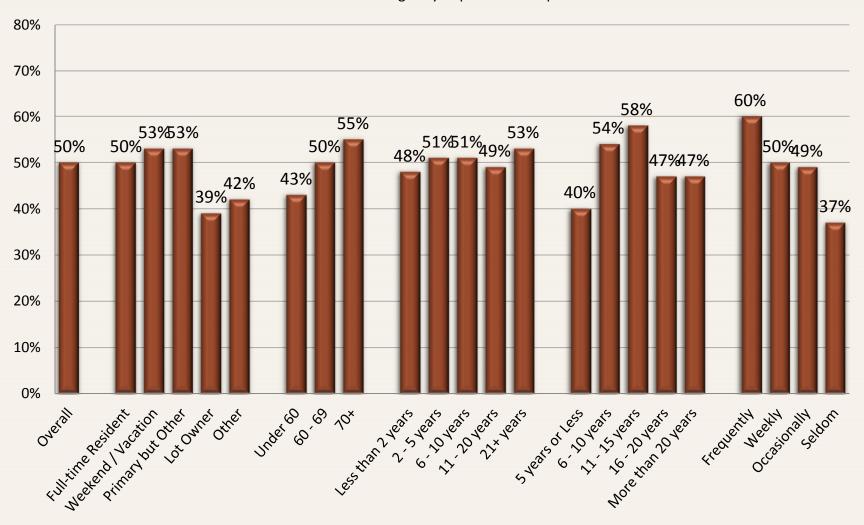
Potential Swim Club Facilities Enhancements

- Residents were asked to indicate the importance of various potential enhancements to the Swim Club Facilities
- These questions were asked on a Scale of 5 (Very Important)
 to 1 (Very Unimportant)
- The statistics on the following slides represent Respondents who indicated Very Important and Important. The reciprocal of these statistics represent Respondents who indicated Neutral, Unimportant or Very Unimportant.

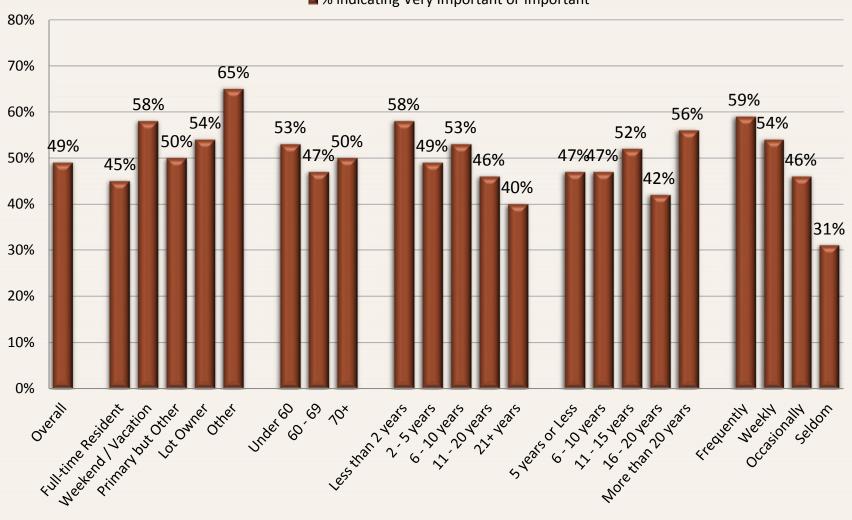
Providing additional shade at the Pool



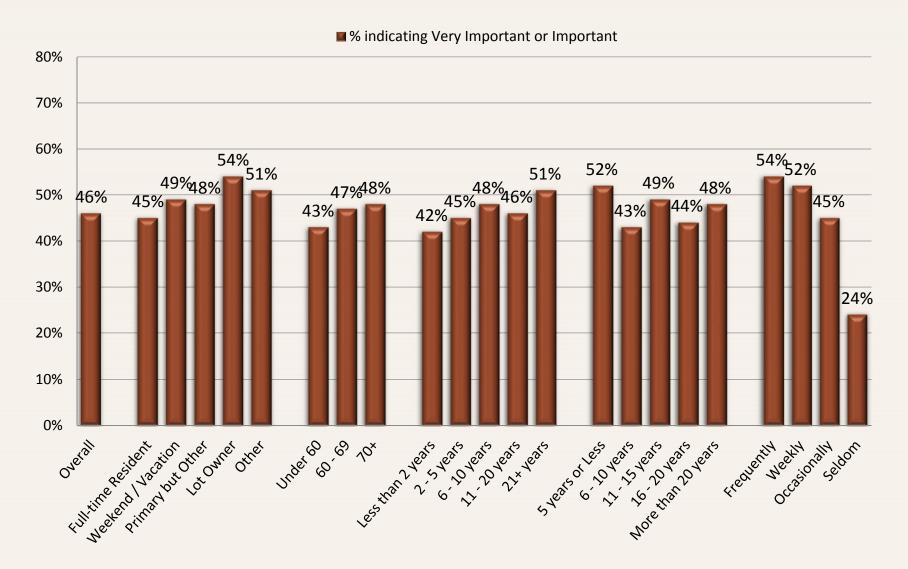
Providing additional parking in close proximity to the Swim Club



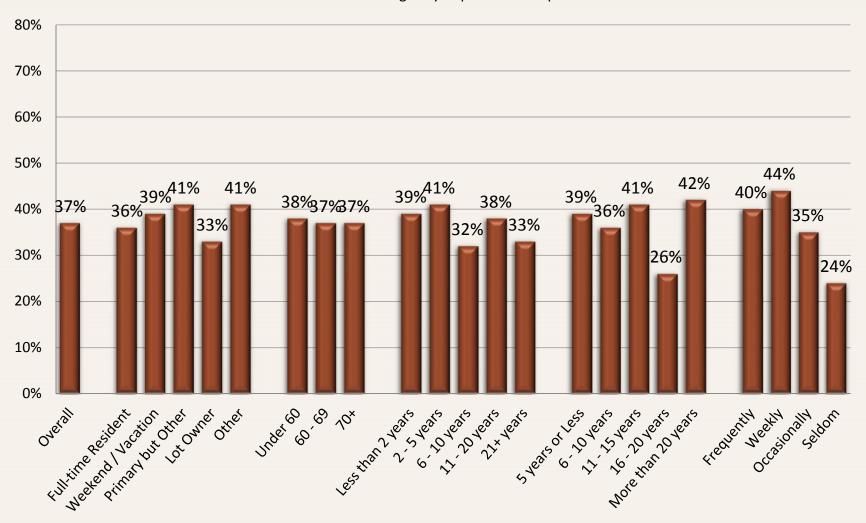
Renovate and enlarge the Kitchen facility to provide improved menu offerings and enhanced service efficiencies



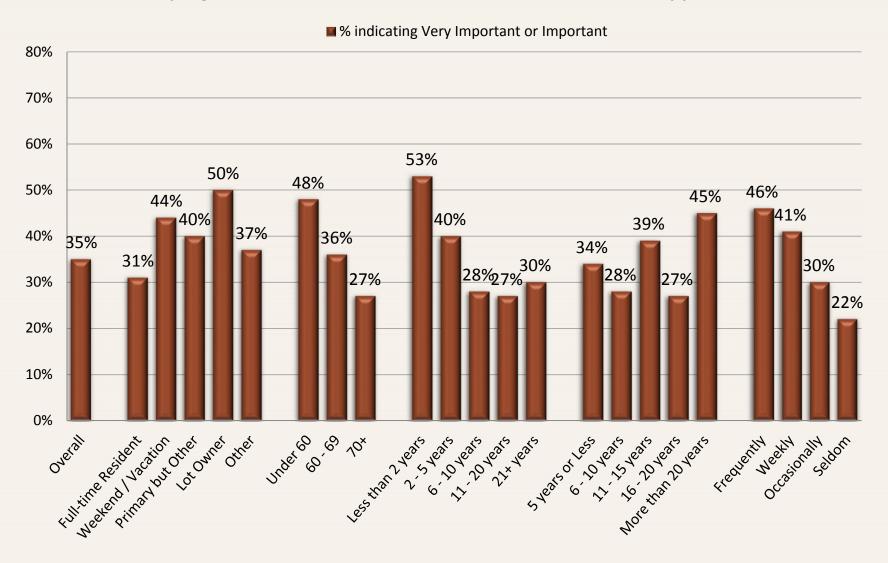
Renovating the Changing Rooms / Restroom facilities



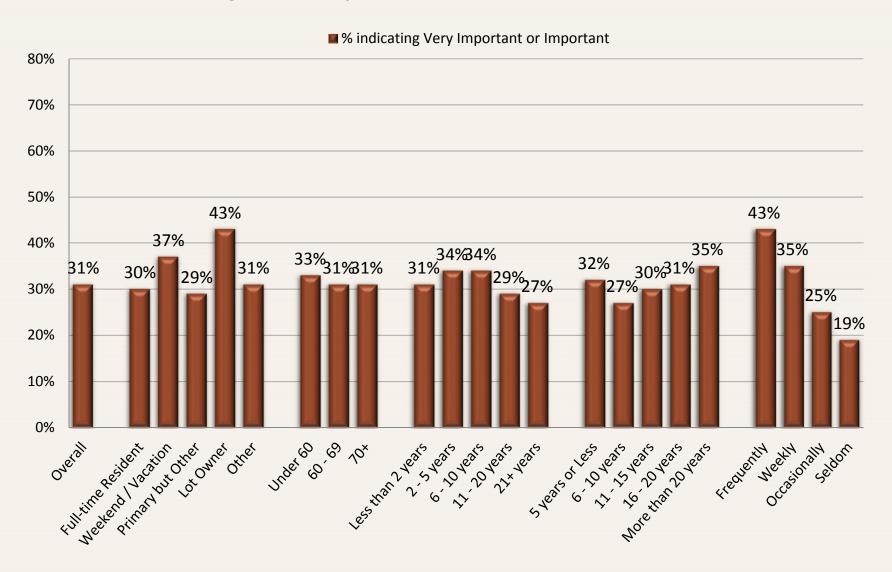
Aesthetically upgrading the Upper Level function room at the Swim Club



Developing an adult cabana bar for enhanced socialization opportunities



Providing additional youth oriented amenities at the Swim Club



Racquet Facilities Usage and Potential Enhancements



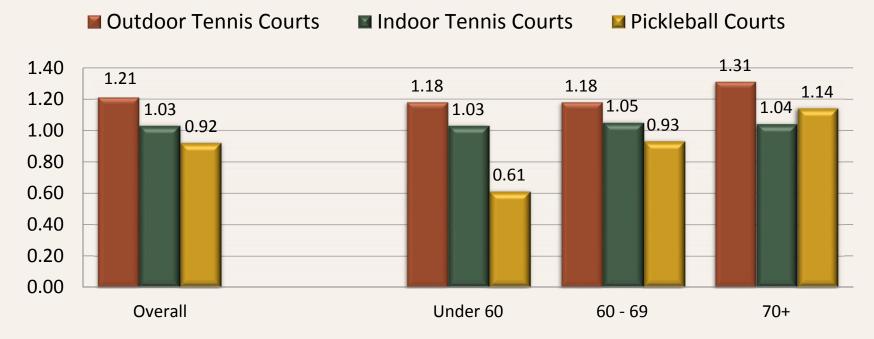


Racquet Facilities Usage

Have you and / or your family utilized the Racquet Facilities in the past year?

Utilization	Overall Respondents
Yes	18%
No	82%

Racquet Facilities Average Weekly Utilization

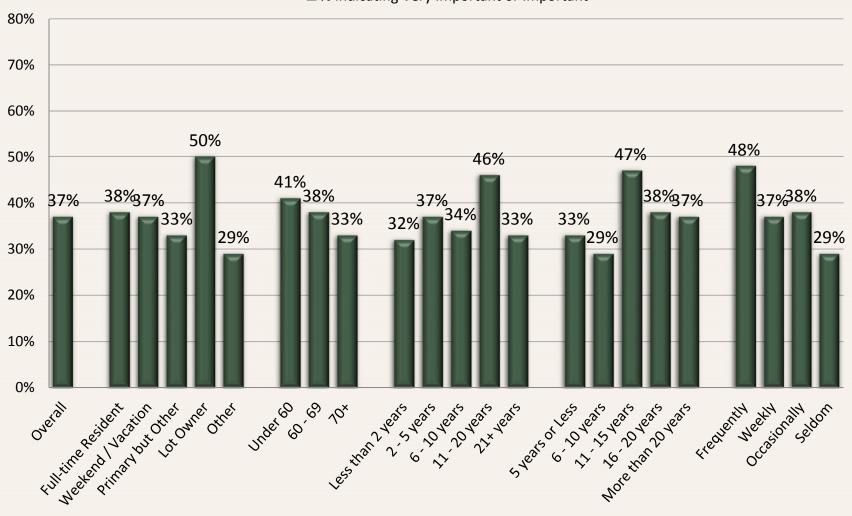




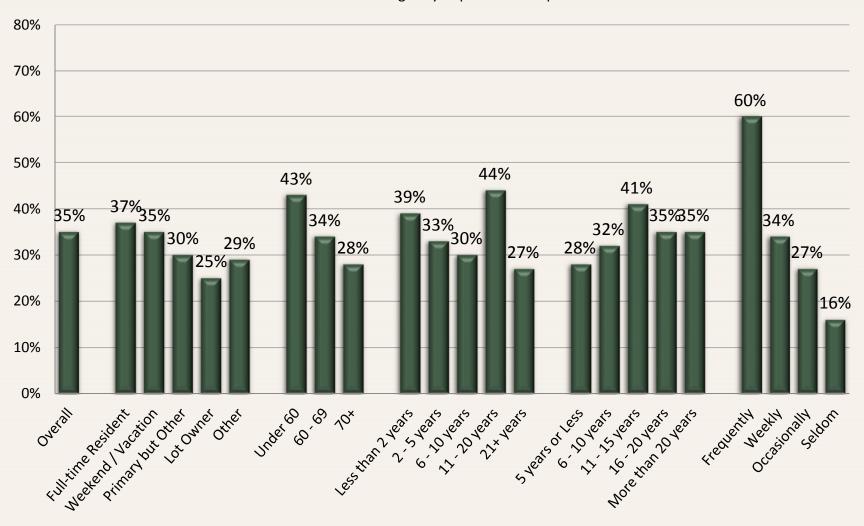
Potential Racquet Facilities Enhancements

- Residents were asked to indicate the importance of various potential enhancements to the Racquet Facilities
- These questions were asked on a Scale of 5 (Very Important)
 to 1 (Very Unimportant)
- The statistics on the following slides represent Respondents who indicated Very Important and Important. The reciprocal of these statistics represent Respondents who indicated Neutral, Unimportant or Very Unimportant.

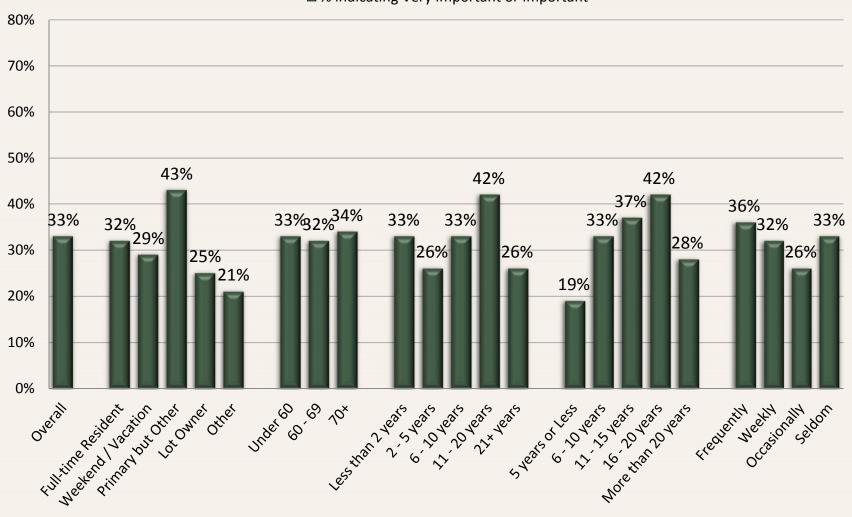
Providing a covered pavilion-type structure at the Tennis Shop for enhanced functionality and socialization opportunities



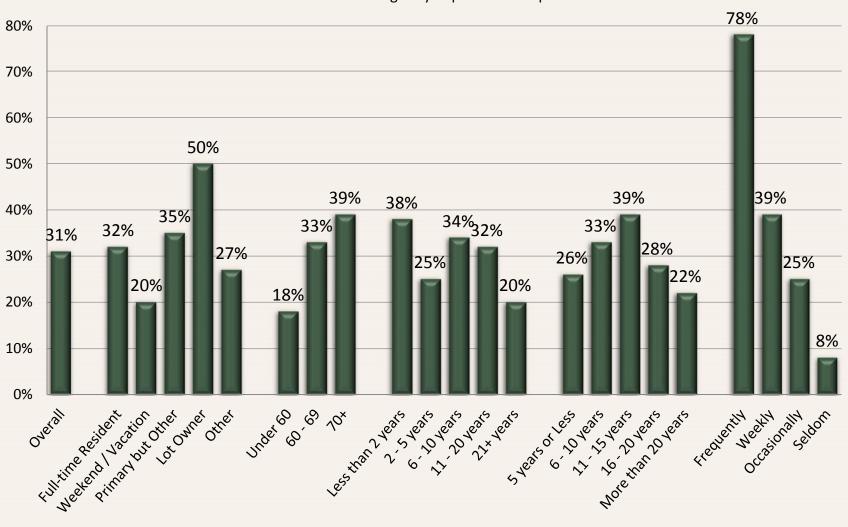
Resurfacing the current Clay-tec courts to Har-Tru



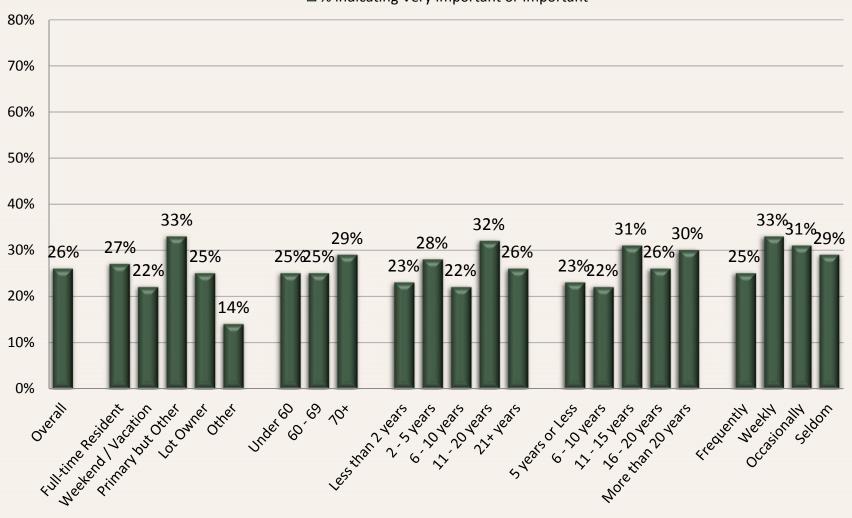
Studying opportunities to provide centralized Racquet facilities with both indoor and outdoor courts in close proximity to each other



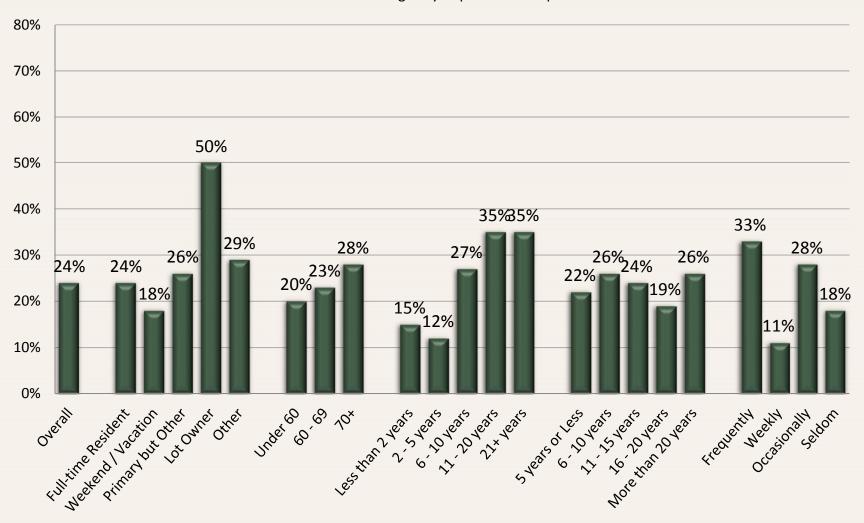
Providing additional Pickleball Courts



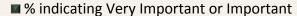
Improving the outdoor grill at the Tennis Shop for enhanced offerings and socialization opportunities

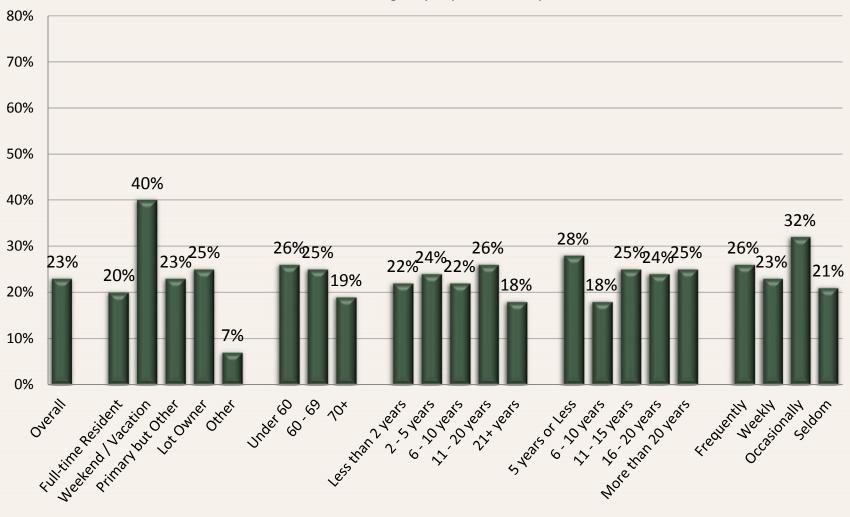


Providing additional parking at the Tennis Shop

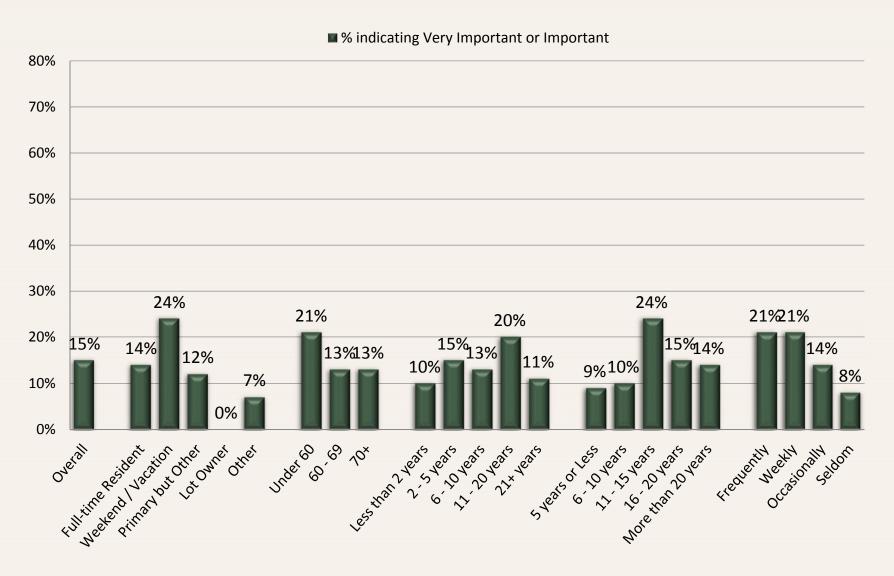


Aesthetically enhancing the Tennis Pro Shop facilities





Enhancing the viewing stands at the outdoor tennis courts



Wildcat Facilities Usage and Potential Enhancements



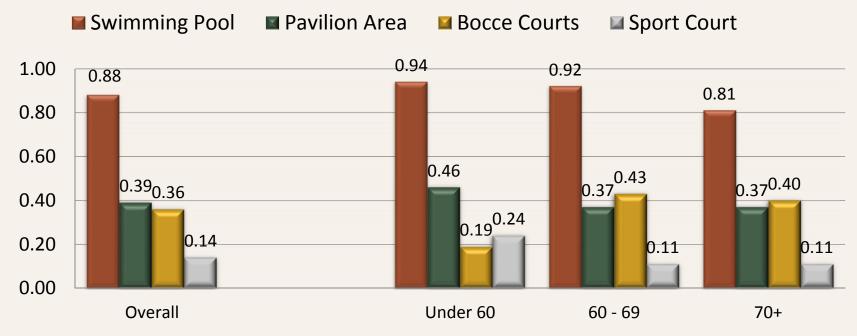


Wildcat Facilities Usage

Have you and / or your family utilized the Wildcat Facilities in the past year?

Utilization	Overall Respondents
Yes	62%
No	38%

Wildcat Facilities Average Monthly Utilization

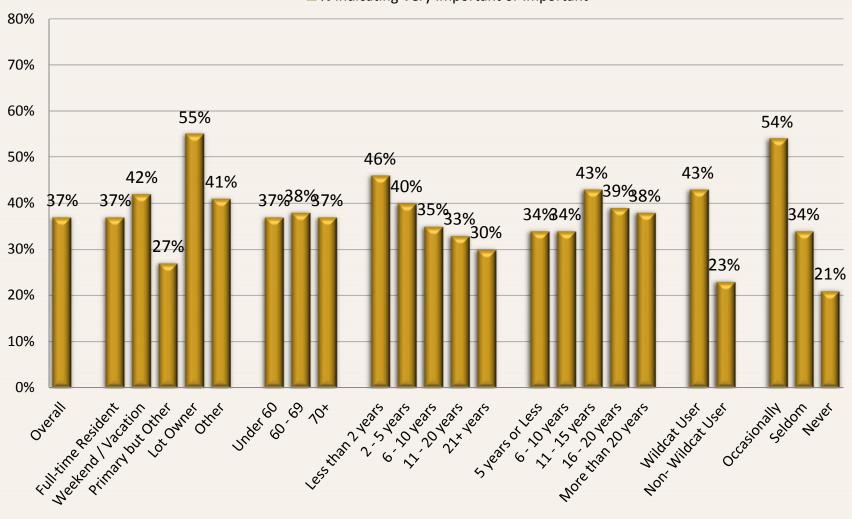




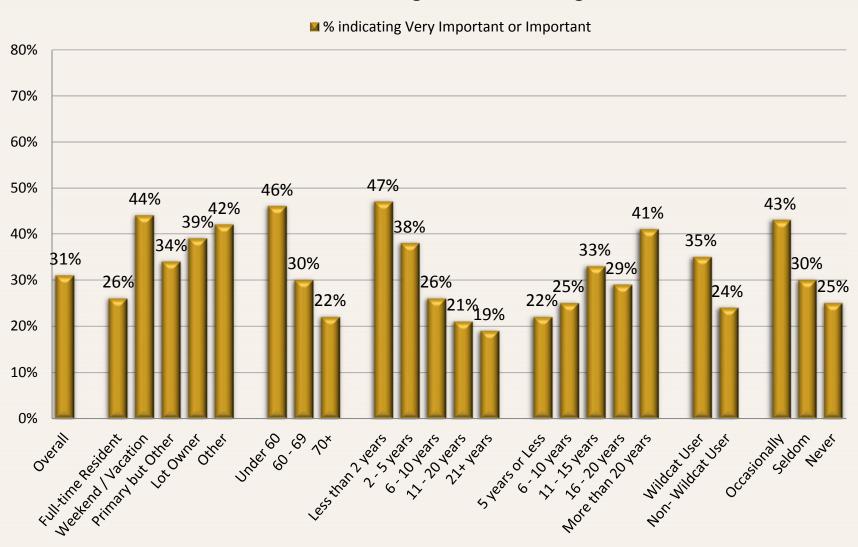
Potential Wildcat Facilities Enhancements

- Residents were asked to indicate the importance of various potential enhancements to the Wildcat Facilities
- These questions were asked on a Scale of 5 (Very Important)
 to 1 (Very Unimportant)
- The statistics on the following slides represent Respondents who indicated Very Important and Important. The reciprocal of these statistics represent Respondents who indicated Neutral, Unimportant or Very Unimportant.

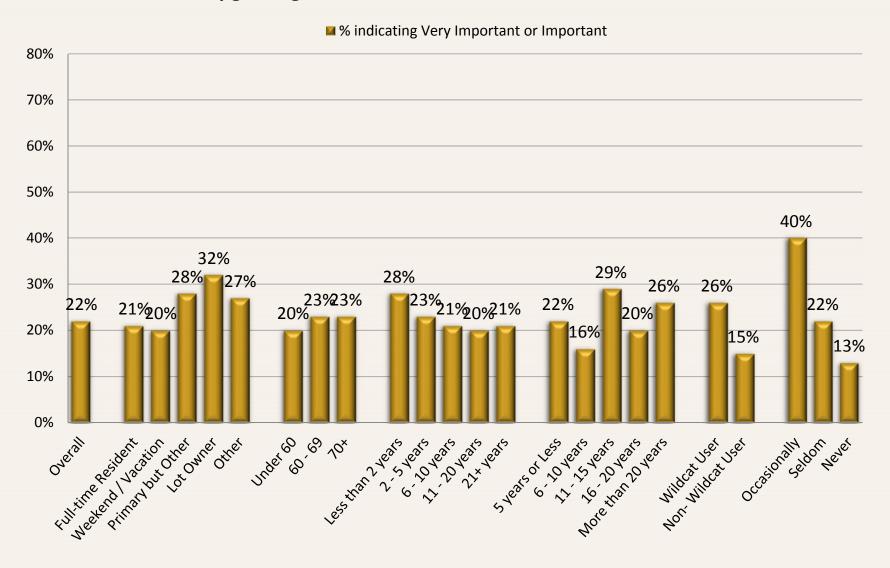
Providing additional shade at the Pool



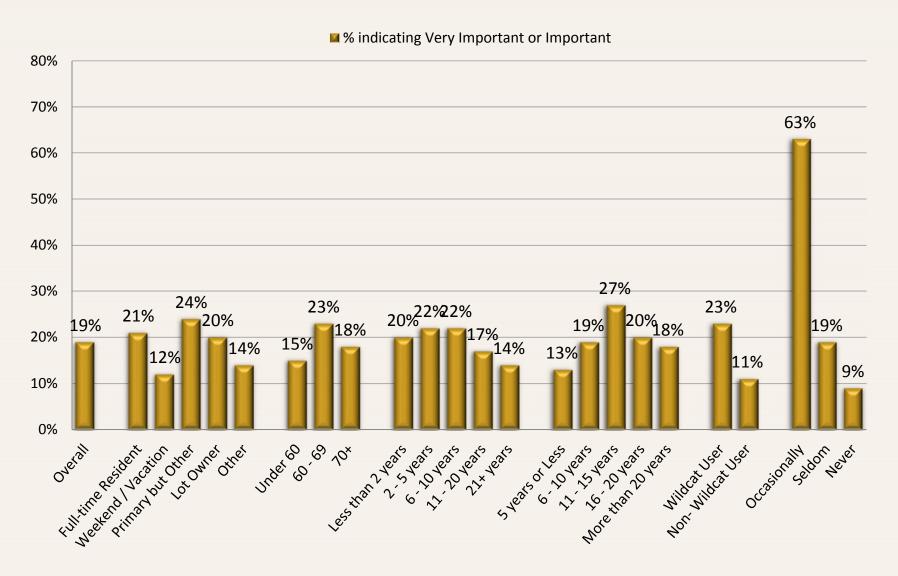
Developing an ultra-casual sports bar-themed dining area near the pool as an additional dining venue within Big Canoe



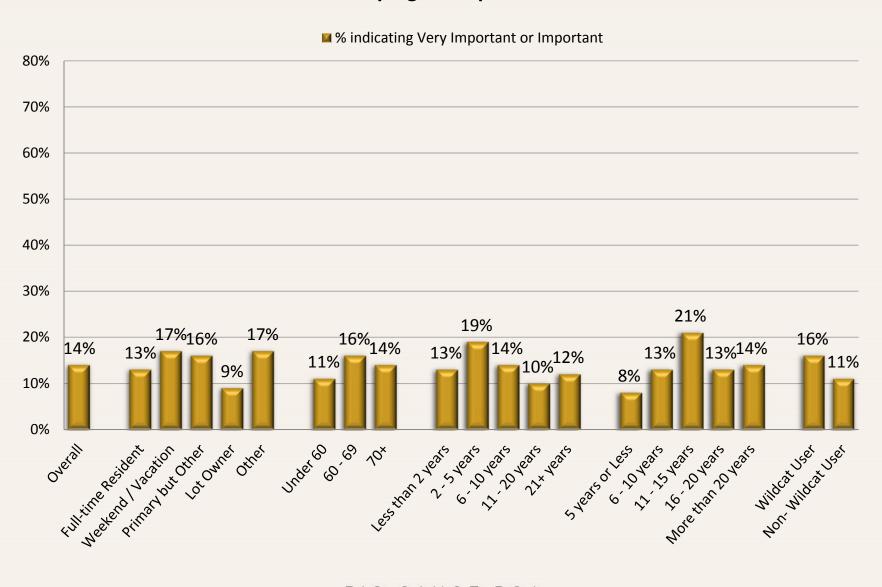
Upgrading the current Pavilion / Restroom facilities



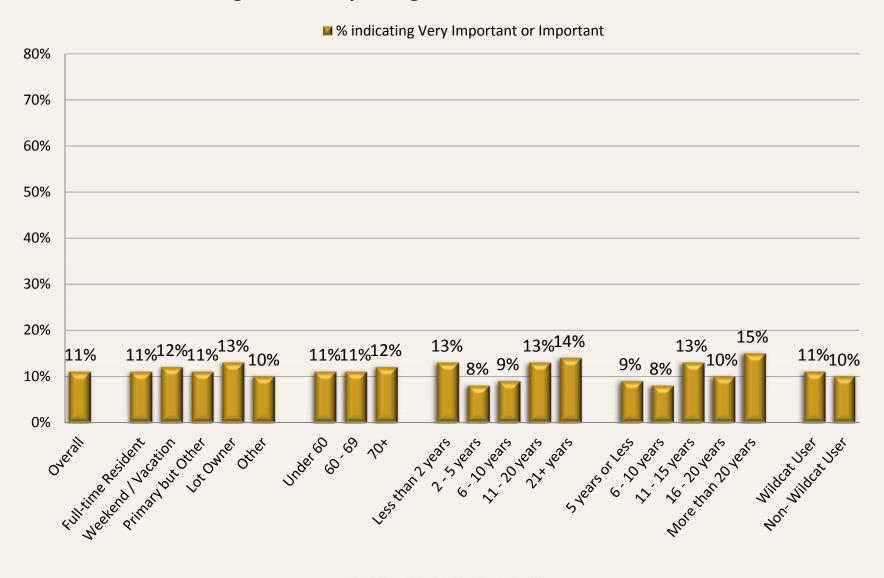
Enhancing the Bocce Courts with shade pavilions



Developing a Croquet Lawn



Providing additional parking at the Wildcat Recreational area



Marina Usage and Potential Enhancements



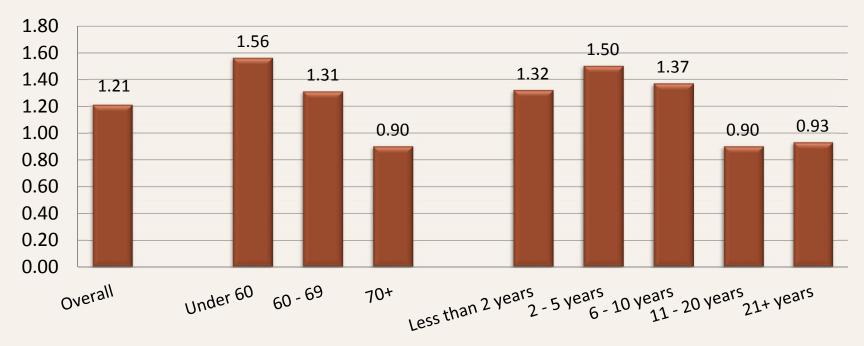


Marina Usage

Have you and / or your family utilized the Marina Facilities in the past year?

Utilization	Overall Respondents
Yes	73%
No	27%

Marina Average Monthly Utilization in Season

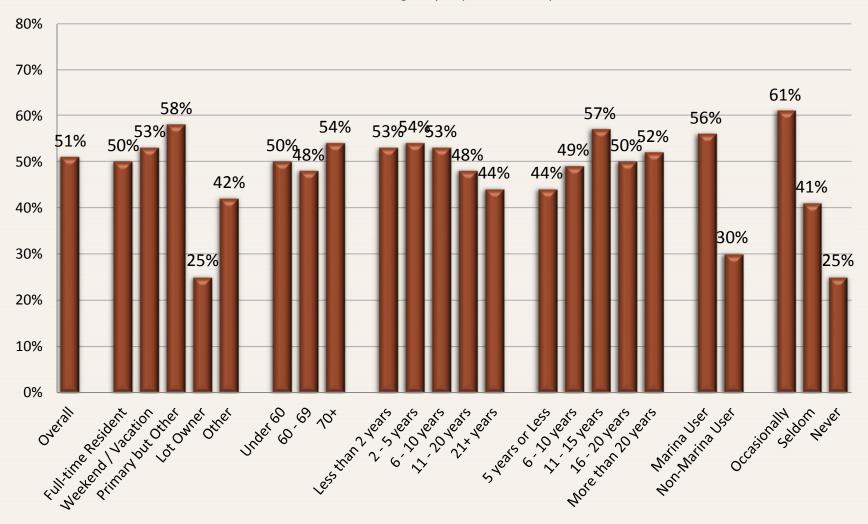




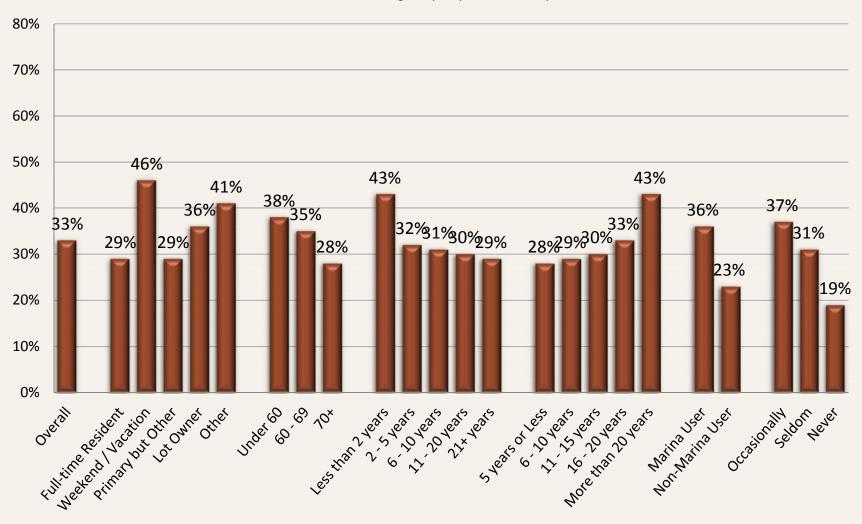
Potential Marina Facilities Enhancements

- Residents were asked to indicate the importance of various potential enhancements to the Marina Facilities
- These questions were asked on a Scale of 5 (Very Important)
 to 1 (Very Unimportant)
- The statistics on the following slides represent Respondents who indicated Very Important and Important. The reciprocal of these statistics represent Respondents who indicated Neutral, Unimportant or Very Unimportant.

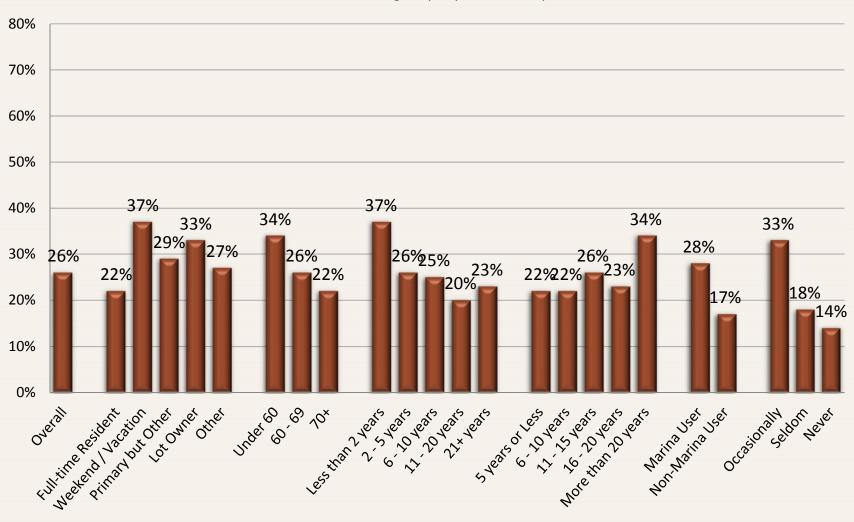
Providing additional parking at the Marina



Providing additional Pontoon Boats for rental



Expanding the number of docks for additional slip capacity for rentals and / or Resident boats



Other Potential Enhancements / New Amenities

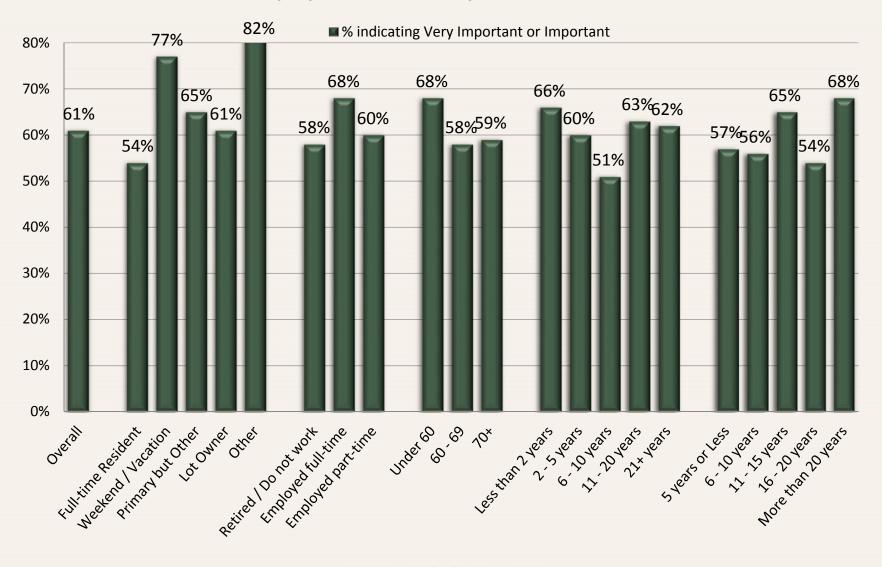




Other Potential Enhancements / New Amenities

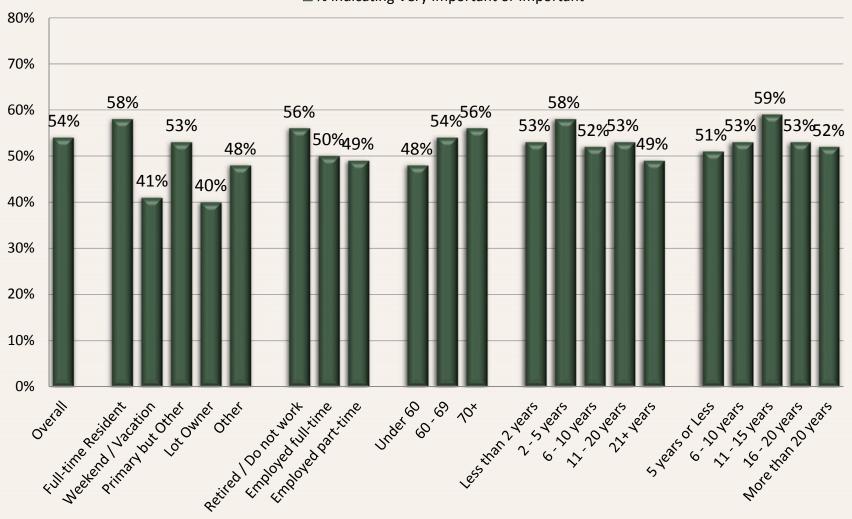
- Residents were asked to indicate the importance of various other potential enhancements / new amenities
- These questions were asked on a Scale of 5 (Very Important)
 to 1 (Very Unimportant)
- The statistics on the following slides represent Respondents who indicated Very Important and Important. The reciprocal of these statistics represent Respondents who indicated Neutral, Unimportant or Very Unimportant.

Recreating the General Store / Community Convenience Shop for quick prepared foods, daily essentials, etc.

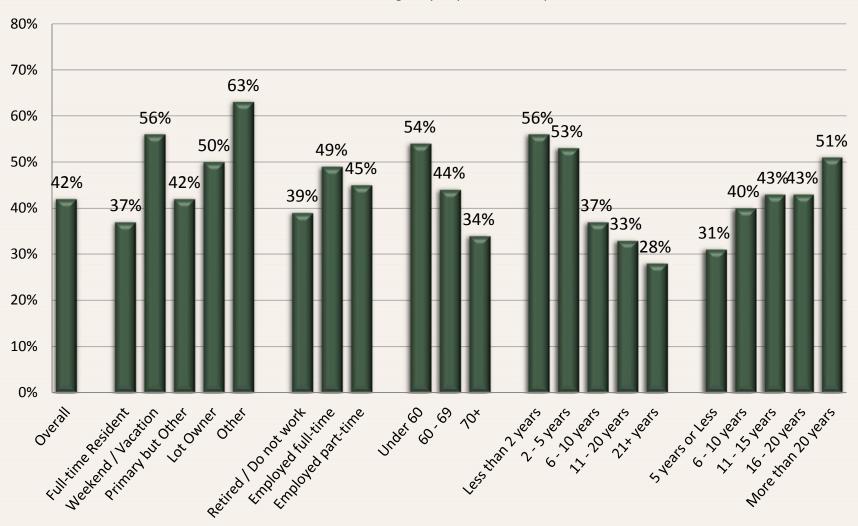


Developing an improved community Post Office

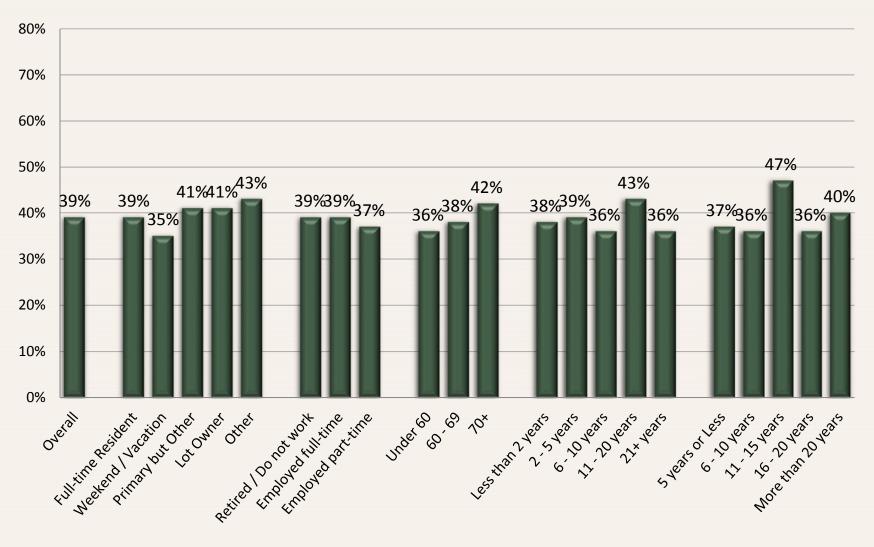




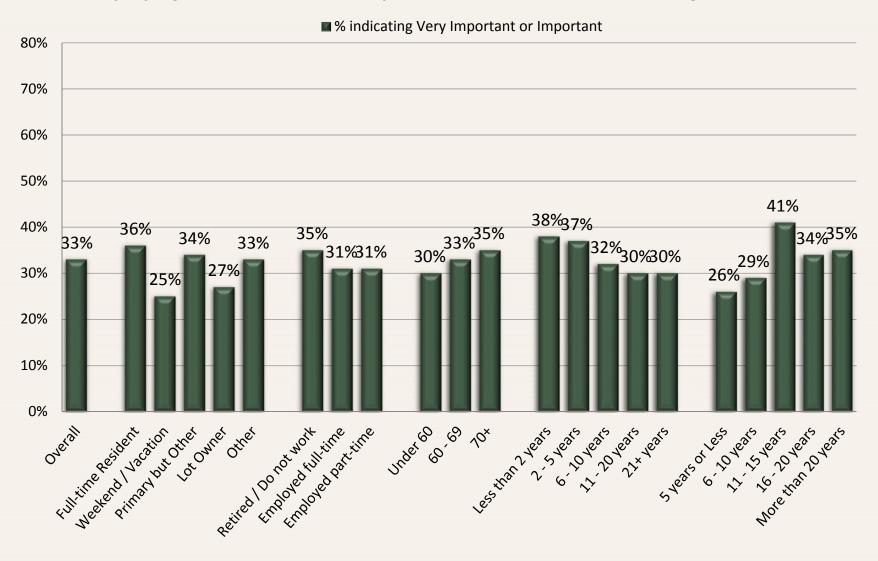
Offering additional Community-owned dining venues within Big Canoe



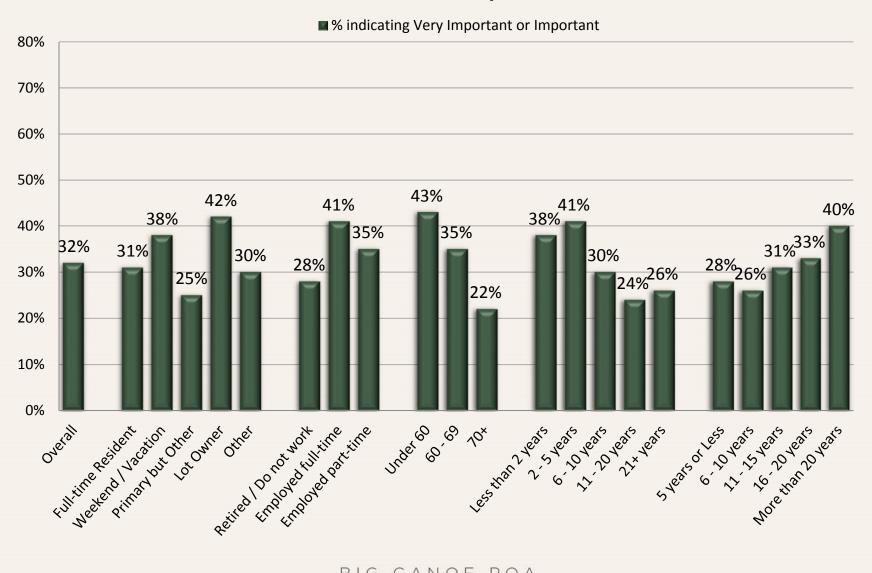
Enhancing the Canoe Lodge at Sconti Lake as a meeting / event space



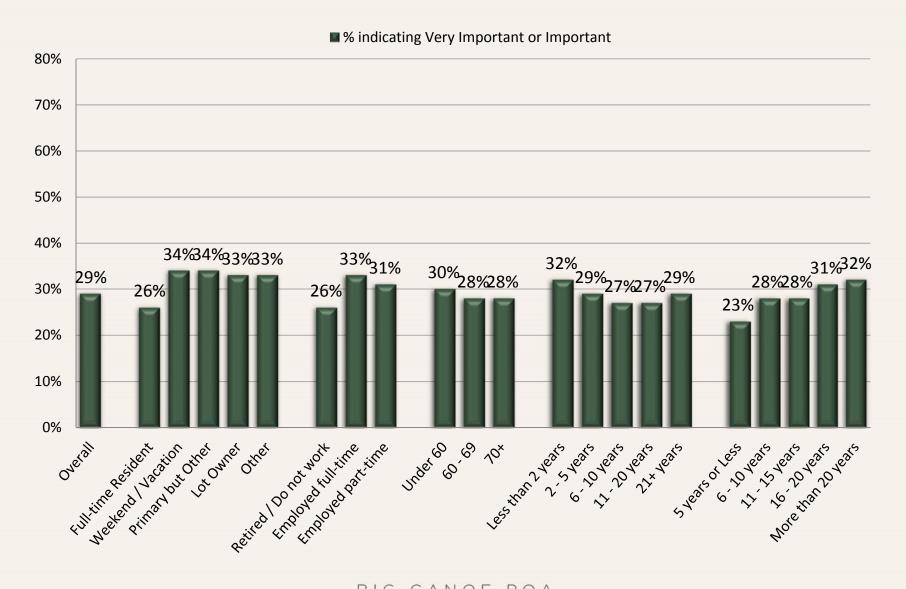
Developing a Community Center for additional meeting rooms, card playing, etc. to alleviate compaction at the Club for non-dining events



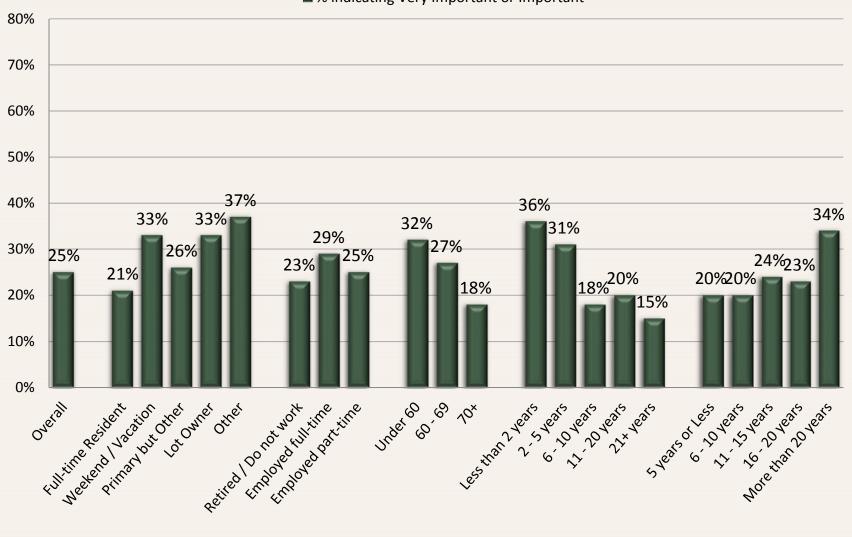
Developing a Community Garden / Food Forest for enhanced sustainability



Providing a children's / youth activity room



Developing an outdoor stage / concert venue for community events, productions, concerts, etc.



Developing a facility for enhanced offerings such as massages, skin treatments, etc.

80%

70%

60%

50%

40%

30%

20%

10%

0%

Overall

23%

tulltine Resident Westerd Vacation

35%

18%

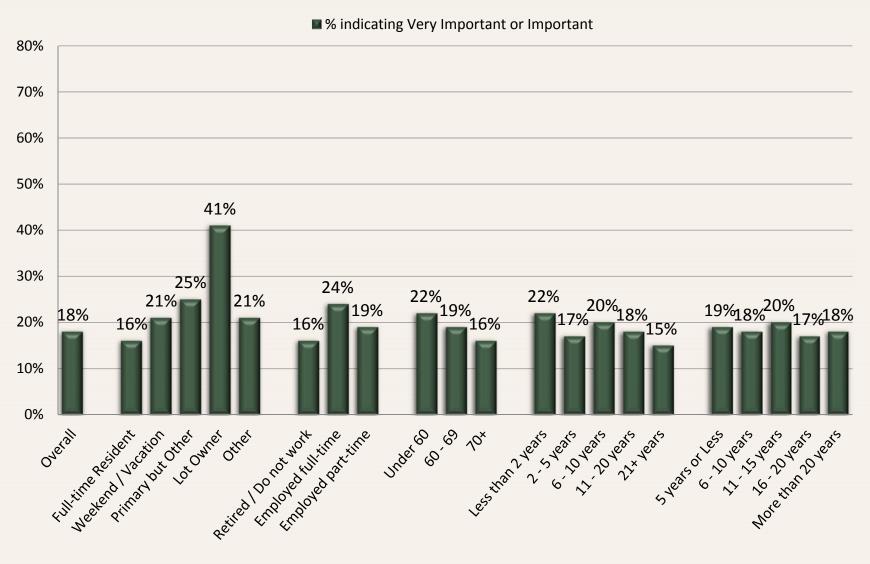
Primary but Other

Lot Onner

■ % indicating Very Important or Important 39% 33% 33% 28%27% 28% 23%24% 23% 23% 23% 21%20%20%22% 19% 18% 16% 15% Retired tradoved tultine

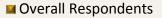
Under 60,69 10x

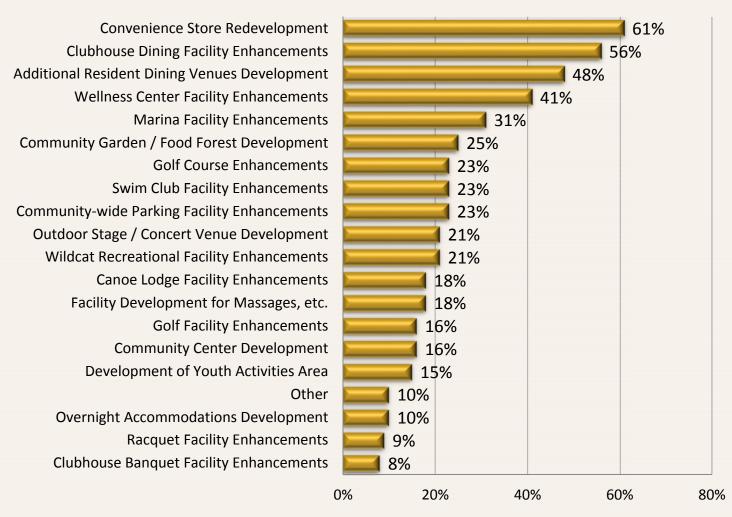
Developing a third-party partnership to offer overnight accommodations within the Community for use by guests of residents, corporate retreats, etc.

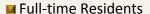


Overall Prioritization Key Strategic Driver – Increased Utilization

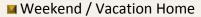


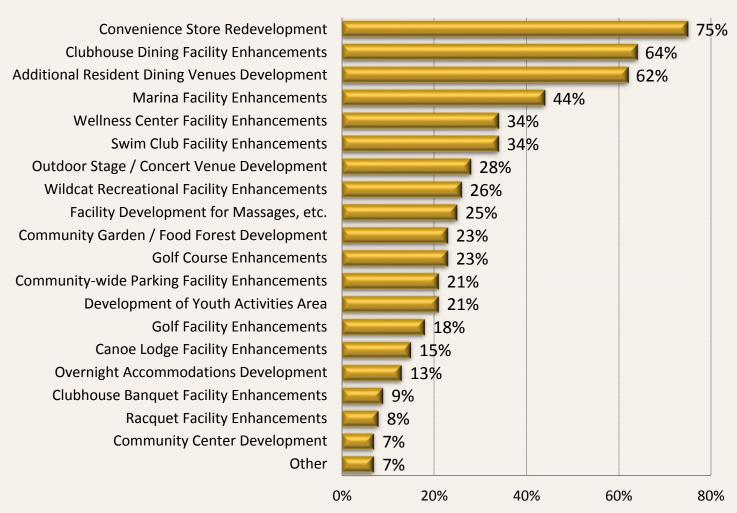




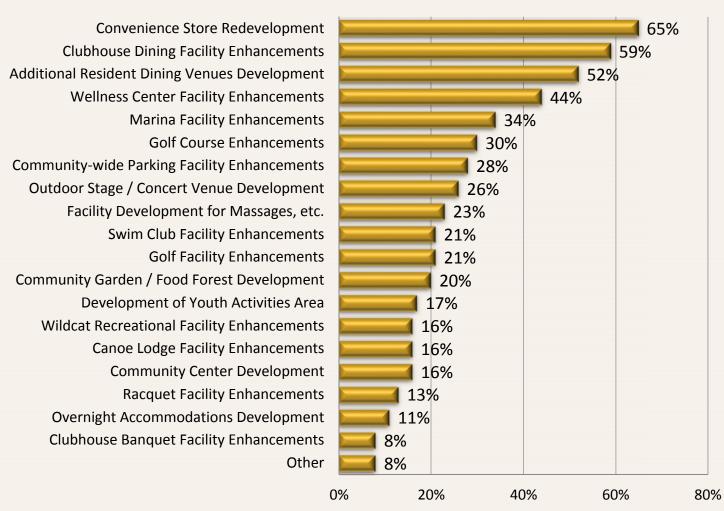


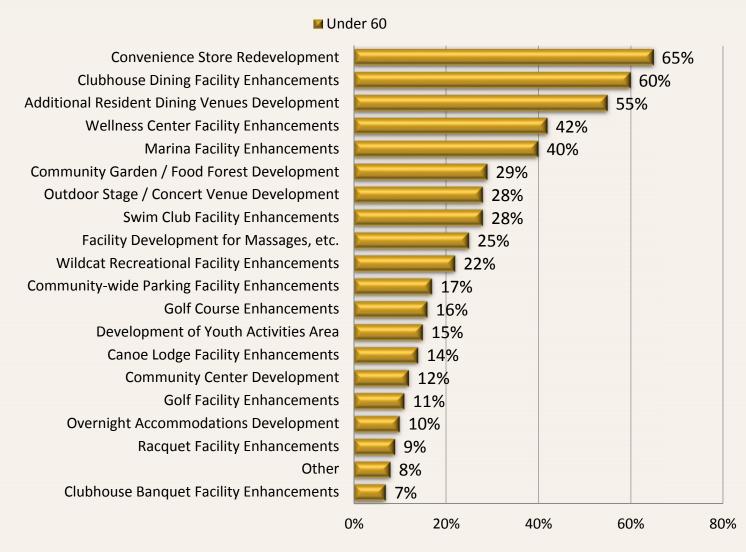


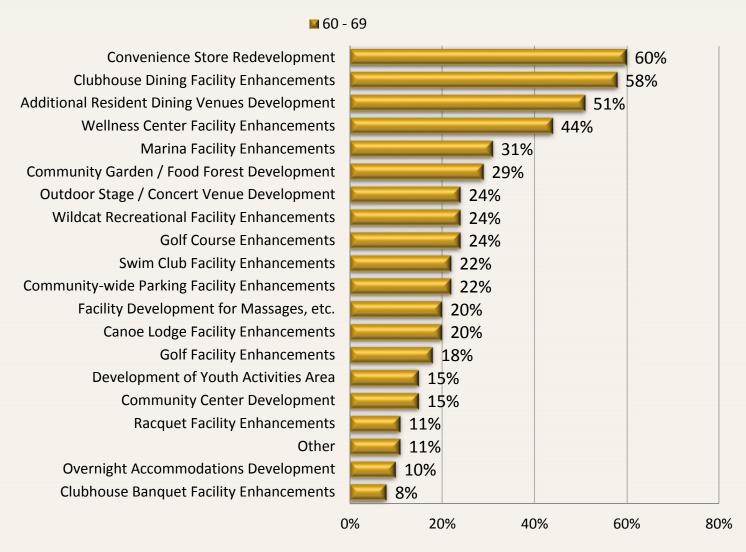


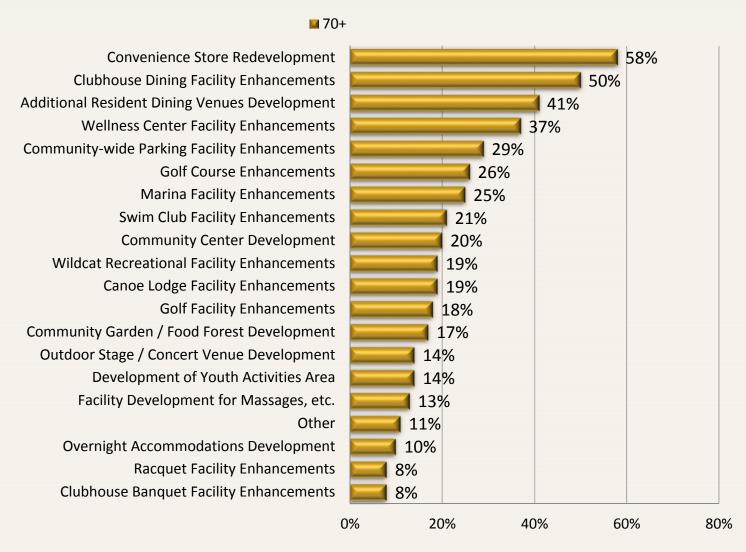


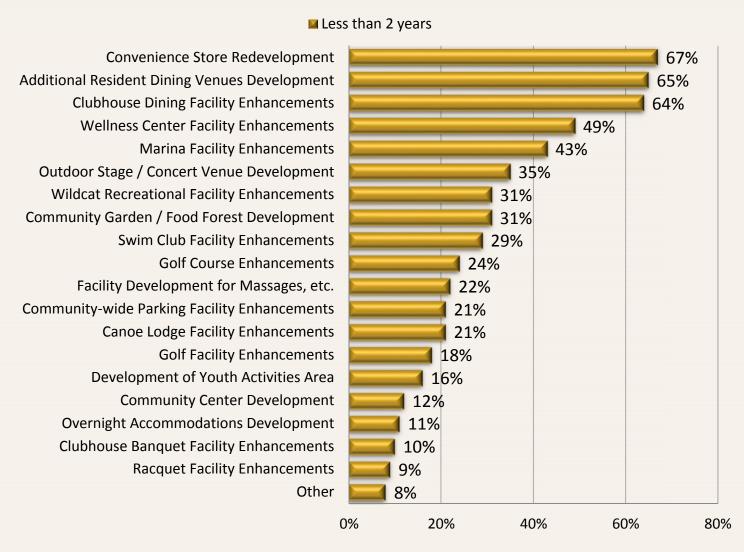




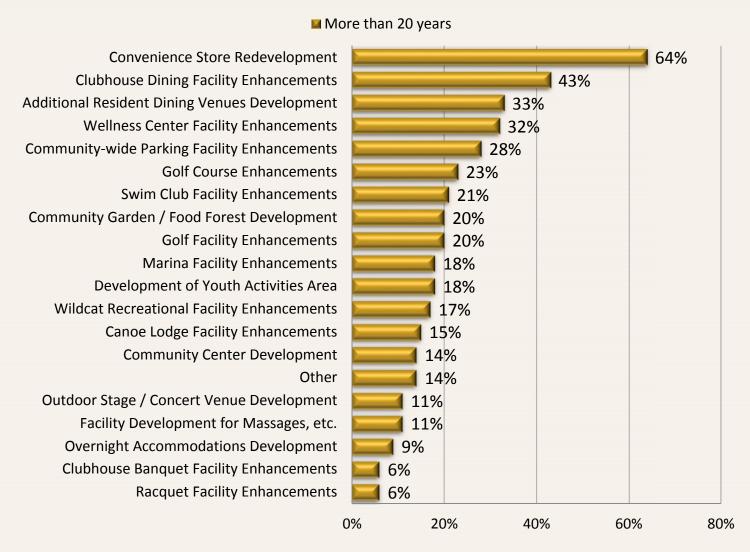




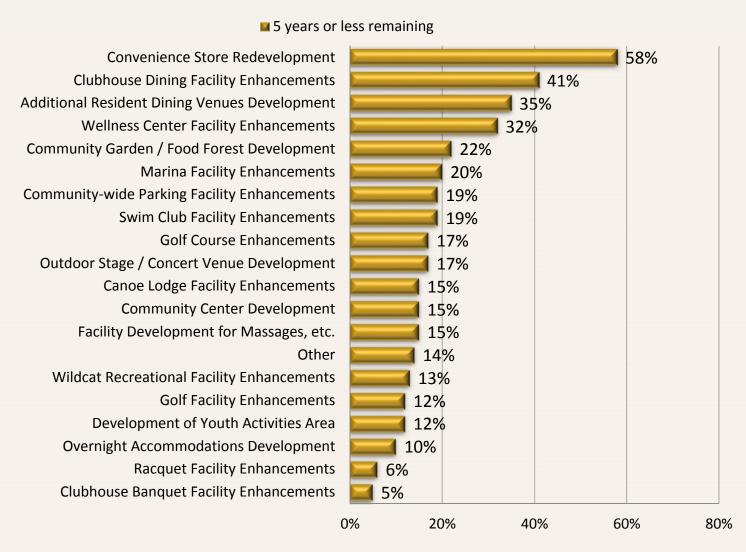




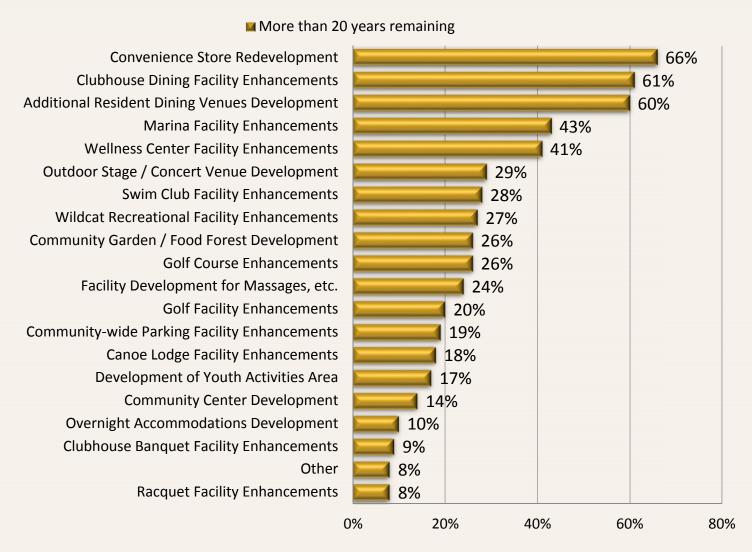
In your opinion, which of the following facilities, if improved / enhanced / developed, will increase your utilization of the Community facilities?



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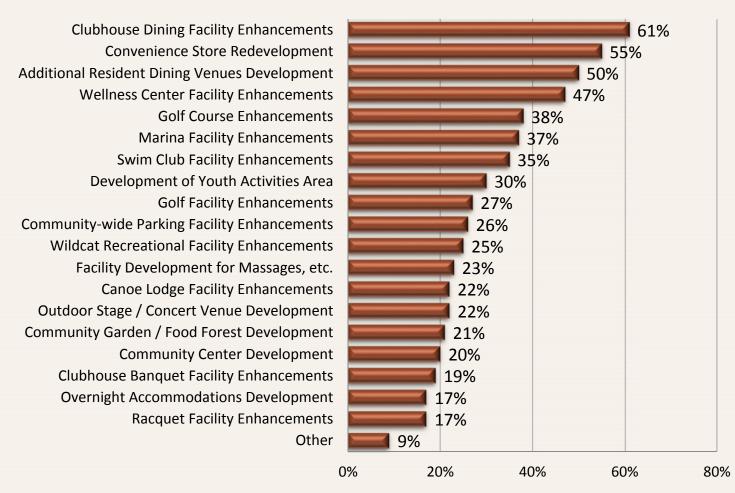
In your opinion, which of the following facilities, if improved / enhanced / developed, will increase your utilization of the Community facilities?



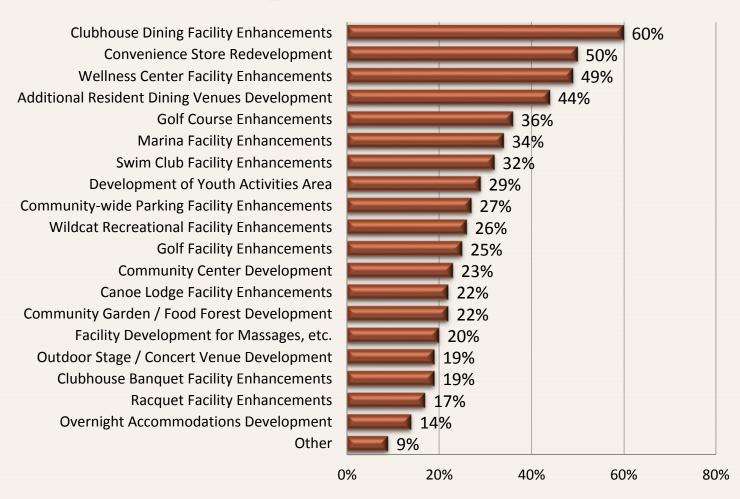
Overall Prioritization Key Strategic Driver – Attraction for Prospective Residents



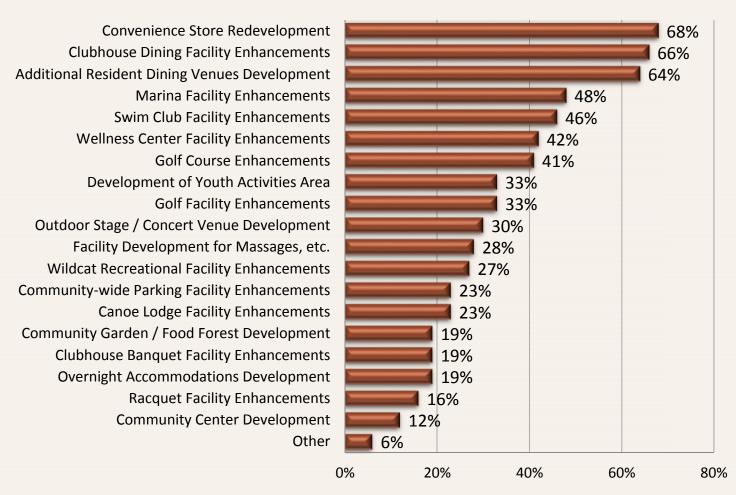
■ Overall Respondents



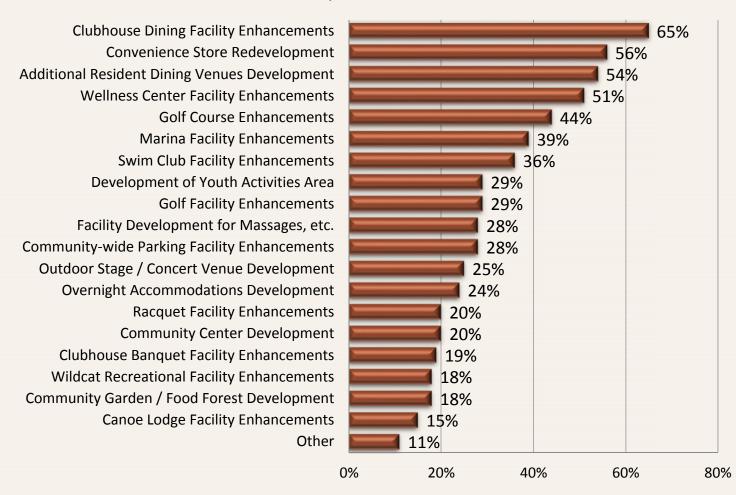
■ Full-time Residents



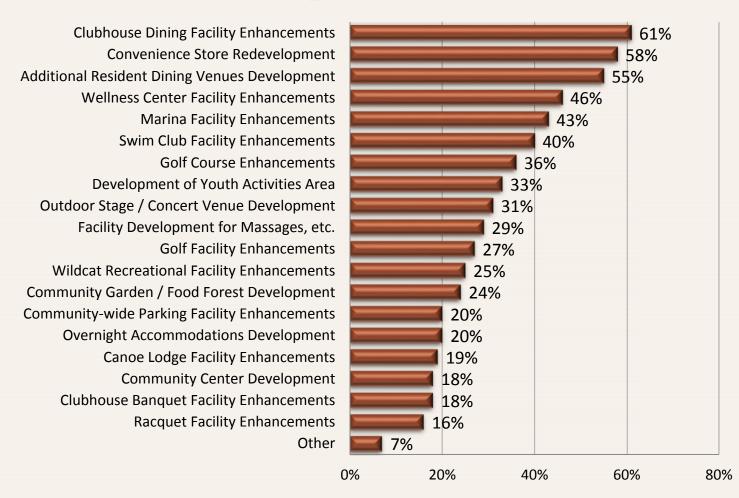
■ Weekend / Vacation Home



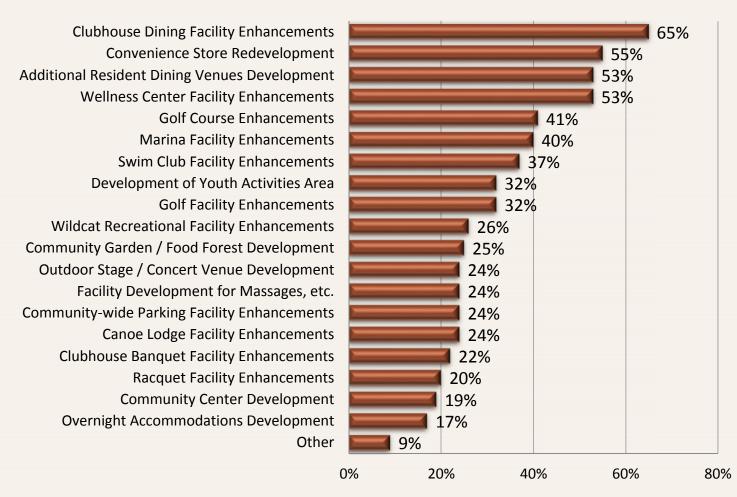
■ Primary Home but others



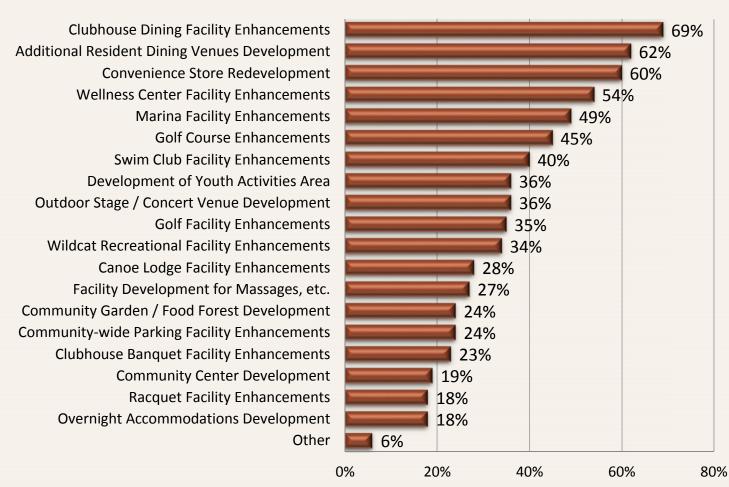








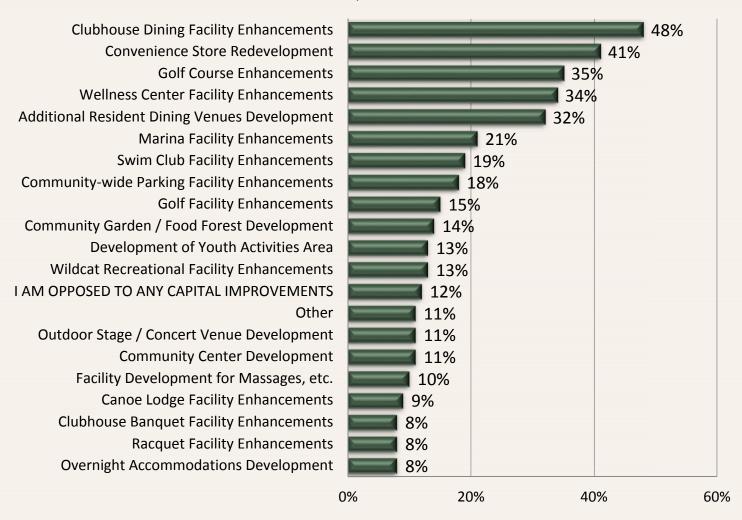
■ Less than 2 years



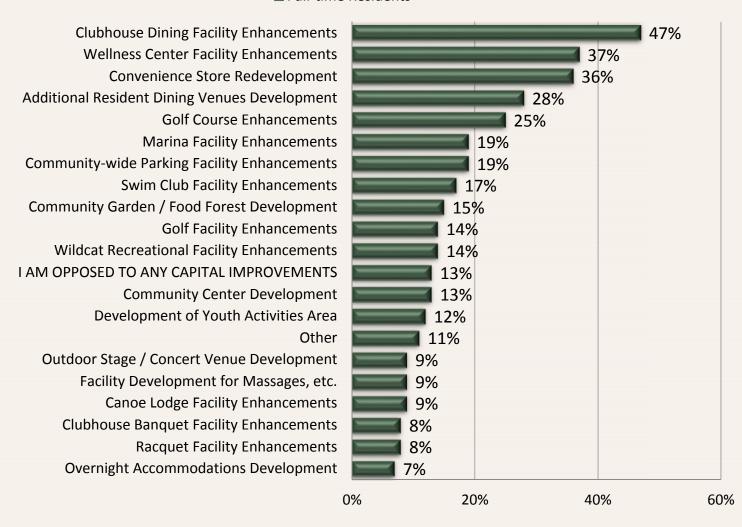
Overall Prioritization Community Residents' Priorities



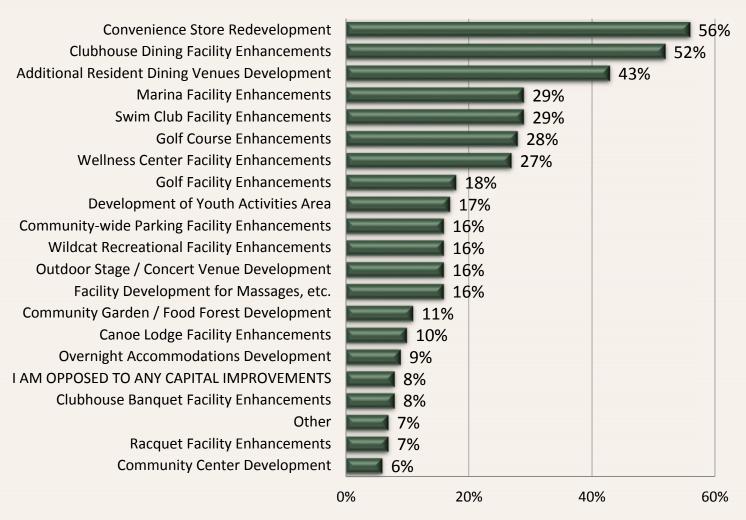
■ Overall Respondents



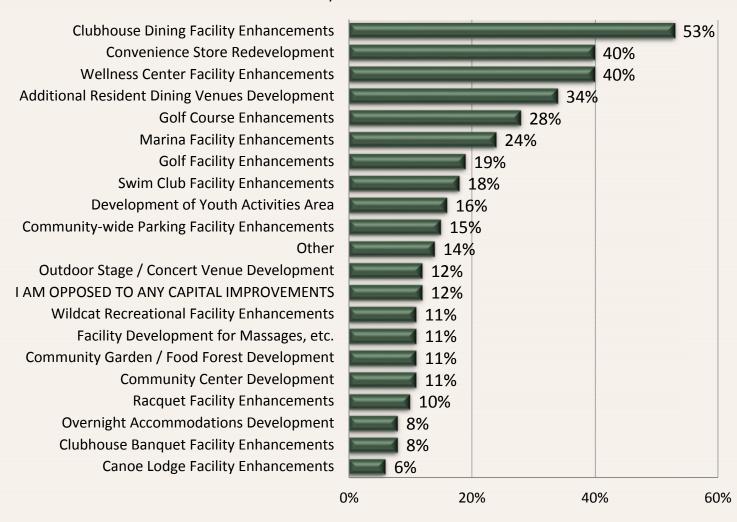
■ Full-time Residents



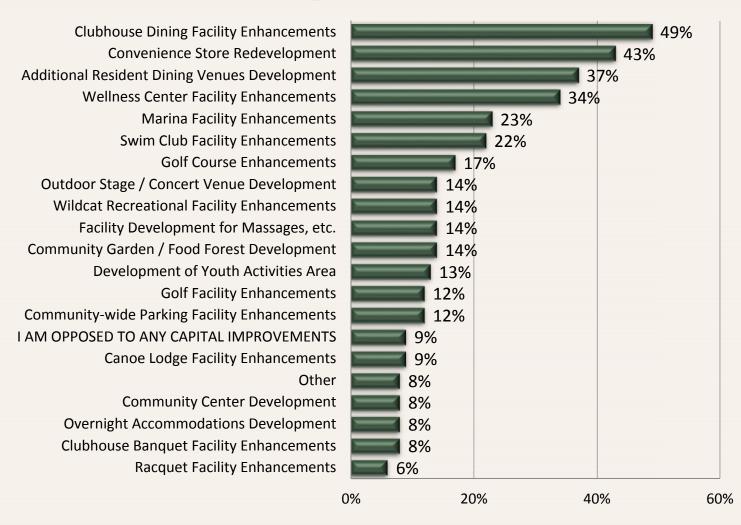
■ Weekend / Vacation Home



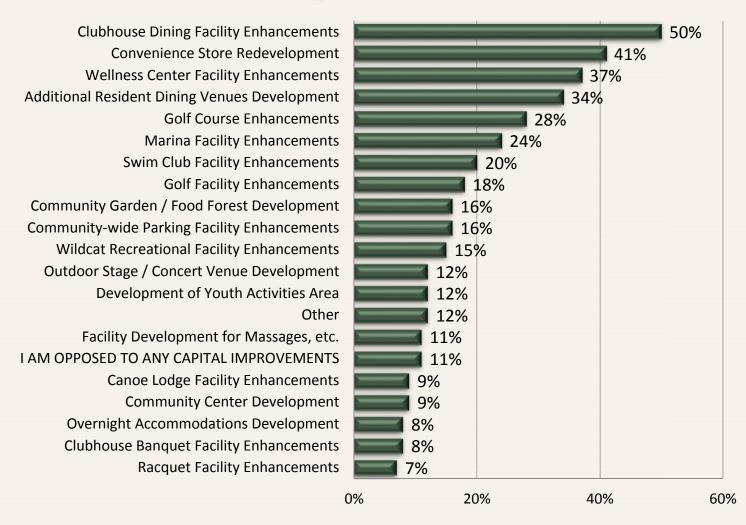
■ Primary Home but others



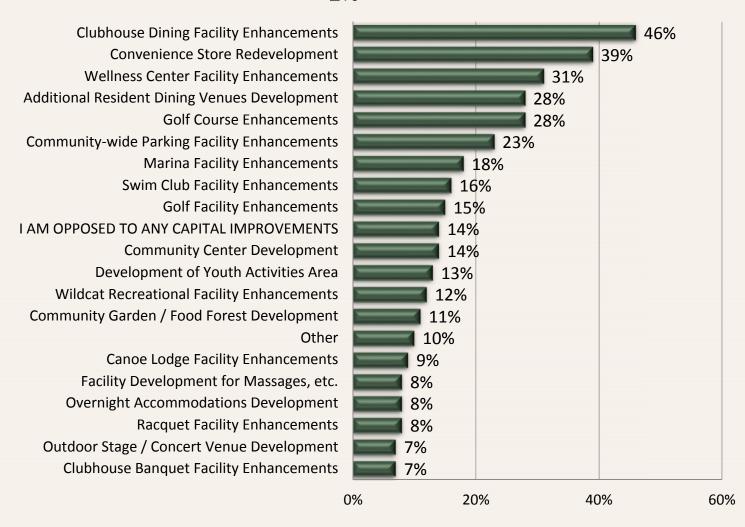
■ Under 60



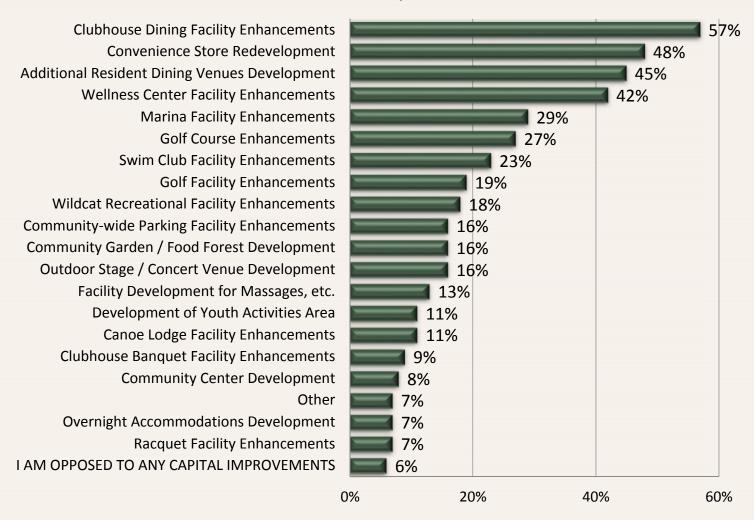
60 - 69



■ 70+



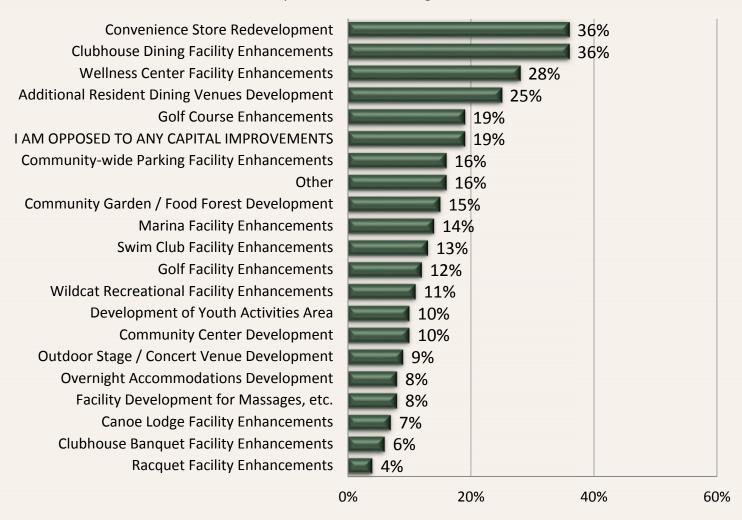
■ Less than 2 years



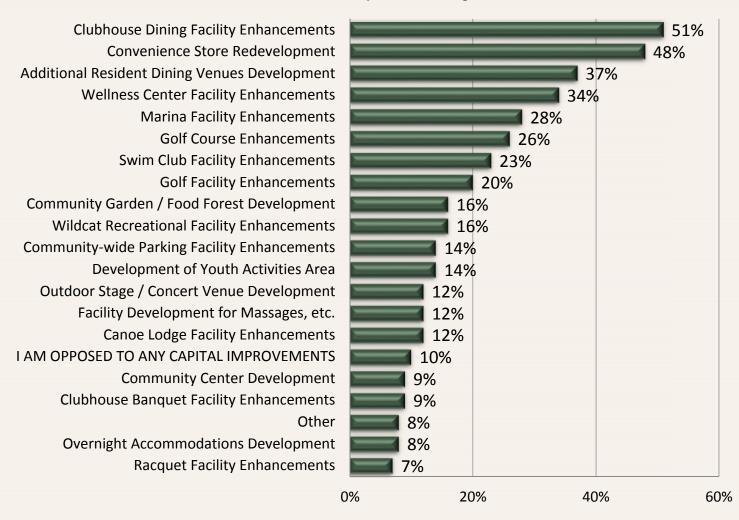
■ More than 20 years



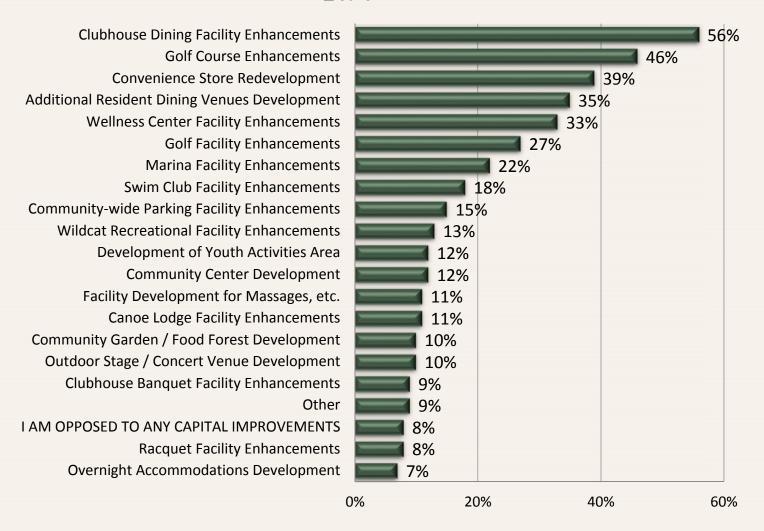
■ 5 years or less remaining



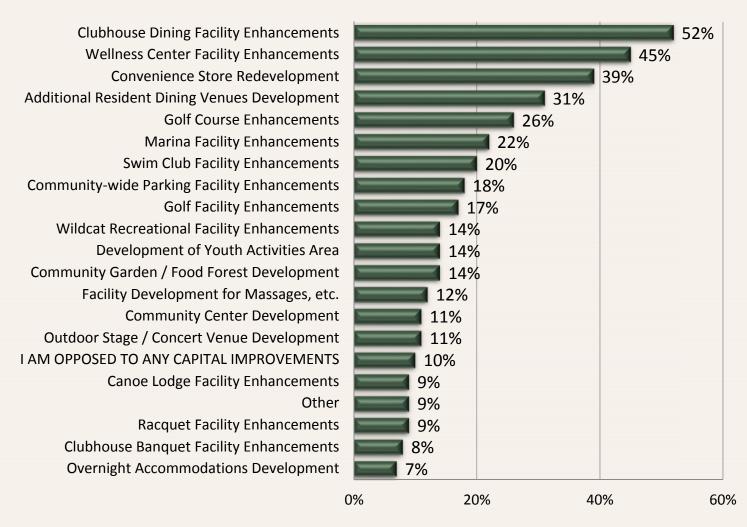
■ More than 20 years remaining



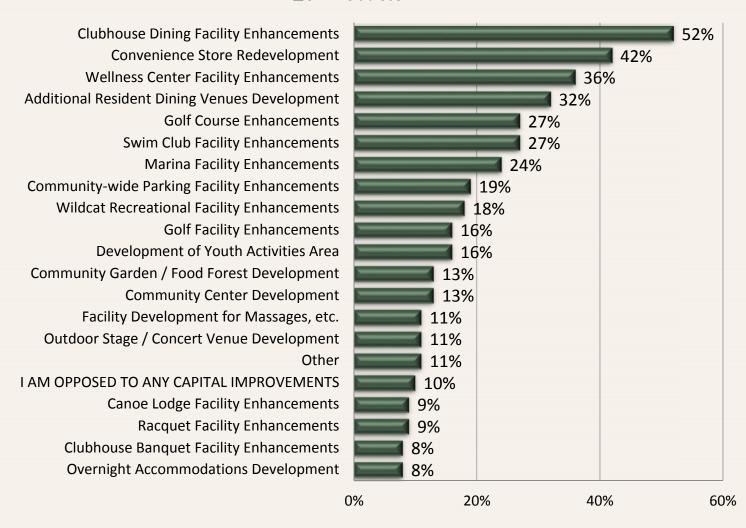
■ Golfer



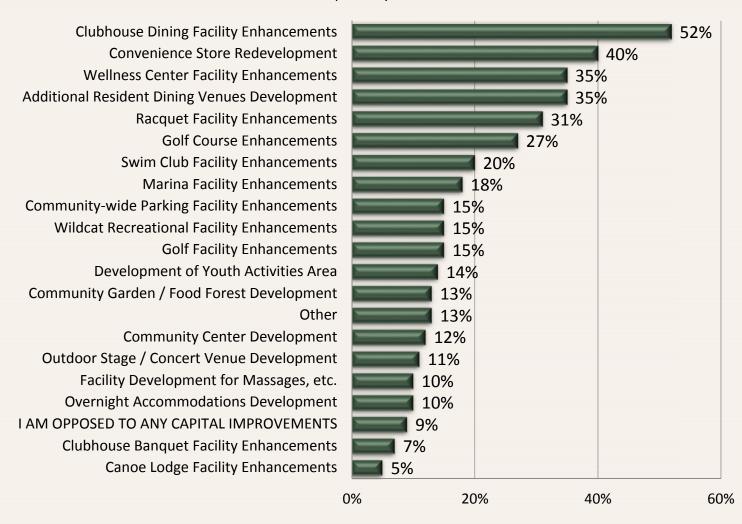
■ Wellness Center User



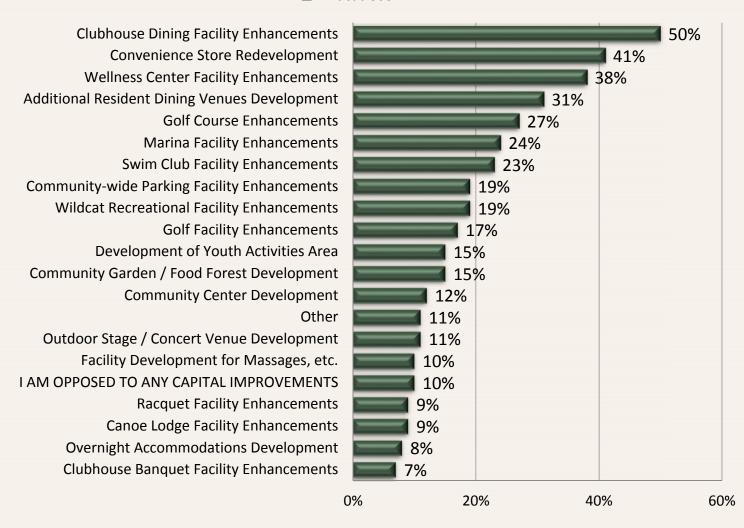
■ Swim Club User



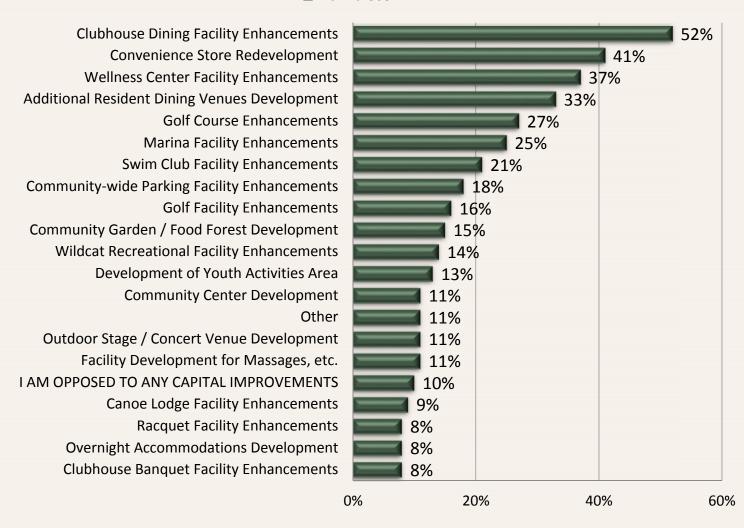
■ Racquet Player



■ Wildcat User



■ Marina User



Thank you!!

