



# **Incline Village & Crystal Bay Owner and Tenant Research**

Conducted for IVGID  
Dec 2018 – Jan 2019

Prepared for:

**Susan Herron**

Executive Assistant/District Clerk/Public Records Officer  
Incline Village General Improvement District  
(775) 832-1207

[Susan.Herron@ivgid.com](mailto:Susan.Herron@ivgid.com)

Prepared by:

**Lou Riordan & Stephen Bohnet**

Finn

(415) 624-7254

[lou@finn-group.com](mailto:lou@finn-group.com)

[www.finn-group.com](http://www.finn-group.com)



## Background & Research Objectives

The Incline Village General Improvement District is conducting research among all residents and owners of Incline Village and Crystal Bay properties, including businesses. The first round of this research was conducted in 2016, and the second round was conducted in late 2018 – early 2019.

The purposes of this research are:

- **To assess the needs and wants of the community**
  - What are their opinions of Incline's various amenities?
  - What amenities do they use, and how often?
  - What types of improvement or additions are desired?
- **To understand how properties are used**
  - How often are people on site at their properties?
  - How many are using their properties as income/rental, and how (VRBO, AirBNB, etc.)?
- **To understand the demographic make-up of Incline Village and Crystal Bay residents and owners**

## Methodology Details

An online survey was sent via postcard to all Incline Village and Crystal Bay parcel owners and tenants

- Survey dates: Dec. 6, 2018 to Jan. 31, 2019
- Interview length: **15 minutes**
- Sample size: **839** (margin of error +/- 3%)
- Respondents were required to enter the unique ID code provided on their mailer or their street address, and all responses were subject to quality control to prevent speeders, straight-liners, and spam entries

*Note: All differences noted between 2016 and 2018-19 data are at 90% statistical significance or greater*

## Key Findings

### Major changes since 2016

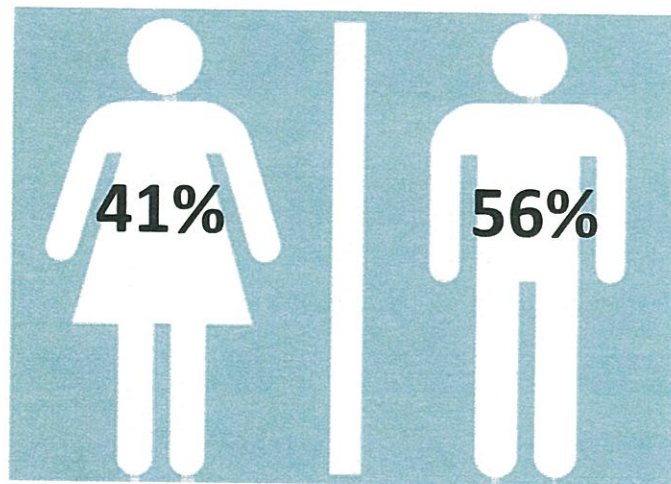
- Attitudes toward individual amenities have improved significantly
  - Average Net Promoter Score (NPS) across all amenities increased from 16 to 27
  - 14 of 18 amenities surveyed improved their NPS
  - 10 amenities had double-digit NPS improvements
  - Only 1 amenity was at or below zero NPS (6 were in 2016)
- Perception of value of recreation fee has improved
  - 58% now say very/fairly good value (compared to 53% in 2016)
- NPS for “Incline Village/Crystal Bay as a place to own property” decreased from 45 to 34 (still good overall)
- Satisfaction with “IVGID informing about governing” decreased from 41% to 36%

Both of these decreases can be at least partially explained by an increased percentage of respondents this time being full-time residents (compared to 2016). In both studies, full-time residents were more likely to be negative on these measures than part-timers or vacationers.



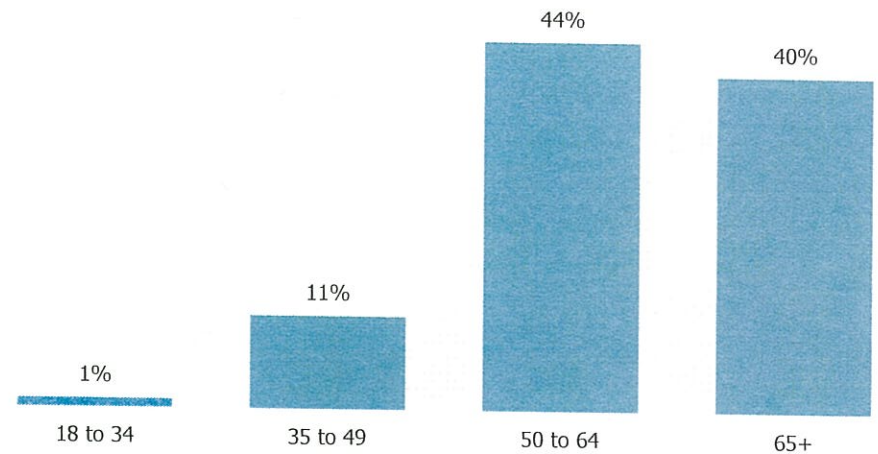
## Majority of Respondents Were Male; 40% over 65 years old

Gender



Declined to state: 3%  
Total (N=839)

Age



Declined to state: 3%  
Total (N=839)



What is your gender?  
Please indicate your age (ranges provided):

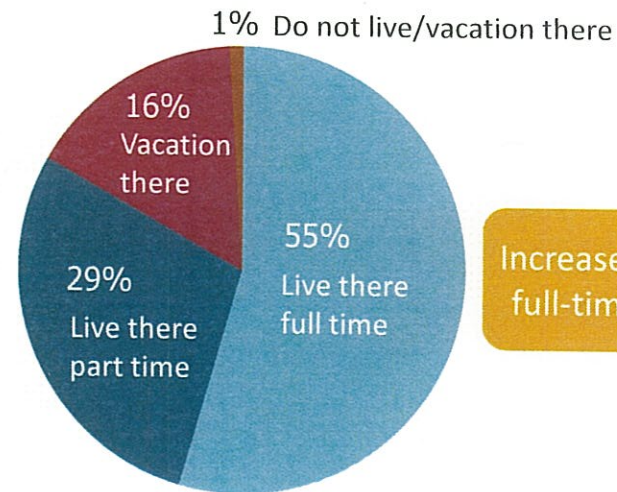
Vast majority were from Incline Village; Over half are full-time residents

### Location of Property Ownership

**98%** Incline Village  
**2%** Crystal Bay

Property Owners (N=804)

### Residence Status



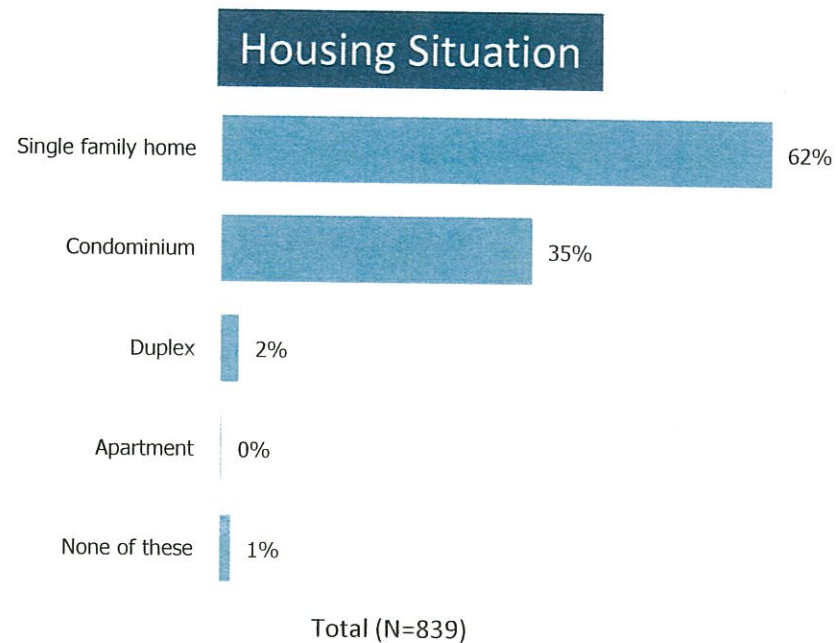
Total (N=839)

Increased from 46% full-timers in 2016



Do you own a property in Incline Village or Crystal Bay? (Select all that apply)  
Do you live in Incline Village or Crystal Bay?

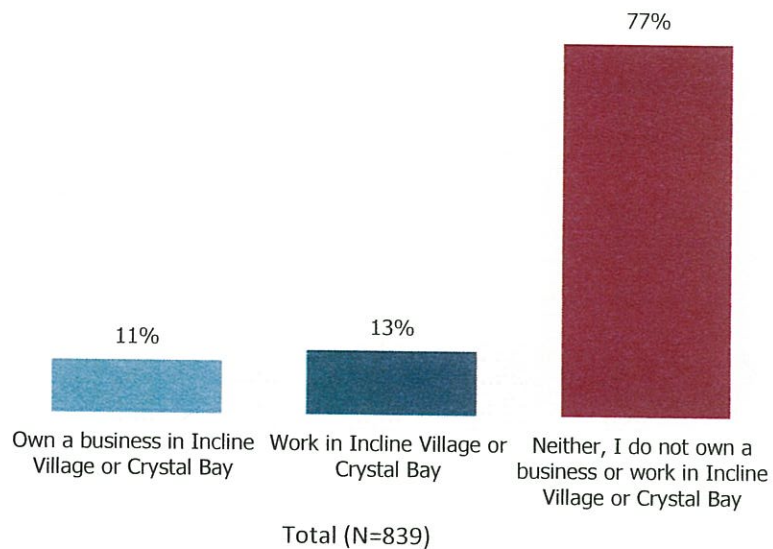
## Majority live in single family homes



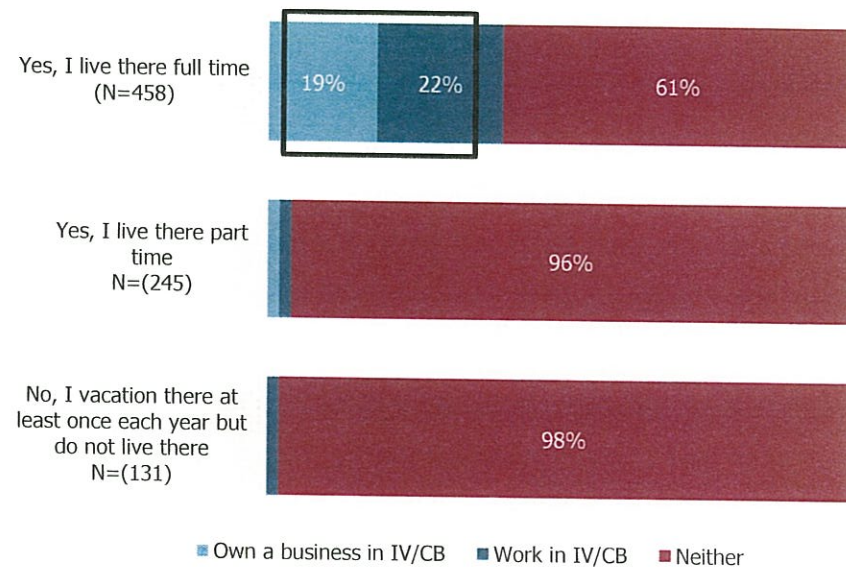
Describe your housing situation in Incline Village or Crystal Bay.

## 41% of full-timers work or own a business in Incline Village or Crystal Bay

### Working Arrangement



### Working Arrangement by Residence Status

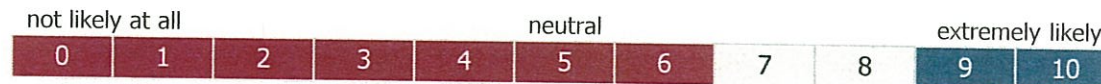


Which of these describes your work? (Select all that apply)  
Do you live in Incline Village or Crystal Bay?

## Net Promoter Score (NPS) – A method for measuring engagement

By asking one simple question — *How likely are you to recommend Incline Village (or Crystal Bay) as a place to live full time?* — we can identify three groups and get an overall measure of performance.

Participants respond to a 0-to-10 point rating scale and are categorized as follows:



- **Promoters** (score 9-10) are loyal enthusiasts who will keep referring others
- **Passives** (score 7-8) are satisfied but unenthusiastic
- **Detractors** (score 0-6) are unhappy and can damage your reputation and impede growth through negative word-of-mouth.

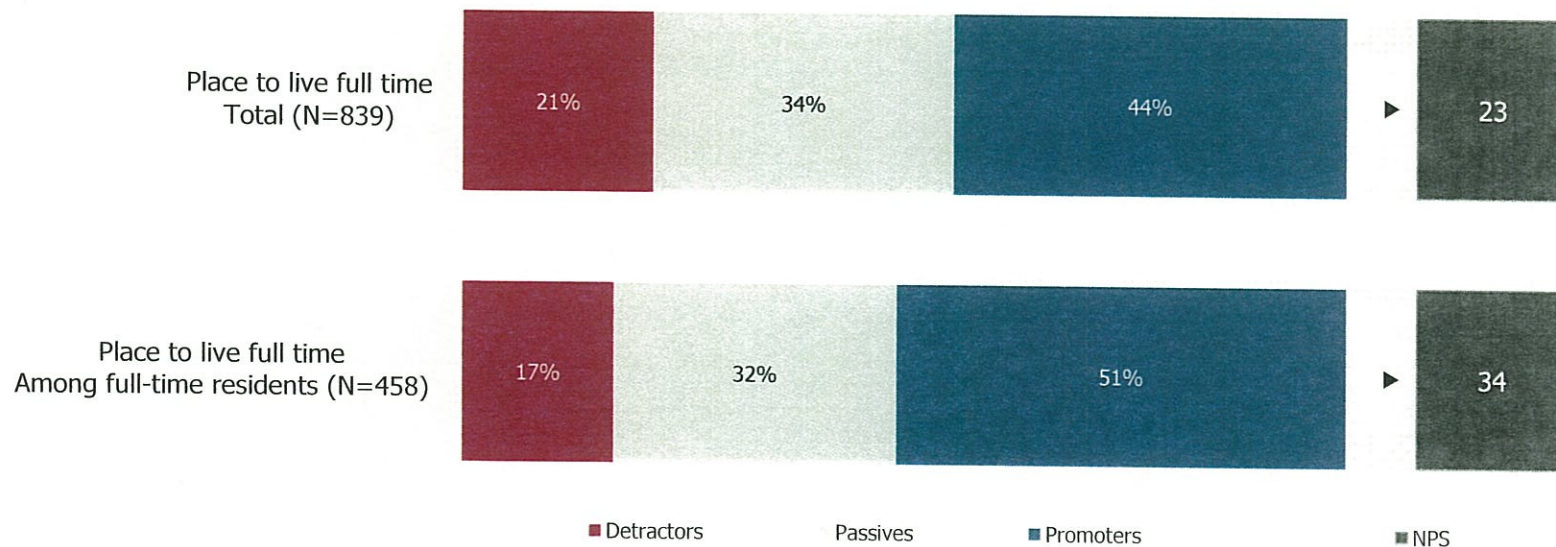
To calculate NPS, take the percentage of customers who are Promoters and subtract the percentage who are Detractors. A positive score means there are more promoters than detractors.



For more information on the methodology: <http://www.netpromoter.com/why-net-promoter/know>

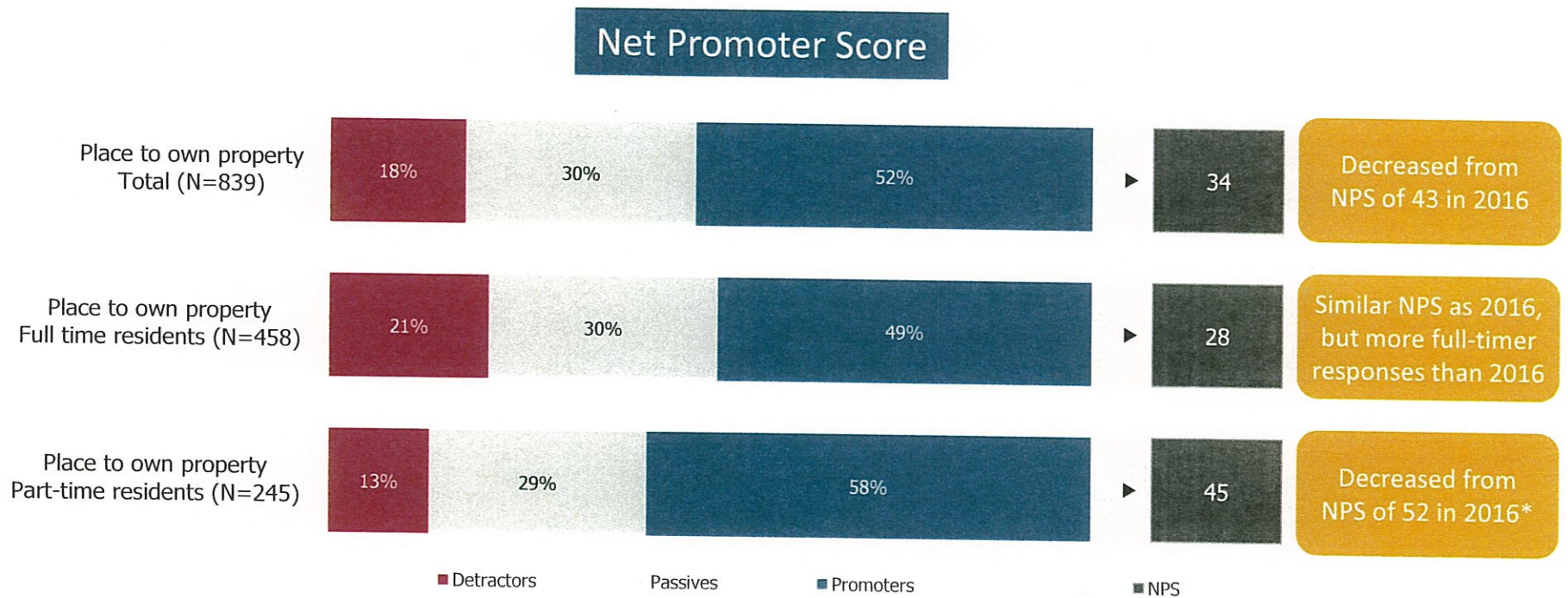
Incline Village/Crystal Bay is positively perceived as a place to live full time (more so among those who live there full time) and to own property

### Net Promoter Score



Recommend Incline Village or Crystal Bay as a place to live full time?

Incline Village/Crystal Bay is also perceived as a positive place to own property, more so by part-time residents than full-timers



Recommend Incline Village or Crystal Bay as a place to own property?  
 \*Directional change – only 87% confidence level for statistical significance

## Who are Detractors and what are their perceptions?

Detractors vs. Promoters

### Who they are

More likely to live there full-time	64% vs. 52%
See recreation fee as somewhat/very poor value	47% vs. 10%
Feel like the rec fee should be lower by \$100	53% vs. 23%

### Attitudes regarding amenities

Our amenities don't influence how much time I spend at Incline Village/Crystal Bay	66% vs. 34%
IVGID should invest only to maintain existing amenities	48% vs. 22%
I would like IVGID to focus more on improving the amenities we already have	67% vs. 47%
I do not believe amenities improve my property value	39% vs 9%

### Attitudes concerning IVGID

Less satisfied with IVGID's services*	33% vs. 67%
Less satisfied with IVGID's efforts to keep them informed*	42% vs. 75%
I am somewhat/very dissatisfied with how IVGID informs me about their finances	53% vs. 32%
I am somewhat/very dissatisfied with how IVGID informs me about their operations	47% vs. 22%
I am somewhat/very dissatisfied with how IVGID informs me about their governing	57% vs. 26%
Much less satisfied with finding answers to IVGID questions*	36% vs. 63%



\* Top 2 Box

Based on detractors for question: Recommend Incline Village or Crystal Bay as a place to own property? (18% of total sample)

## What Detractors are Saying

The facilities are too crowded! Since I can't ever use them, why would I recommend adding more people?

Other than an indoor pool and maybe golf course (which I don't use) there are similar amenities in other areas around Tahoe and less expensive.

IVGID's poor focus on property owners and high focus on commercial use of amenities.

The list of amenities is impressive. I do not like the way beach access is handled during busy times.

They are nice facilities but... I don't use them enough to justify the annual payment.

The amenities are fine but there are lots of different locations around the lake that offer great amenities but with better restaurants, bars, and nightlife. Incline Village is lacking a lot in terms of things to do outside the IVGID facilities.

As we own and live in Crystal Bay, IVGID's managements long standing position has been to treat Crystal Bay residents as outsiders and second class citizens. IVGID has NO amenities in Crystal Bay and has successfully held off on including Crystal Bay in its activities since day one of the merger.

They are turning activities into anyone can pay and use. Way too crowded now.

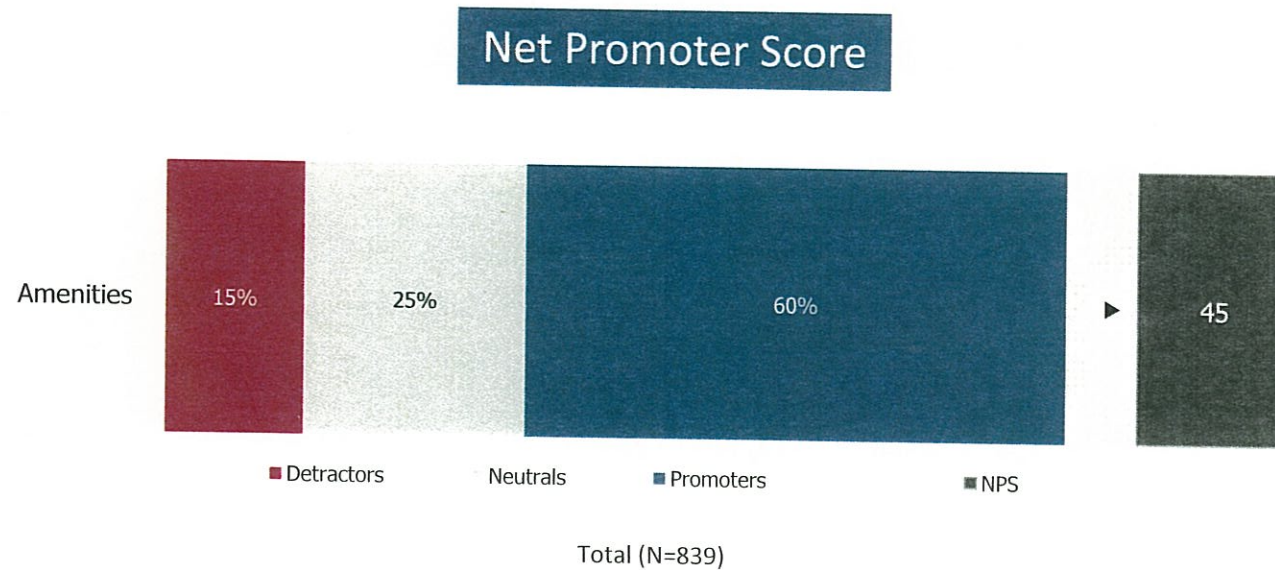


Based on detractors for question: Recommend Incline Village or Crystal Bay as a place to own property? (18% of total sample)

A silhouette of a golfer in mid-swing, captured against a bright, hazy background. The golfer is positioned on the right side of the frame, with their club raised high. In the background, a golf flag is visible on the left, and a small dark spot, likely a golf ball, is visible in the air to the right of the golfer. The overall scene is set on a green field, possibly a golf course.

# Attitudes about the Amenities

Amenities overall receive a healthy NPS with a relatively small group of Detractors



Recommend IVGID for its amenities?

## Reasons for Amenities Ratings – Themes

Detractors	Neutrals	Promoters
<ul style="list-style-type: none"> <li>• Don't use the amenities enough to justify the fees</li> <li>• Overcrowding, specifically by visitors, renters, and/or the general public</li> <li>• Crystal Bay residents ineligible for amenities, including beach</li> <li>• Other better, cheaper amenities available nearby</li> <li>• Poor maintenance of facilities</li> </ul>	<ul style="list-style-type: none"> <li>• Good but not great amenities</li> <li>• Really like the beaches, but very concerned about crowds</li> <li>• Only use a few of the amenities</li> <li>• Don't like use fees tacked on to yearly dues</li> <li>• Believe quality could be improved</li> </ul>	<ul style="list-style-type: none"> <li>• Amenities are very convenient</li> <li>• Golf, skiing, tennis, and private beaches are highlights</li> <li>• Concerned about overcrowding at beach</li> <li>• Crystal Bay residents want to use beaches and other programs</li> <li>• Well run overall; great diversity of year-round amenities</li> </ul>



What were the main reasons you rated IVGID a "'X' for its amenities?

## Reasons for Amenities Ratings – Verbatims

The beach is very nice but I am not a beachgoer so I don't care. The other amenities are of no value. They did not drive my decision to live in Incline. – 0 rating

Incline Village has everything one would want or need for a vacation home in Tahoe. – 10 rating

I don't play golf. The gym and recreation center are very nice, but not a 10. Diamond Peak is not a 10 compared to NorthStar, for example, but it is nice. – 7 rating

The amenities of skiing, beachgoing and the excellent recreation center are outstanding. So far, the taxes and fees charged for these amenities is well worth it. – 9 rating

Enjoy Mountain Golf Course and Rec Center. Have not been able to secure a kayak rack for over five years. The beaches are crowded on weekends. A dog park would be an improvement over the Village Green. – 8 rating

The skiing discount, the beach and outside bars at the beach, the parks are in amazing shape and well managed, the private beaches, gym, and walking paths. – 10 rating

We are getting too many part time and vacationers here in Incline Village to the point that we cannot even use our facilities with all the out of town and part time people. – 2 rating

Access to high quality amenities and them being private for the town mostly. Gives the town an intimate feel. – 9 rating

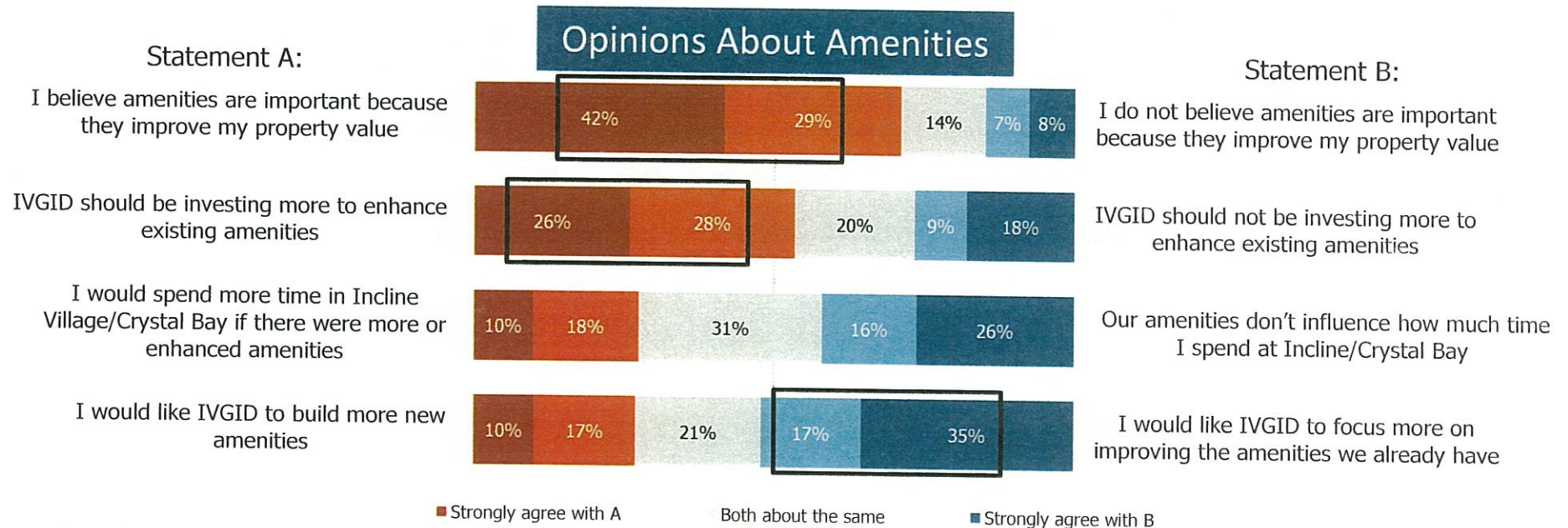
839 comments were provided in response to this question.  
The ratio of positive to negative comments was approximately 4 to 1.



What were the main reasons you rated IVGID a "'X' for its amenities?

Residents believe amenities are important to their property value, and the focus should be on enhancing and improving existing amenities rather than building new ones.

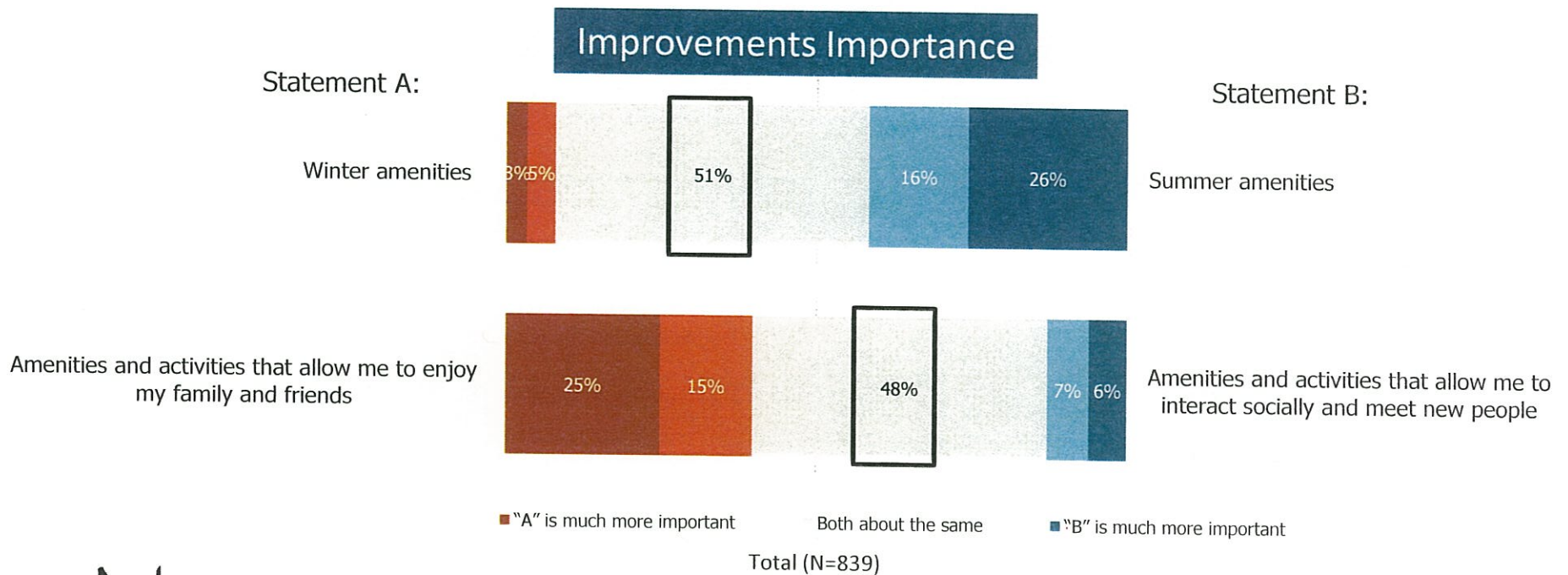
Amenities only have some impact on time spent in Incline Village/Crystal Bay.



N=839, except N=804 for "property value" statements, which were only shown to property owners  
 Below are pairs of statements. For each pair, please indicate how much you agree with statement A vs. statement B? (Select one per row)

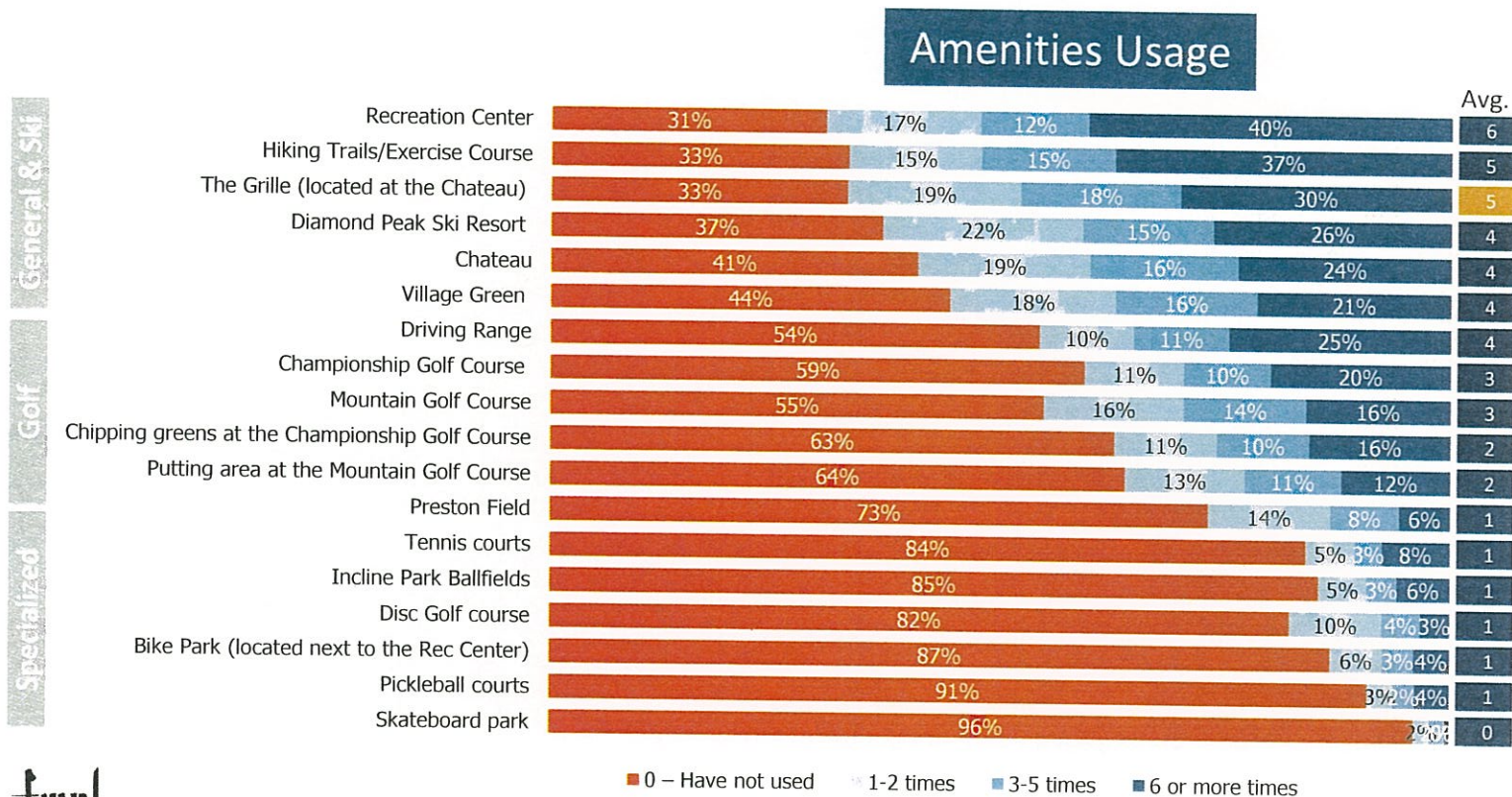
## Half of residents value summer and winter amenities equally

Almost half of residents also place equal importance on family and friends activities versus social activities.



When you think about improvements to amenities and classes, which is more important to you? (Select one per row)

## General amenities and skiing are most frequently used amenities

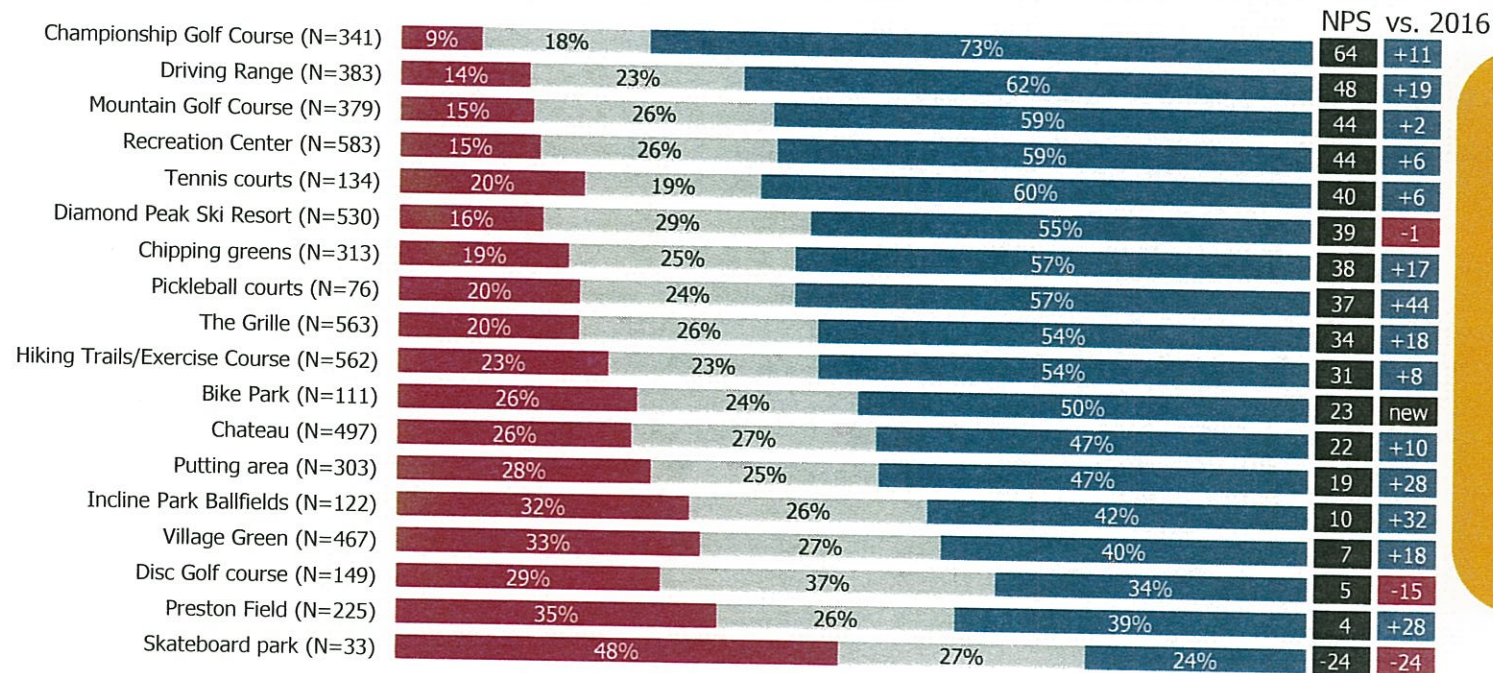


**The Grille:**  
avg. # of uses increased from 3 in 2016 to 5 and "have not used" dropped from 50% to 33%



## NPS Scores show improvement for almost every amenity since 2016

### Likelihood to Recommend Amenities - Among Users



#### Biggest Risers since 2016

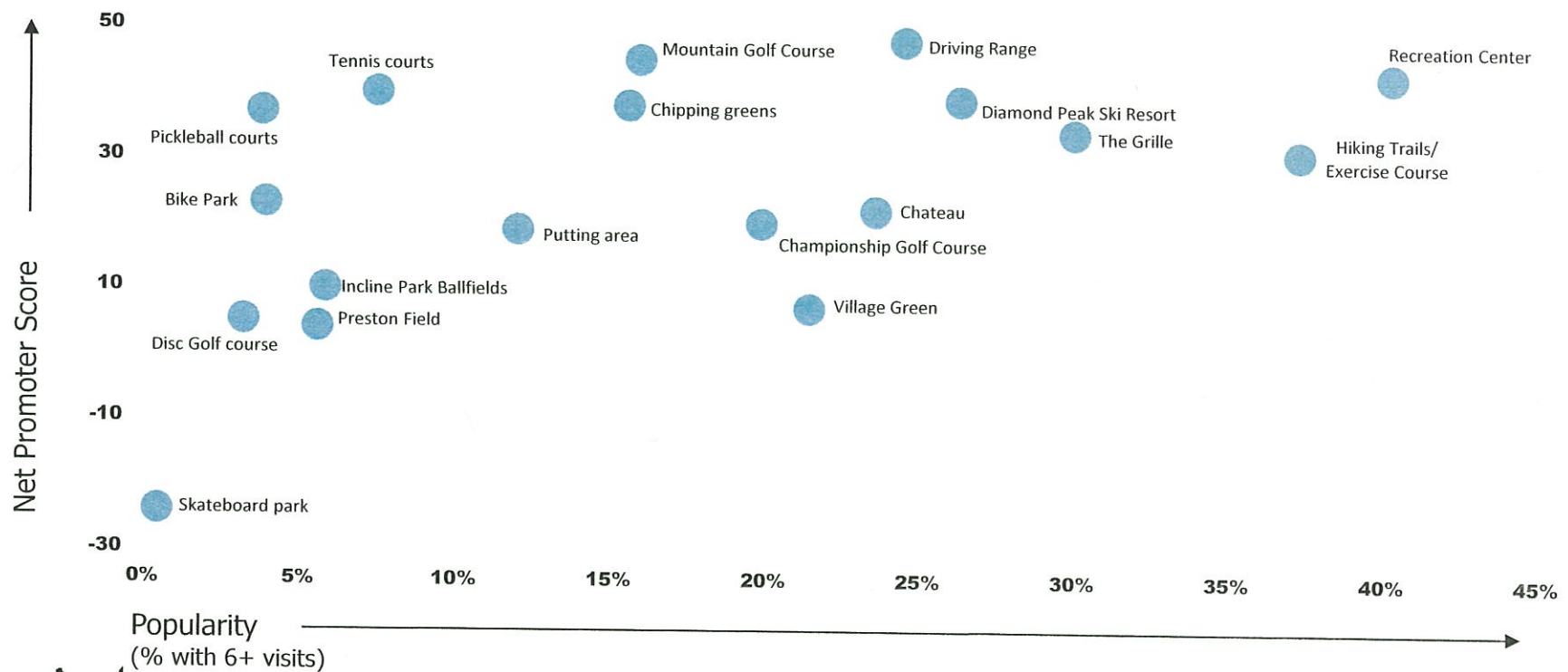
Pickleball Courts +44  
 Incline Park Ballfields +32  
 Putting Area +28  
 Preston Field +28  
 Driving Range +19  
 The Grille +18  
 Village Green +18  
 Chipping Greens +17  
 Champ. Golf Course +11

Average NPS increased  
 from 16 to 27

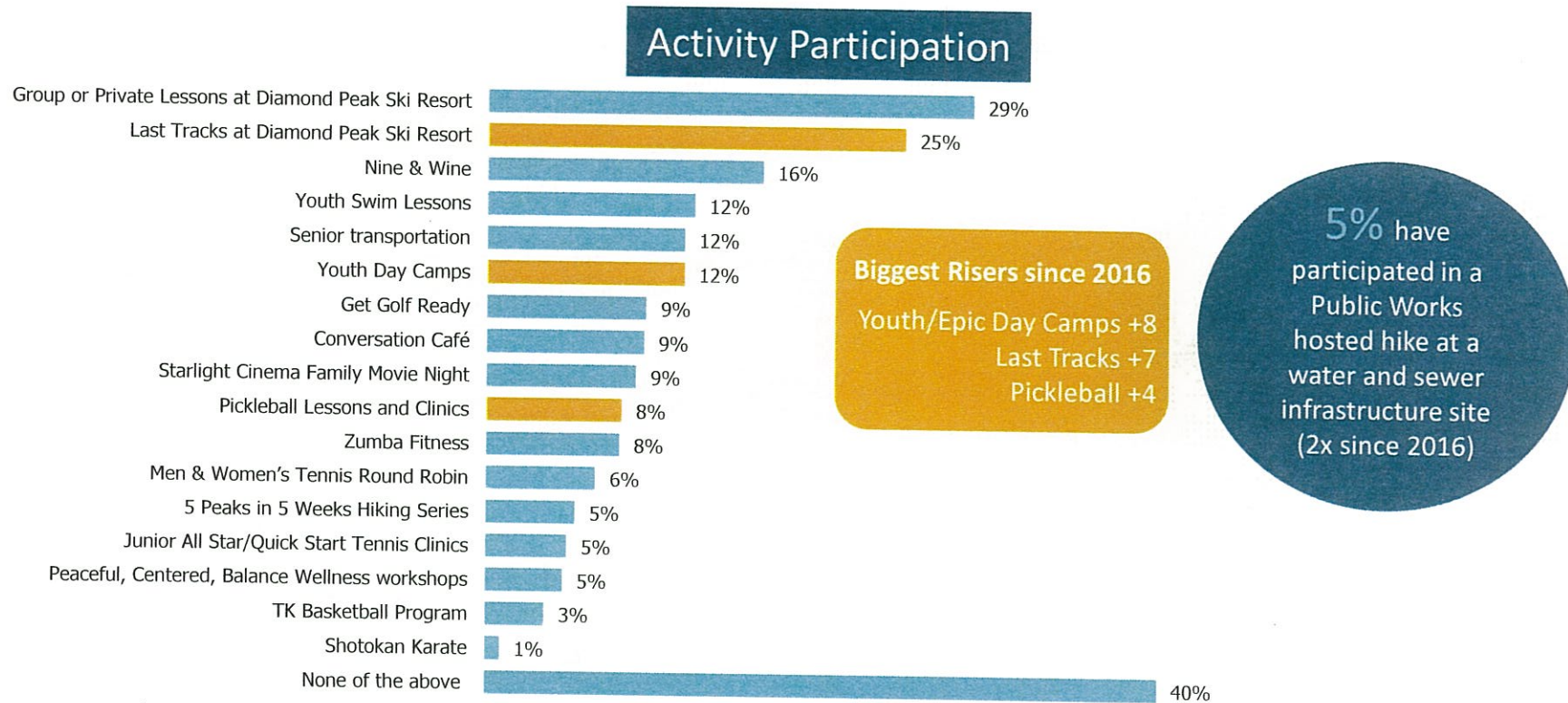


How likely is it that you would recommend each of the following amenities? (Select one per row) - Among Amenity Users

The most popular amenities have good NPS scores; potential opportunities for improvement include the Village Green, Championship Golf Course, and Chateau



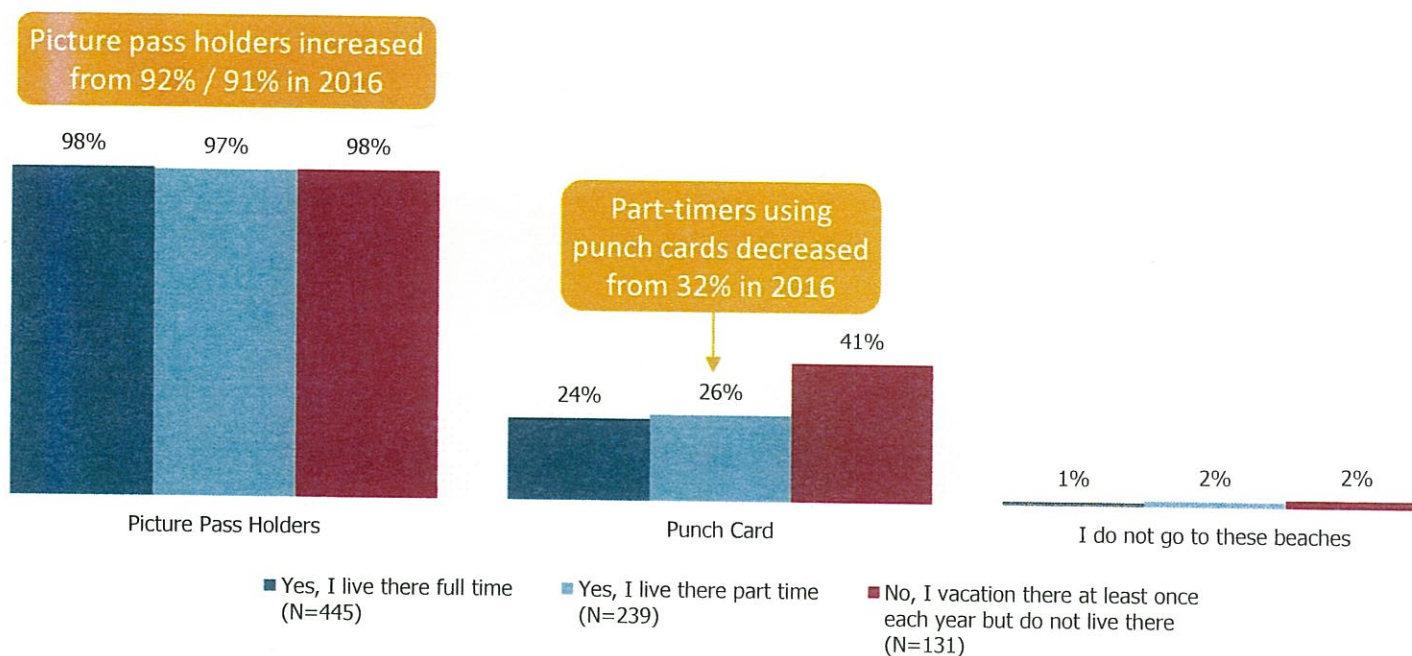
Skiing is still most popular activity, with Last Tracks rising since 2016.  
Two out of every five residents don't participate in any activities.



IVGID offers different types of programs, classes, and activities. Which, if any have you, or someone in your family, ever participated in? (Select all that apply)

Picture Pass is the by far the most common method for accessing IVGID beaches. Vacationers are more likely to use punch cards.

### IVGID Beach Access Method

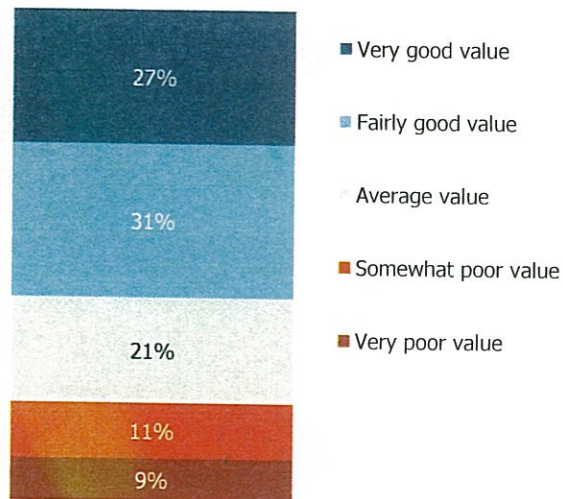


If you access IVGID beaches, what access method do you use?

Perception of Rec Fees has improved since 2016; a majority think they are "fair and reasonable" as is and fewer people think they are too high

### Perception of Rec Fees

"Very/fairly good value" increased from 53% in 2016 to 58%

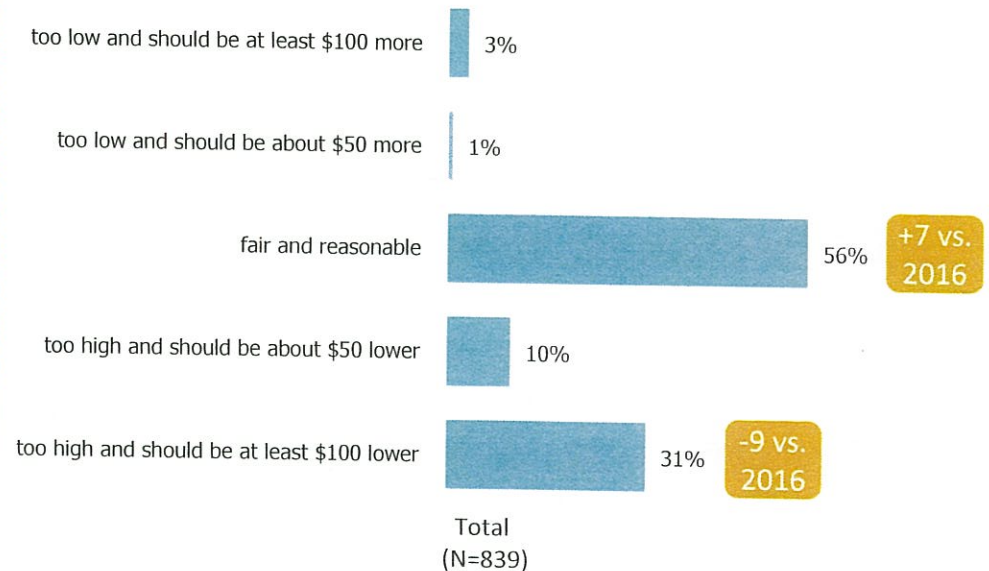


Those that pay the fee  
(N=823)



How do you feel about the value of the Recreation Fee (\$730) and Beach Fee (\$100) that you currently pay, which helps fund all of IVGID's amenities? For the amenities available to you at Incline Village and Crystal Bay, do you feel that the Recreation Fee (\$730) and Beach Fee (\$100) are...?

### Rec Fee Specifics



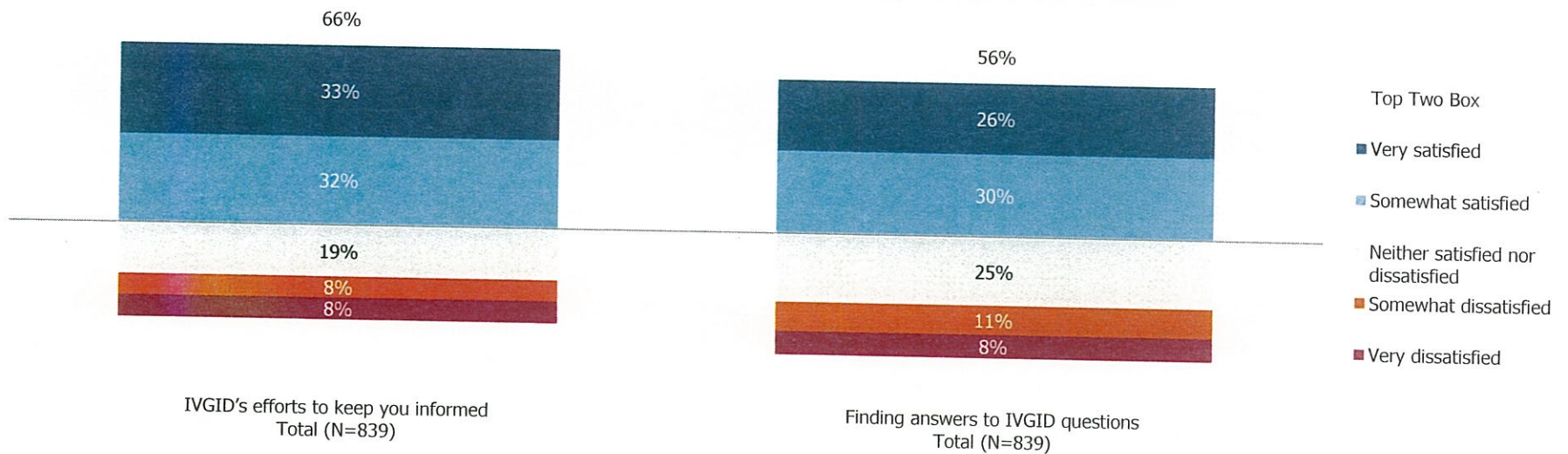
A silhouette of a person with long hair, standing with their back to the camera and arms outstretched horizontally. They are positioned in front of a large, bright, glowing sun that fills the right side of the frame. The sky is a mix of soft yellow and pinkish-purple hues, suggesting a sunset or sunrise. The overall mood is peaceful and expansive.

# IVGID Communication

While more than 80% are satisfied or neutral with IVGID's efforts to keep them informed, 16% are dissatisfied

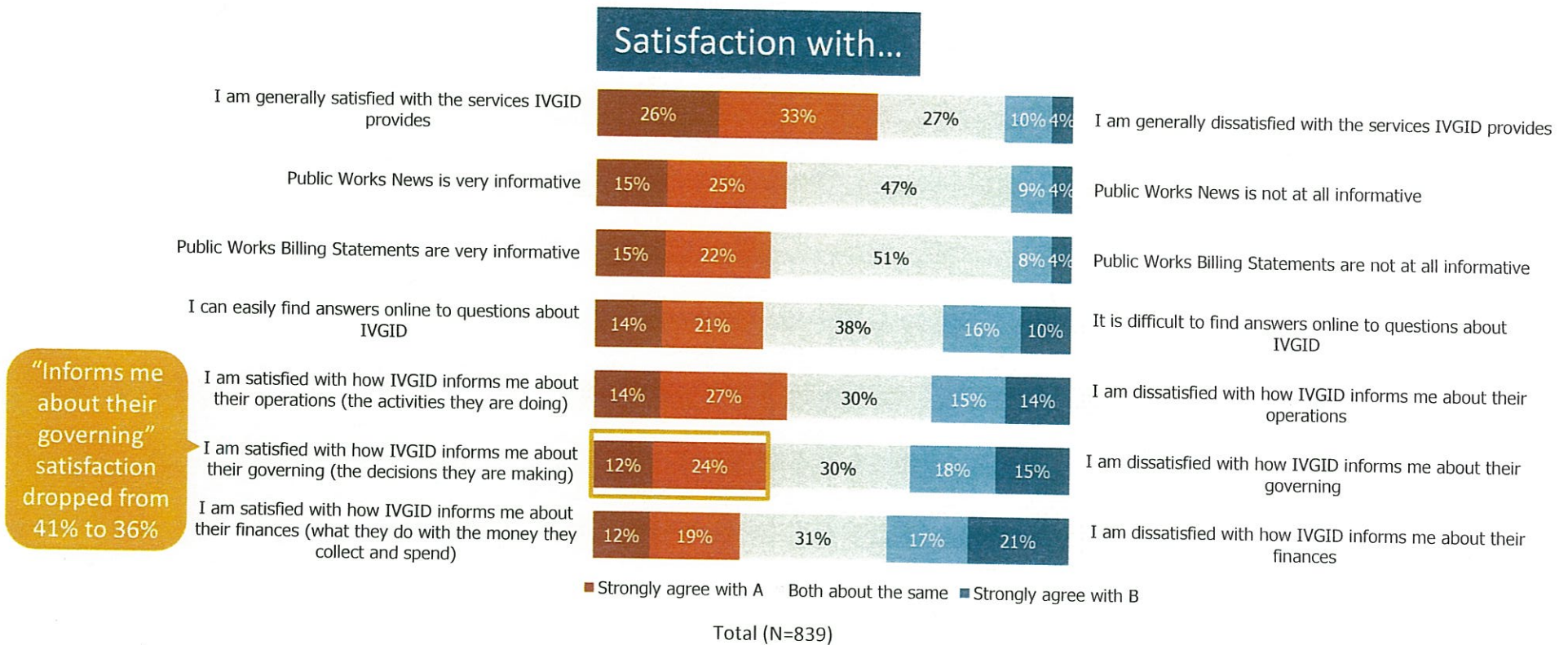
16% is very close to the 18% who are considered NPS Detractors for recommending Incline Village/Crystal Bay as a place to own property.

### Communication Efforts & Information Provided



How satisfied are you with....? (Select one per row)

## Between a quarter and a third are dissatisfied about the services and/or communications IVGID provides



Below are pairs of statements. For each pair, please indicate how much you agree with statement A vs. statement B? (Select one per row)

Those that said they are generally dissatisfied with the services IVGID provides are...

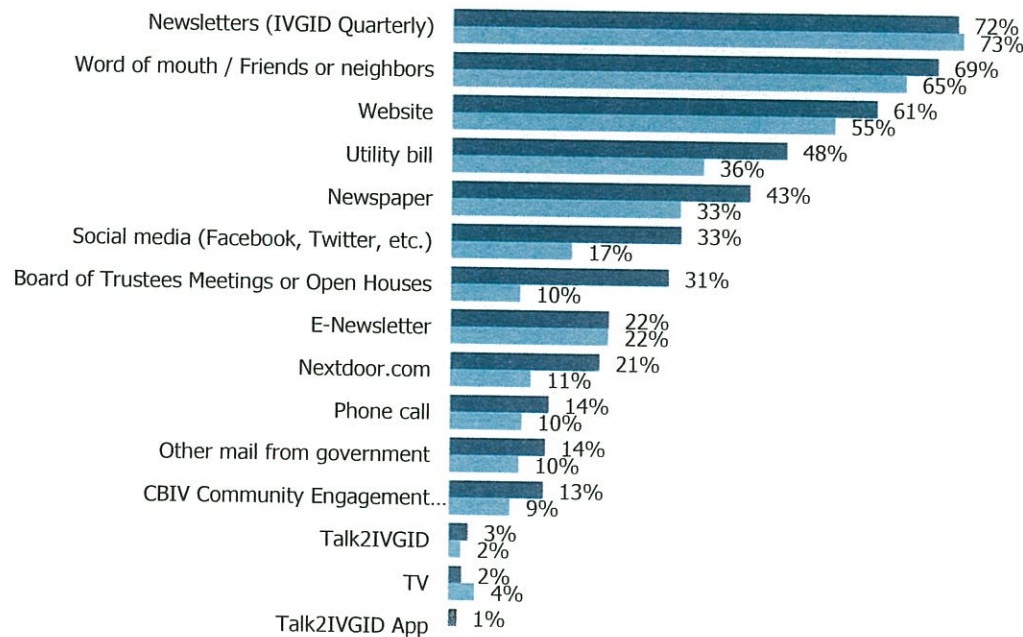
	Dissatisfied vs. Satisfied (N=120) (N=494)
More likely to:	
live there full time	77% vs. 50%
live in a single family home	76% vs. 58%
be Detractors across all three measures:	
–place to live full time	42% vs. 15%
–place to own property	43% vs. 10%
–Amenities	45% vs. 6%
Slightly more likely to be a business owner	17% vs. 10%
Less likely to rent their home	6% vs. 14%



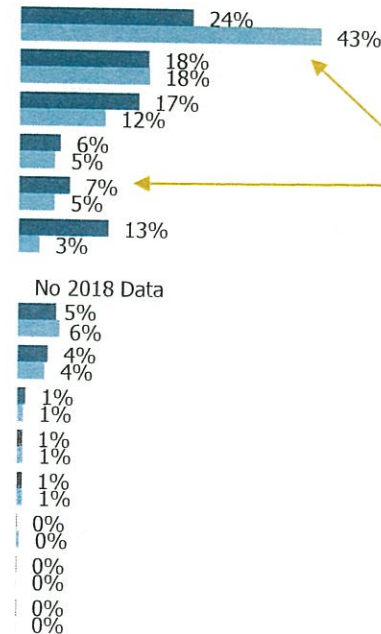
Based on who agreed with "I am generally dissatisfied with the services IVGID provides"

The newsletter and website are the main informational sources used; social media, Nextdoor.com, and Board Meetings are used more by full-timers than part-timers

### Source of Information



### Used Most Frequently



**Used Most:**  
Newsletters increased from 21%/29%, and Newspaper decreased from 21%/14%

■ Full-time residents (N=458)  
■ Part-time residents (N=245)



In the past 12 months, what sources of information have you used to stay informed about IVGID? (Select all that apply)  
And in the past 12 months, what source of information have you used most frequently to stay informed about IVGID? (Select One)

## Transparency and digital communications are major areas of focus

There is general satisfaction about what is being communicated, but a majority are looking for more, specifically around decision-making and budget/finances. Continued movement towards digital communication would be appreciated.

### Recommended Changes to IVGID Communications

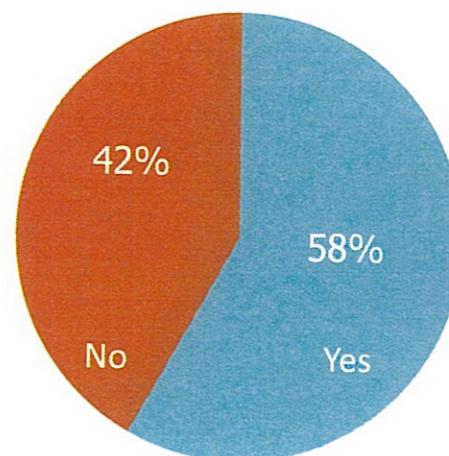
- Increased transparency and more frequent communication (monthly emails) about:
  - Board meeting minutes, preferably before the next meeting
  - Upcoming agendas
  - Upcoming events
  - Financial updates
  - How improvements are decided and funds are allocated
- Email version of IVGID Quarterly
- More opportunities to provide input on land-use decisions
- More regular web updates including posting newsletters and other content in PDF format (searchable)
- Facebook updates, or a hotline to provide status updates on activities and amenities
- Present all sides of important issues, if possible, to better inform residents
- Communicate results of this and other surveys
- More dialogue/responsiveness overall



What, if anything, would you change about how IVGID keeps you informed?

More than half are aware of portal bill pay capabilities, and awareness has increased since 2016

### Portal Bill Pay Awareness



Awareness increased from 52% in 2016

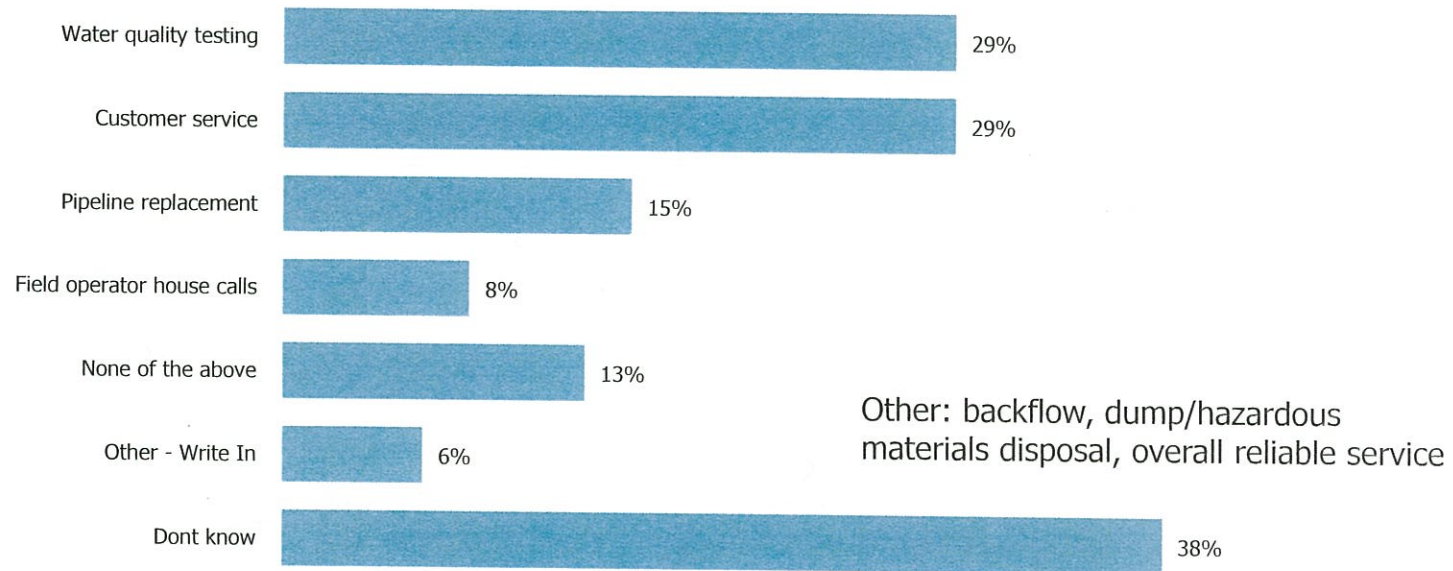
Total (N=839)



Were you aware that you could pay your Public Works bill through a secure online account access portal?

## Water quality testing and customer service are highlights of IVGID Public Works services

### Positive Aspects of IVGID



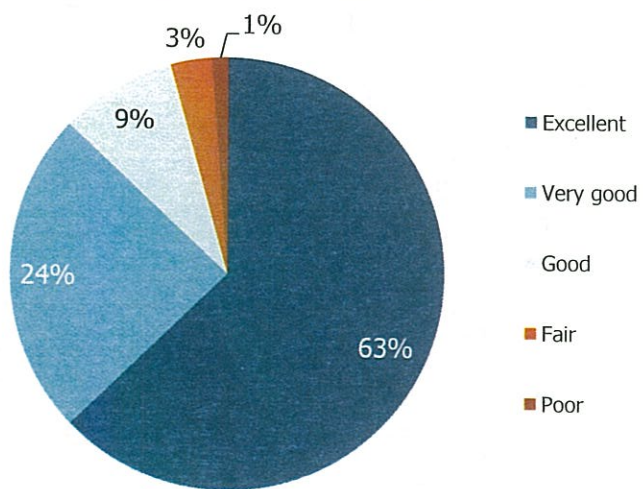
Total (N=839)



What, if anything, do you like about IVGID Public Works? (Select all that apply)

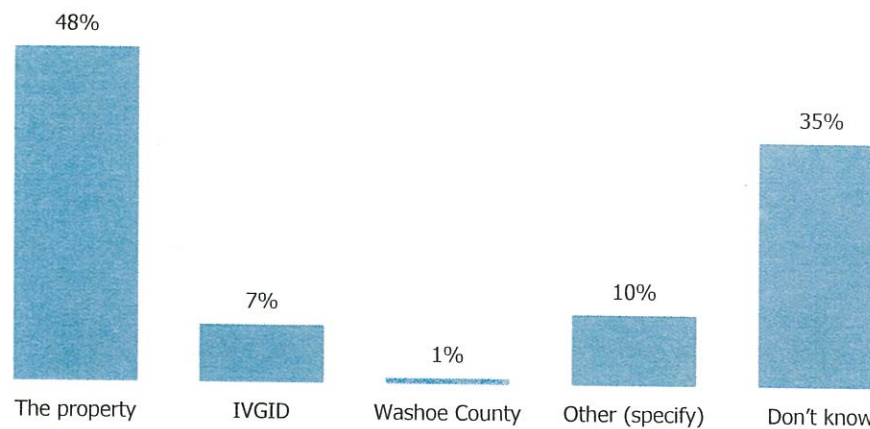
96% describe the tap water quality as good or better.  
More than a third don't know who owns their water line.

### Tap Water Quality



Total (N=839)

### Perceived Owner of Water Line



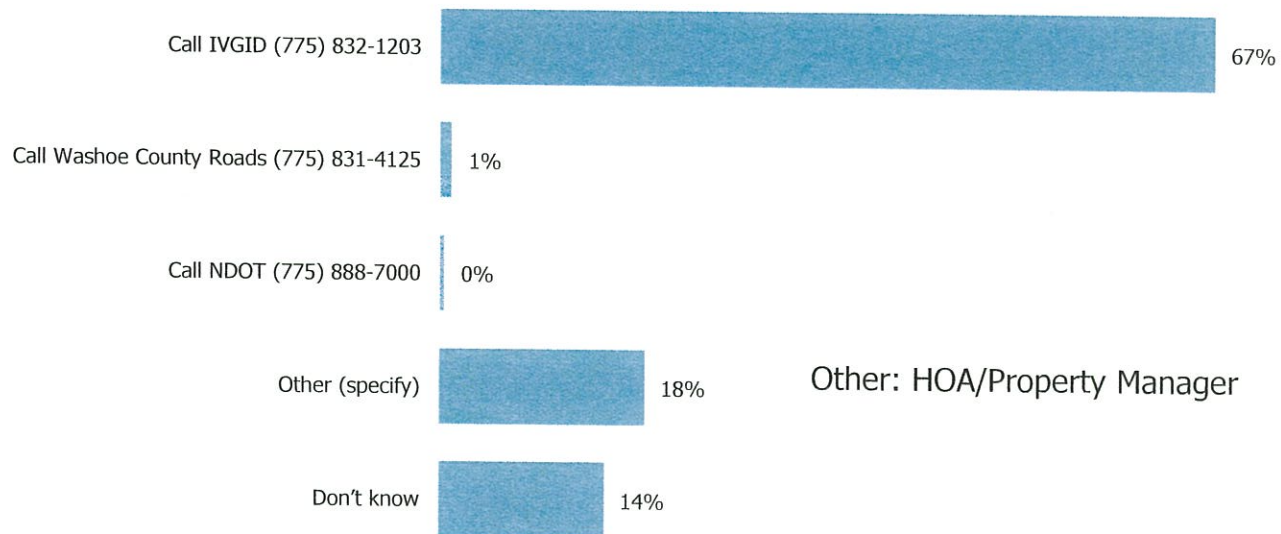
Total (N=839)



How would you rate the quality of your tap water?  
Who owns the water line on your property after the water meter?

In the event of a water leak, two-thirds would call IVGID

### Report Water Leak



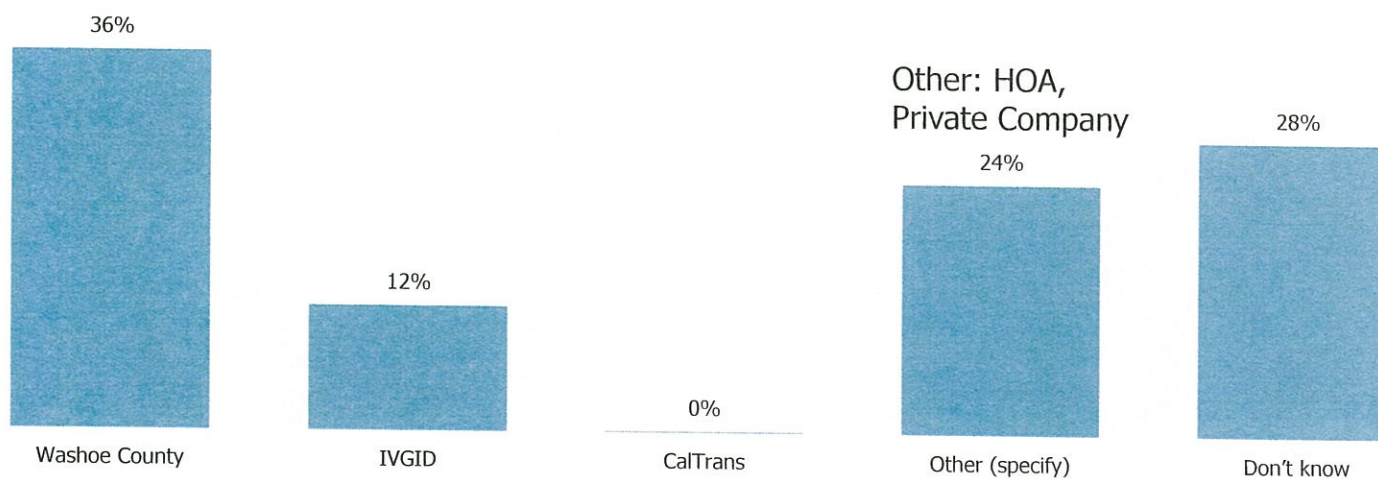
Total (N=839)



Which way would you be most likely to report a water leak?

Over a third of the snow removal is done by Washoe County; however, a little more than a quarter don't know who does the snow removal

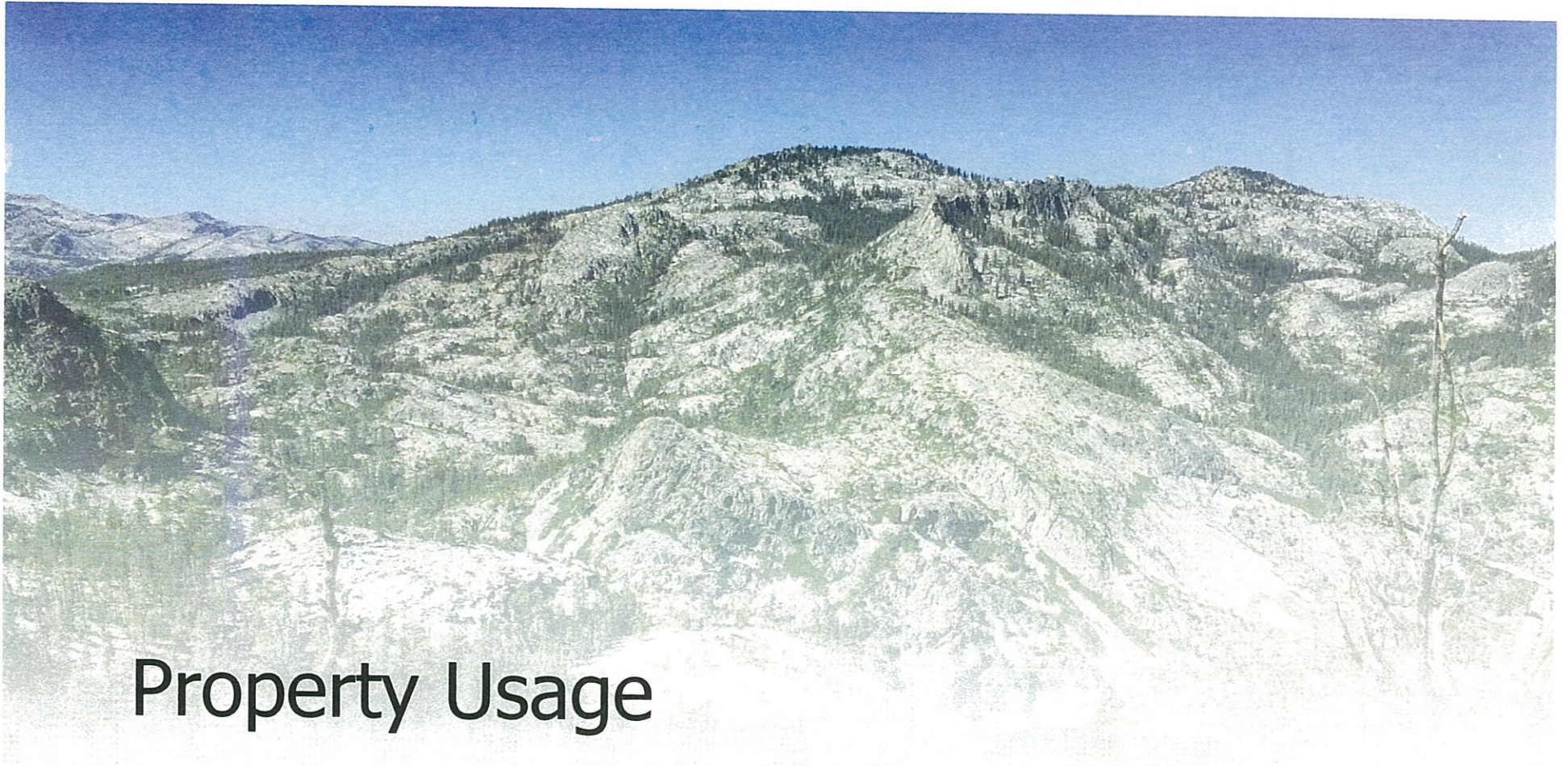
### Snow Removal



Total (N=839)



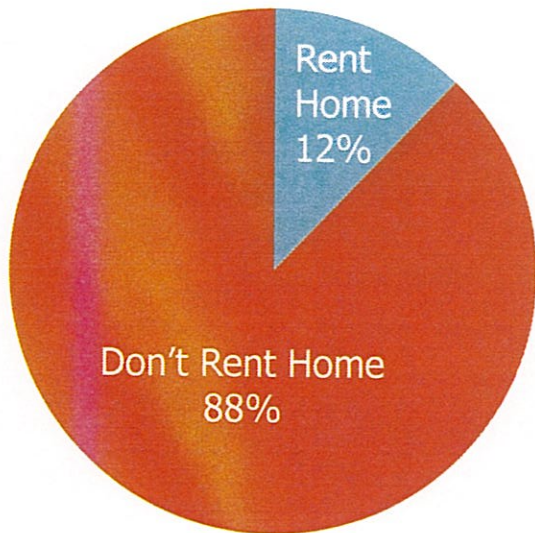
Who does snow removal on your street?



## Property Usage

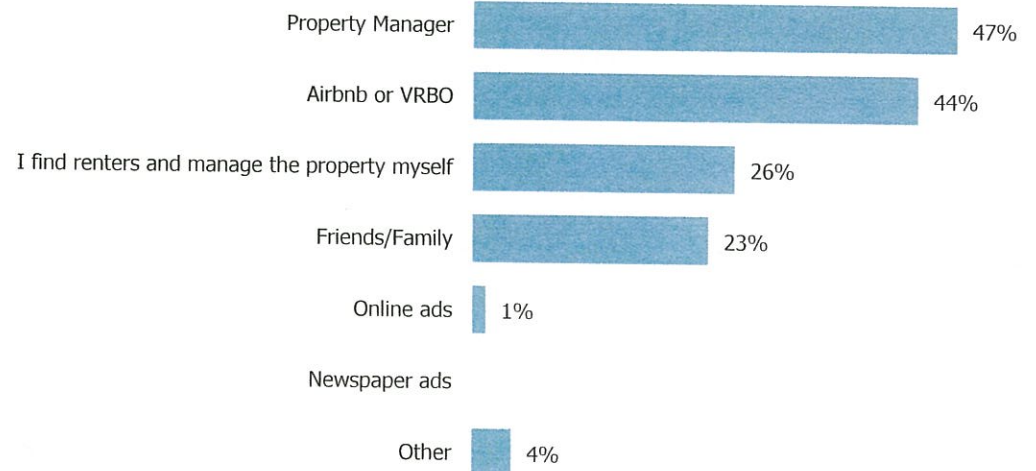
One in eight are renting their home, with a variety of methods used to find renters.

### % Who Rent Home



Property Owners (N=804)

### Rental Source



Property Owners who rent out their homes (N=78)

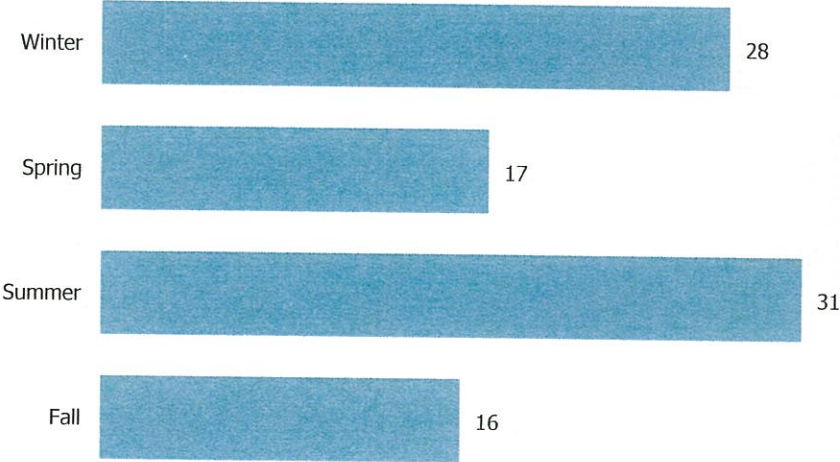


Do you ever rent your home at Incline Village or Crystal Bay?

Which sources do you use to find or manage renters for your property at Incline Village or Crystal Bay? (Select all that apply)

# Summer and winter are the busiest seasons for renting

Days property rented by Season



Average rental home is rented out for **92 days per year**

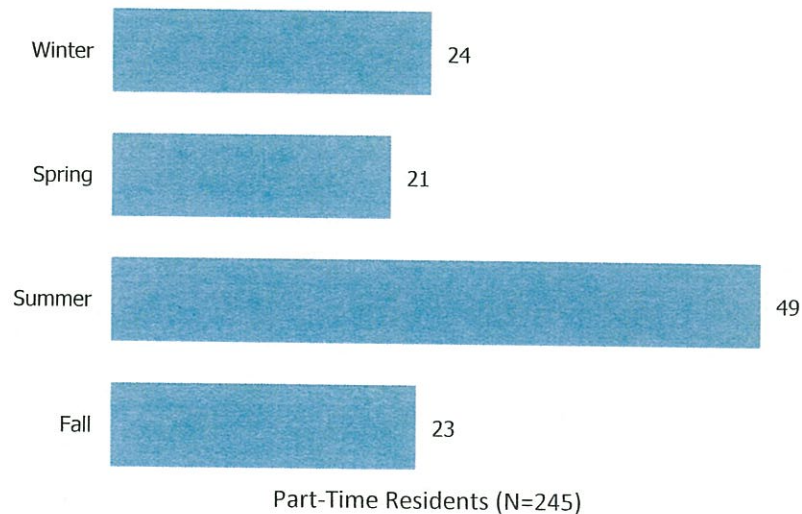
Property Owners who rent out their homes (N=78)



Over the past 12 months, how many days did you rent out your Incline Village or Crystal Bay home in each season?

Property owners who are part-time residents are using their properties the most in the summer (including friends and family)

### Days property used by Season among Part-Time Residents



Average home  
is used by part-  
timers for **117**  
days per year

Avg. days used  
increased from  
94 in 2016



Over the past 12 months, how many days do you estimate your Incline Village or Crystal Bay home was used by you, your immediate/extended family, and/or friends?

## Input you would like to share with IVGID management

Some common themes include:

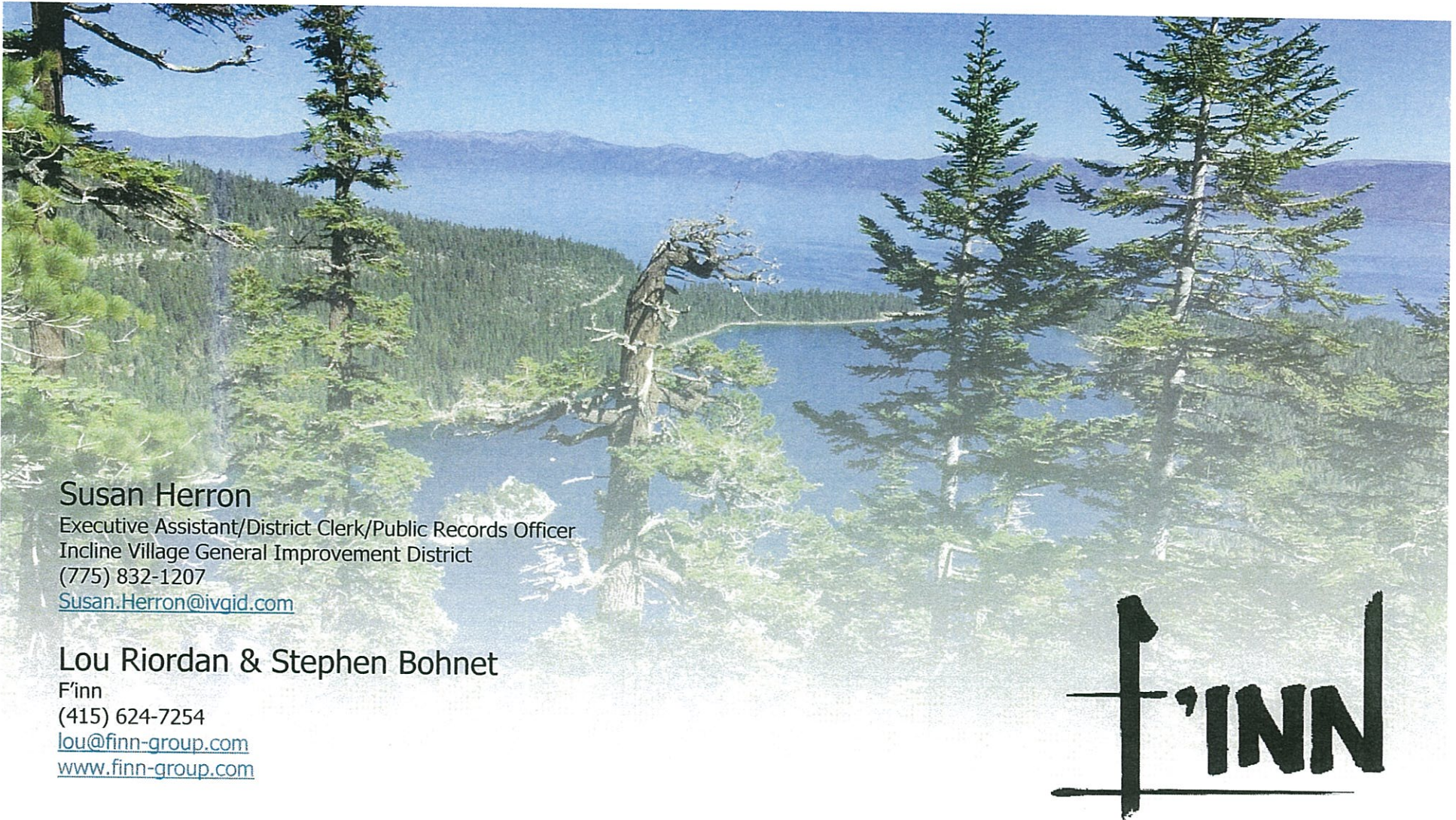
- Focus on serving residents rather than visitors
- Beaches are very crowded (especially on holidays), and parking is a major issue
- Work to address short-term rentals
- Waste management contract is a concern
- Crystal Bay residents feel like they are excluded unfairly from access to amenities
- Lack of access to kayak racks
- In summer, access to Diamond Peak and other ski areas for hiking
- In winter, cross country skiing
- Limit “unlimited access” passes that get used by visitors/renters, and limit number of punch cards that can be purchased
- Focus on maintaining and fixing up existing amenities, including beach facilities

**450+** Responses were provided. Residents were very candid about their pain points, concerns, and wishes for their community. All of these comments are made available.



Is there any other input you would like to share with management at IVGID?





**Susan Herron**

Executive Assistant/District Clerk/Public Records Officer  
Incline Village General Improvement District  
(775) 832-1207  
[Susan.Herron@ivgid.com](mailto:Susan.Herron@ivgid.com)

**Lou Riordan & Stephen Bohnet**

F'inn  
(415) 624-7254  
[lou@finn-group.com](mailto:lou@finn-group.com)  
[www.finn-group.com](http://www.finn-group.com)

