

Incline Village & Crystal Bay Parcel Owner of Record Research

Presentation

Conducted for IVGID

Sept-Oct 2016

Prepared for:

Incline Village General Improvement District

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Background & Research Objectives

Incline Village General Improvement District is conducting research among all parcel owners of records in Incline Village and Crystal Bay, including businesses.

The purposes of this research are:

- **To assess the needs and wants of the community**
 - What are their opinions of IVGID'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/Crystal Bay parcel owners**

Methodology Details

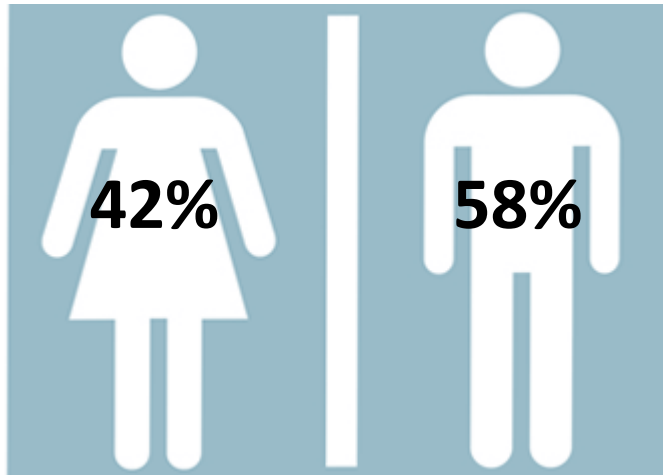
An online survey was sent via postcard to parcel owners of records in Incline Village and Crystal Bay, including businesses.

- Survey dates: September 20 to October 31, 2016
- Interview length: **20 minutes**
- Sample size: **842**

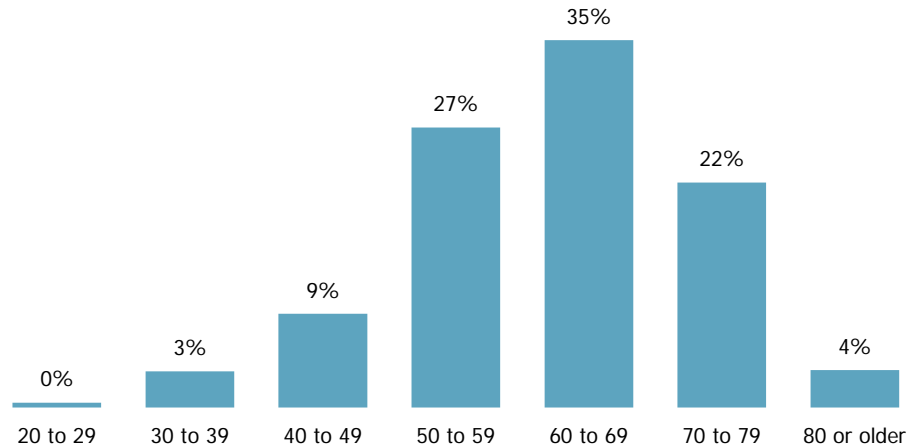


Majority of Respondents Were Male; Average Participant Age was 61 Years Old

Gender



Age



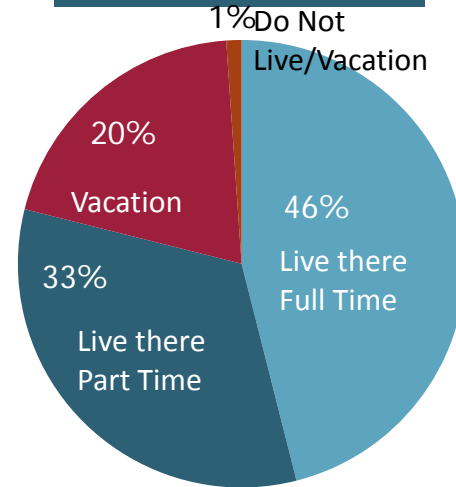
Average Age= 61

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

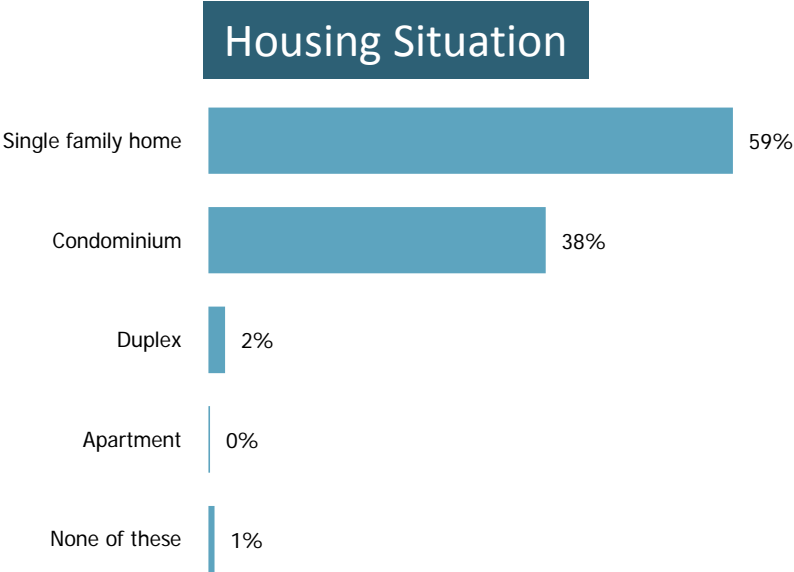
Property Ownership

97% Incline Village
3% Crystal Bay

Residence Status

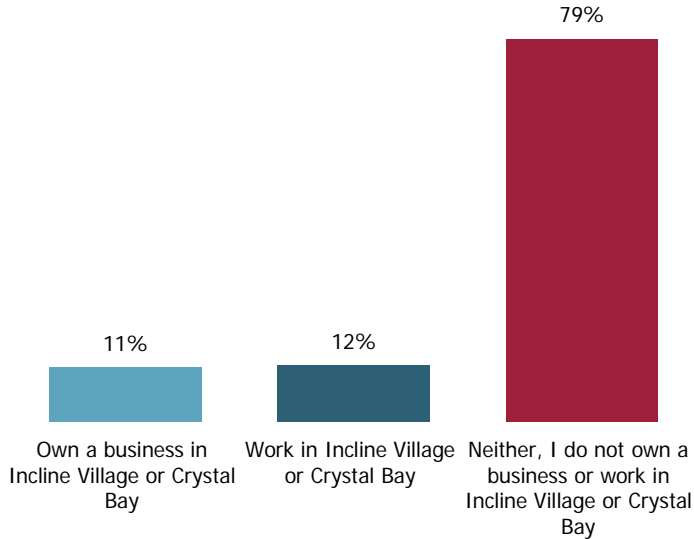


Majority live in single family homes

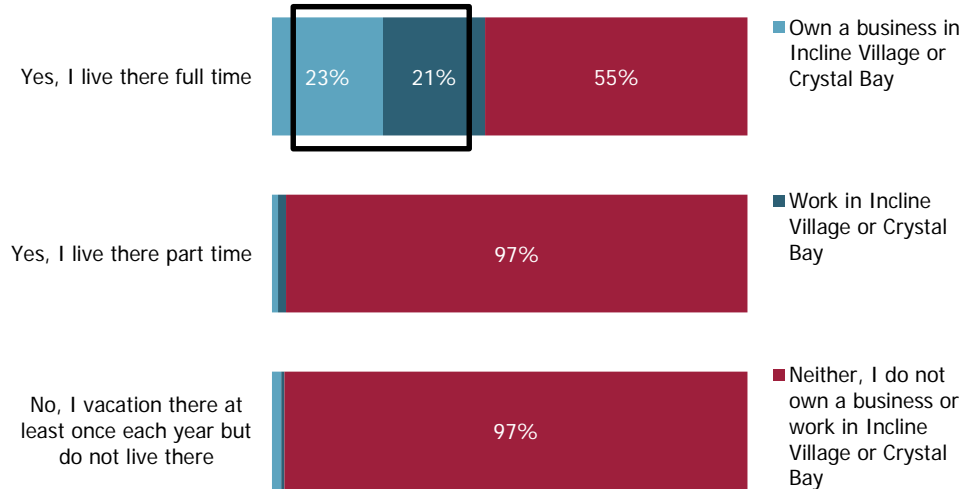


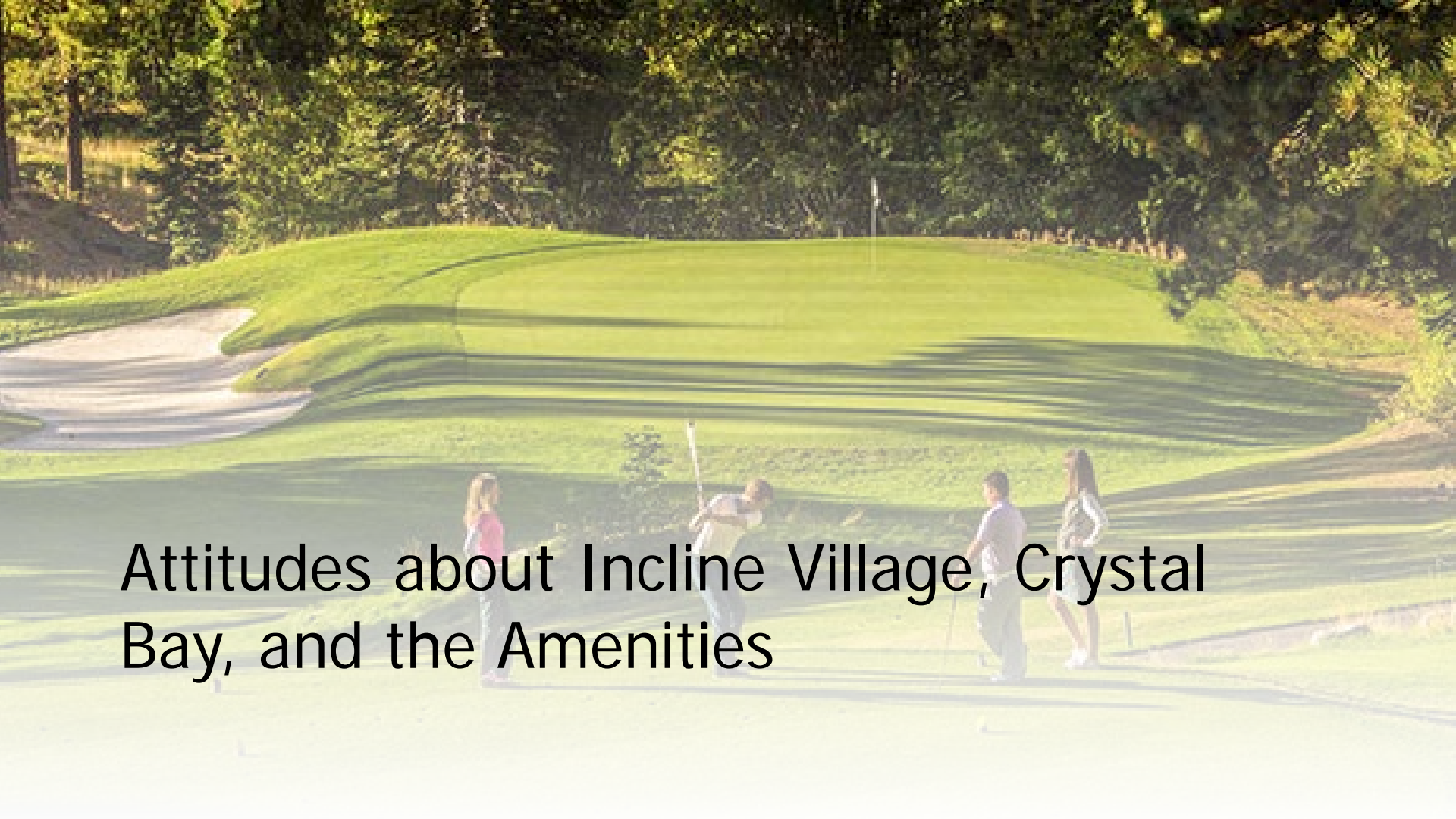
43% of full-timers work or own a business in Incline Village or Crystal Bay

Working Arrangement



Working Arrangement by Residence Status





Attitudes about Incline Village, Crystal Bay, and the Amenities

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

By asking one simple question — *How likely are you to recommend Incline Village 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:

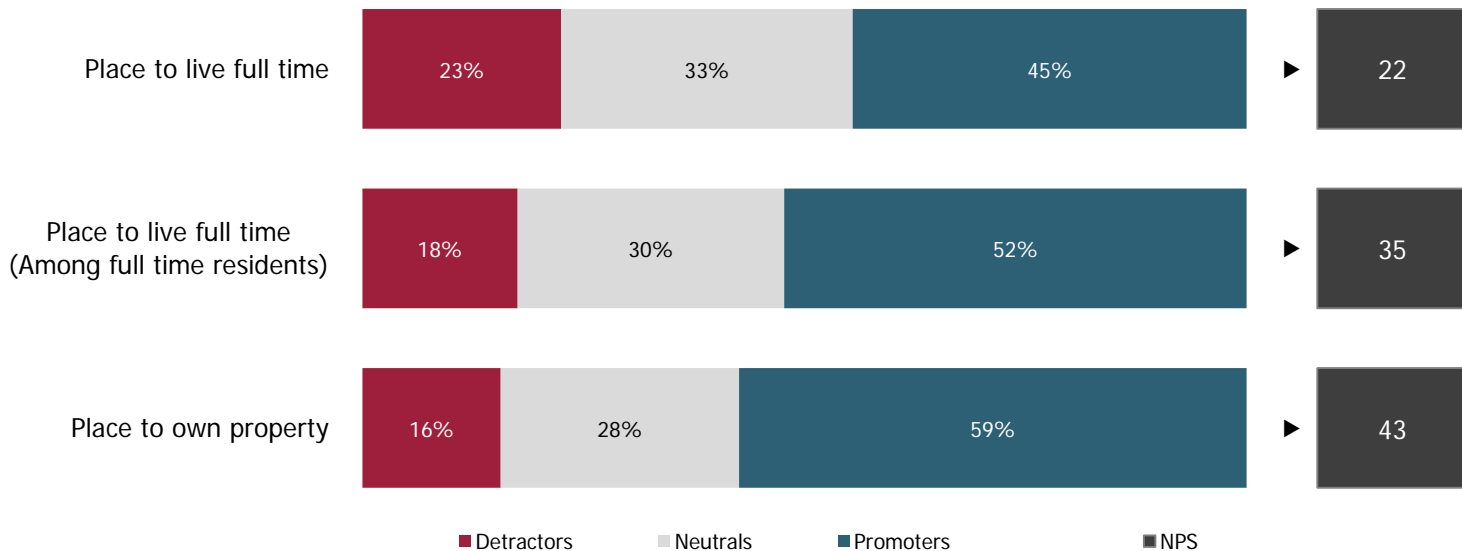


- **Promoters** (score 9-10) are loyal enthusiasts who will keep referring others
- **Passives** (score 7-8) are satisfied but unenthusiastic
- **Detractors** (score 0-6) are unhappy and can damage your reputation and impede growth through negative word-of-mouth.

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.

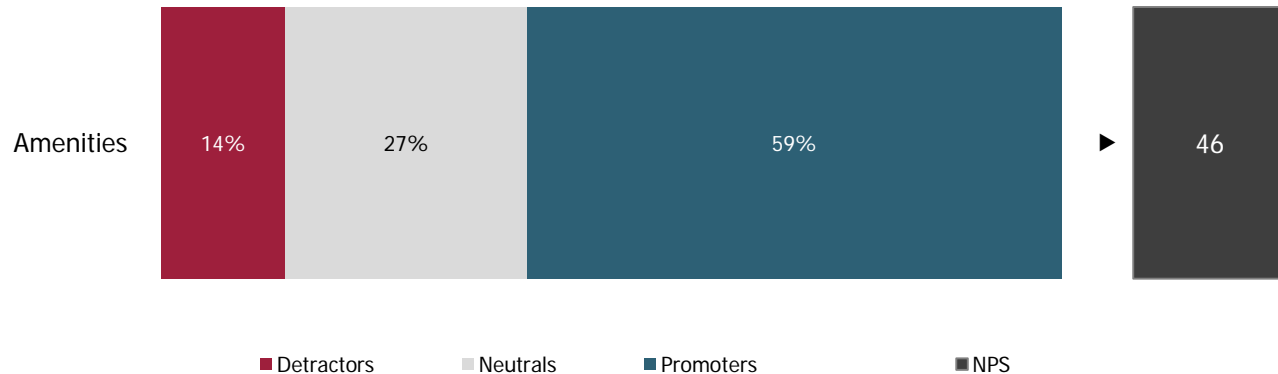
Incline Village/Crystal Bay is positively perceived as a place to live full-time and own property

Net Promoter Score



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

Net Promoter Score



Promoters are more likely to be open and engaged while Detractors desire more exclusivity and reduced fees

Reasons for Amenities Ratings

Detractors

- Don't use the amenities
- Private beaches are not private, and are too crowded
- Crystal Bay residents can't use the beach
- Too many visitors/renters allowed to use amenities
- Amenities are open to general public which causes parking issues and overcrowding
- Fees are rising or too high
- Rec center staff is not friendly

Neutrals

- Generally pleased with beaches and other amenities
- Outsiders are using amenities
- Would like more discounts for locals
- Would like one payment system across amenities.
- Parking/traffic at beach is overcrowded

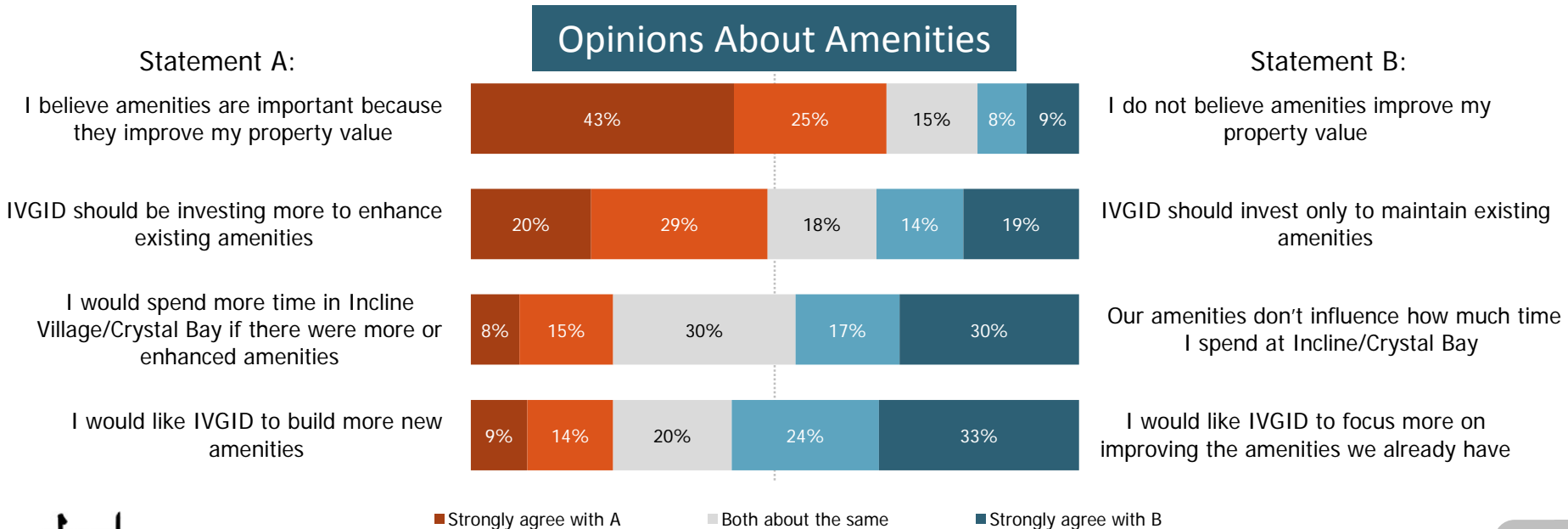
Promoters

- Facilities are well maintained
- Good/high quality amenities
- Good beaches (but needs tighter control)
- Always something to do
- Convenient
- Makes the area a more desirable place to live
- Creates a sense of community
- A match with active lifestyle



Parcel owners of record believe the focus should be on enhancing and improving existing amenities rather than building new amenities.

Most agree amenities improve their property value. Amenities do not seem to impact time spent in Incline Village/Crystal Bay.

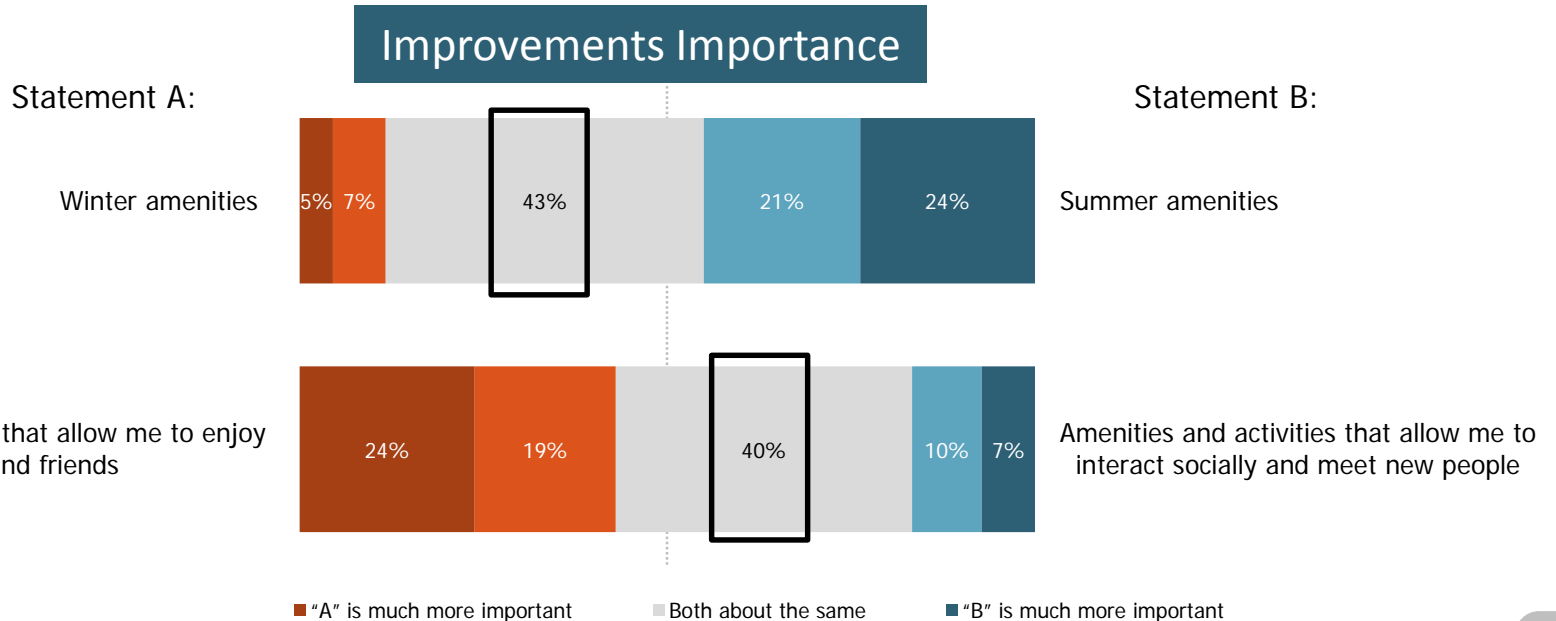


Below are pairs of statements. For each pair, please indicate how much you agree with statement A vs. statement B? (Select one per row)



Although family activities are imperative, many are also seeking a social experience

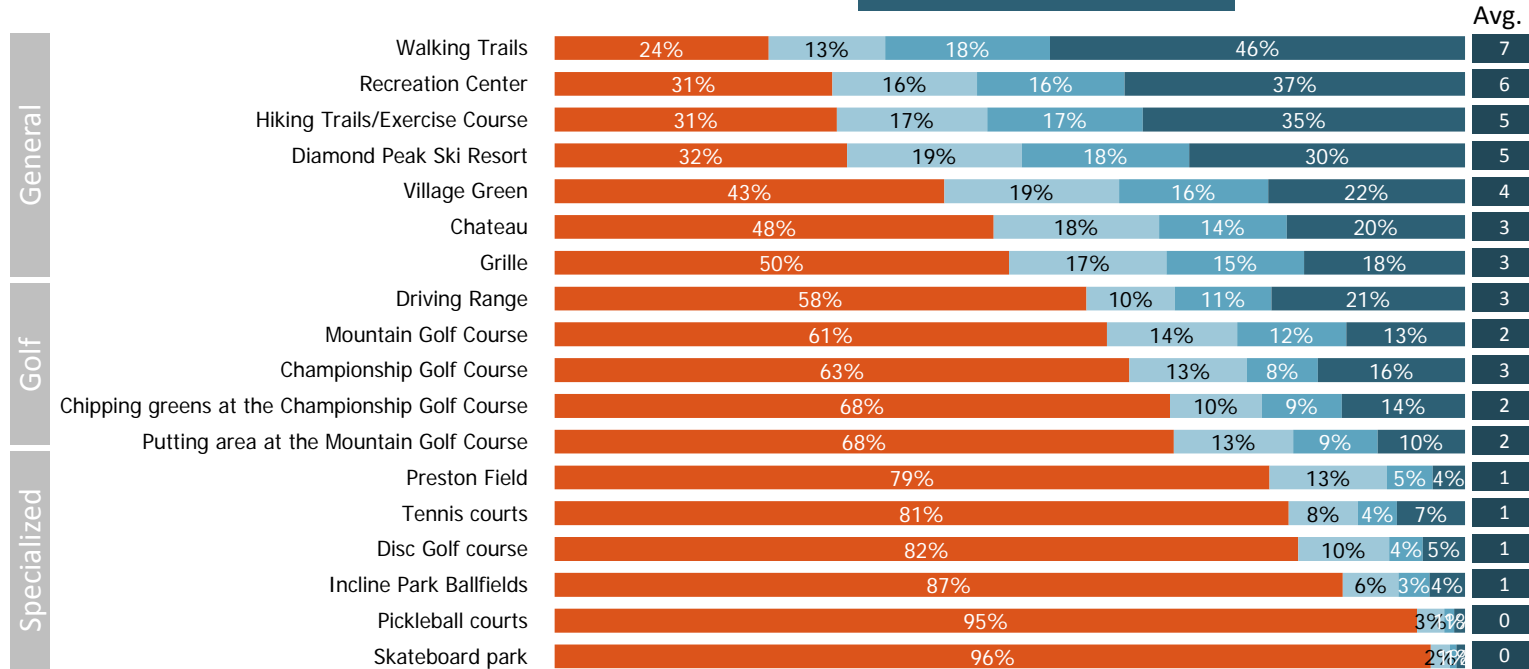
Summer activities appear to be more important; however, a large group do feel that both are important.



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

Aside from skiing, general amenities are used more frequently

Amenities Usage



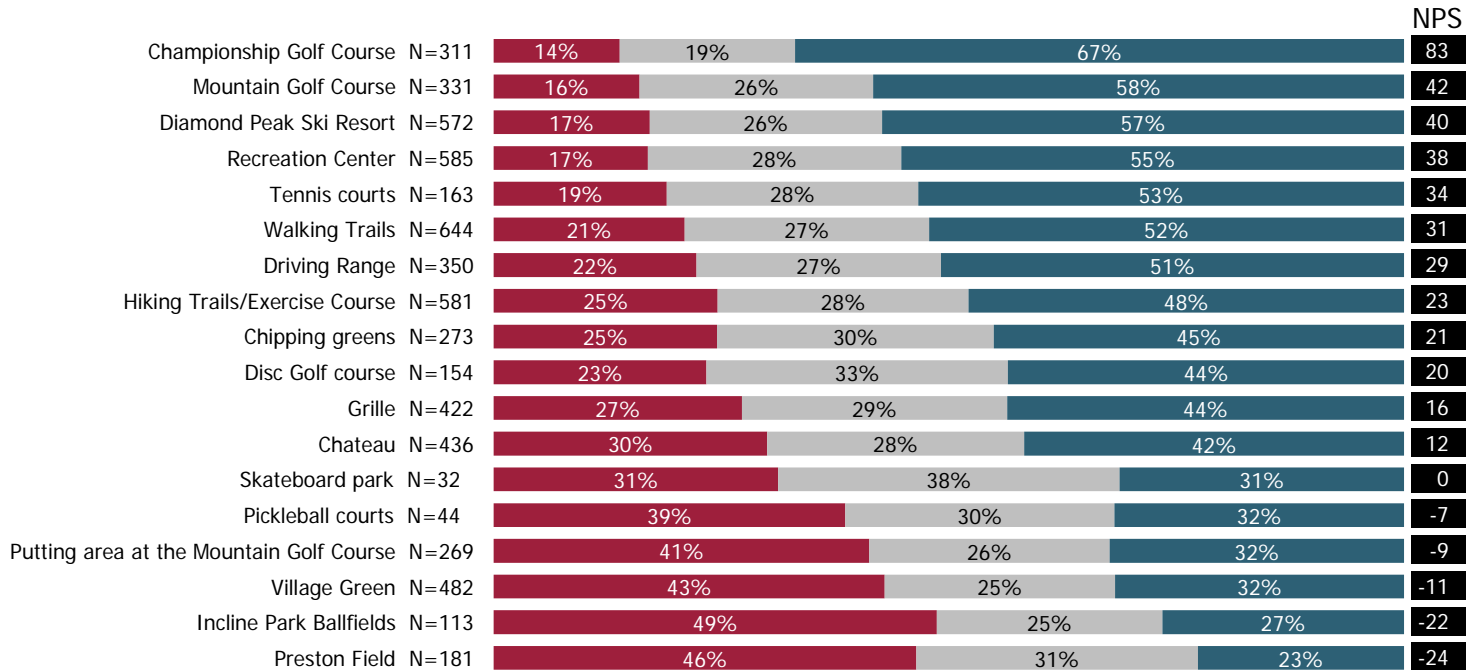
0 – Have not used 1-2 times 3-5 times 6 or more times

In the past 12 months, how many times have you used each of the following amenities? (Select one per row)



NPS among Users of each Amenity

Likelihood to Recommend Amenities- Among Users

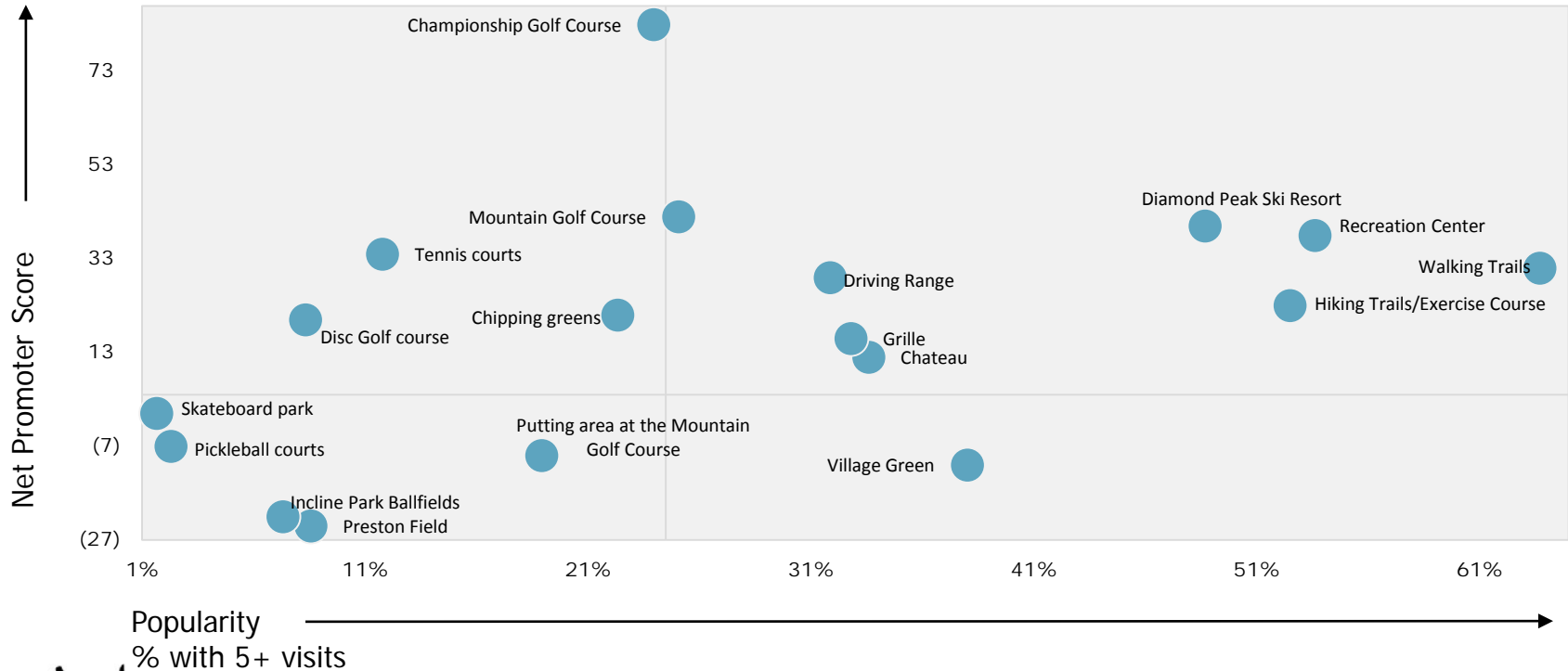


■ Detractor ■ Neutral ■ Promoters

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

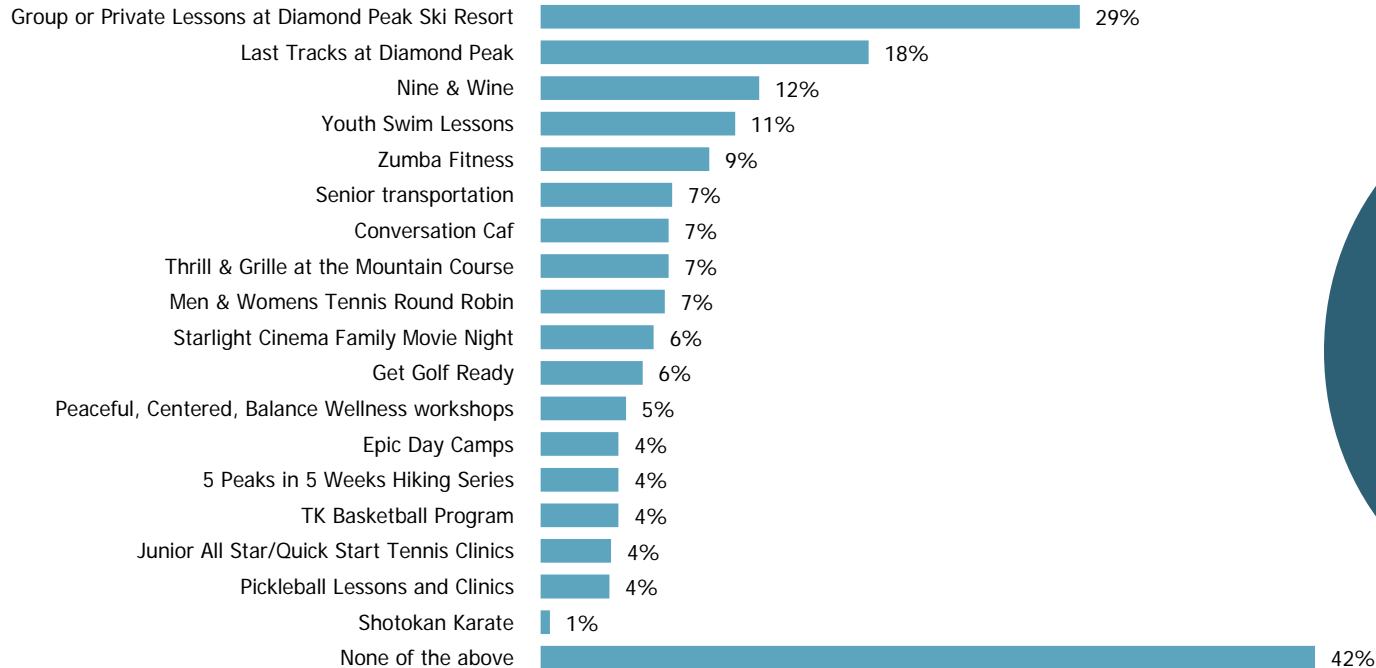


The most popular amenities have good NPS scores; Village Green represents an opportunity for improvement



Among IVGID classes and activities, skiing is most popular, but overall participation is low across activities

Activity Participation

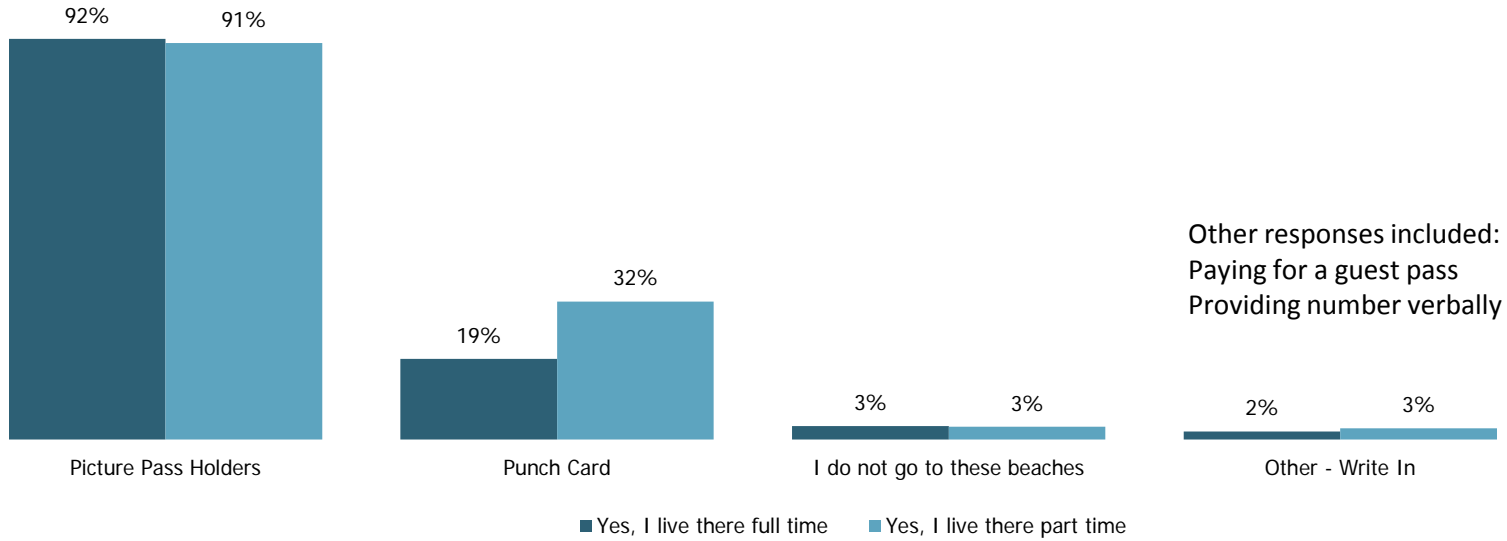


2.3% have you participated in a Public Works hosted hike at a water and sewer infrastructure site



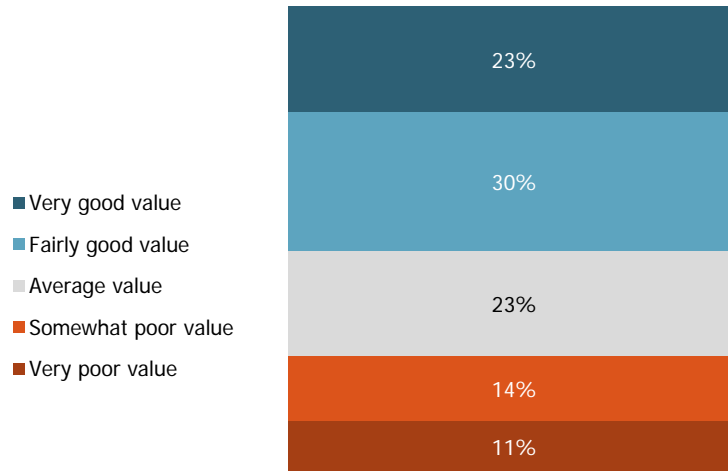
Picture Pass is the most common method for accessing IVGID beaches. Part time residence are more likely to use punch cards.

IVGID Beach Access Method



Recreation fees are perceived as being of decent value

Perception of Rec Fees



N=830

Base: Those that pay fee



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...?

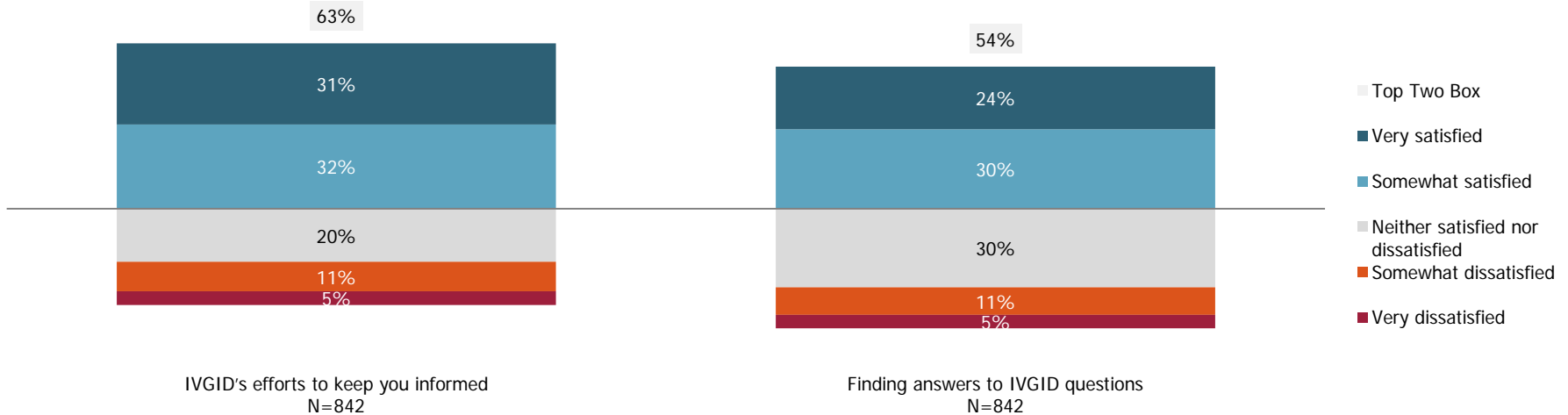


IVGID Communication

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

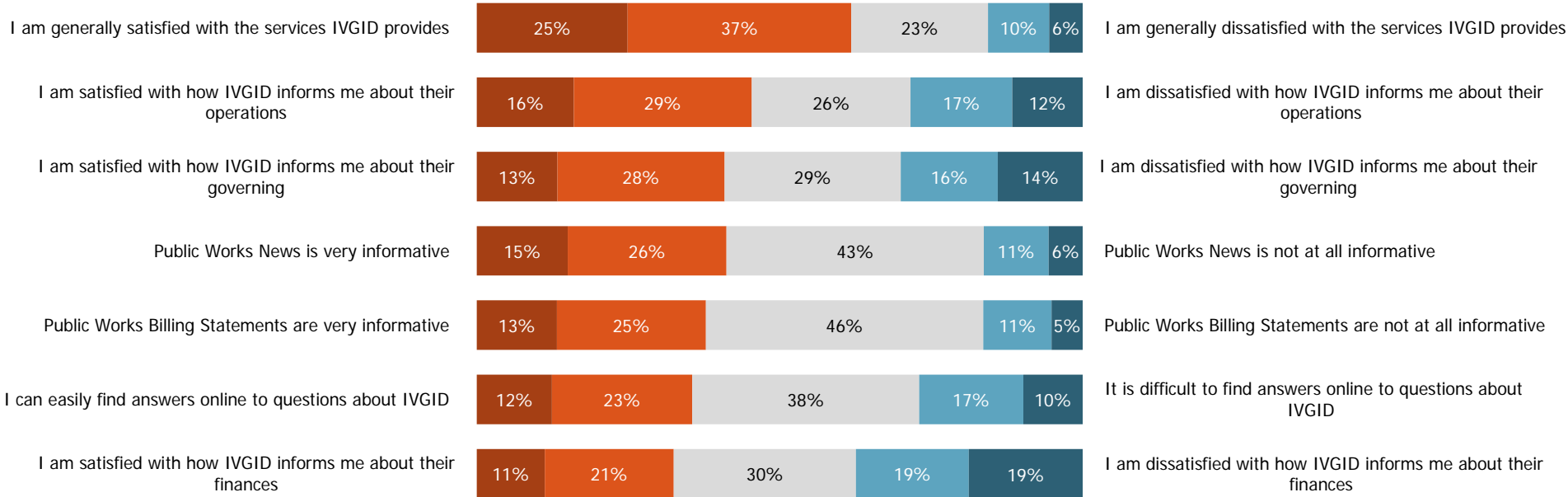
16% is a recurring figure and is the same percentage who are considered NPS Detractors for recommending Incline Village/Crystal Bay as a place to own property.

Communication Efforts & Information Provided



Between 1/4 and 1/3 are dissatisfied about the services and/or communications IVGID provides

Satisfaction with...



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



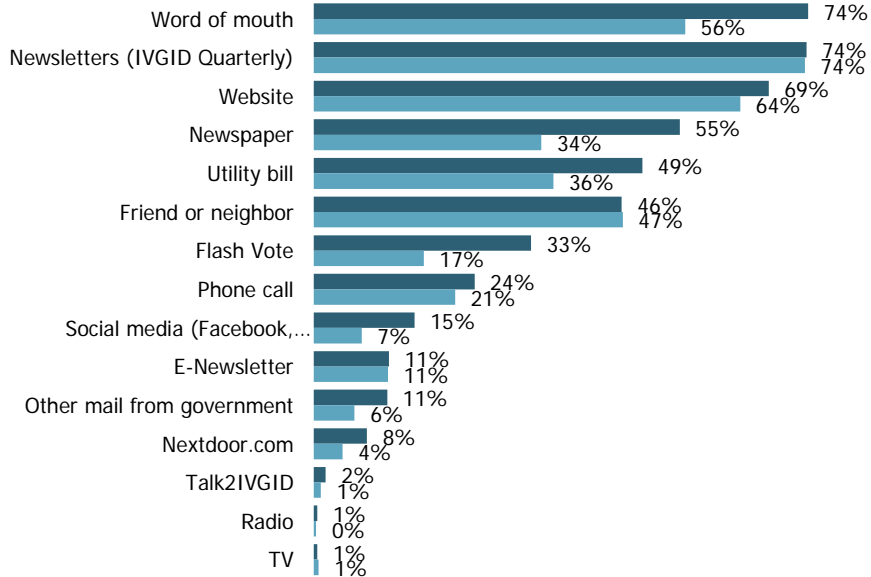
Below are pairs of statements. For each pair, please indicate how much you agree with statement A vs. statement B? (Select one per row)

A closer look at those that said they are generally dissatisfied with the services IVGID provides

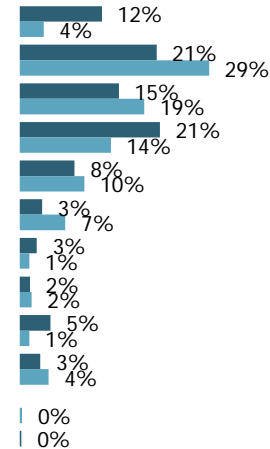
	Dissatisfied vs. Satisfied
More likely to:	
live there full time	65% vs. 44%
live in a single family home	72% vs. 59%
be male	69% vs. 55%
be older (60+ yrs. old)	70% vs. 56%
to be Detractors across all three measures:	
–place to live full time	57% vs. 21%
–place to own property	61% vs. 12%
–Amenities	84% vs. 5%
Slightly more likely to be a business owner	17% vs. 11%
Less likely to rent their home	94% vs. 88%

The newsletter and website are the main informational sources used

Source of Information



Used Most Frequently



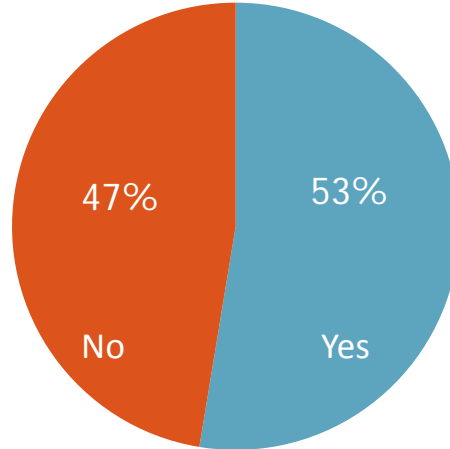
■ Full time
■ Part time



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)

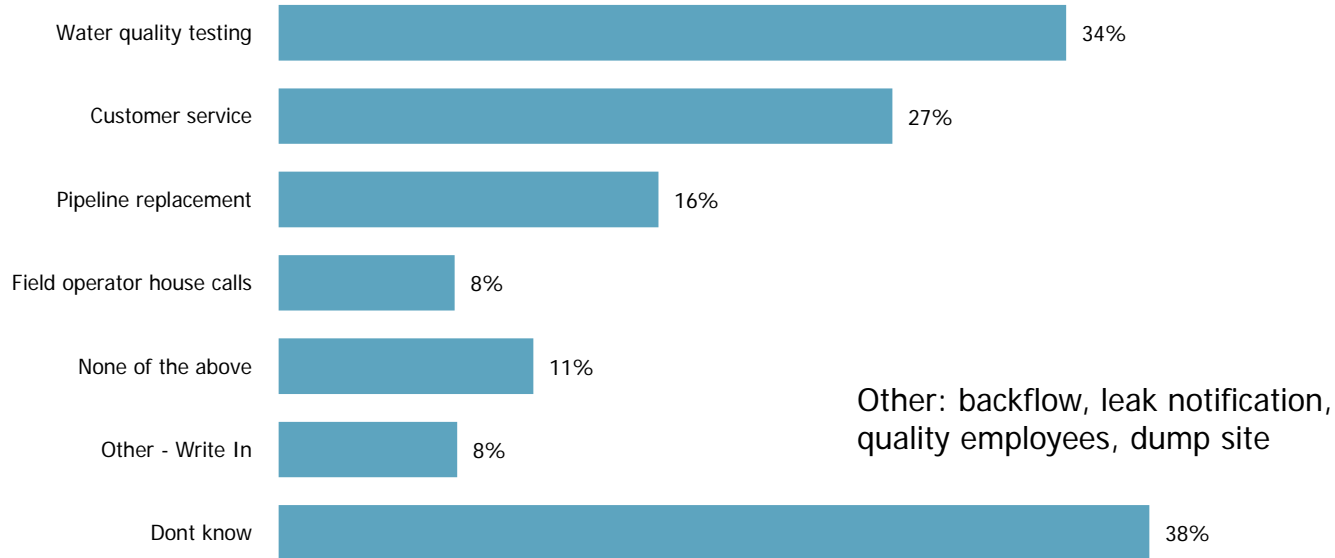
A little more than half are aware of portal bill pay capabilities

Portal Bill Pay Awareness



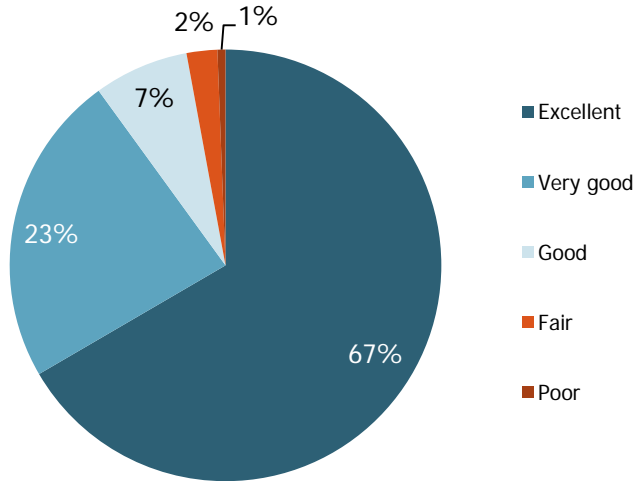
Water quality testing is the most liked aspect of IVGID

Positive Aspects of IVGID

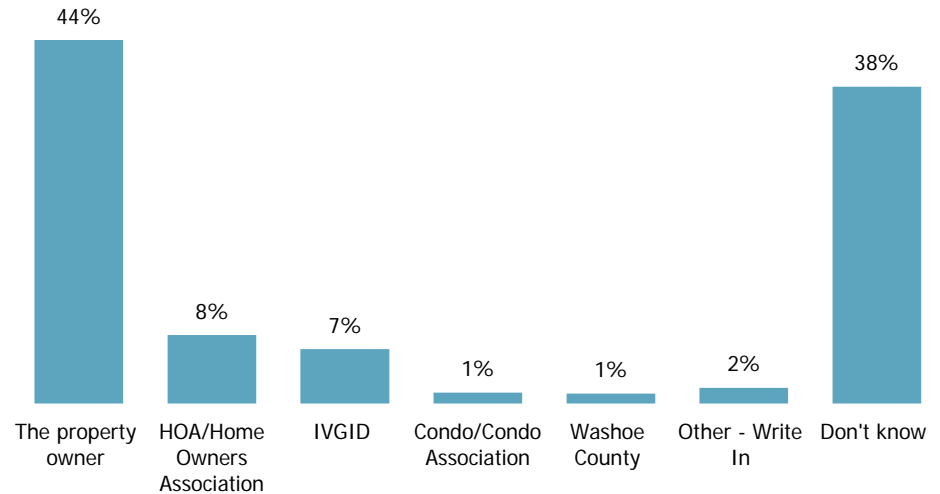


Strong scores for tap water quality with 97% describing the quality as good or better

Tap Water Quality



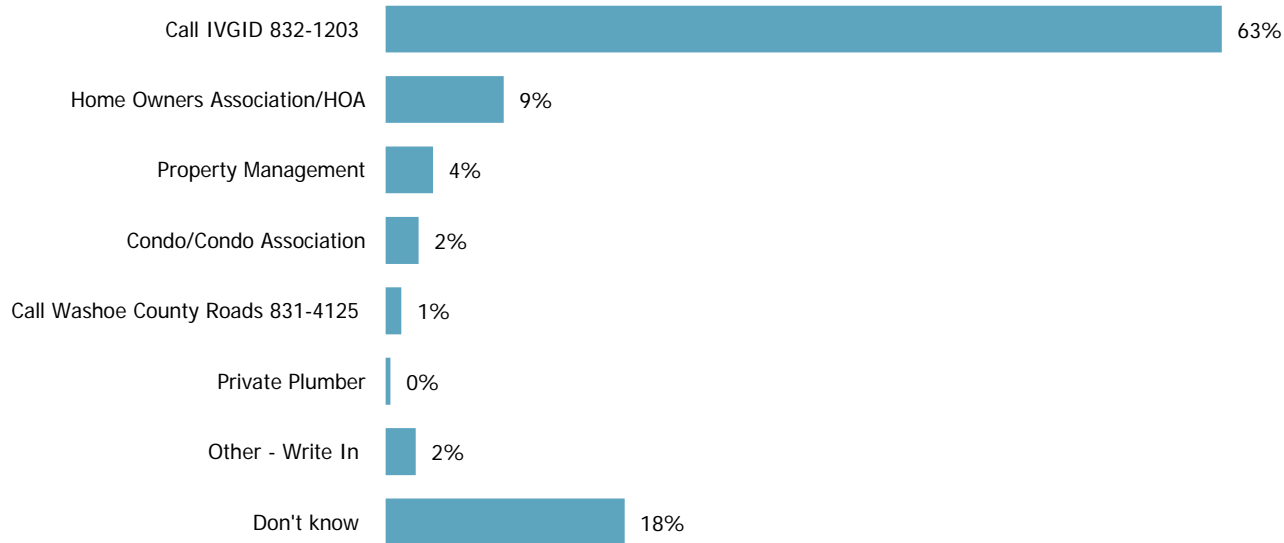
Perceived Owner of Water Line



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

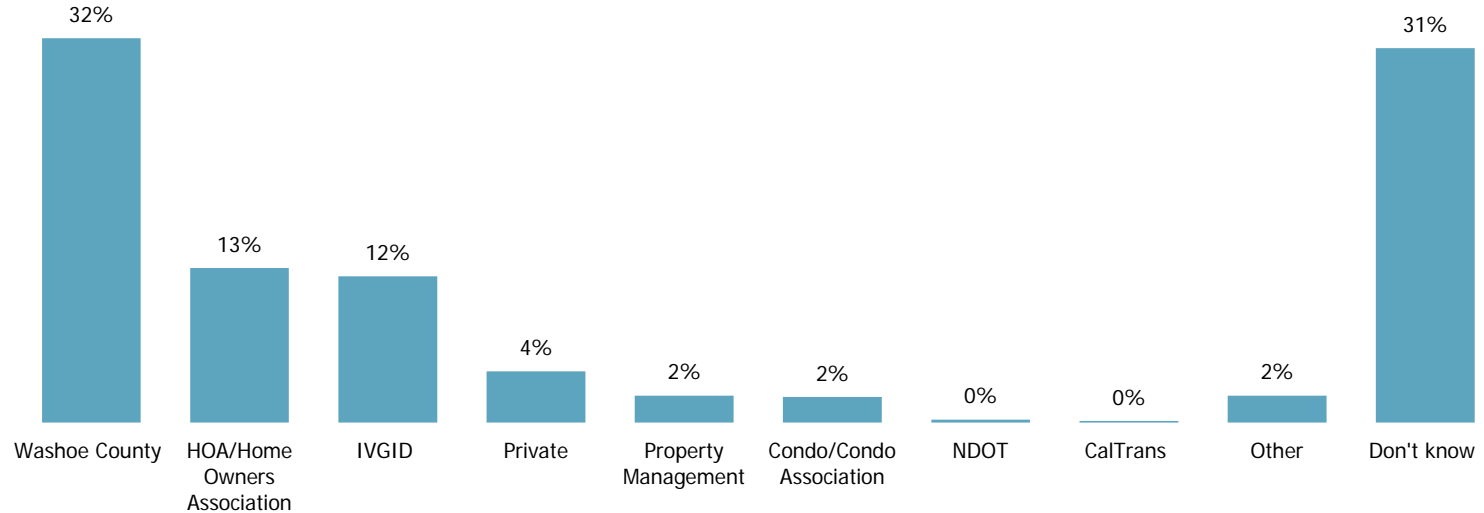
Almost two-thirds would call IVGID in the event of a water leak

Report Water Leak



Almost a third of the snow removal is done by Washoe County; however, another third don't know who does the snow removal

Snow Removal

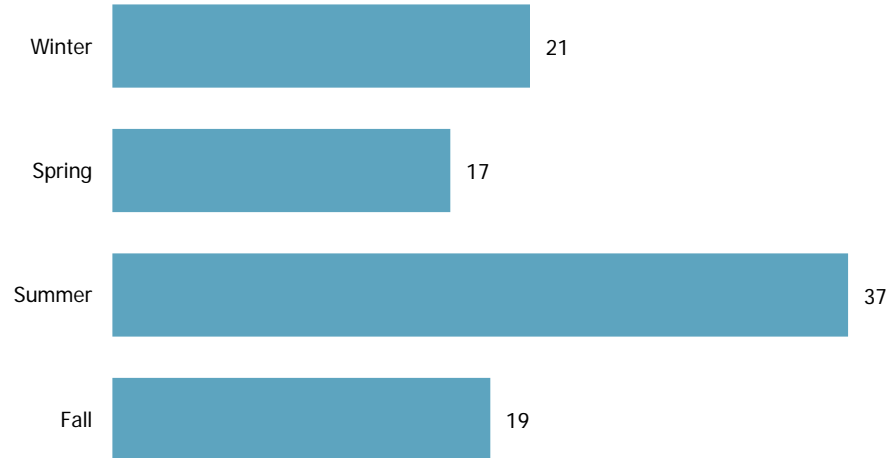




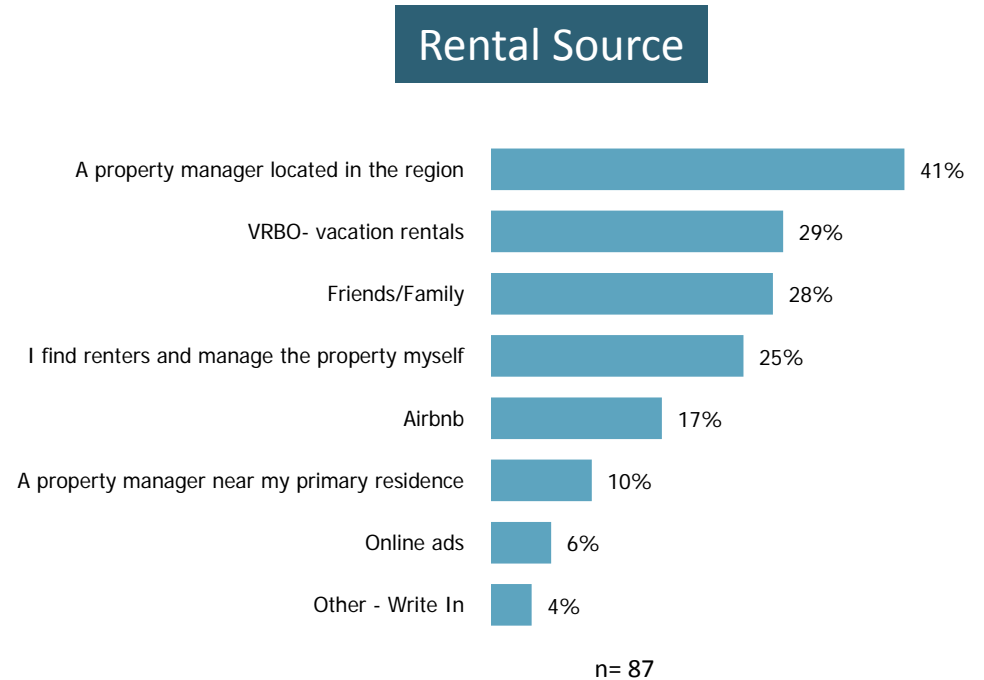
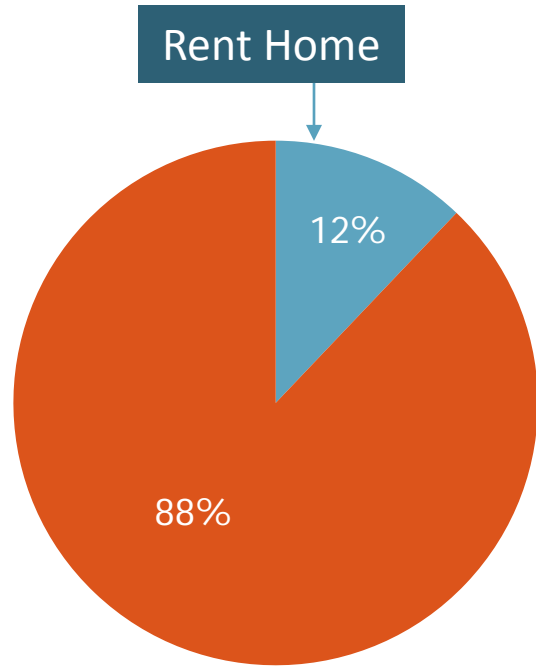
Property Usage

Summer is the busiest season with almost double the usage of other seasons

Days at Incline Village/Crystal Bay by Season Among part time residents

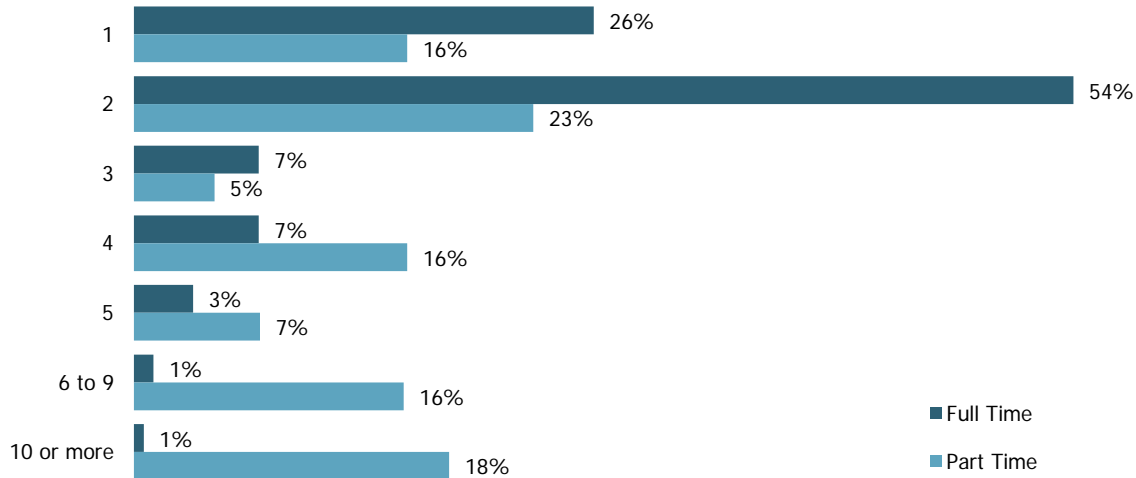


One in eight are renting their home



Most full-time residents have no more than 2 tenants; for part-timers, many more tenants use the property

Number of Individuals Using Property



Key Findings

General amenities such as walking trails and the Recreation Center are used more frequently than those that are more specialized, i.e. pickleball courts and the skateboard park.

- The average age of interviewees is 61, and amenities with higher usage trend towards activities one would expect to be more popular with this demographic.
- Preference is to improve and enhance amenities, rather than adding more.

Opportunity exists for improved communications between IVGID and the community.

- 16% are unsatisfied with IVGID's efforts to keep them informed
- Detractors desire transparency in IVGID communications, especially around finances, operations, and governing
- Greatest dissatisfaction is around communications regarding finances
- Discontent around new waste management policies and how the change was communicated

Summer is the busiest season. Many have concerns about overcrowding and difficulty with parking. There are concerns that IVGID is catering too much to tourists which is stressing resources.

- Crystal Bay parcel owners of record are upset that they are unable to use the beach

Appendix

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Who are Detractors and what are their perceptions?

Detractors vs. Promoters

Who they are

More likely to live there full-time	59% vs. 42%
More likely to live in a single family home	69% vs. 55%
Older- 60+ years old	72% vs. 56%
See recreation fee as somewhat/very poor value	47% vs. 16%
Feel like the rec fee should be lower by \$100	60% vs. 32%

Attitudes regarding amenities

Our amenities don't influence how much time I spend at Incline Village/Crystal Bay	61% vs. 41%
IVGID should invest only to maintain existing amenities	46% vs. 27%
I would like IVGID to focus more on improving the amenities we already have	64% vs. 53%

Attitudes concerning IVGID

Less satisfied with IVGID's services*	40% vs. 69%
Less satisfied with IVGID's efforts to keep them informed*	41% vs. 70%
I am somewhat/very dissatisfied with how IVGID informs me about their finances	55% vs. 30%
I am somewhat/very dissatisfied with how IVGID informs me about their operations	42% vs. 23%
I am somewhat/very dissatisfied with how IVGID informs me about their governing	45% vs. 23%
Much less satisfied with finding answers to IVGID questions*	32% vs. 61%



* Top 2 Box
Based on detractors for question: Recommend Incline Village or Crystal Bay as a place to own property? (16% of total sample)

What Detractors are saying

I do not use any of the amenities. I think too much money is spent on Diamond Peak. IVGID runs many of these enterprises in a manner to bring in more tourism, which I am against. Between construction and tourists, it's hard to do much in the summer.

On top of being taxed to pay for their upkeep they cost way too much.

More public input as to decisions. You should always put to a vote of IVGID major capital projects.

Stop acting like the chamber of commerce and start acting like a public ally owned utility - transparency.

Decisions need more input from citizens who live here and there needs to be more transparency

IVGID has opened up the amenities to too many entities who do not have "skin in the game" and I am frustrated with the overcrowding.

IVGID "shades" the truth about finances

Amenities improve quality of life. It's ironic that the non-stop construction projects going on in Incline nearly destroy the quality of life. For example, is it the Duffields building at the Burnt Cedar end of Lakeshore ? Lots of fun for the rest of us, thanks.

Feelings vary across different amenity ratings

Golf fees too high for residents. Ski hill overcrowded Tennis is the sole bright spot. Private beaches 'in name only' - too many efforts to get around the restrictions. Beach access has exceeded capacity often in recent years. Chateau remodel was excessive, but a nice meeting place if you can afford it. Same for rec center.- 4 rating

They're all good. None is particularly world class, but it's nice to have them as a home owner. - 8 rating

Golf and downhill skiing are great and have been enjoyed by family for many years. Beaches are very crowded and management is somewhat loose. I love them anyway. - 9 rating

I have lived here since 1971 and continue to use all these amenities. Where it is difficult sometimes to put up with the influx of users, they are still close, cost effective and solid. -10 rating

No beach access or ability to participate in community activities held at beaches. – 8 rating, Crystal Bay

They are part of why it is good to live here. We meet active people as a result of these amenities. – 9 rating

Too many restrictions; boat ramp is not always available ... too many visitors allowed to utilize amenities; road side parking is terrible at Incline/Ski Beach; tennis courts are closed late fall to mid spring (need indoor courts); new garbage contract does not allow year round yard waste collection (limited to new totes versus 7 bags) - why is yard waste combined with refuse waste; true full time residents are subsidizing renters/vacation rentals.- 2 rating

I use all of the amenities offered and feel it is a huge value added to the reason I live in Incline Village rather than anywhere else in the Tahoe area. – 10 rating

Over 840 comments were provided in response to this question.
The ratio of positive to negative comments was approximately 4 to 1.



Strong desire to be in the know regarding activities and have transparency around decisions and budgets

Most are satisfied with the communications. Transparency will cultivate trust; there is a desire for better communications around budget and upcoming decisions.

Suggested Changes offered to IVGID on Communications

- More transparency about budgets and decisions to spend money
 - Detailed financial reports
- Don't like being surprised by decisions, communicate what is being contemplated, forward looking communications, what board is reviewing
- More detailed review of board meetings
- Continue to improve website so it is the go-to spot for all information
 - Keep website up to date
- Better inform employees
- Improve e-mail capture
- More newspaper articles
- More frequent e-mail communications
 - Links to info on website
 - Meeting dates/times/agendas
 - Newsletter
 - Calendar of events
 - Relevant changes
 - Seasonal reminders
 - Available amenities
 - Subject specific e-mails
- Move away from expensive printed communications (glossy) towards digital channels
- Text messages for emergency situations (power outages, etc....)

Input you would like to share with management

Some common themes include:

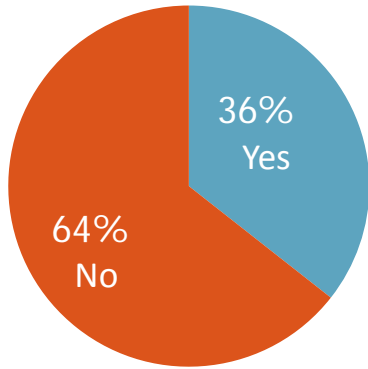
- Have a residents focus, not tourist focus
- Beaches are overcrowded and would like to see tighter controls on usage
- Parking is an issue in regards to beach usage
- Concerns over new recycling/waste management programs
- Rec fees are too high, and additional fees on top of rec fees are too high
- Crystal Bay residence do not get as much value for their cost paid when compared to Incline Village
- Concerns around Diamond Peak planned development
 - Do not want to attract more tourists
 - Do not want an amusement park atmosphere
- Dog park
- Improve boat ramp
- Would like to be able to roll punch card balances to next season or use for different amenities

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

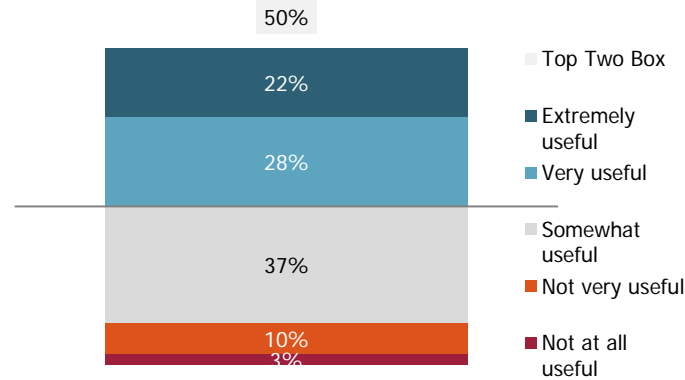


Only a few don't find FlashVote useful; opportunity to engage more via this platform

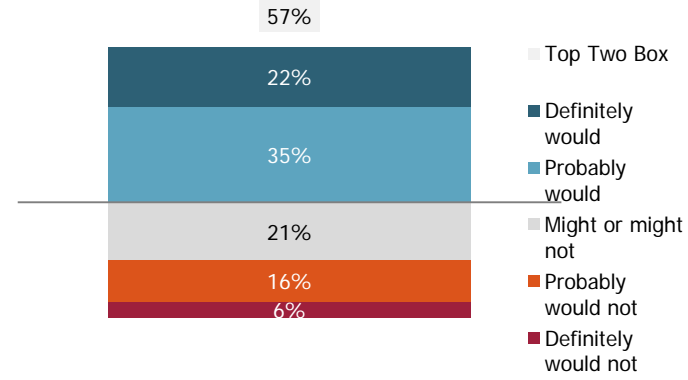
Have Used FlashVote

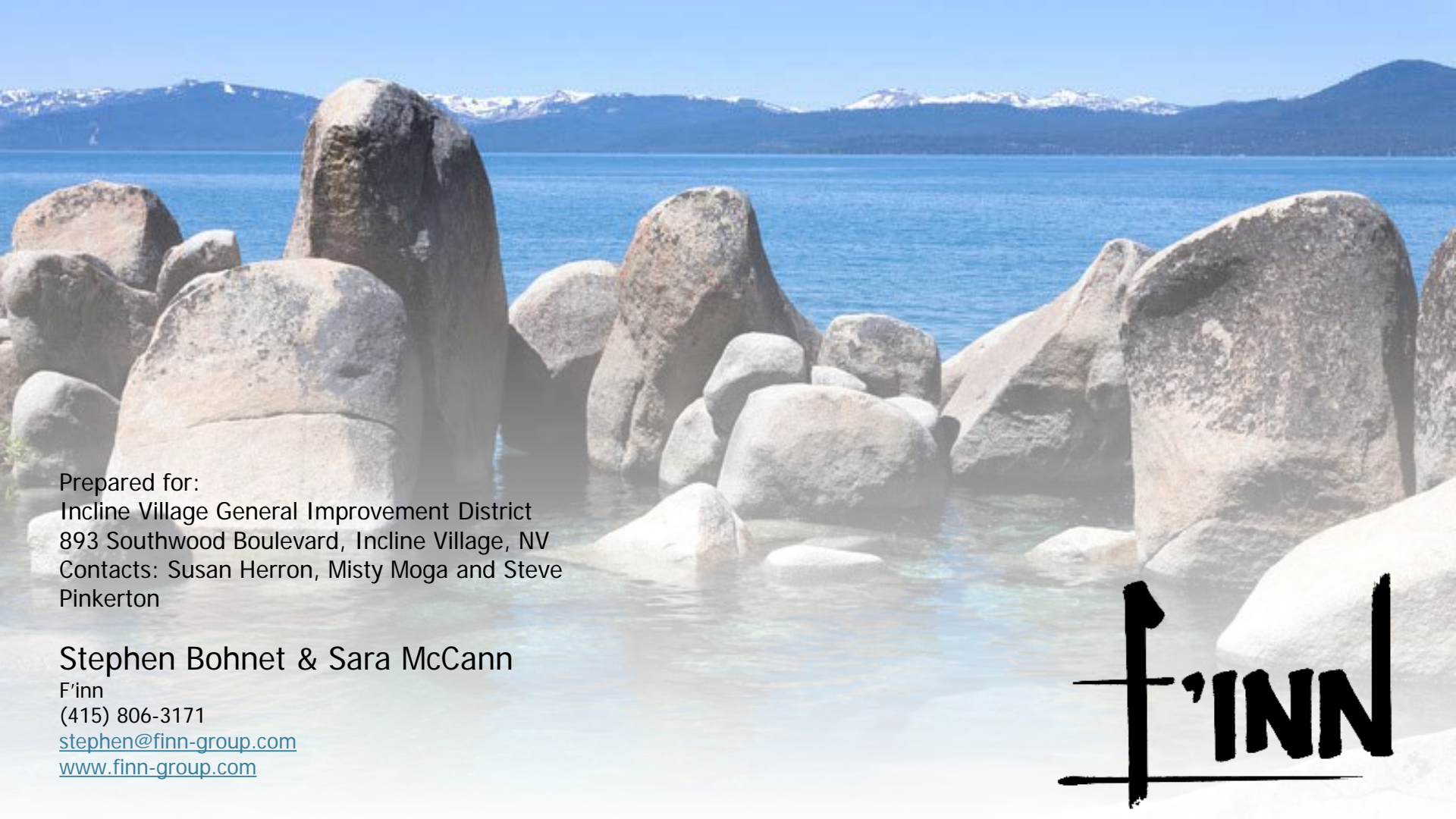


Usefulness of FlashVote



Likelihood to Sign-up in Future





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