SURVEY RESULTS

PURPOSE
To provide the District with user and community feedback to help understand the type of experience desired at the different beaches and what types of facilities and amenities may be desired to enhance that experience.

APPROACH
BEACH INTERCEPT SURVEYS – VISITORS ON THE BEACHES
- Conducted during weekdays and weekends during July – August 2014
- 267 surveys completed
  - 155 Incline Beach
  - 83 Burnt Cedar
  - 29 Ski Beach
- 248 of the 267 respondents were picture pass holders (92%)
- Able to cross tabulate between residency type (full time, second home, guest, vacation rental) and beach access method (picture pass, punch card, cash entry)

RESPONDENT DEMOGRAPHIC PROFILE
AGE: RELATIVELY OLDER DEMOGRAPHIC
61.0 year average (mailed)
52.9 year average (online)
52.8 year average (intercept)

PERCENT OF RESPONDENTS OVER 65
42.1% of mailed respondents
48.0% online respondents
24.8% intercept respondents

HOUSEHOLD COMPOSITION

<table>
<thead>
<tr>
<th>HOUSEHOLD COMPOSITION</th>
<th>MAILED</th>
<th>ONLINE</th>
<th>INTERCEPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single, no children</td>
<td>3.75%</td>
<td>2.83%</td>
<td>2.40%</td>
</tr>
<tr>
<td>Single, with children</td>
<td>1.10%</td>
<td>1.15%</td>
<td>1.15%</td>
</tr>
<tr>
<td>Couple, no children</td>
<td>55.90%</td>
<td>52.90%</td>
<td>53.40%</td>
</tr>
<tr>
<td>Couple, with children</td>
<td>27.30%</td>
<td>27.70%</td>
<td>26.90%</td>
</tr>
<tr>
<td>Multiple adults, no children</td>
<td>5.00%</td>
<td>5.10%</td>
<td>5.30%</td>
</tr>
<tr>
<td>Multiple adults, with children</td>
<td>5.10%</td>
<td>4.90%</td>
<td>4.90%</td>
</tr>
</tbody>
</table>

EDUCATION

<table>
<thead>
<tr>
<th>EDUCATION</th>
<th>MAILED</th>
<th>ONLINE</th>
<th>INTERCEPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did not complete high school</td>
<td>27.00%</td>
<td>26.90%</td>
<td>25.30%</td>
</tr>
<tr>
<td>Some college or technical training</td>
<td>26.10%</td>
<td>27.90%</td>
<td>28.20%</td>
</tr>
<tr>
<td>College graduate</td>
<td>24.80%</td>
<td>24.00%</td>
<td>24.00%</td>
</tr>
<tr>
<td>Graduate degree</td>
<td>27.00%</td>
<td>25.00%</td>
<td>27.70%</td>
</tr>
<tr>
<td>Post-graduate degrees</td>
<td>27.00%</td>
<td>25.30%</td>
<td>27.70%</td>
</tr>
</tbody>
</table>

RESPONDENT DEMOGRAPHIC BY PREFERRED BEACH

BEACHES TYPICALLY VISITED

<table>
<thead>
<tr>
<th>BEACHES TYPICALLY VISITED</th>
<th>MAILED</th>
<th>ONLINE</th>
<th>INTERCEPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ski Beach</td>
<td>53.40%</td>
<td>50.20%</td>
<td>56.80%</td>
</tr>
<tr>
<td>Incline Beach</td>
<td>28.10%</td>
<td>35.80%</td>
<td>34.40%</td>
</tr>
<tr>
<td>Burnt Cedar Beach</td>
<td>18.50%</td>
<td>14.00%</td>
<td>19.80%</td>
</tr>
<tr>
<td>Do not visit IVGID beaches</td>
<td>10.0%</td>
<td>16.0%</td>
<td>9.80%</td>
</tr>
</tbody>
</table>

RECREATION USER PROFILE

ACCESS METHOD

<table>
<thead>
<tr>
<th>ACCESS METHOD</th>
<th>MAILED</th>
<th>ONLINE</th>
<th>INTERCEPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>IVGID picture pass holder</td>
<td>91.00%</td>
<td>94.90%</td>
<td>97.10%</td>
</tr>
<tr>
<td>Punch card day use entry</td>
<td>5.00%</td>
<td>3.94%</td>
<td>2.77%</td>
</tr>
<tr>
<td>Cash day use entry</td>
<td>3.00%</td>
<td>1.96%</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

FREQUENCY OF USE BY PREFERRED BEACH

<table>
<thead>
<tr>
<th>FREQUENCY OF USE</th>
<th>SKI BEACH</th>
<th>INCLINE BEACH</th>
<th>BURNT CEDAR BEACH</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than one day per week</td>
<td>20%</td>
<td>10%</td>
<td>20%</td>
</tr>
<tr>
<td>Weekly</td>
<td>30%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Once a month</td>
<td>20%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Less than once a month</td>
<td>30%</td>
<td>40%</td>
<td>30%</td>
</tr>
<tr>
<td>Never</td>
<td>10%</td>
<td>20%</td>
<td>20%</td>
</tr>
</tbody>
</table>

PREFERRED BEACH

<table>
<thead>
<tr>
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<th>MAILED</th>
<th>ONLINE</th>
<th>INTERCEPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ski Beach</td>
<td>44.0%</td>
<td>35.80%</td>
<td>46.60%</td>
</tr>
<tr>
<td>Incline Beach</td>
<td>35.60%</td>
<td>34.40%</td>
<td>34.40%</td>
</tr>
<tr>
<td>Burnt Cedar Beach</td>
<td>19.40%</td>
<td>20.20%</td>
<td>19.40%</td>
</tr>
<tr>
<td>Average Party Size</td>
<td>26.77</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Hours Per Visit</td>
<td>3.71</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

MAIL/ON-LINE SURVEYS – PARCEL OWNERS AND TENANTS WITH BEACH ACCESS

- 8,193 surveys mailed
  - Mailed to all parcel owners and tenants with beach access that have an address on file
  - 6,603 parcel owners with beach access
  - 1,590 tenants with beach access
- 26% return rate (to date)
- 1,990 returned via mail
- 159 completed on-line
- Typical satisfactory mailed survey return rate: 15%
- Able to differentiate between parcel owner and tenant response
- Able to identify multiple online entries from the same IP address

Reason for Not Visiting IVGID Beaches

- Too busy/traveling: 41%
- Too far from home/work: 44%
- Just not a beach goer: 4%
- Don’t have the time: 7%
- Do not need the facilities I need: 5%
- Poor customer service: 5%
- Other: 1%
REASONS FOR Visiting Preferred Beach

- Scenery/Natural environment
- Proximity/Closeeness
- Barbecue & picnic areas
- Open lawn areas
- Pool
- More family friendly
- Quiet
- Food services
- Bar services
- Social interaction
- Playground
- Good boating
- Lively atmosphere
- Volleyball/bocce ball area

Primary Reason for Visiting Preferred Beach

- Scenery/Natural environment
- Proximity/Closeeness
- Pool
- Good boating
- Barbecue & picnic areas
- More family friendly
- Quiet
- Facilities were better maintained
- Open lawn areas
- Playground
- Volleyball and bocce ball areas
- Bar services
- Lively atmosphere
- Food services

Survey Results

Which of the following activities do you typically participate in during your visit to your preferred beach?

**Typical Activities**

- Resting/Relaxing
- Swimming in the Lake
- Renting/Charting
- Sunbathing
- Barbecuing
- Swimming in the Pool
- Kayaking
- Sightseeing
- Standup Paddle Boarding
- Special Event
- Power Boating
- Volleyball Use
- Bocce Ball Use
- Personal Watercraft (PWC)
- Fishing (from shore)
- Fishing (by boat)

Rate the importance of these attributes as a reason for visiting your preferred beach.

**Primary Activity**

- Resting/Relaxing
- Swimming in the Lake
- Renting/Charting
- Sunbathing
- Barbecuing
- Swimming in the Pool
- Kayaking
- Sightseeing
- Standup Paddle Boarding
- Special Event
- Power Boating
- Volleyball Use
- Bocce Ball Use
- Personal Watercraft
- Fishing (from shore)
- Fishing (by boat)
- Boating

**Primary Activity: Results Sorted by Preferred Beach**

Results Sorted by Preferred Beach

- Ski Beach
- Incline Beach
- Burnt Cedar Beach

**Importance of New Amenities and Services**

1-5 scale average: “1” = not at all important to “5” = absolutely necessary

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Ski Beach</th>
<th>Incline Beach</th>
<th>Burnt Cedar Beach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved restrooms</td>
<td>$4.25</td>
<td>$4.5</td>
<td>$4.25</td>
</tr>
<tr>
<td>Improved snack bar/café/restaurant</td>
<td>$4.25</td>
<td>$4.5</td>
<td>$4.25</td>
</tr>
<tr>
<td>Additional picnic &amp; barbeque areas</td>
<td>$4.25</td>
<td>$4.5</td>
<td>$4.25</td>
</tr>
<tr>
<td>Drink service to the beach</td>
<td>$4.25</td>
<td>$4.5</td>
<td>$4.25</td>
</tr>
<tr>
<td>Improved bar service</td>
<td>$4.25</td>
<td>$4.5</td>
<td>$4.25</td>
</tr>
<tr>
<td>Food service to the beach</td>
<td>$4.25</td>
<td>$4.5</td>
<td>$4.25</td>
</tr>
<tr>
<td>Improved playground facilities</td>
<td>$4.25</td>
<td>$4.5</td>
<td>$4.25</td>
</tr>
<tr>
<td>Chair rentals</td>
<td>$4.25</td>
<td>$4.5</td>
<td>$4.25</td>
</tr>
<tr>
<td>Cabana rentals</td>
<td>$4.25</td>
<td>$4.5</td>
<td>$4.25</td>
</tr>
<tr>
<td>Valet parking</td>
<td>$4.25</td>
<td>$4.5</td>
<td>$4.25</td>
</tr>
<tr>
<td>Bungee Trampoline</td>
<td>$4.25</td>
<td>$4.5</td>
<td>$4.25</td>
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**Desired Amenities and Services**

If new amenities and services were provided, please indicate whether the following amenities and recreation opportunities would enhance or detract from your beach-going experience at this beach location?

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<td>$3.5</td>
</tr>
</tbody>
</table>
SURVEY RESULTS

WRITE-IN RESPONSES

IDENTIFY ANY OTHER ACTIVITIES OR FACILITIES THAT ARE CURRENTLY NOT AVAILABLE THAT YOU FEEL WOULD ENHANCE YOUR BEACH-GOING EXPERIENCE OR ENCOURAGE YOU TO VISIT A BEACH.

WHAT IS THE MOST IMPORTANT THING THAT CAN BE DONE TO IMPROVE THE RECREATION EXPERIENCE AT IVGID BEACHES OR ENCOURAGE YOU TO VISIT A BEACH?

WRITE-IN RESPONSES FOR THESE TWO QUESTIONS, THOSE ONLY MENTIONED ONE OR TWO TIMES NOT LISTED

OVERALL SATISFACTION

WOULD YOU RECOMMEND THE IVGID BEACHES TO YOUR FAMILY, FRIENDS, AND COLLEAGUES?

RESULT SORTED BY PREFERRED BEACH

MAILED ONLINE INTERCEPT

ABSOLUTELY NOT (1)
Absolute Yes (10)
Neutral (5)
OPPORTUNITIES
INCLINE BEACH + SKI BEACH

OVERALL OPPORTUNITIES
• Improve beach entries and pedestrian access
• Replace restroom/concession buildings
• Enhance group areas
• Enhance beach access connections
• Develop a consistent design aesthetic

IMPROVED ENTRY CONCEPT
KEY IDEA: WIDEN DROP-OFF AREA

Replace Restroom/Concession Buildings

KEY IDEA: SAFE PEDESTRIAN ACCESS TO GUARD SHACK

Enhance Group Areas

KEY IDEA: OUTDOOR RINSE STATIONS AT RESTROOMS

Defined Outdoor Seating with Lake Views

KEY IDEA: BEACHFRONT HOSPITALITY ZONE

Defined Outdoor Seating with Lake Views

KEY IDEA: SCRAMBLE STYLE FOOD + BEVERAGE LAYOUT
OVERALL OPPORTUNITIES:
- Improve beach entries and pedestrian access
- Replace restroom/concession buildings
- Enhance Burnt Cedar Pool House for functionality and improved concession operations

IMPROVED ENTRY CONCEPTS:
- Replace Restroom/Concession Buildings
- Improve Beach Access
- Improve Picnic Sites

ENHANCE GROUP AREAS:
- Separate circulation from the pool deck area

KEY IDEA: IMPROVE FLOW OF CONCESSION FACILITIES

KEY IDEA: CONSISTENT DESIGN AESTHETIC

KEY IDEA: ENHANCE GROUP PICNIC AREAS

KEY IDEA: ENHANCE INDIVIDUAL PICNIC AREA