



RECREATION DISTRICT

Analysis of 2025 HGRD Annual Strategic Planning Survey

FEBRUARY 2025

Introduction

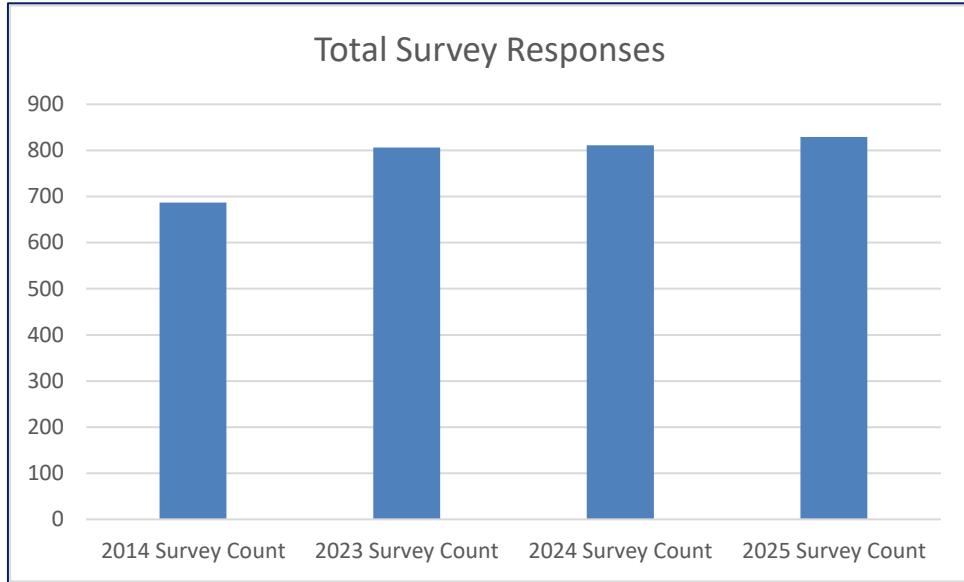
Welcome to the Analysis of the 2025 HGRD Annual Strategic Planning Survey.

This survey is a vital tool in assessing the needs, expectations, and satisfaction of Herons Glen residents. Resident participation has helped guide our efforts to enhance operations, improve amenities, and ensure Herons Glen remains one of Southwest Florida's premier active adult communities.

While the Herons Glen Recreation District and the Herons Glen Homeowners Association operate independently, each with its own initiatives and offices, we share a common goal: supporting and enriching our community. This survey is a key element of the Recreation District's strategic planning process and is conducted separately from the initiatives of the Homeowners Association.

In this presentation, you will review the key findings from the survey, offering valuable insights into your priorities and concerns as residents. These results will assist us in making our strategic decisions and future planning, ensuring that Herons Glen continues to thrive.

Survey Responses Summary



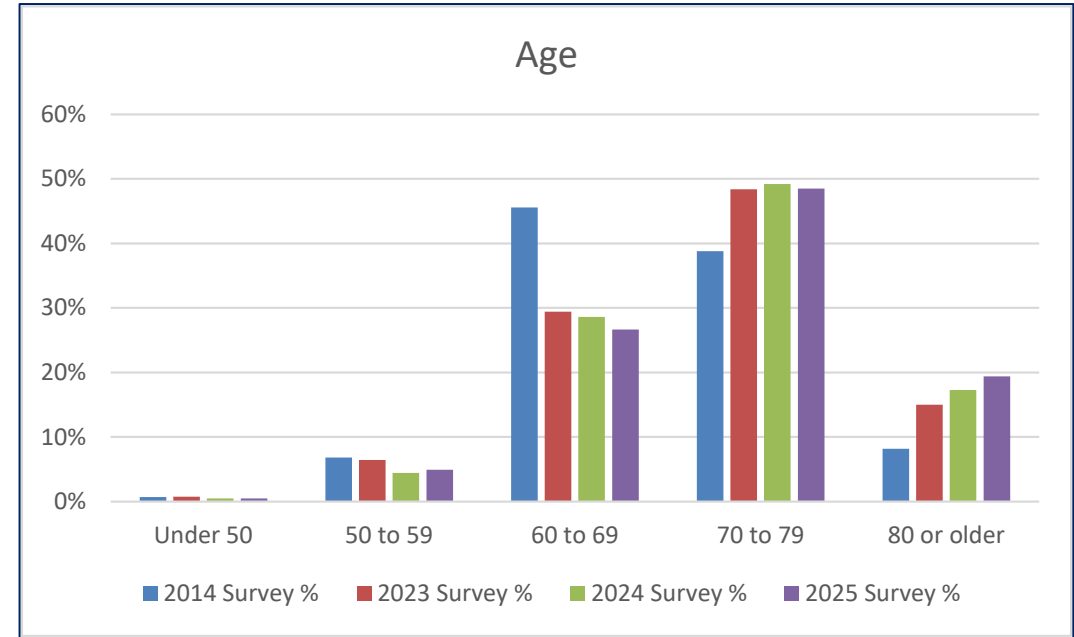
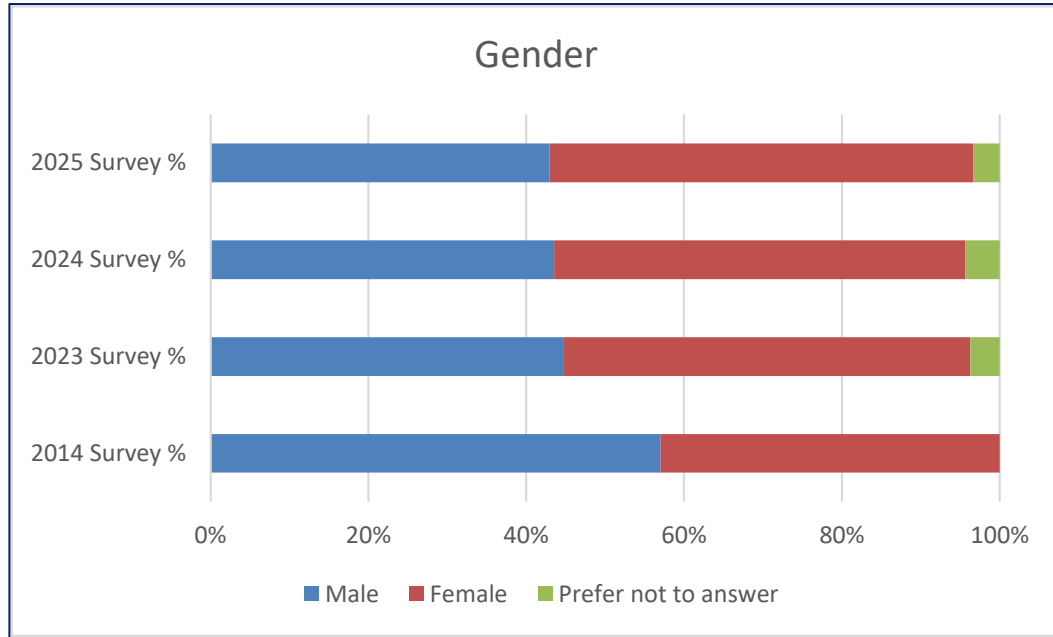
The 2025 HGRD Resident Survey provided a higher number of responses than any prior survey (829)

- Of the 829 total responses, 812 represented unique responses (as identified by the survey monkey respondent ID number).
- However, the 2025 survey did NOT request account numbers, so it is not possible to identify duplicate or anonymous responses.

<u>Responses</u>	<u>2014</u>	<u>2023</u>	<u>2023</u>	<u>2024</u>	<u>2024</u>	<u>2025</u>	<u>2025</u>
	<u>Survey</u>	<u>Survey</u>	<u>Survey</u>	<u>Survey</u>	<u>Survey</u>	<u>Survey</u>	<u>Survey</u>
	<u>Count</u>	<u>Count</u>	<u>%</u>	<u>Count</u>	<u>%</u>	<u>Count</u>	<u>%</u>
Total Responses	687	806	100%	811	100%	829	100%
Unique Responses		699	87%	661	82%	812	98%
Duplicate or Anonymous Responses		107	13%	150	18%	17	2%
Duplicate account numbers		93	12%	139	17%		

- The HGRD Resident Survey continued to garner significant response rates from residents (> 50%)
 - This high response rate would seem to indicate that the residents place significant weight on using this vehicle to influence HGRD Board actions.

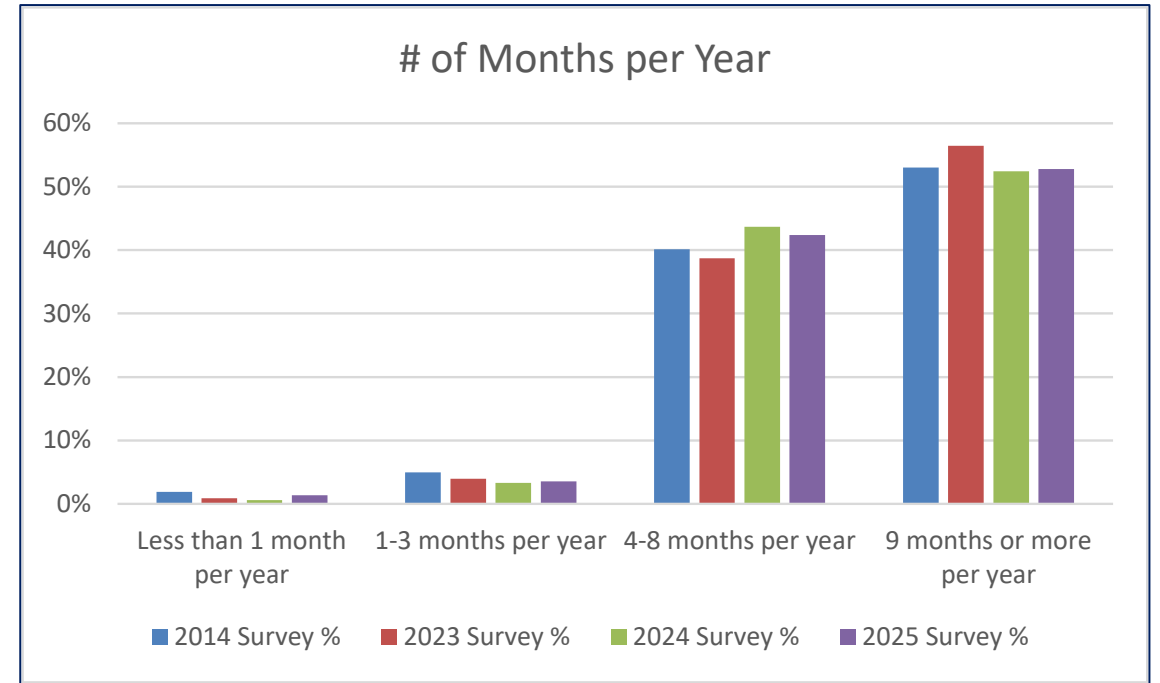
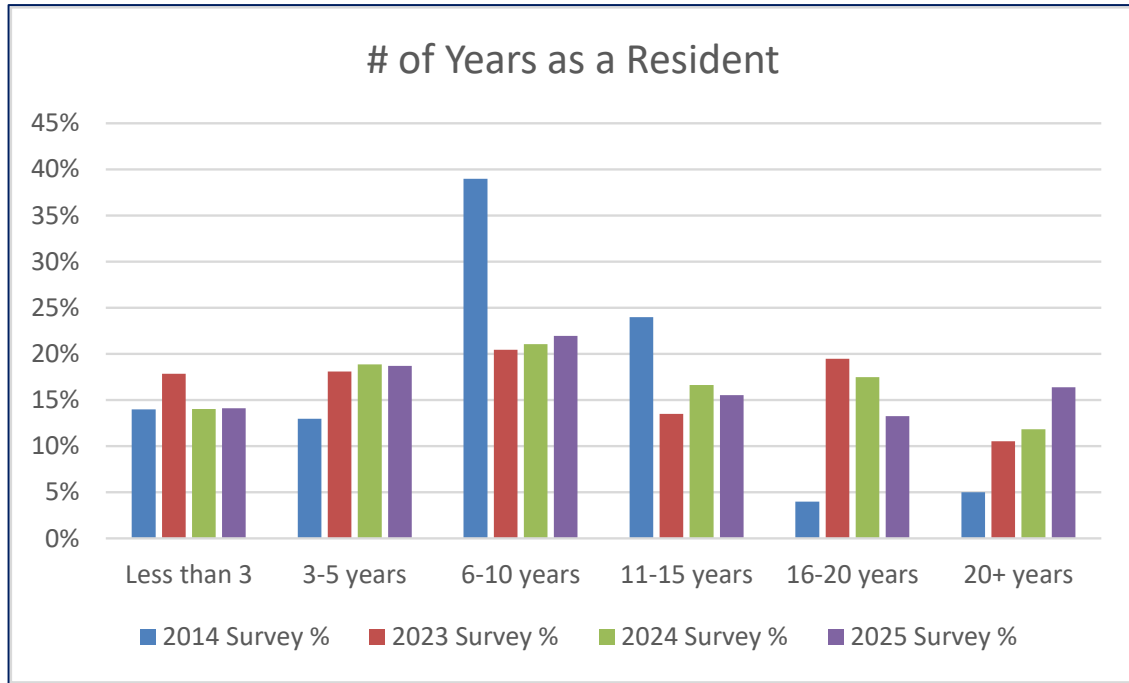
Age & Gender Demographics Summary



The proportion of female residents in Herons Glen has increased by approximately 2% compared to 2024, continuing an 11-year trend of a growing female demographic.

The trend continued as the number of residents who are over the age of 70 has increased from 63% in 2023 to 68% in 2025.

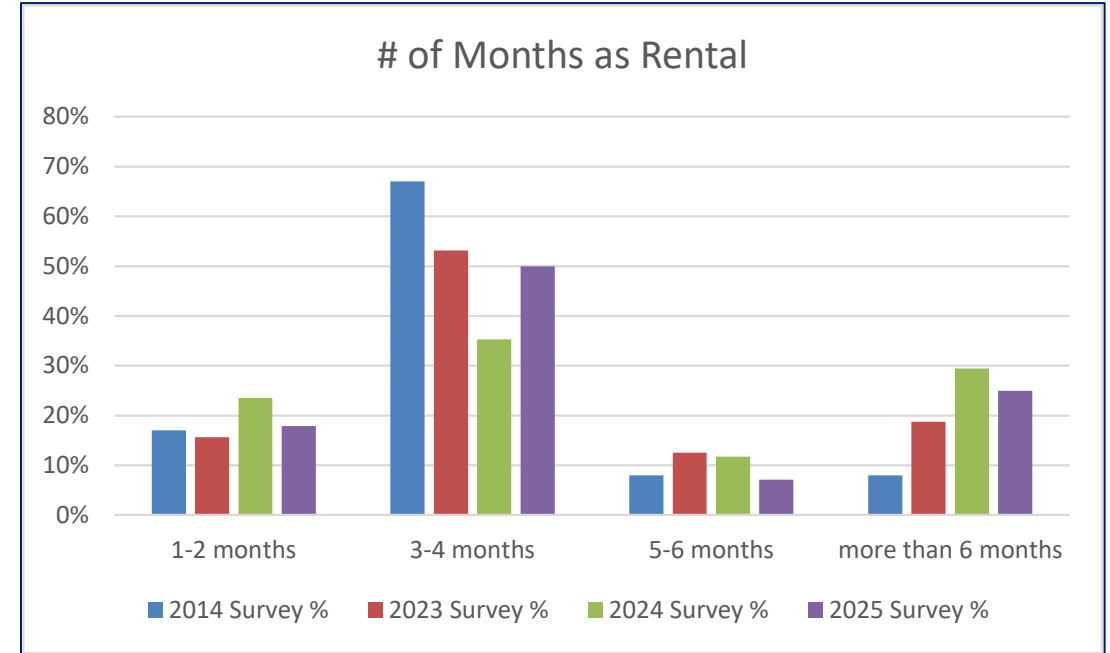
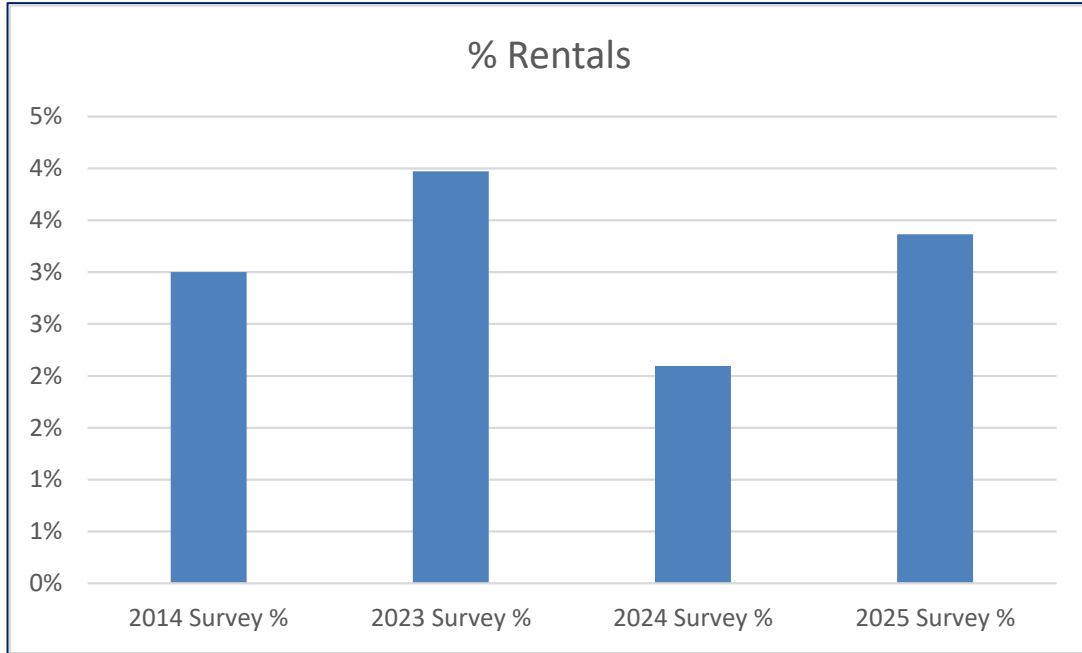
Residency Demographics Summary



The number of years as a resident continued to track with the overall aging of the development with more people staying longer.

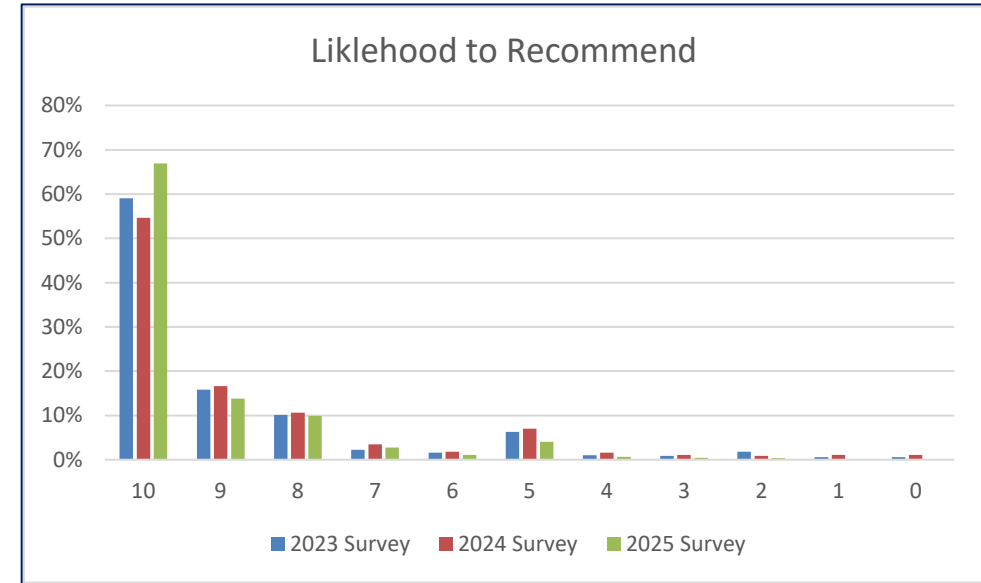
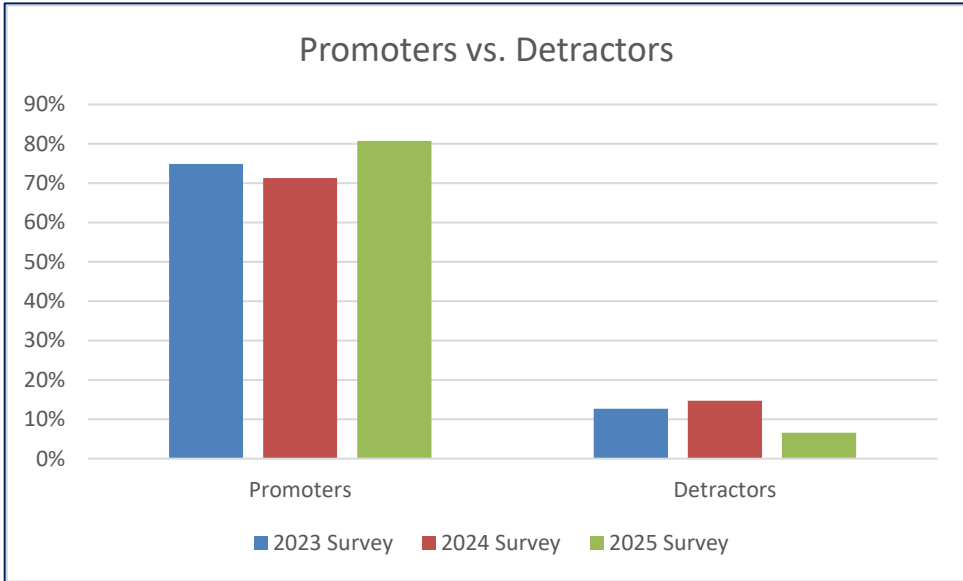
The number of “full-time” residents (9 months or longer) has remained mostly constant over the years at slightly greater than 50%.

Rentals Demographics Summary



The percentage of residents who rent out their property remained somewhat consistent at 2-4% each year. The trend toward longer rental periods reversed course in the 2025 survey with the majority of rentals now dropping below 4 months.

Net Promotor Score (NPS)

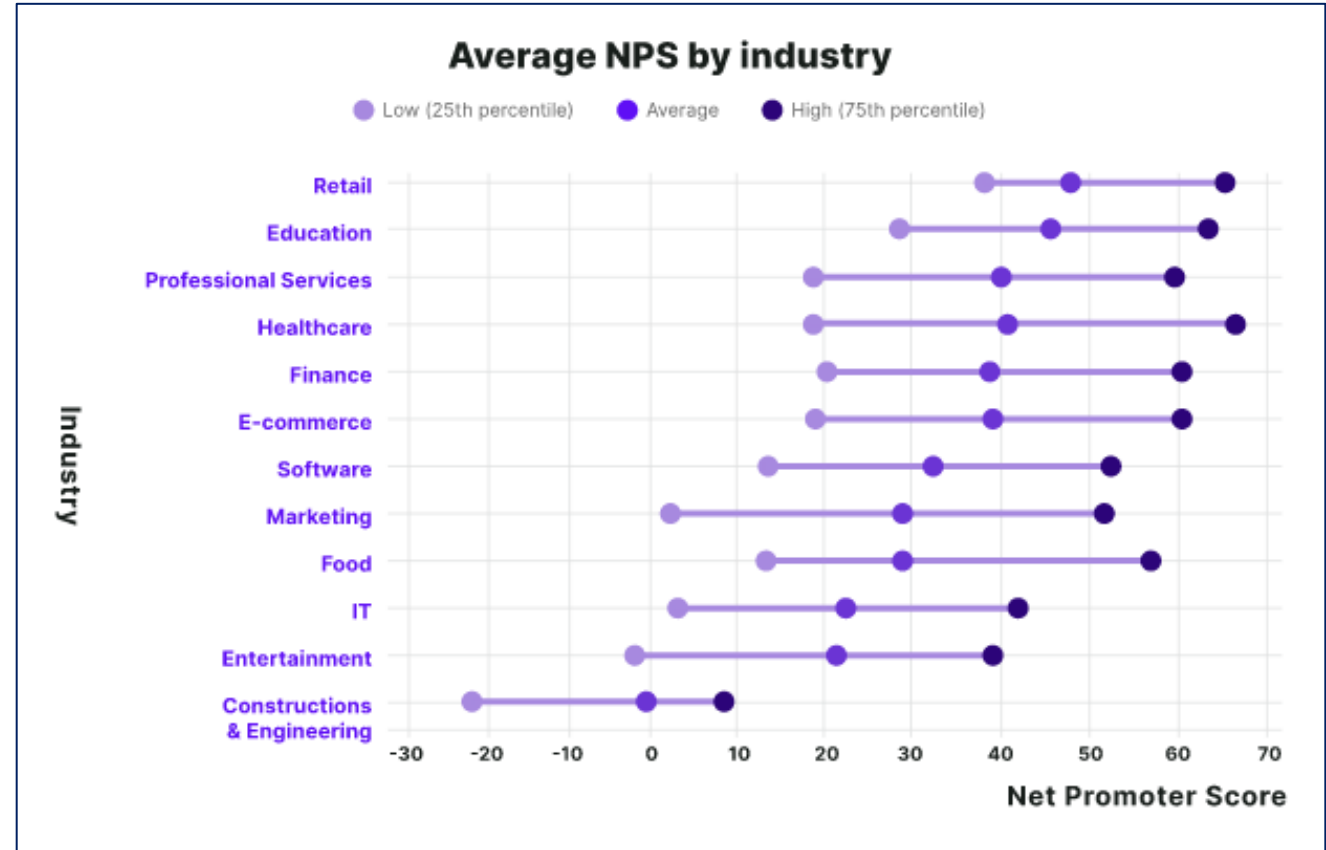
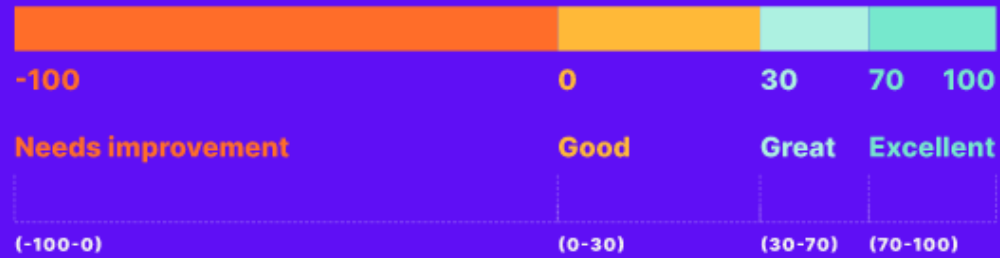


Score			2023 Survey		2024 Survey		2025 Survey	
				%		%		%
10	Extremely Likely to recommend	Promoters	75%	59%	71%	55%	81%	67%
9				16%		17%		14%
8		Passives		10%		11%		10%
7				2%		3%		3%
6		Detractors		2%		2%		1%
5	Neutral			6%		7%		4%
4				1%		2%		1%
3				1%		1%		0%
2				2%		1%		0%
1				1%		1%		0%
0	Not at all likely to recommend		1%		1%		0%	

The Net Promotor Score (NPS) for Herons Glen improved significantly in the 2025 survey (HGRD NPS of 74 in 2025 versus 57 in 2024 and 62 in 2023) as the number of “Extremely Likely to Recommend” responses were significantly higher, up by a full 12%. This NPS score is considered EXCELLENT and should be considered a top-tier performance (see next slide).

Net Promotor Score (NPS) Explained

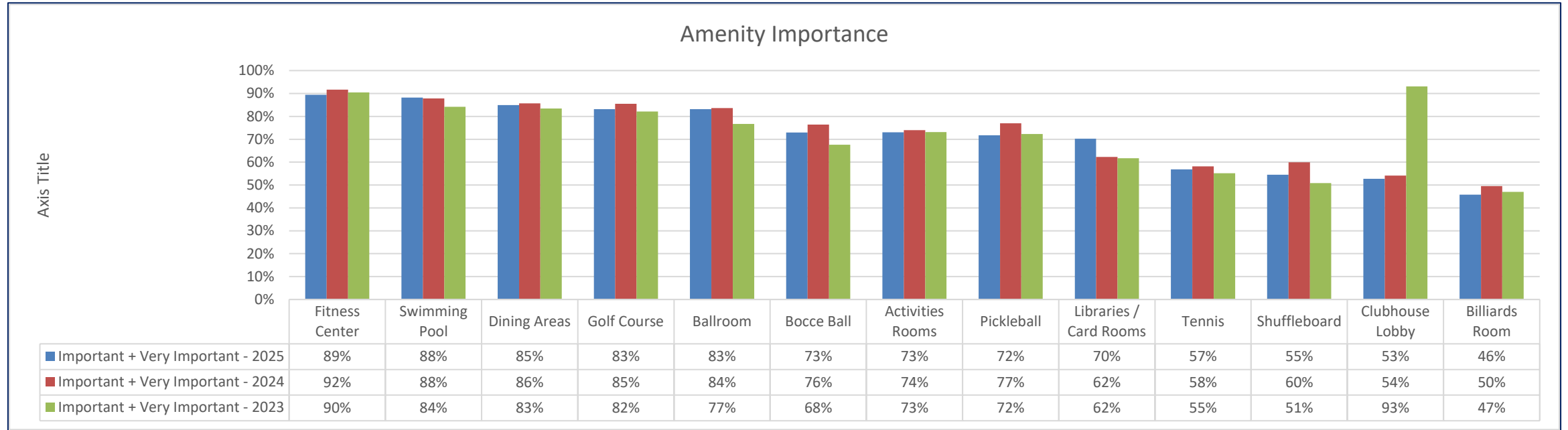
What is a good NPS?



The Net Promotor Score (NPS) is a widely used measure of overall client satisfaction which provides a "top of the mind", consistent trending metric for annual surveys. The NPS is calculated as Promoters (9's and 10's) - Detractors (0 through 6's).

For more information on NPS, go to the following website: <https://www.netpromotersystem.com/about/>

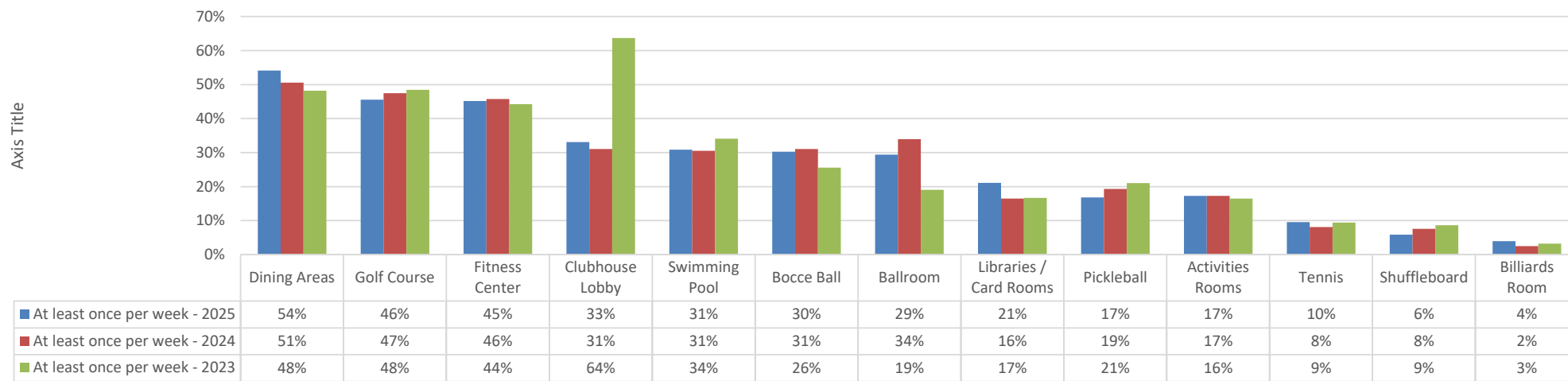
Amenity Importance



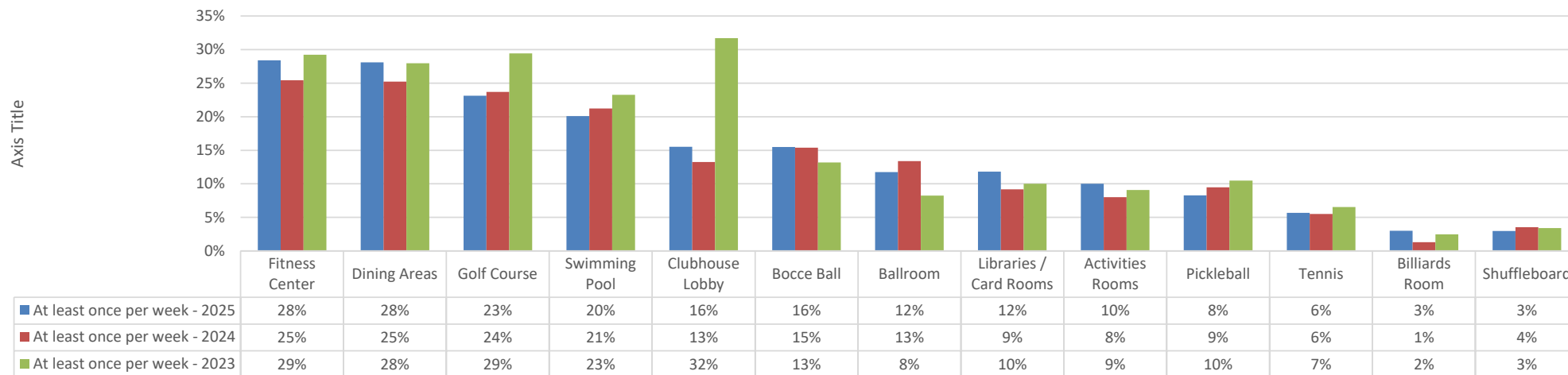
The order of importance for the various amenities did not change significantly in this year's survey. The only real change in relative position is the drop in Pickleball importance from 6th place down to 8th place.

Amenity Utilization

Amenity Utilization during Season (at least once per week)



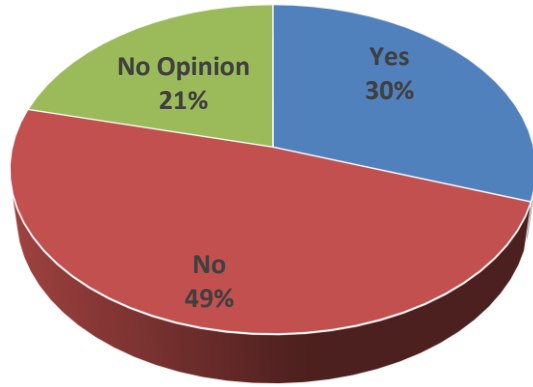
Amenity Utilization during Off-Season (at least once per week)



Interesting changes from 2024:

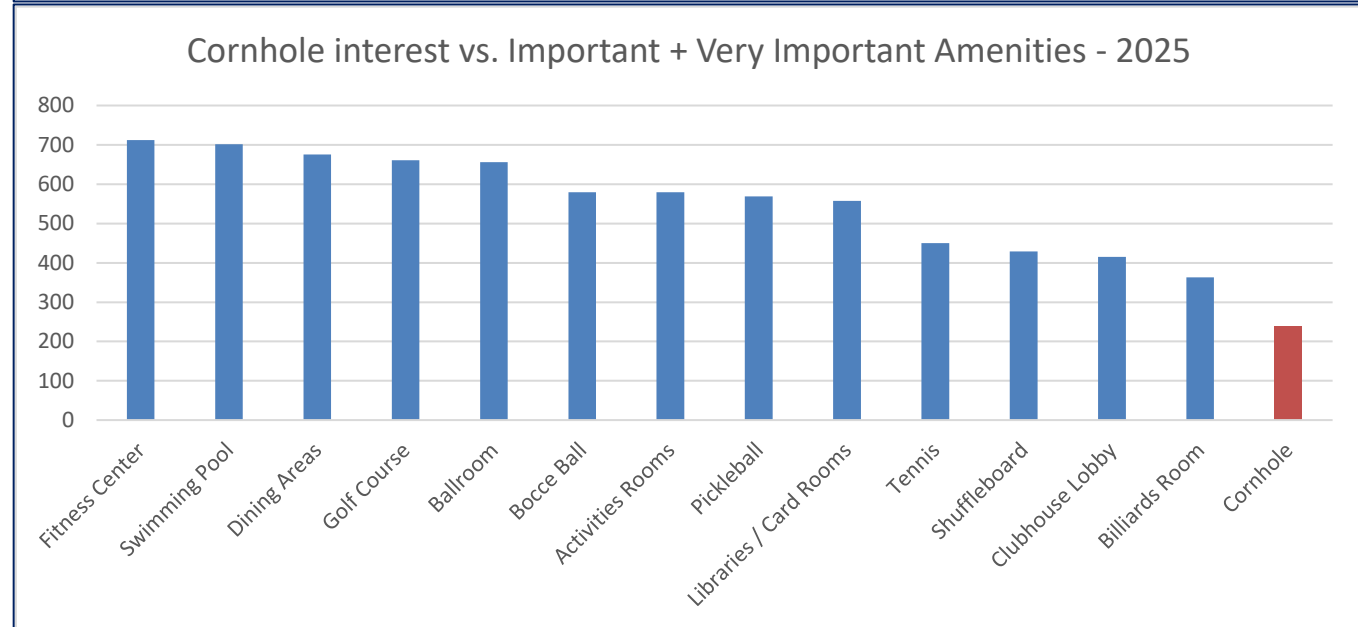
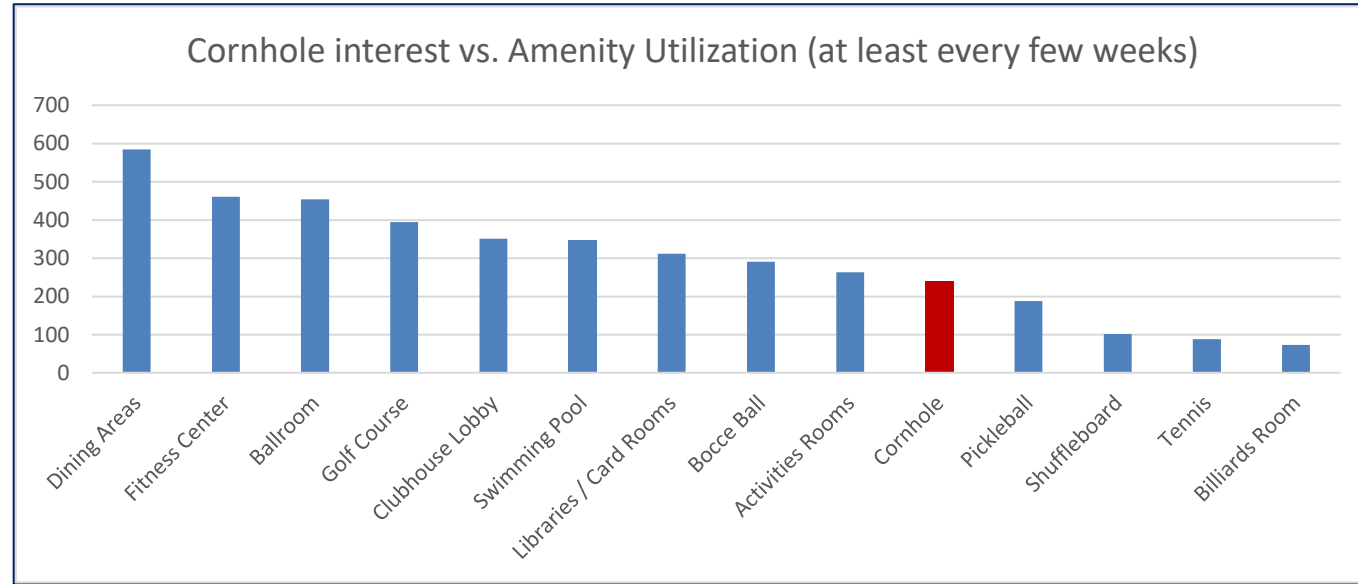
- Dining utilization increased again in 2025 with over 50% of respondents indicating weekly usage during in-season.
- Golf course utilization continued to show another drop-off, both in-season and off-season.
- Pickleball continued to drop-off slightly, both in-season and off-season.

Interest in Cornhole as an Amenity

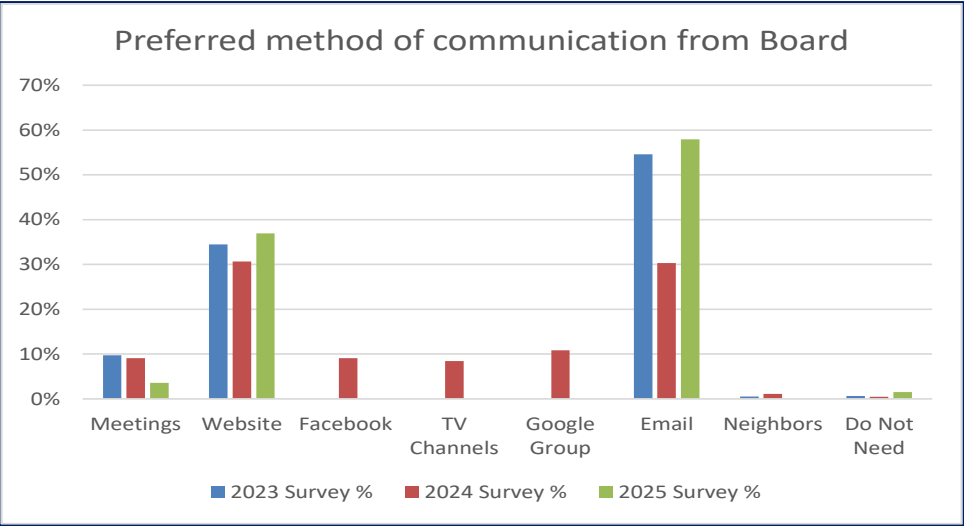
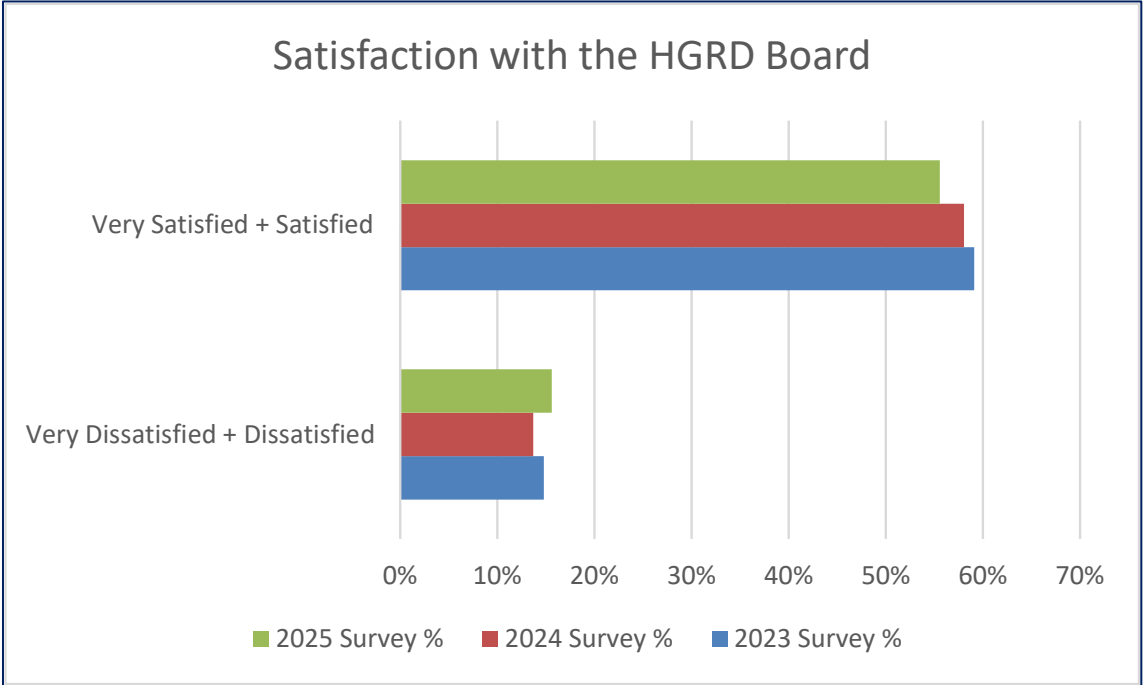
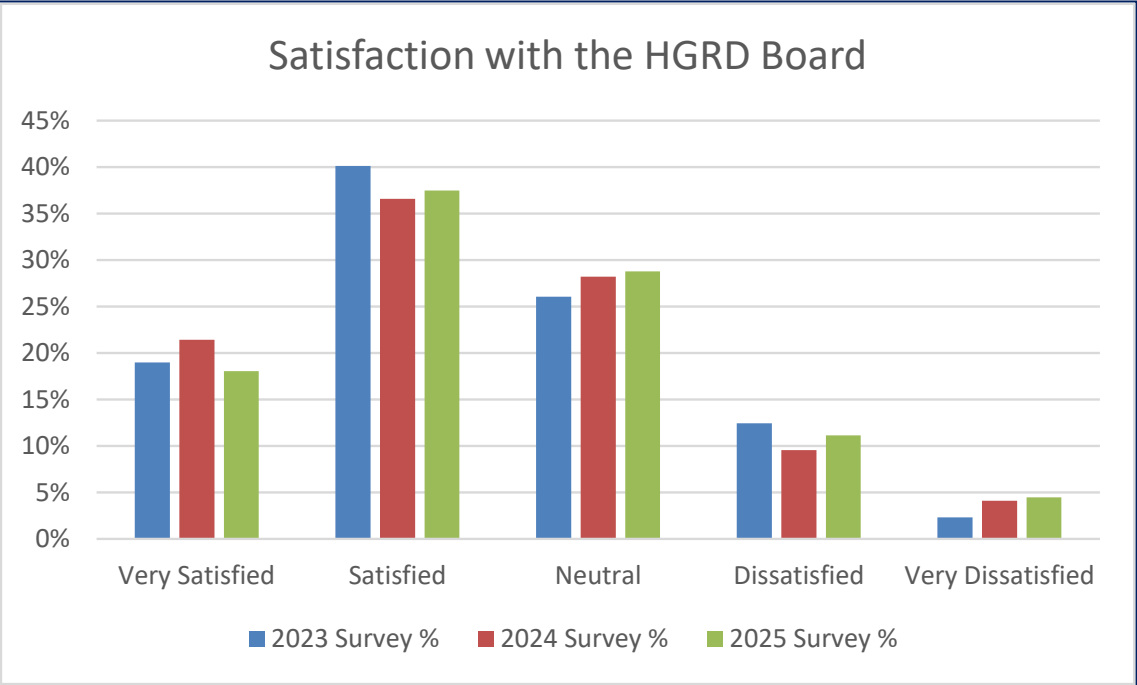


239 Residents expressed an interest in Cornhole becoming a sanctioned amenity by HGRD. This represented 38% of those residents who expressed an opinion and 30% of all survey respondents.

- For context, this response is shown graphically versus resident utilization of other amenities to indicate that more residents showed an interest in Cornhole than utilize the Pickleball Courts.
- When measured against resident importance of the various amenities, Cornhole interest was less than the other amenity importance measures.



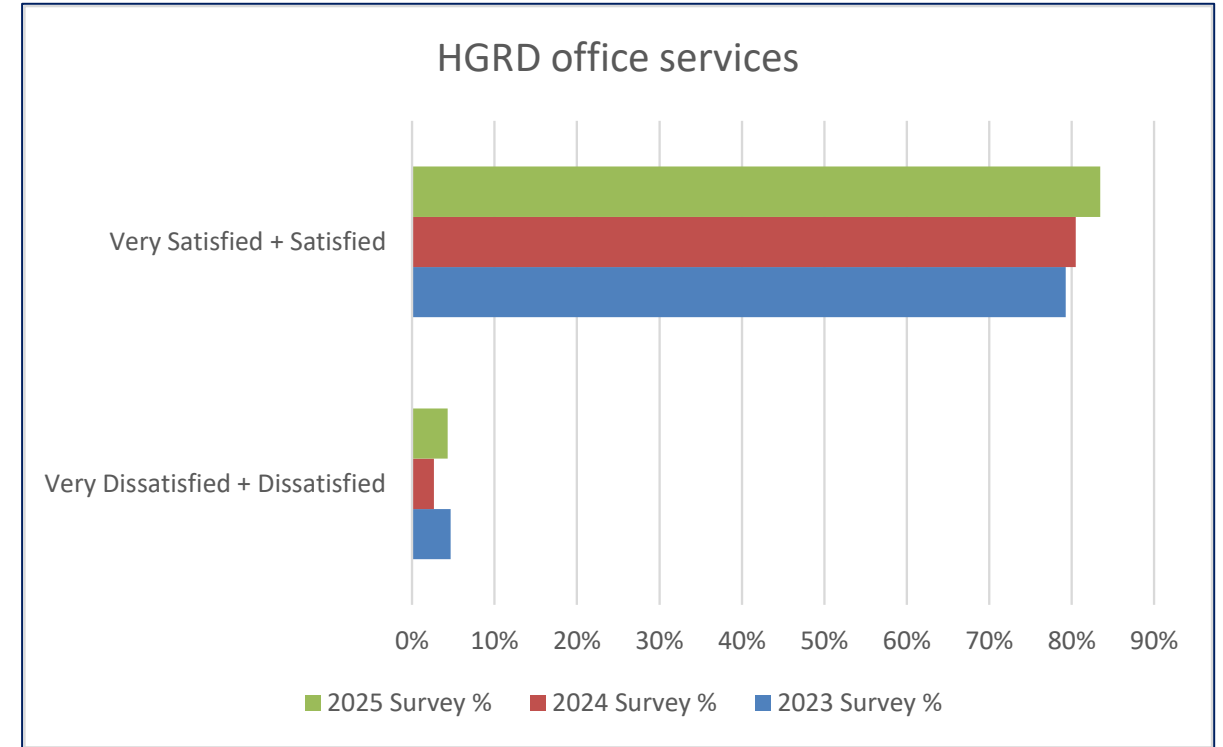
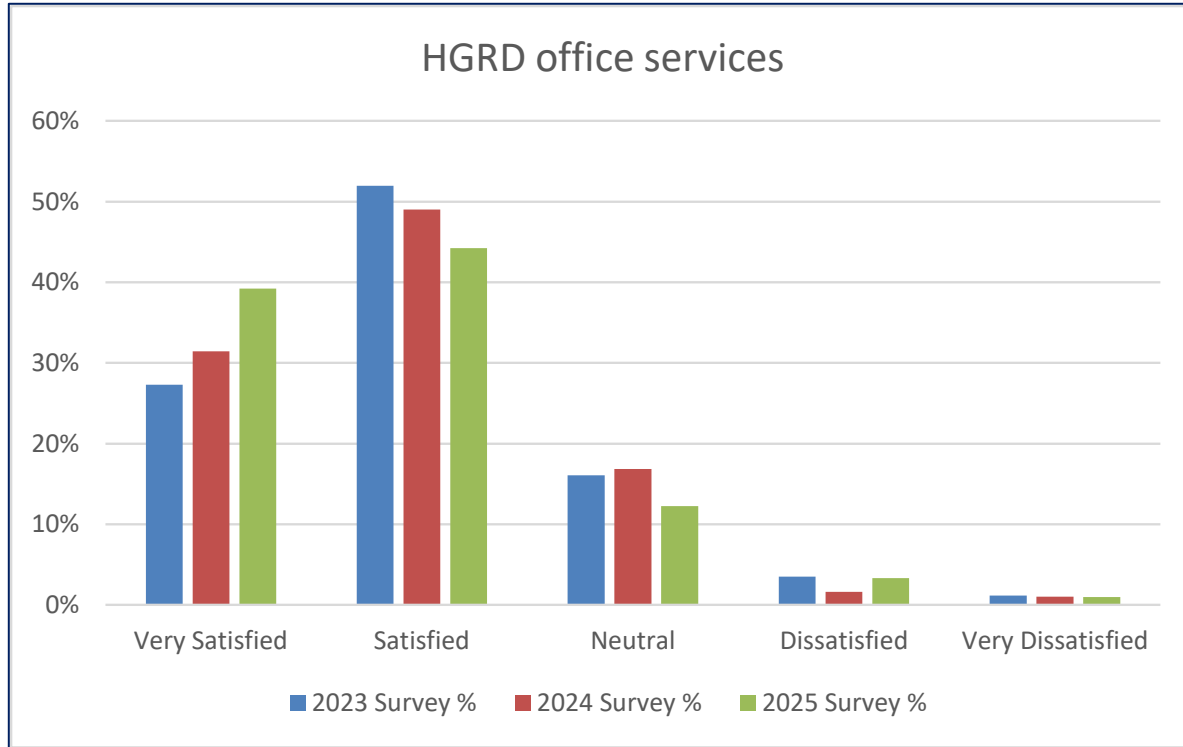
Satisfaction with the HGRD Board



Satisfaction with the Board dropped 2% from the 2024 survey while the amount of dissatisfaction increased by the same 2%. Overall, the net satisfaction with the Board remained overwhelmingly positive.

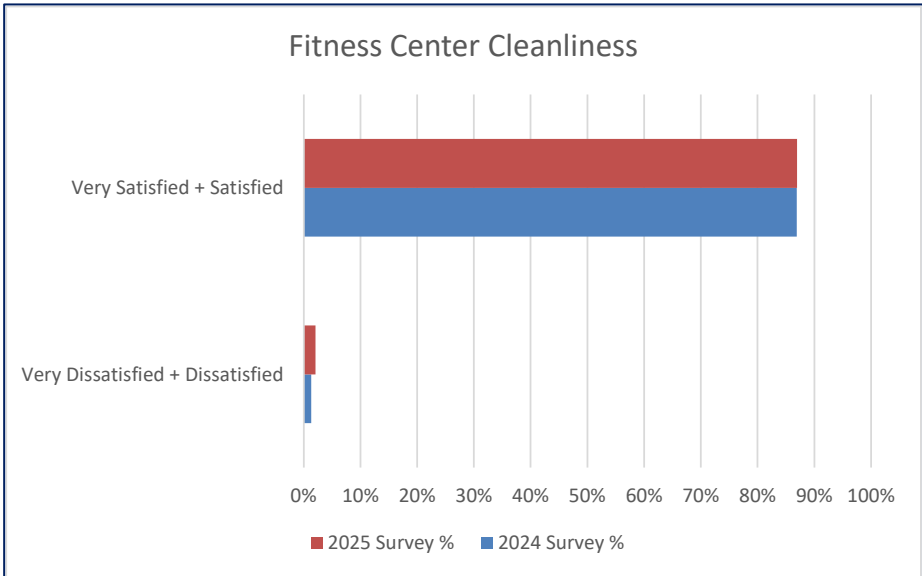
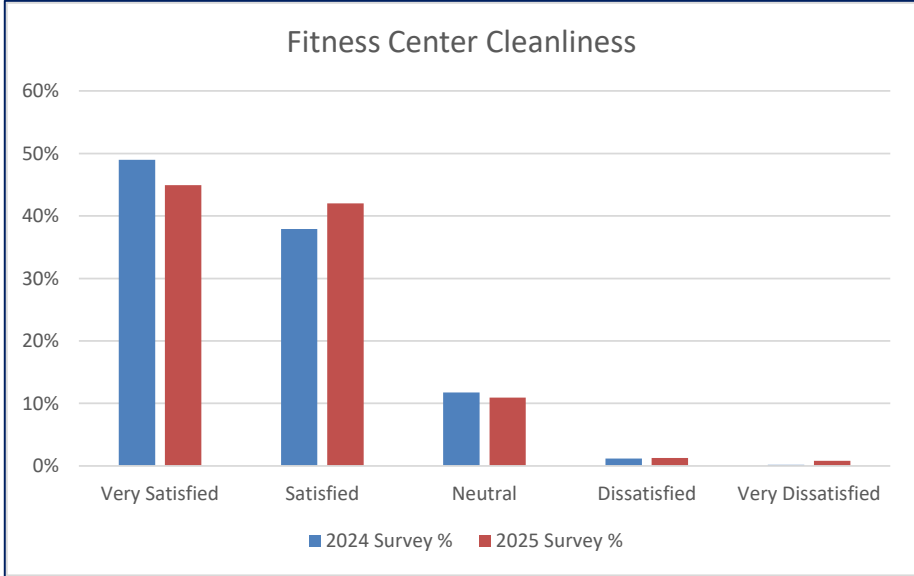
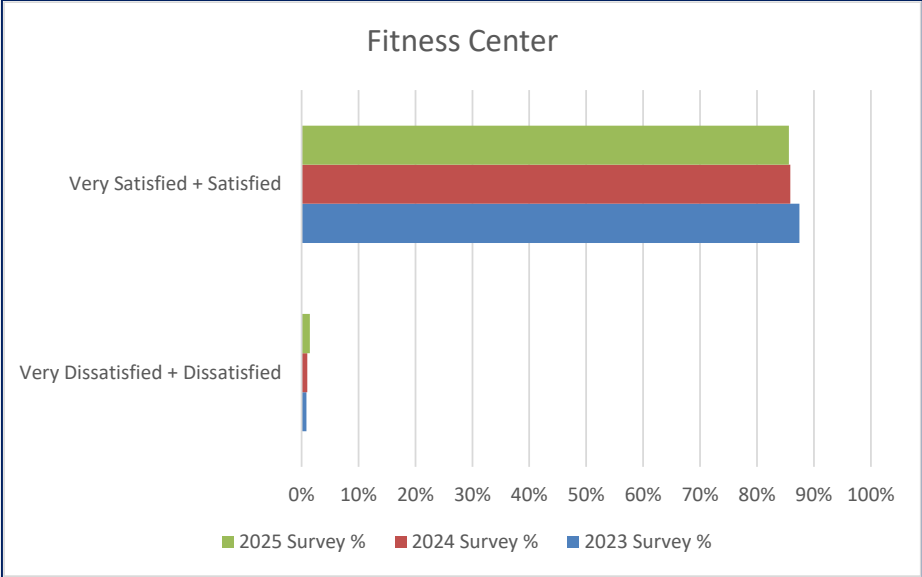
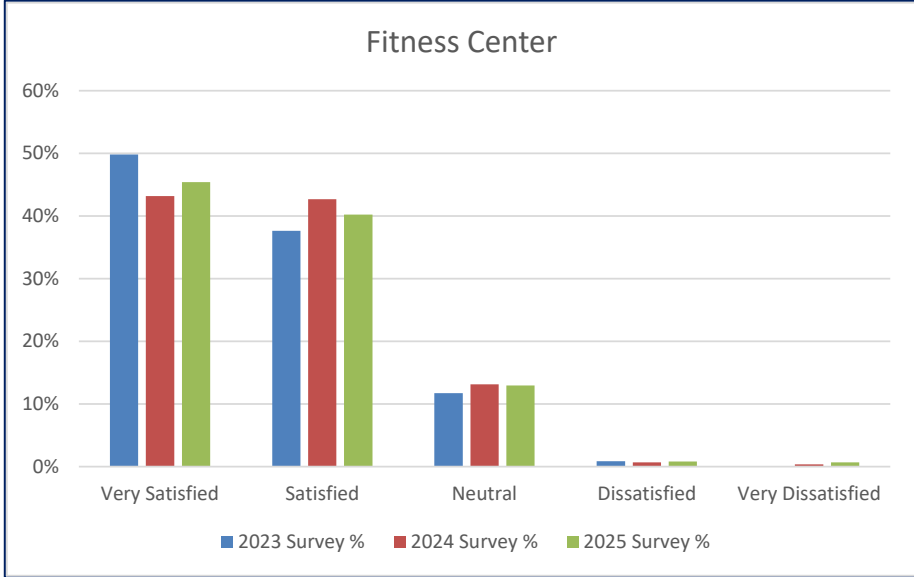
The preferred method of communicating with residents remained via email and the HGRD website.

Satisfaction with the Services Provided by the HGRD Office



The overall satisfaction with the services provided by the HGRD Office continued to be very strong with an increase in the “Very Satisfied” ratings this year and very few “Dissatisfied” responses.

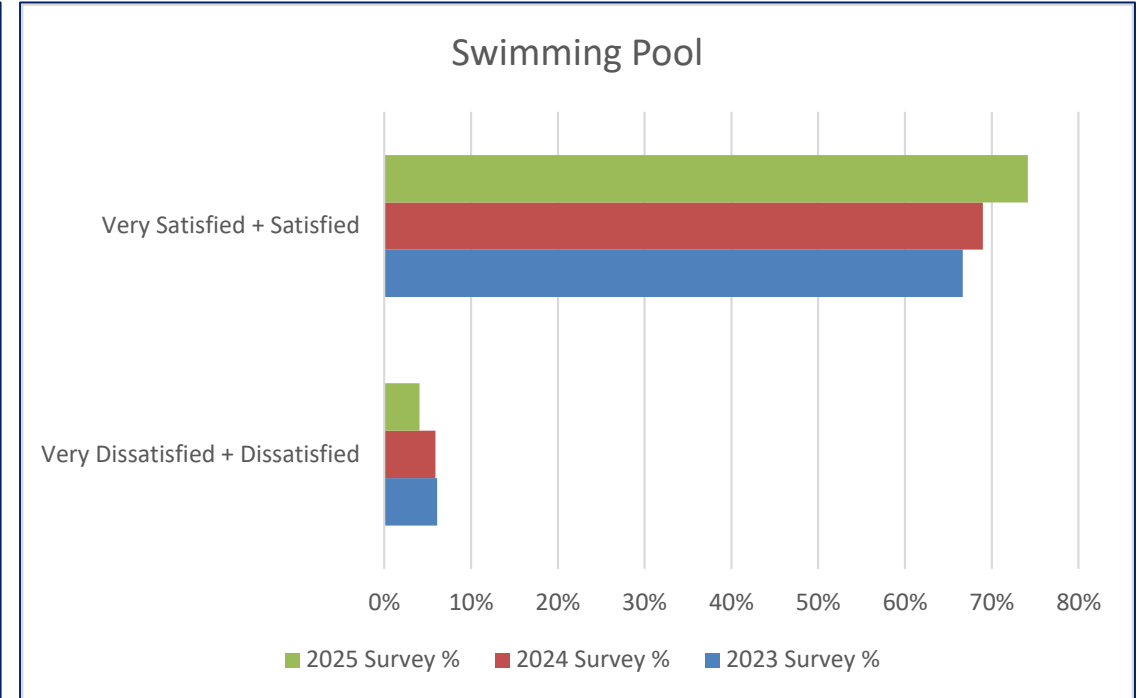
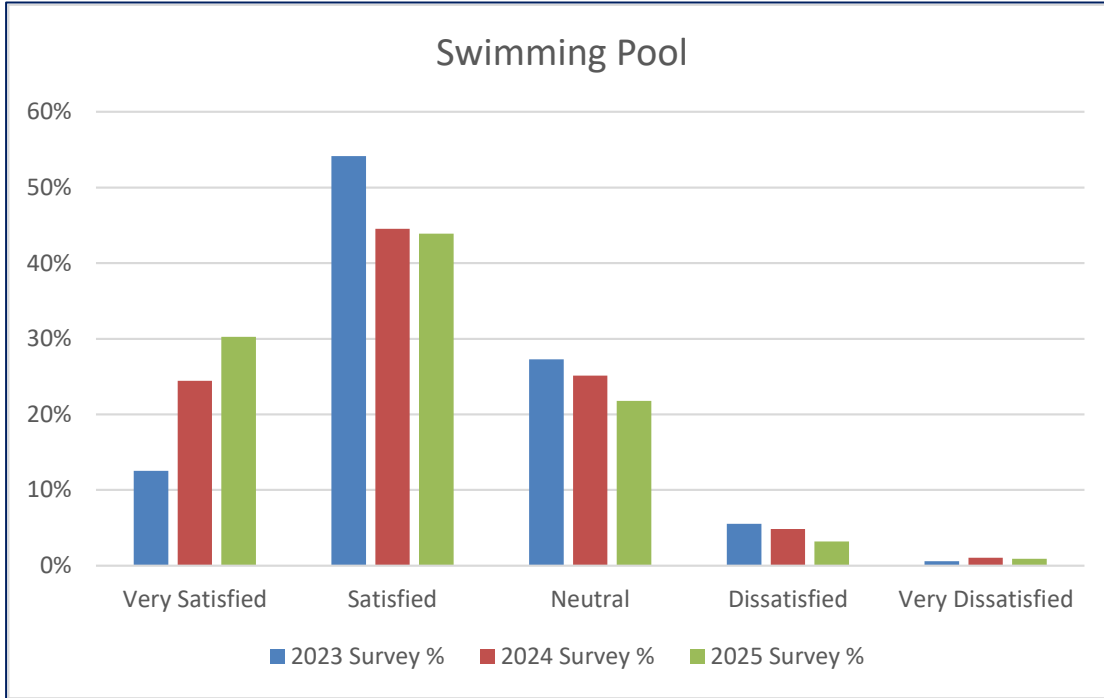
Satisfaction with the Fitness Center



The Fitness Center continued to maintain the highest net satisfaction of all HGRD amenities (along with being rated the most important and one of the most utilized). The dissatisfaction ratings are very small.

The cleanliness of the Fitness Center continued to be rated very favorably.

Satisfaction with the Swimming Pool



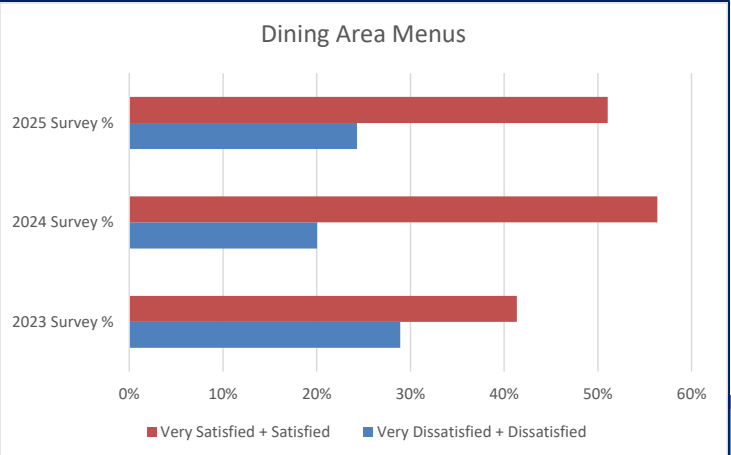
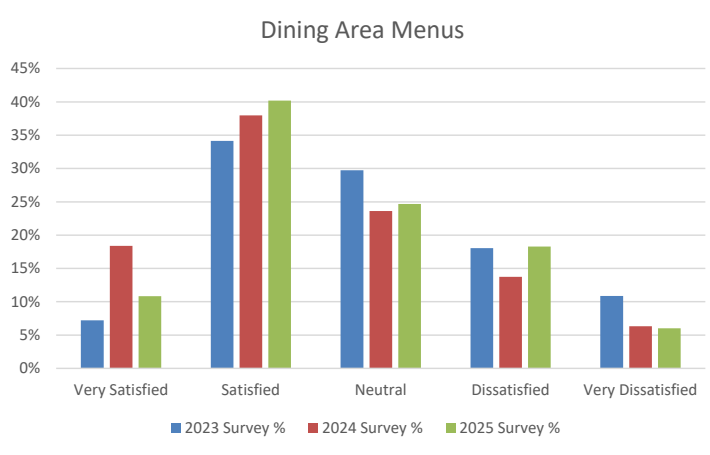
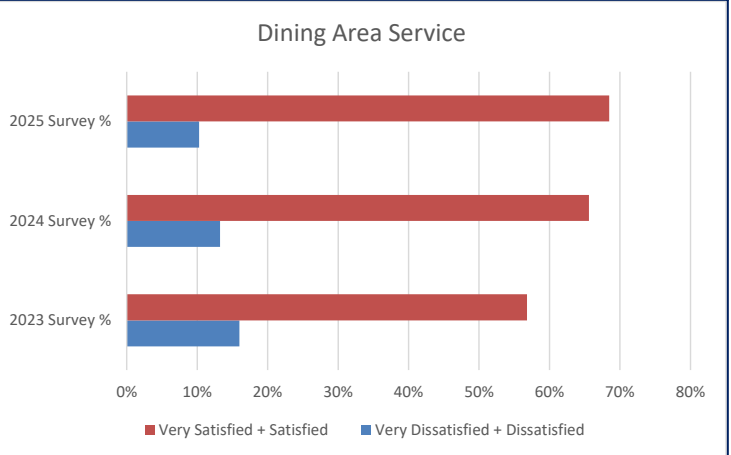
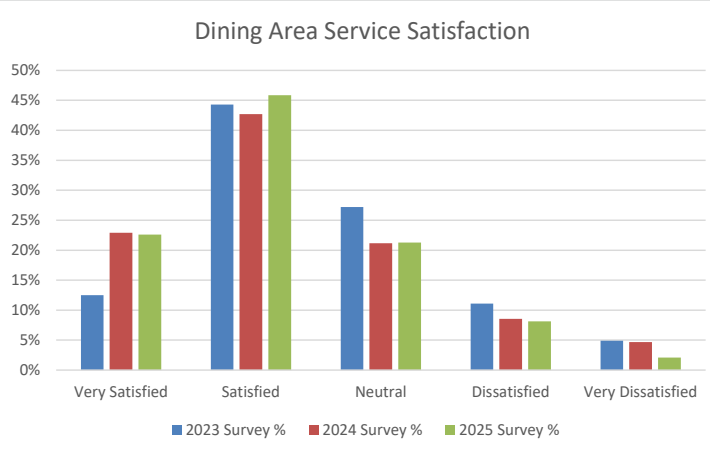
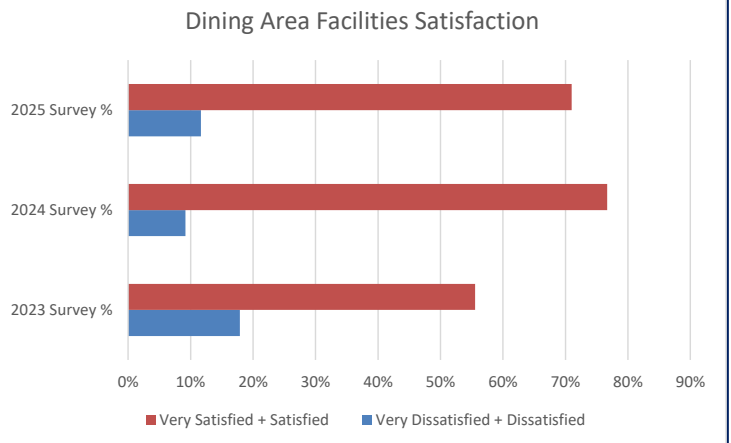
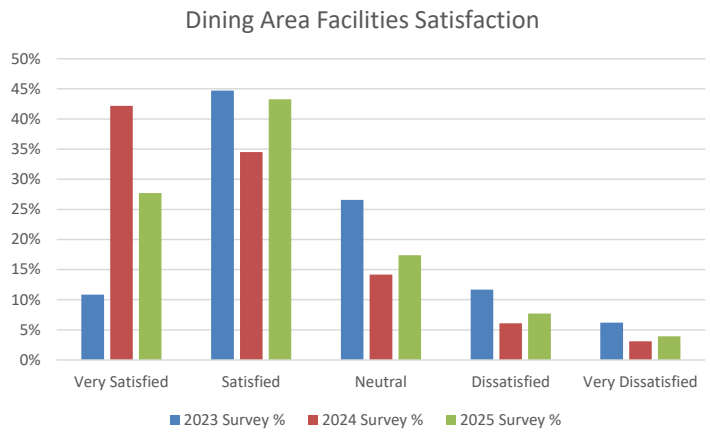
Swimming Pool net satisfaction increased by 5% driven by a strong increase in the “Very Satisfied” ratings along with a corresponding drop in “Dissatisfied” ratings.

Satisfaction with the Dining Areas

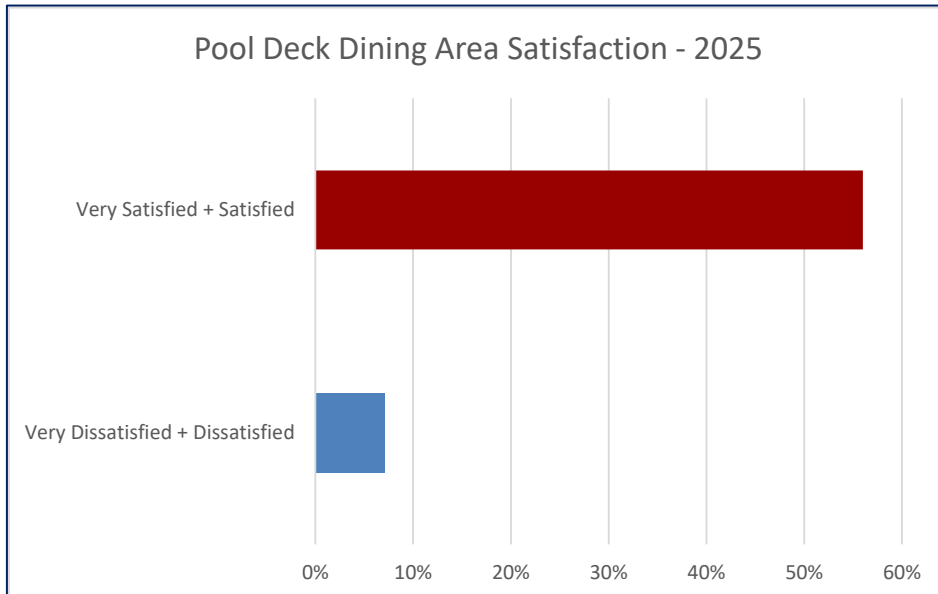
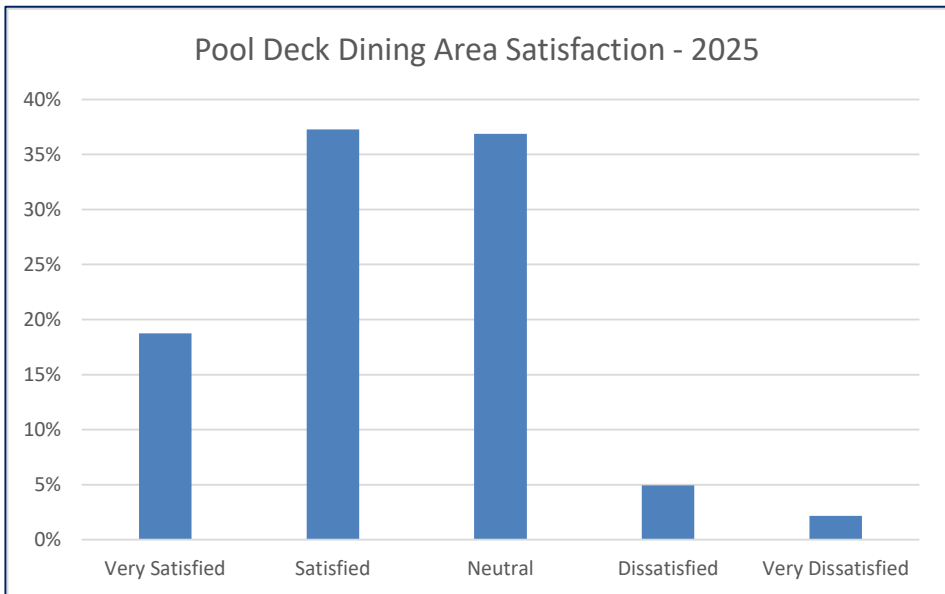
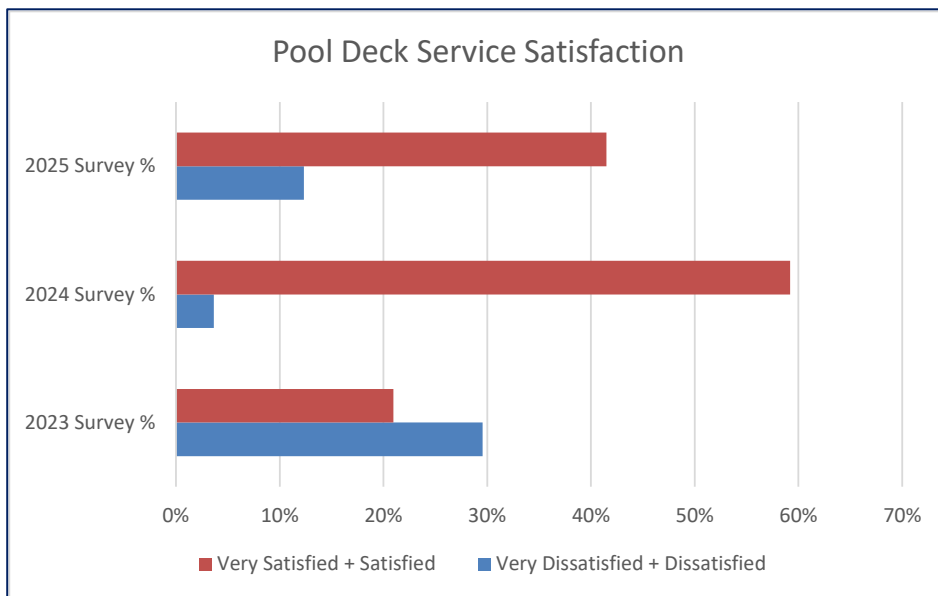
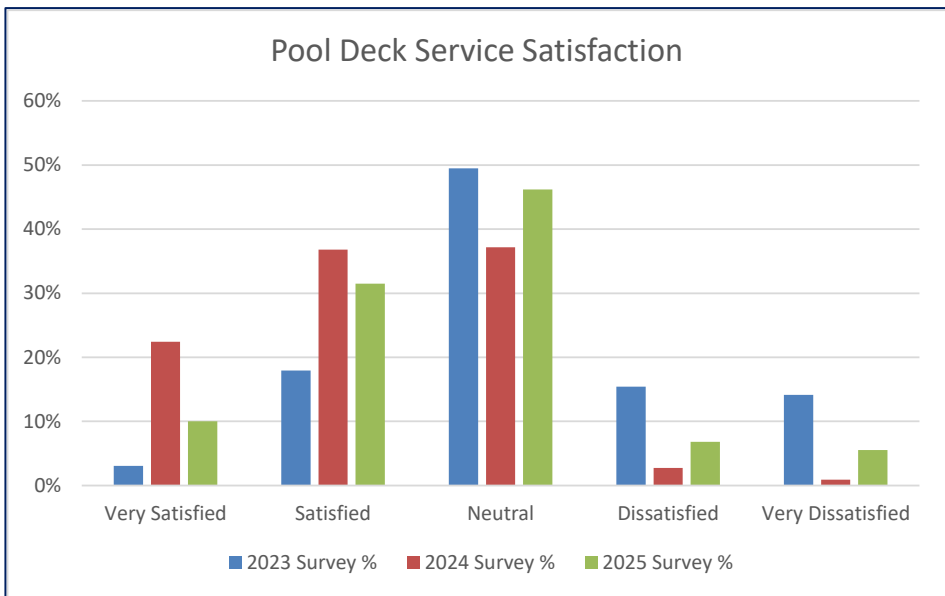
Satisfaction with the Dining Area Service improved slightly (2%) with small improvements in the “Satisfied” responses.

While “Satisfied” responses increased slightly for both the Dining Area Facility and Menus, the “Very Satisfied” responses for both of these areas showed a significant reduction.

Note: Prior surveys independently assessed satisfaction with the Lounge and the Restaurant separately. Thus, for purposes of comparison with the 2025 survey, the prior year results for the Lounge and the Restaurant were averaged together.



Satisfaction with the Pool Deck Dining



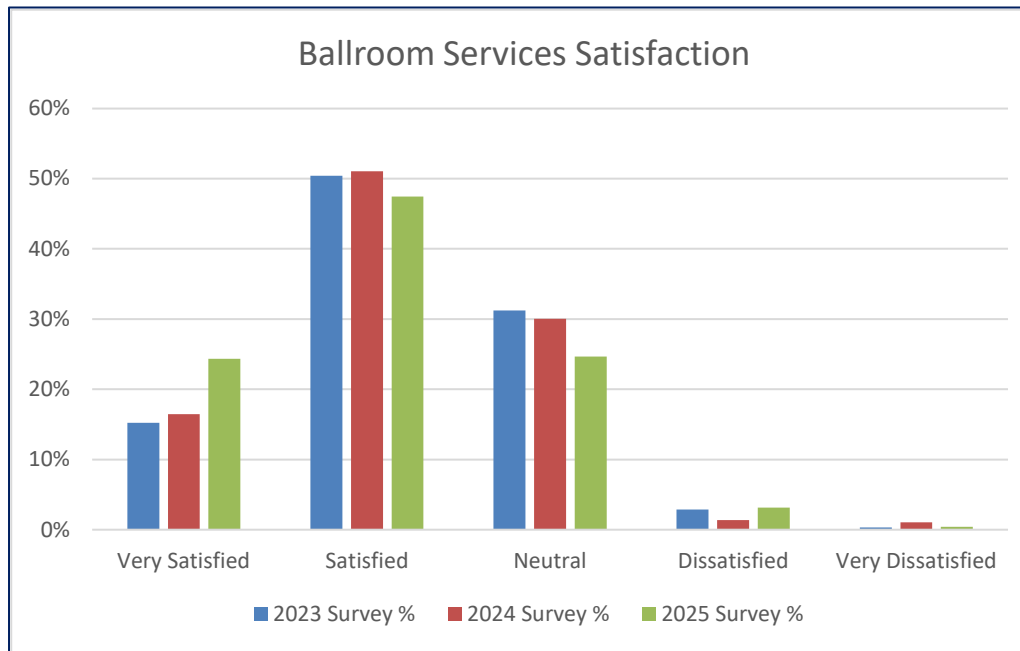
Satisfaction levels for the Pool Deck Service fell significantly from last year.

However, satisfaction with the Pool Deck Dining Area showed stronger satisfaction than the services provided by 15%. Both the “Very Satisfied” and the “Satisfied” ratings were on par with last year’s ratings.

This may be influenced by the fact that only one question was asked over the last two years and did not separate the Dining Area from the Dining Service.

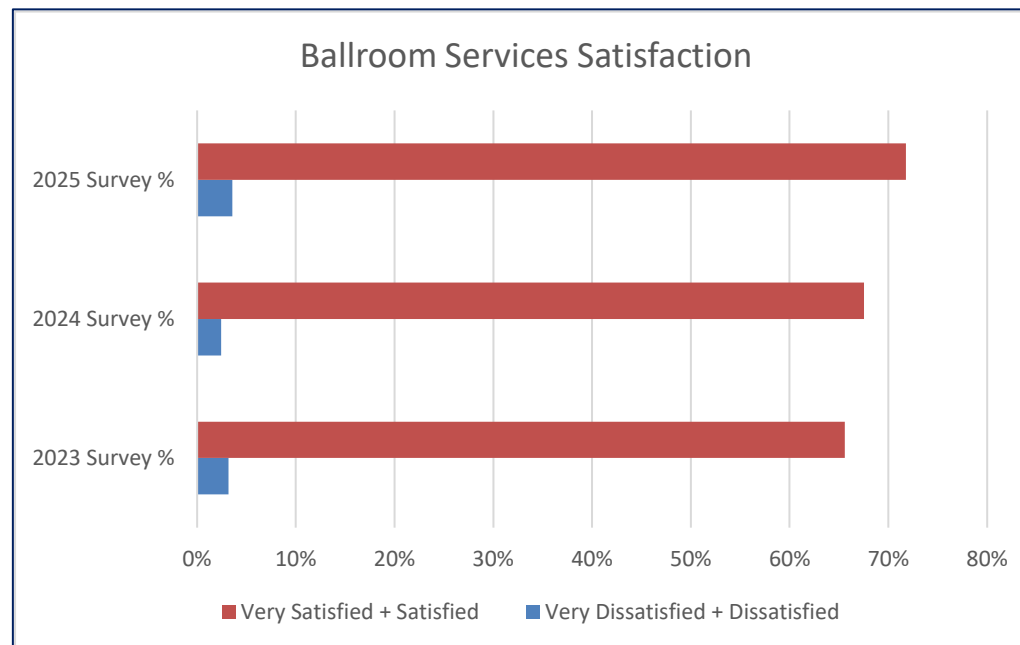
The “Neutral” rating remained very high which suggested a low utilization of Pool Deck dining.

Satisfaction with the Ballroom

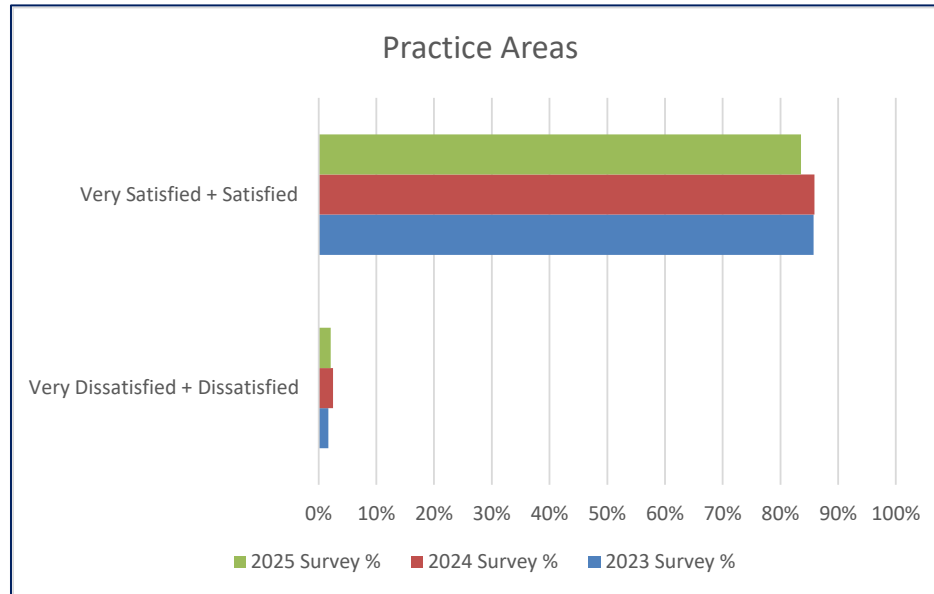
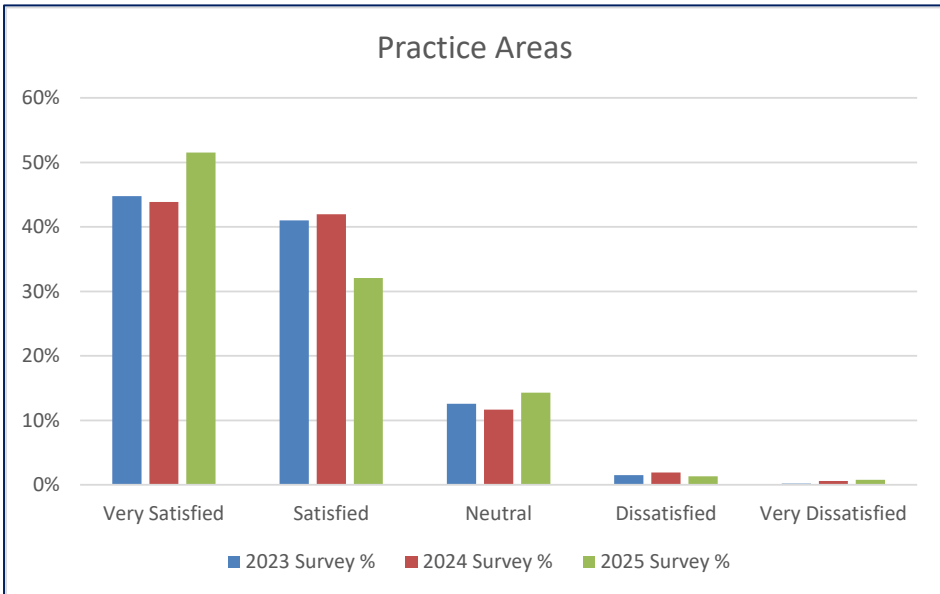
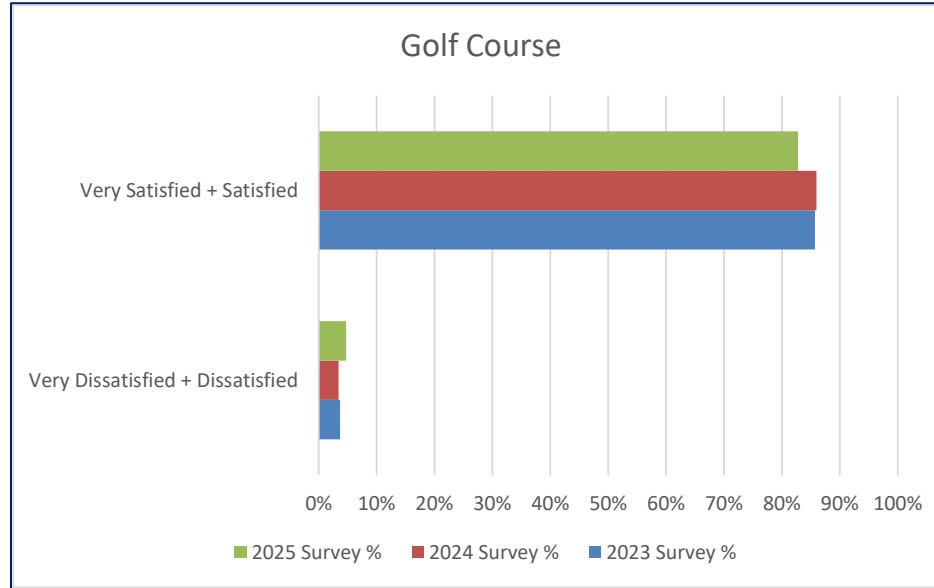
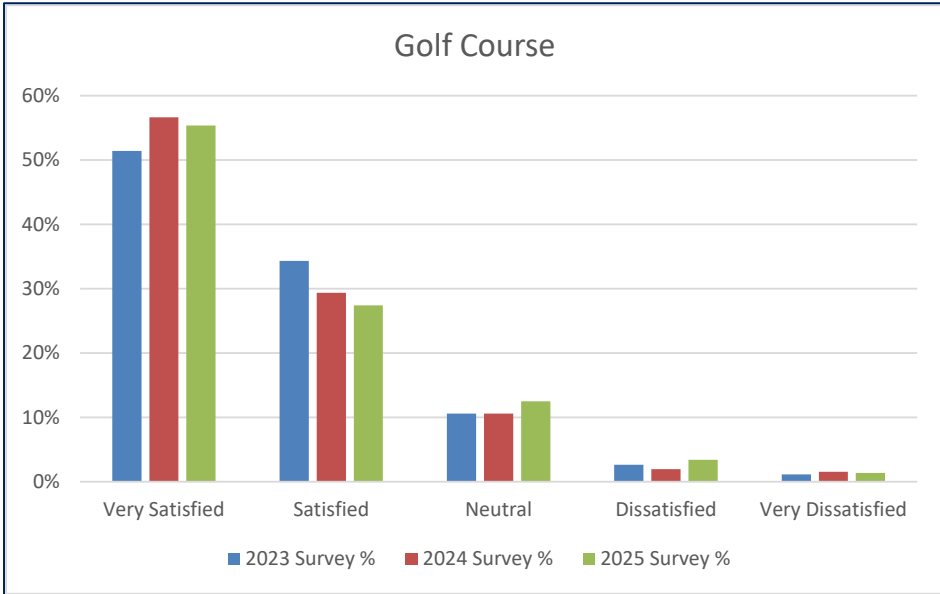


Satisfaction with the Ballroom Service improved by 4% with a strong increase in the “Very Satisfied” rating.

The net difference between “Satisfied” and “Unsatisfied” responses continued to show a strong level of satisfaction with the Ballroom Services.



Satisfaction with the Golf Course & Practice Areas

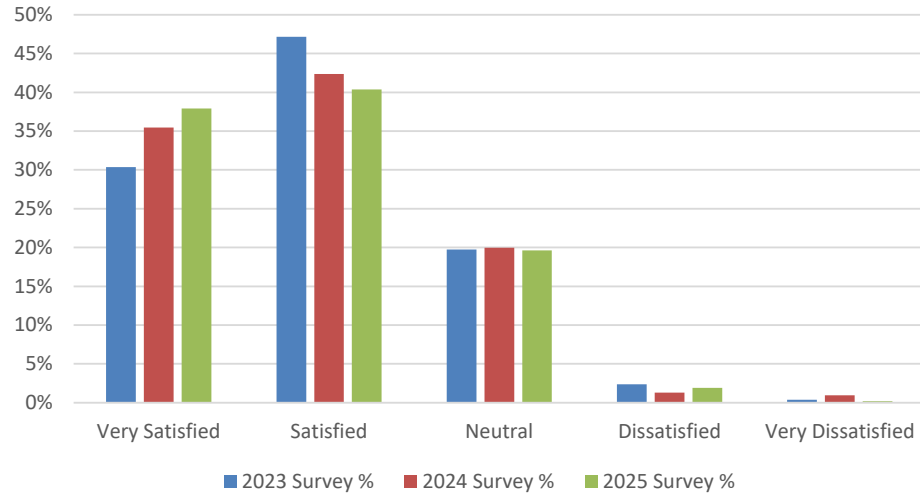


The Golf Course net satisfaction dropped very slightly this year. That said, the golf course still demonstrated the third-highest net satisfaction of all HGRD Amenities (slightly behind the Fitness Center and the Golf Practice Areas).

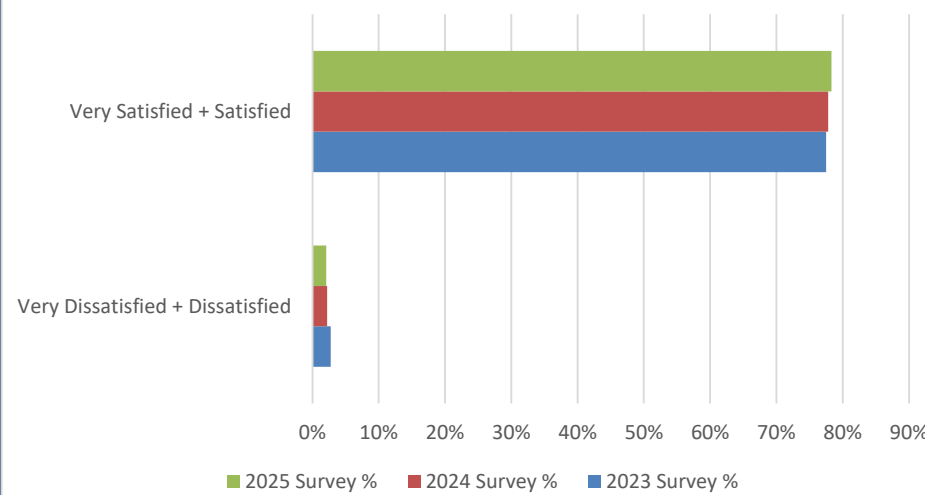
The Golf Practice Areas also continued to demonstrate strong user satisfaction with an increased “Very Satisfied” rating this year. The Golf Practice Areas maintained the second-highest net satisfaction of all HGRD Amenities.

Satisfaction with the Golf Shop & Golf Services/Operations

Golf Shop

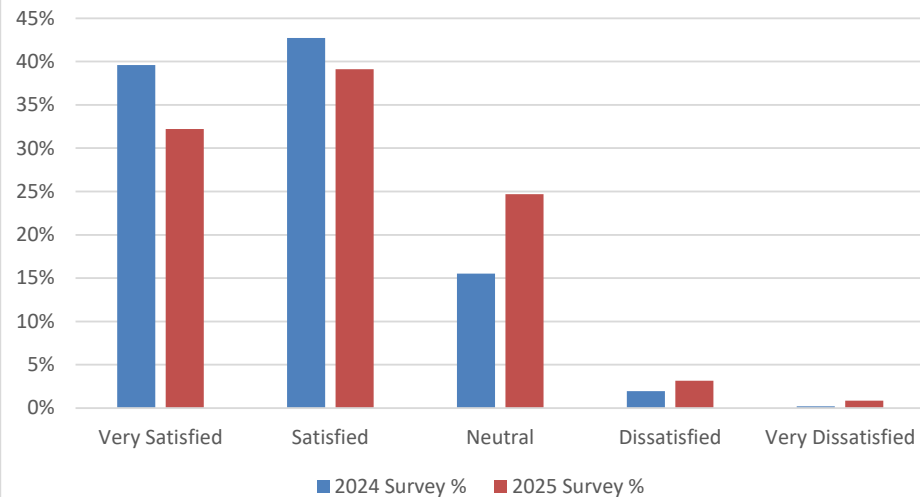


Golf Shop

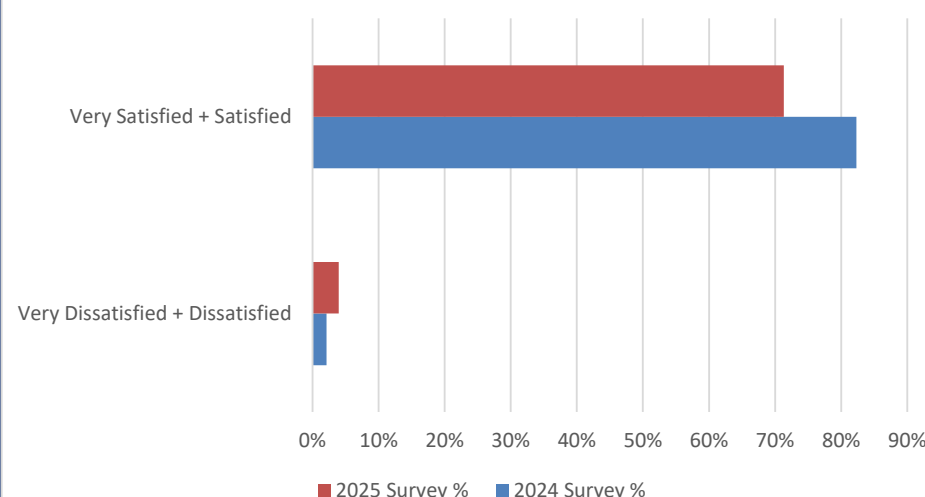


The Golf Shop net satisfaction remained very strong with a shift from “Satisfied” to “Very Satisfied” and a continuing, very low dissatisfaction rating.

Golf Services/Operations

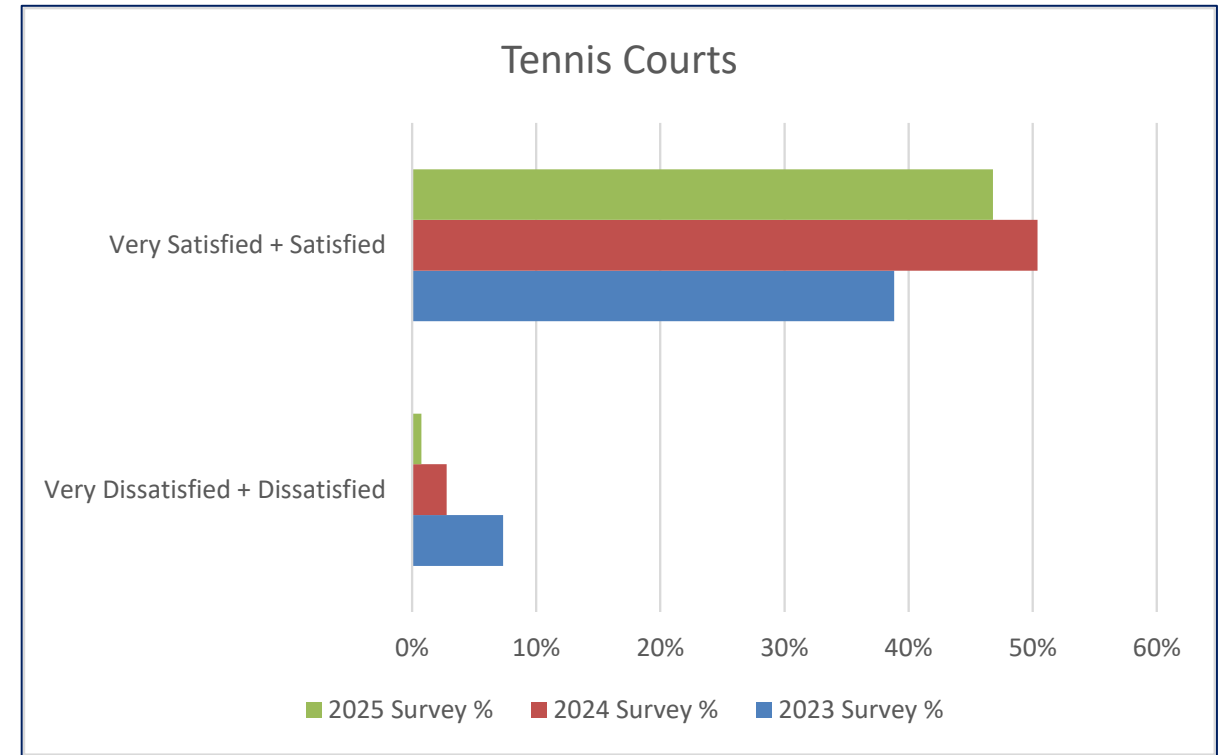
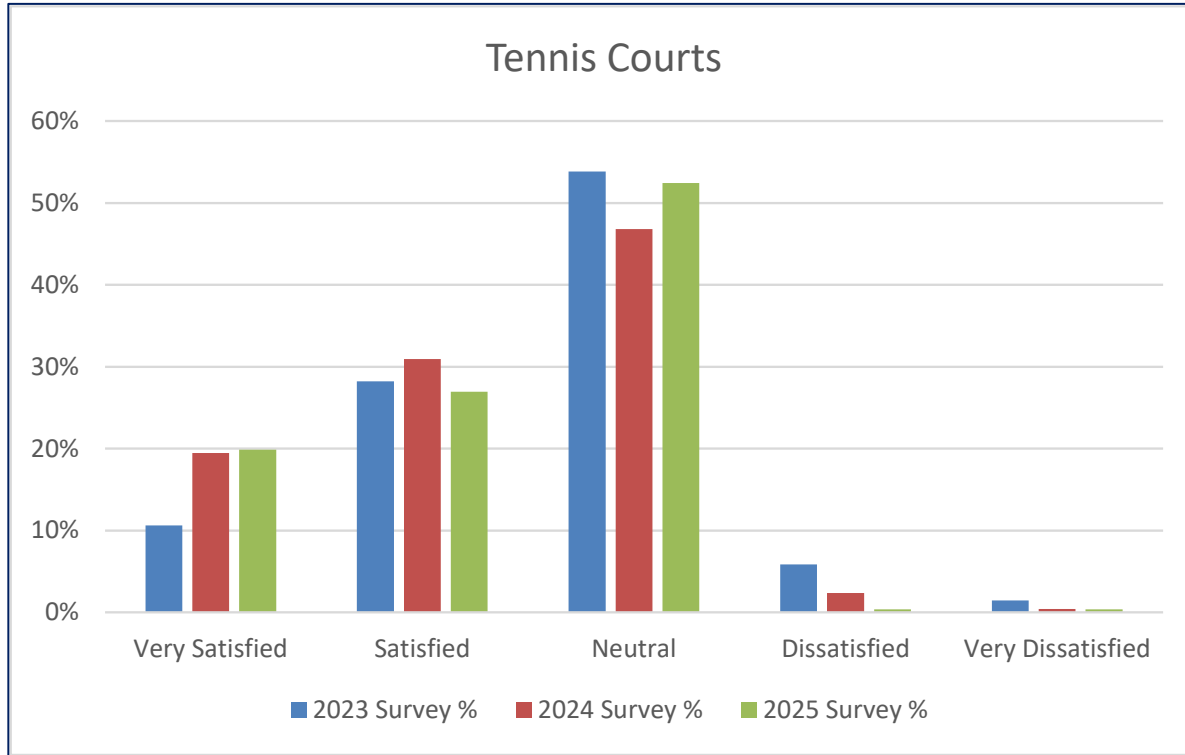


Golf Services/Operations



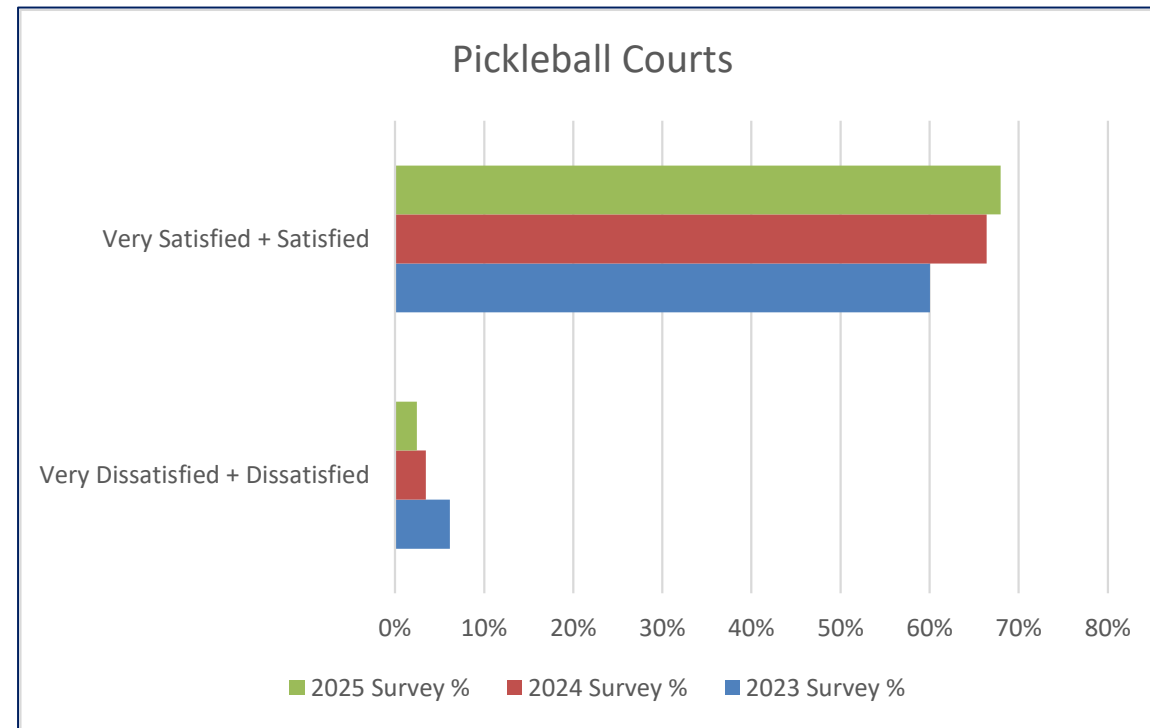
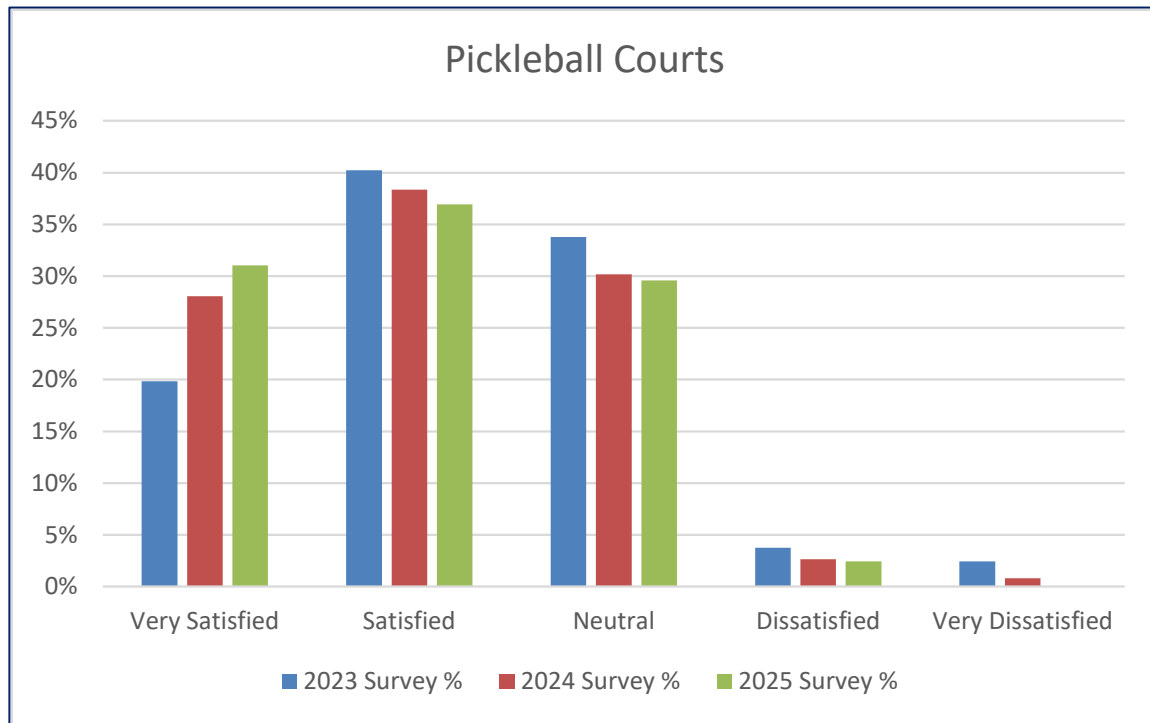
The Golf Services and Operations suffered a 13% drop in net satisfaction from last year.

Satisfaction with the Tennis



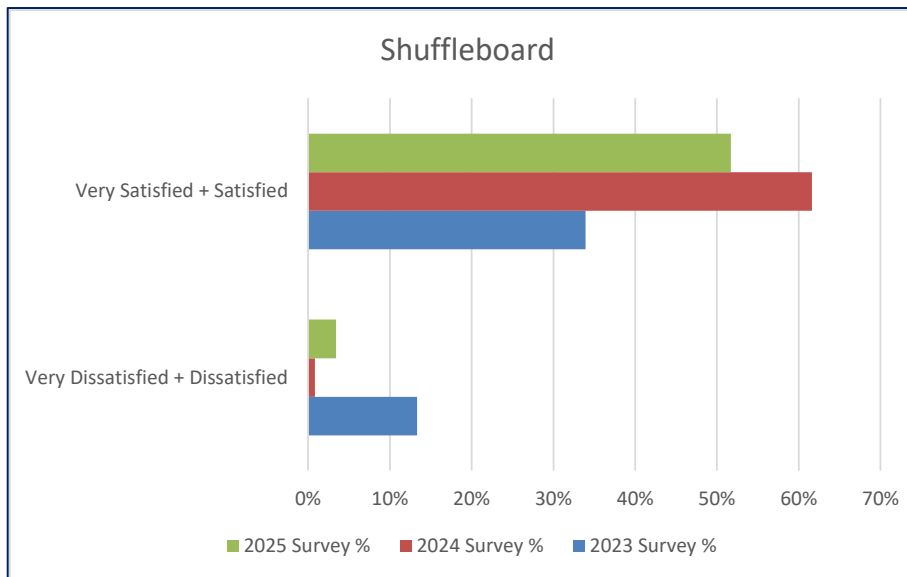
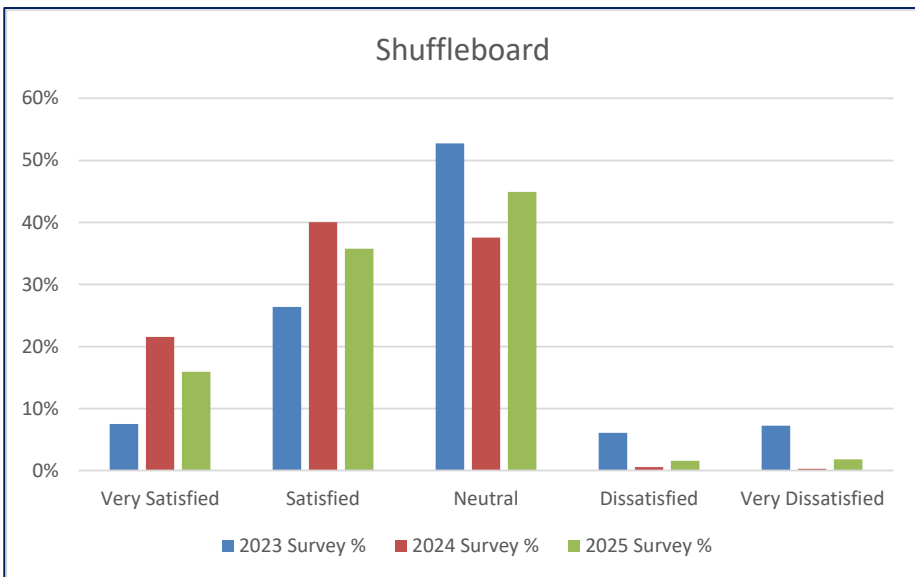
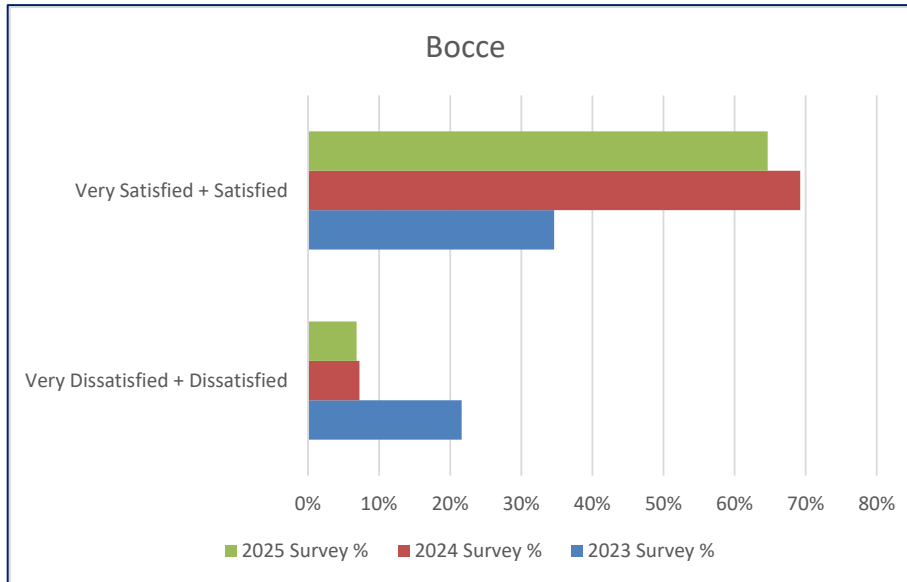
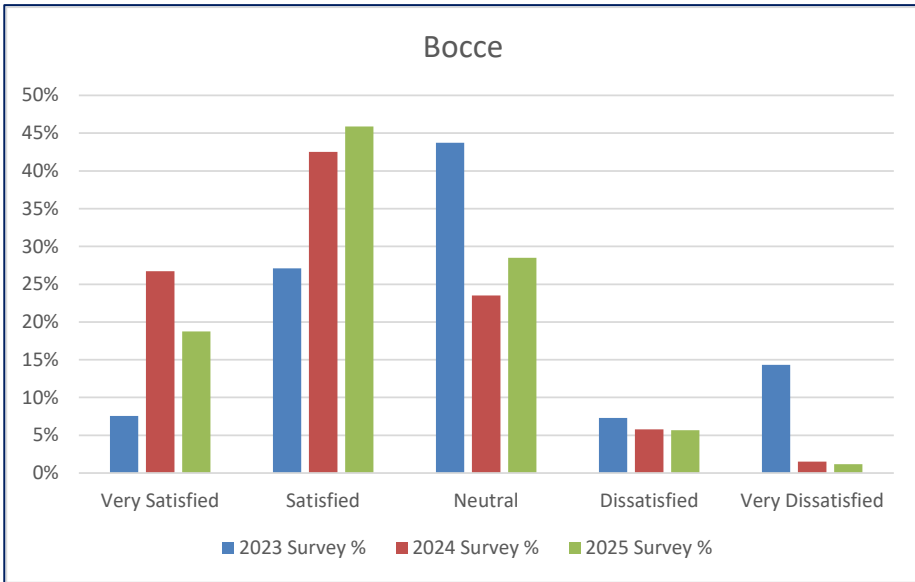
The Tennis Courts maintained a solid net satisfaction with total satisfaction dropping slightly but this is totally offset with a corresponding reduction in dissatisfaction ratings. Tennis continued to show, significant “Neutral” responses which also correlated to a lower utilization rate.

Satisfaction with the Pickleball



Net satisfaction for the Pickleball Courts improved again this year with a slight increase in “Satisfaction” and another slight decrease in “Dissatisfaction” ratings.

Satisfaction with the Bocce & Shuffleboard



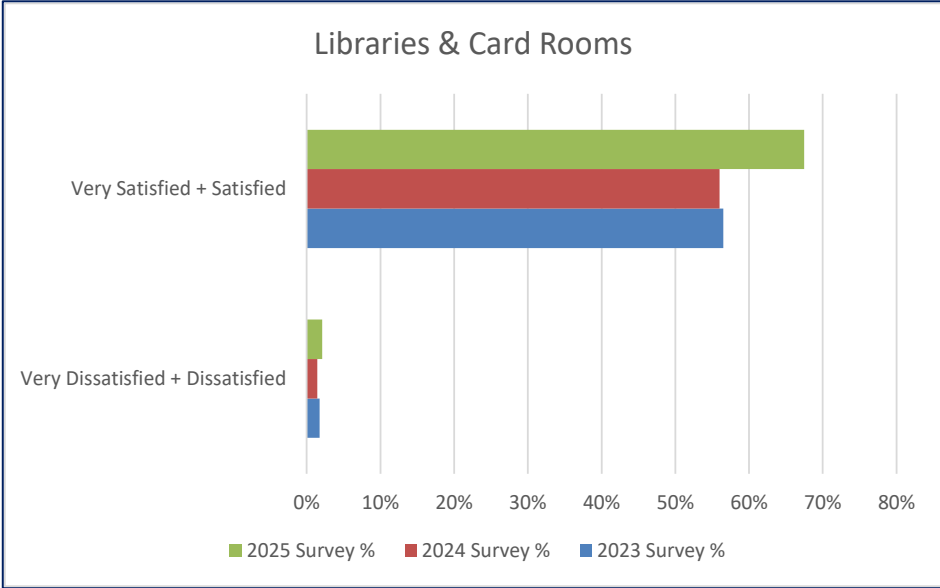
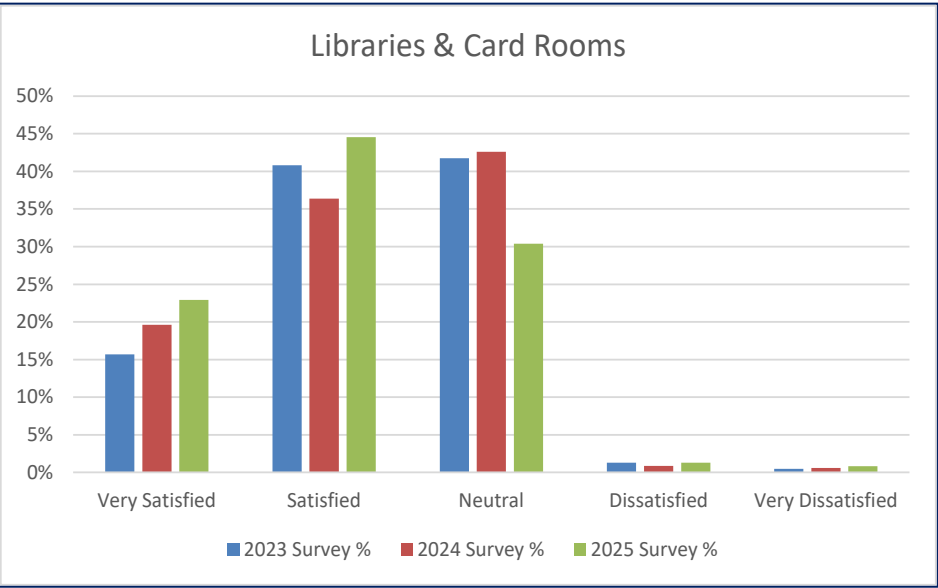
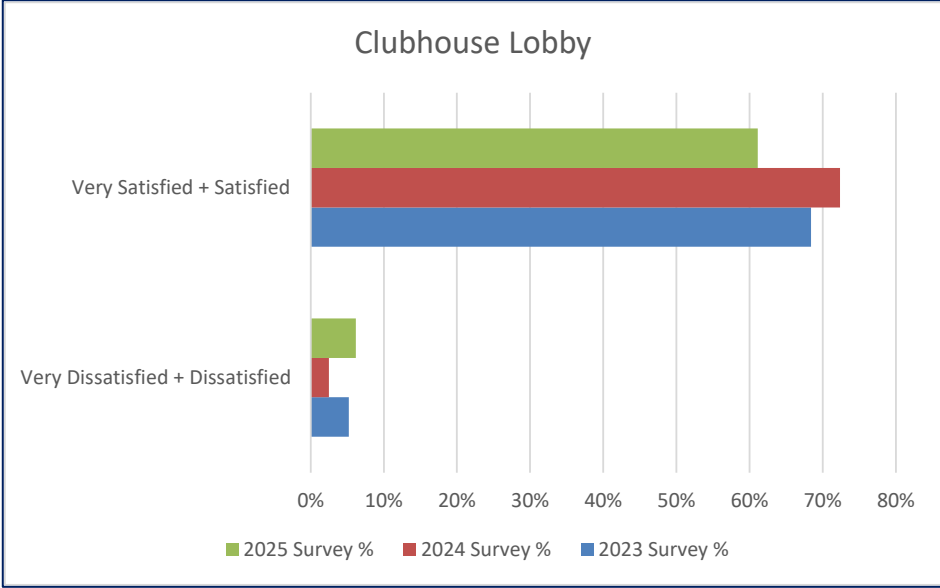
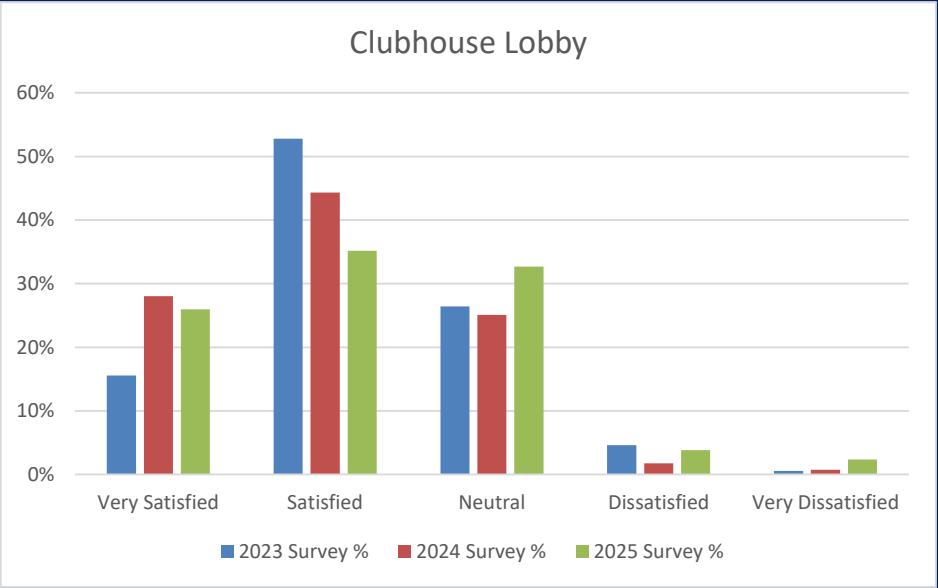
Bocce and Shuffleboard both showed a drop in resident net satisfaction.

Bocce showed a drop in “Very Satisfied” residents but retained a strong “Satisfied” rating.

Shuffleboard showed a drop in both “Satisfied” ratings and an increase in “Dissatisfied” ratings.

Shuffleboard also shows a high “Neutral” rating, which correlates to the low utilization rating of this amenity.

Satisfaction with the Clubhouse, Libraries, and Card Rooms

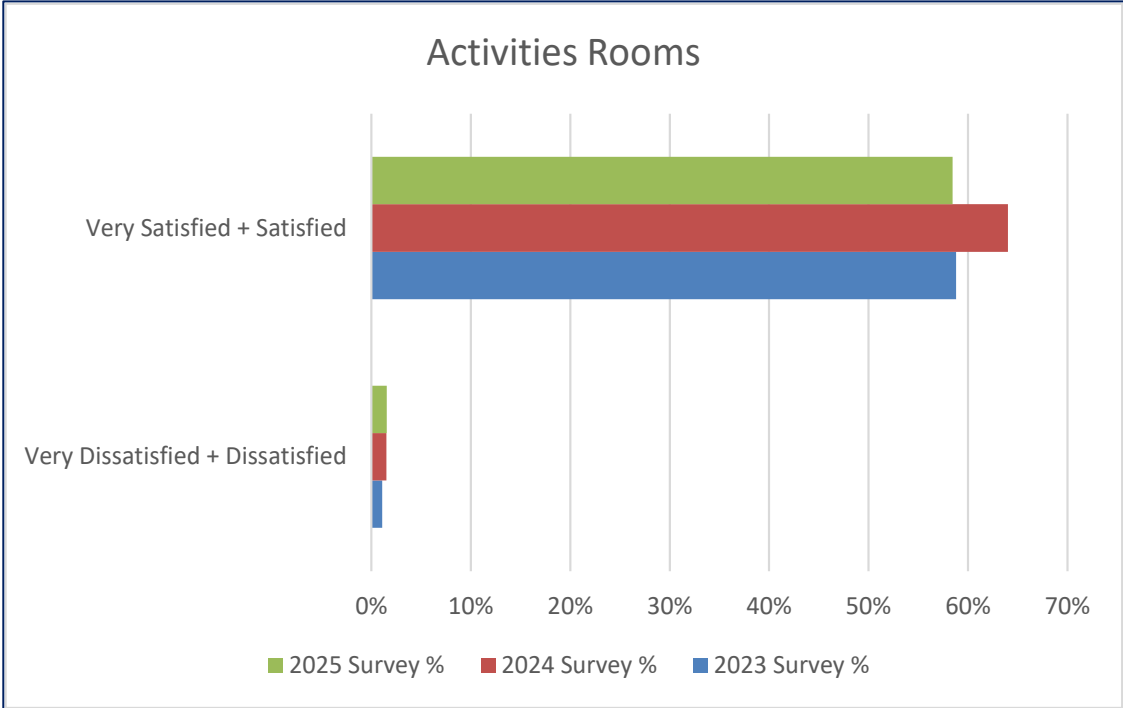
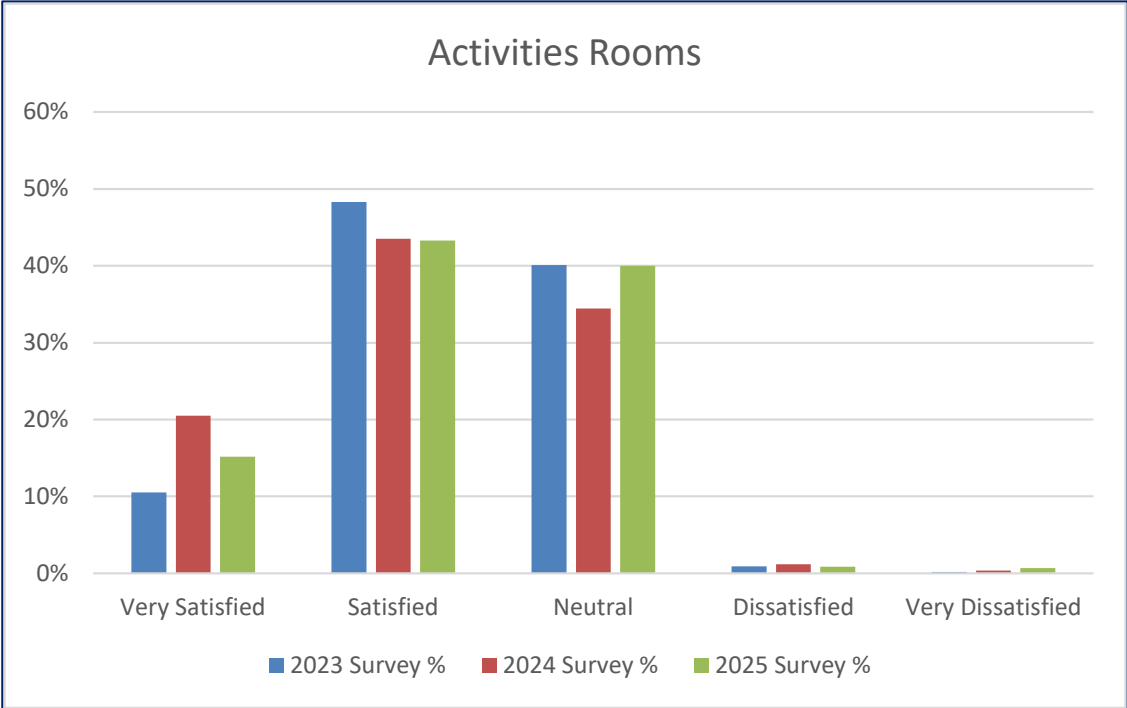


Satisfaction with the Clubhouse Lobby has dropped from the last two years although the net satisfaction is still very high with very small dissatisfaction ratings.

Continued strong satisfaction with the Libraries and Card Rooms with high satisfaction levels and very low dissatisfaction levels.

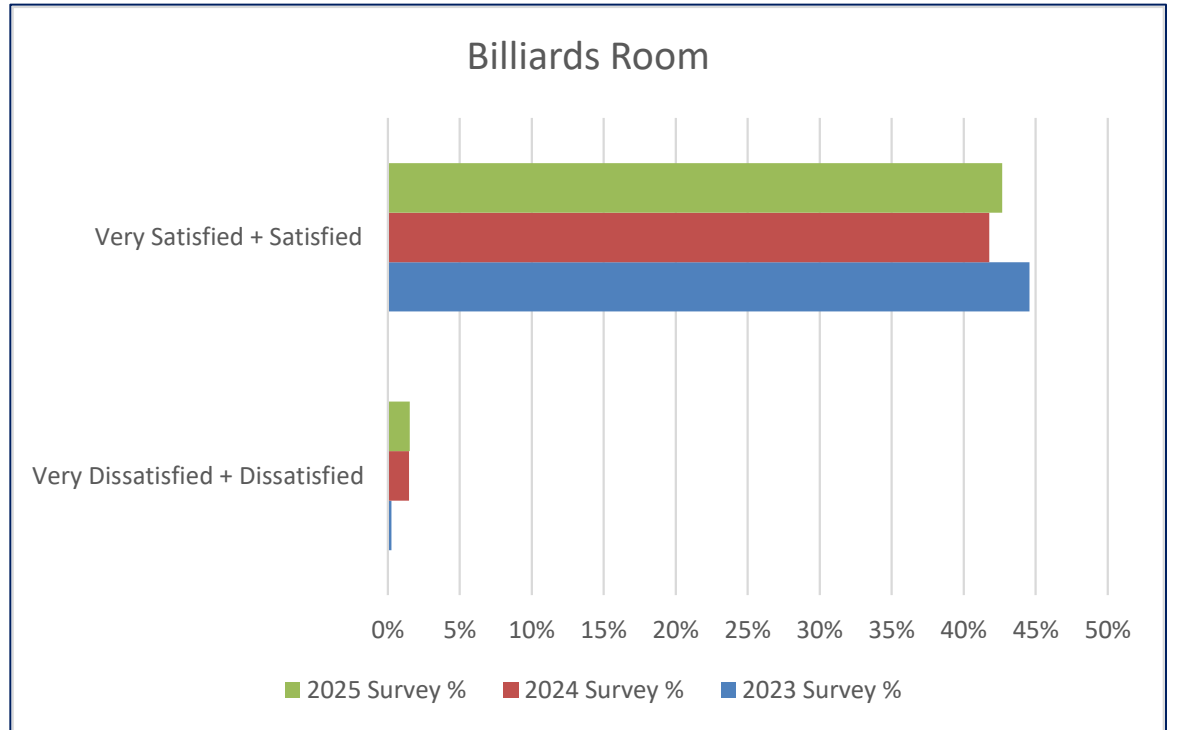
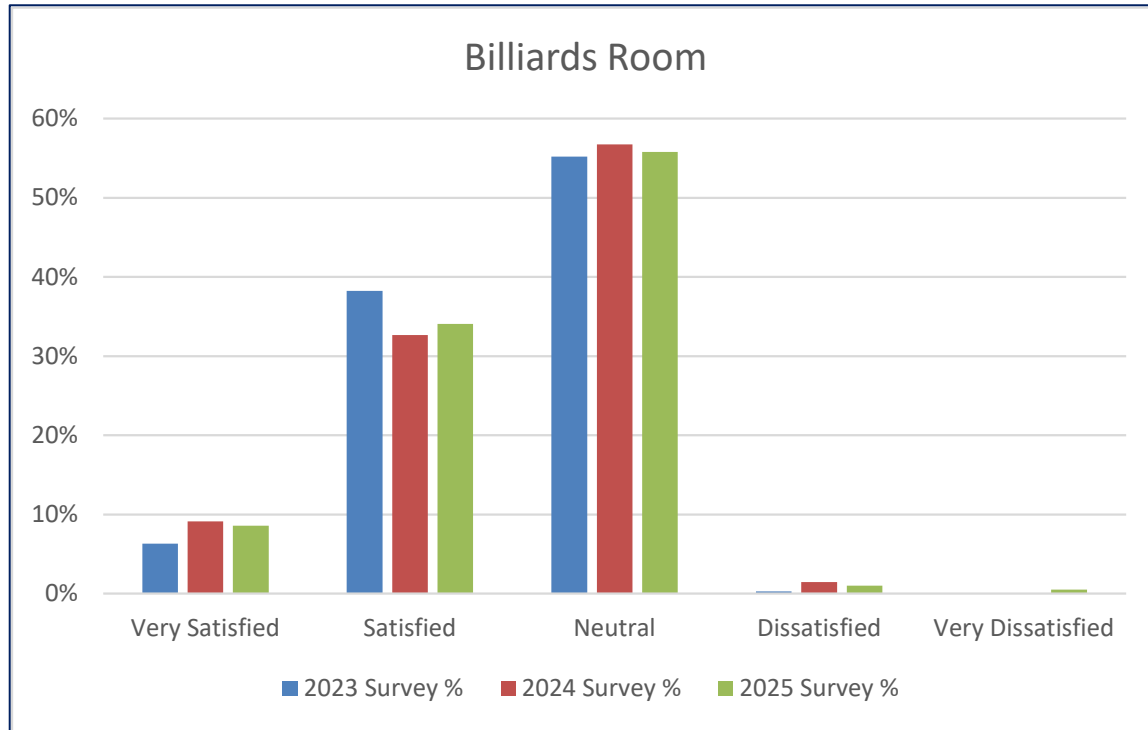
Note: Prior surveys independently assessed satisfaction with the Libraries and Card Rooms separately. Thus, for purposes of comparison with the 2025 survey, the prior year results for the Libraries and the Card Rooms were averaged together.

Satisfaction with the Activities Rooms



Satisfaction with the Activities Rooms dropped slightly with a drop in the “Very Satisfied” rating from last year. However, the Activities Rooms retain very strong net satisfaction with very low dissatisfaction responses.

Satisfaction with the Billiards Room



Continued satisfaction with the Billiards Room with relatively stable “Satisfied” ratings and very low “Dissatisfied” ratings. The “Neutral” ratings remained high and correlated with the low utilization rate of the Billiards Room.

In Closing

Survey results provide us with a roadmap for the future of Herons Glen. Feedback from our residents is instrumental in shaping our community, allowing us to address concerns, improve operations, and enhance the overall resident experience.

The HGRD Board of Supervisors appreciates our residents' engagement in this process and encourages ongoing dialogue as we implement improvements based on these insights. Together, we can ensure Herons Glen remains a vibrant, welcoming, and well-managed community for years to come.

Comments or suggestions may be emailed to the HGRD Board of Supervisors at hgrdboard@hgrdnfm.com.

