

# Analysis of 2024 Annual HGRD Resident Survey

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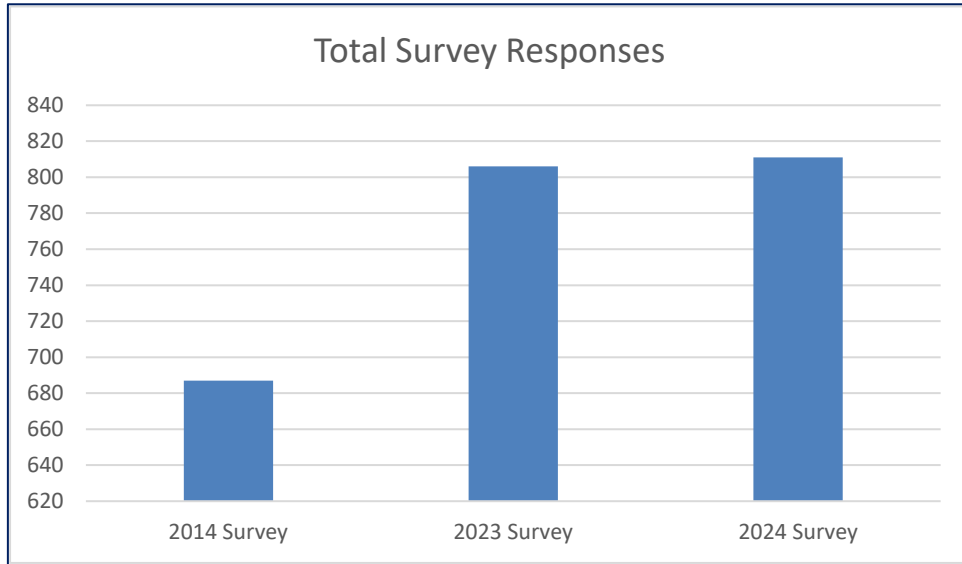
FEBRUARY 2024



# Executive Summary Take-aways

- The 2024 survey produced a similar number of responses as the 2023 survey with over half the homes providing survey responses.
- Herons Glen continues to grow older and more female with more than half the residents being full time residents.
- 71% of respondents can be considered “promoters” of Herons Glen in that they would recommend HG to others who might be considering moving to the area. Herons Glen scored a Net Promoter Score (NPS) of 57, which is a slight drop from the 62 NPS score from 2023. This is due to a 4% reduction in the strongest recommendation rating. This NPS score of 57 is still considered to be excellent.
- Several Amenities experienced significant improvements in resident satisfaction. Most due to recent renovations and/or improvements in services: These include the following with at least a 5% improvement in net satisfaction from 2023 (Very Satisfied/Satisfied less Unsatisfied/Very Unsatisfied):
  - Pool Deck Service (65% improvement in net satisfaction over 2023)
  - Bocce (49% improvement in net satisfaction over 2023)
  - Shuffleboard (40% improvement in net satisfaction over 2023)
  - Restaurant facility (31% improvement in net satisfaction over 2023), Restaurant food (32% improvement in net satisfaction over 2023), Restaurant service (13% improvement in net satisfaction over 2023)
  - Tennis (16% improvement in net satisfaction over 2023)
  - Lounge facility (15% improvement in net satisfaction over 2023), Lounge food (15% improvement in net satisfaction over 2023), Lounge service (11% improvement in net satisfaction over 2023)
  - Ballroom Food (10% improvement in net satisfaction over 2023)
  - Pickleball (9% improvement in net satisfaction over 2023)
  - Clubhouse (7% improvement in net satisfaction over 2023)
- The only amenities that showed a net reduction in overall net resident satisfaction were the following:
  - Billiards (4% reduction in net satisfaction from 2023)
  - Ballroom facility (3% reduction in net satisfaction from 2023)
  - Fitness Center (2% reduction in net satisfaction from 2023)
  - Libraries (2% reduction in net satisfaction from 2023)
  - Golf Practice Areas (1% reduction in net satisfaction from 2023)
- Residents indicated a net preference for three potentially new amenities; Outdoor dining, restrooms at the golf practice area, and additional fitness rooms.

# Survey Responses Summary



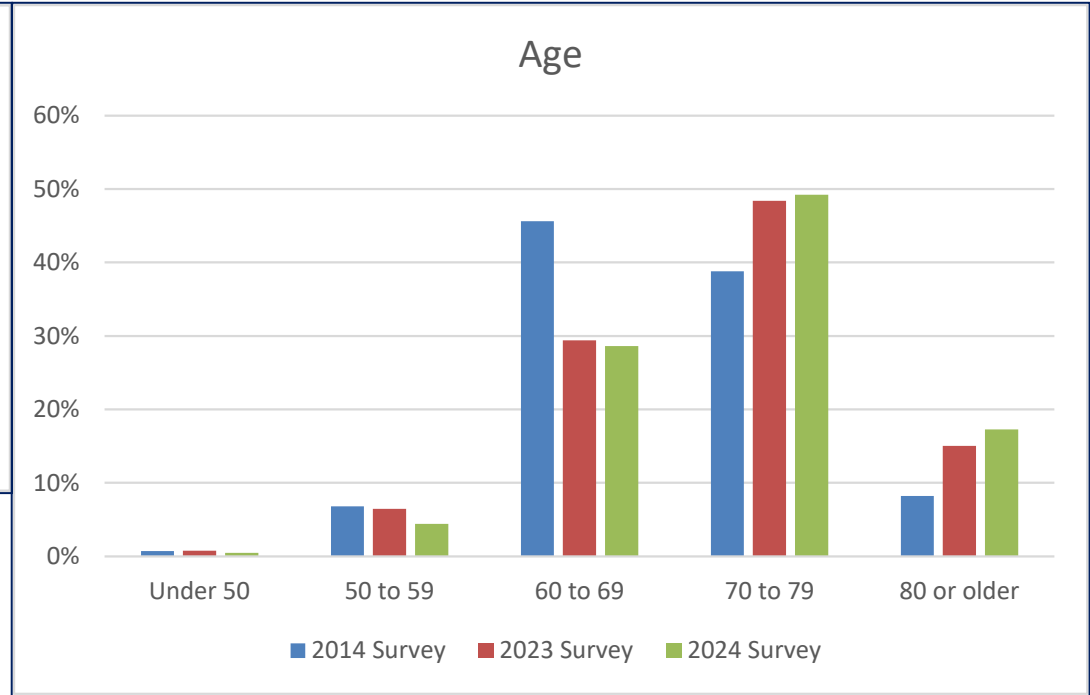
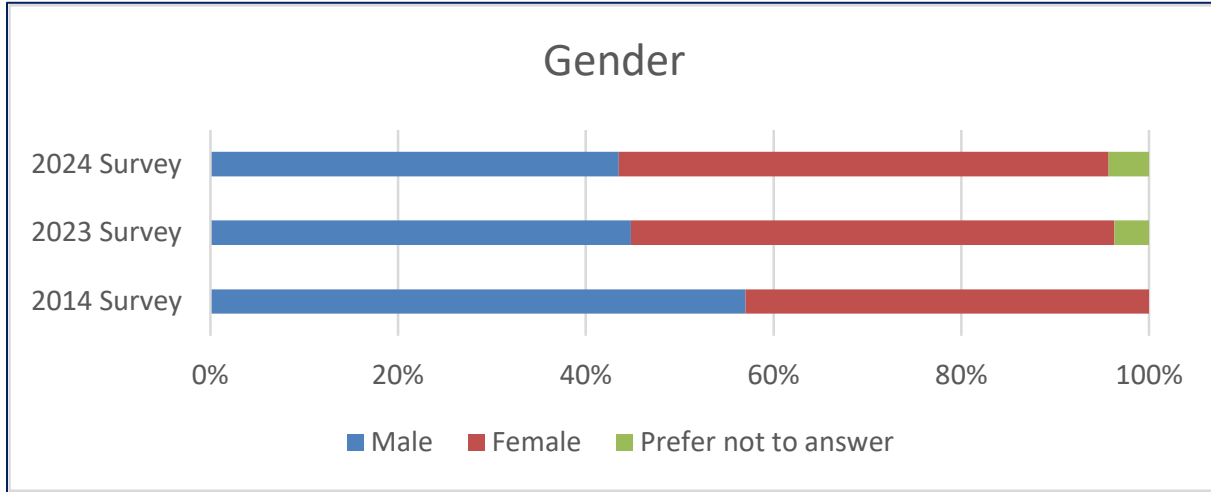
The 2024 HGRD Resident Survey provided slightly more responses than the 2023 survey (811 vs. 806)

- Of the 811 total responses, 661 represented unique responses, 139 responses were from the same account number, and 11 responses were considered anonymous as the respondent used 0000 as their account number.
- Prior to the issuance of the survey, it was agreed that we would allow multiple responses from the same household in order to maximize the input from residents. Thus, the analysis performed in this report did not attempt to eliminate multiple responses from the same account number for either the 2023 or 2024 survey results.

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

- Similar level of responses from residents as 2023
- 661 unique responses from ~1300 homes represents an excellent >50% participation rate
- 139 residents offered multiple responses (17%)
- 11 residents offered anonymous responses (~1%)

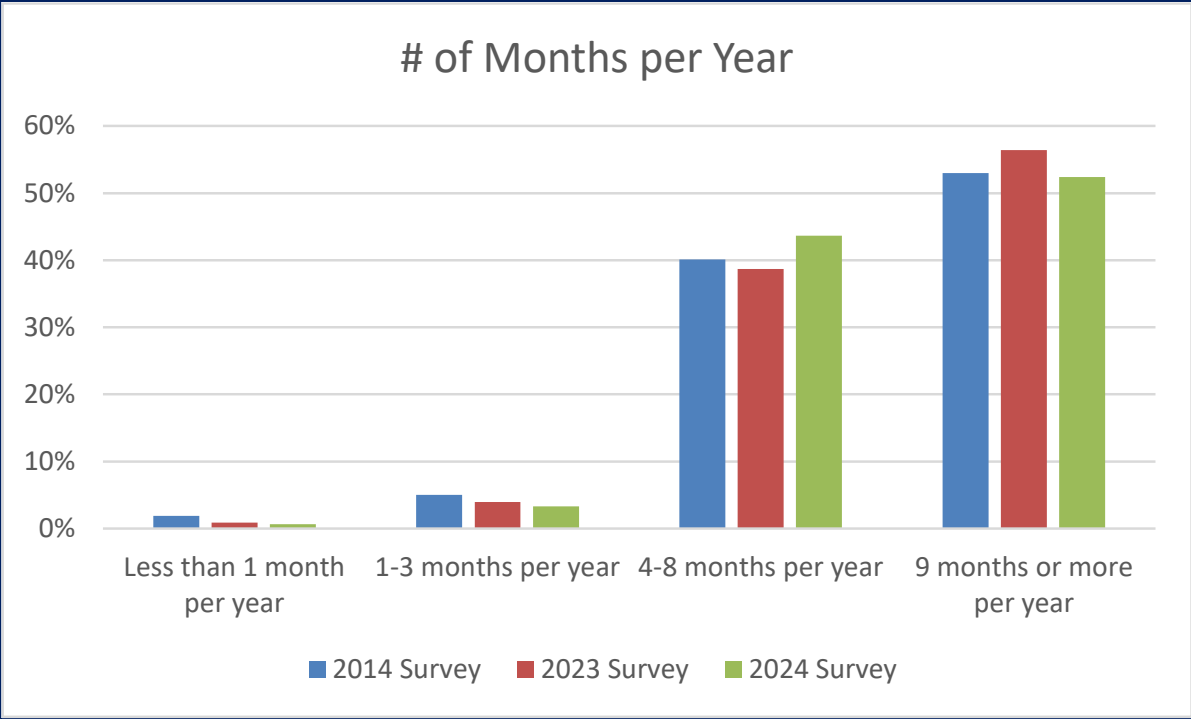
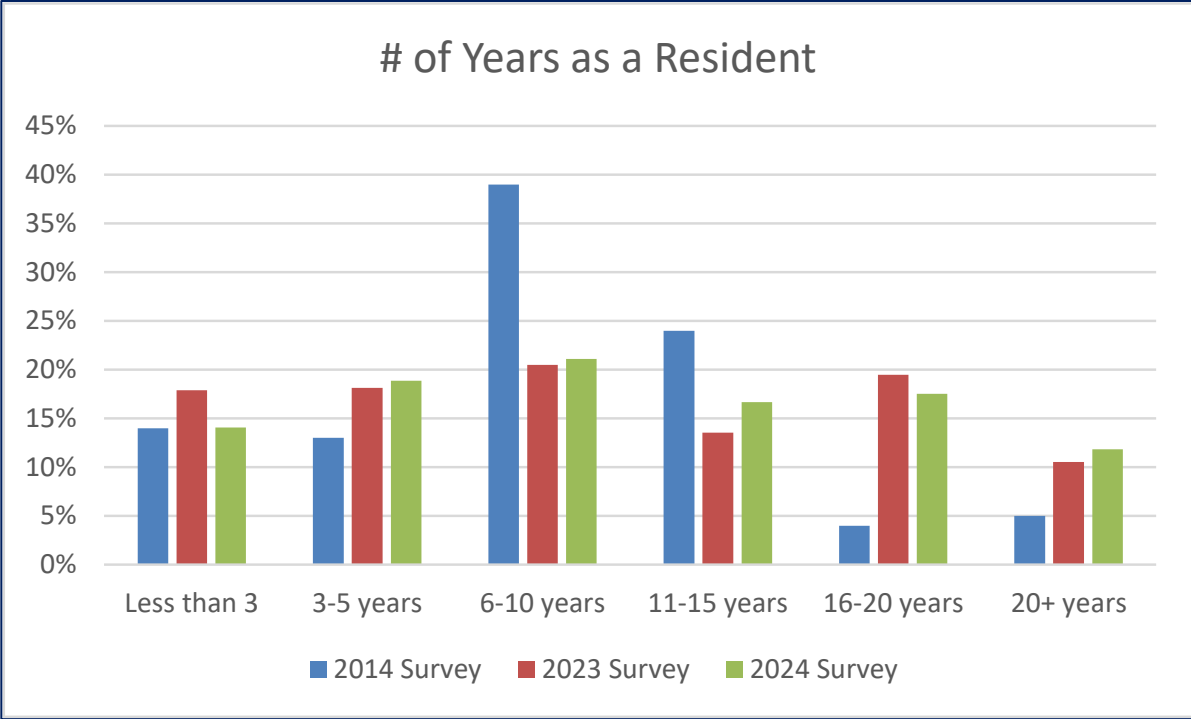
# Age & Gender Demographics Summary



**Slight increase in female mix (~1% more) versus 2023. The residents in Heron’s Glen continue to become more female over the last 10 years.**

**The trend toward Heron’s Glen growing older continued as the 70 to 79 group increased another 1% and the 80 and over group increased another 2%.**

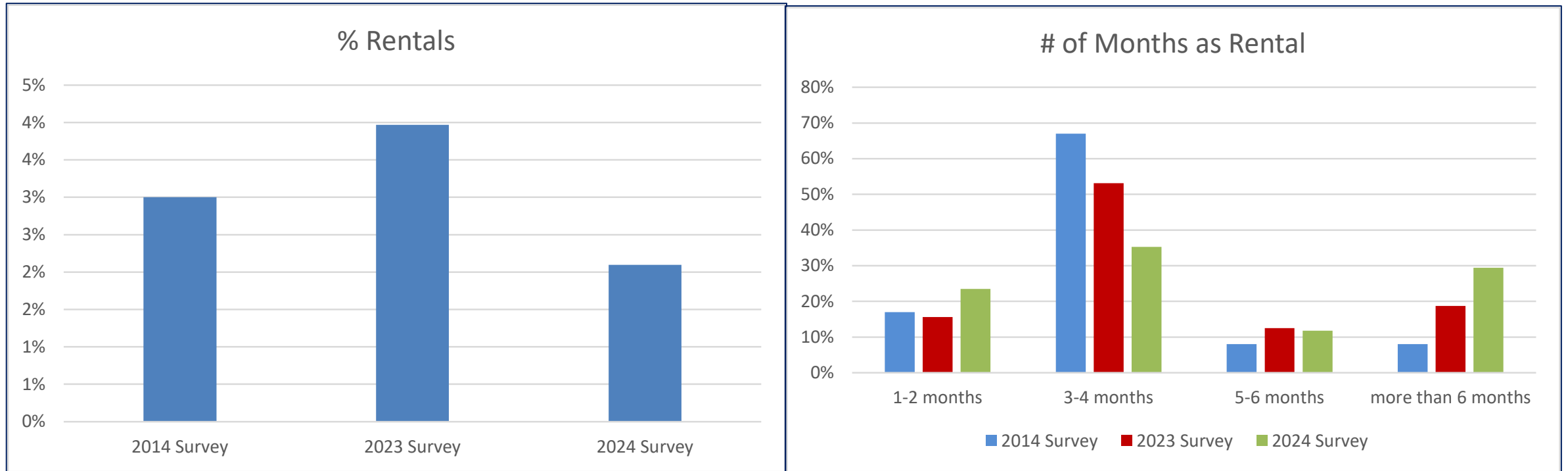
# Residency Demographics Summary



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

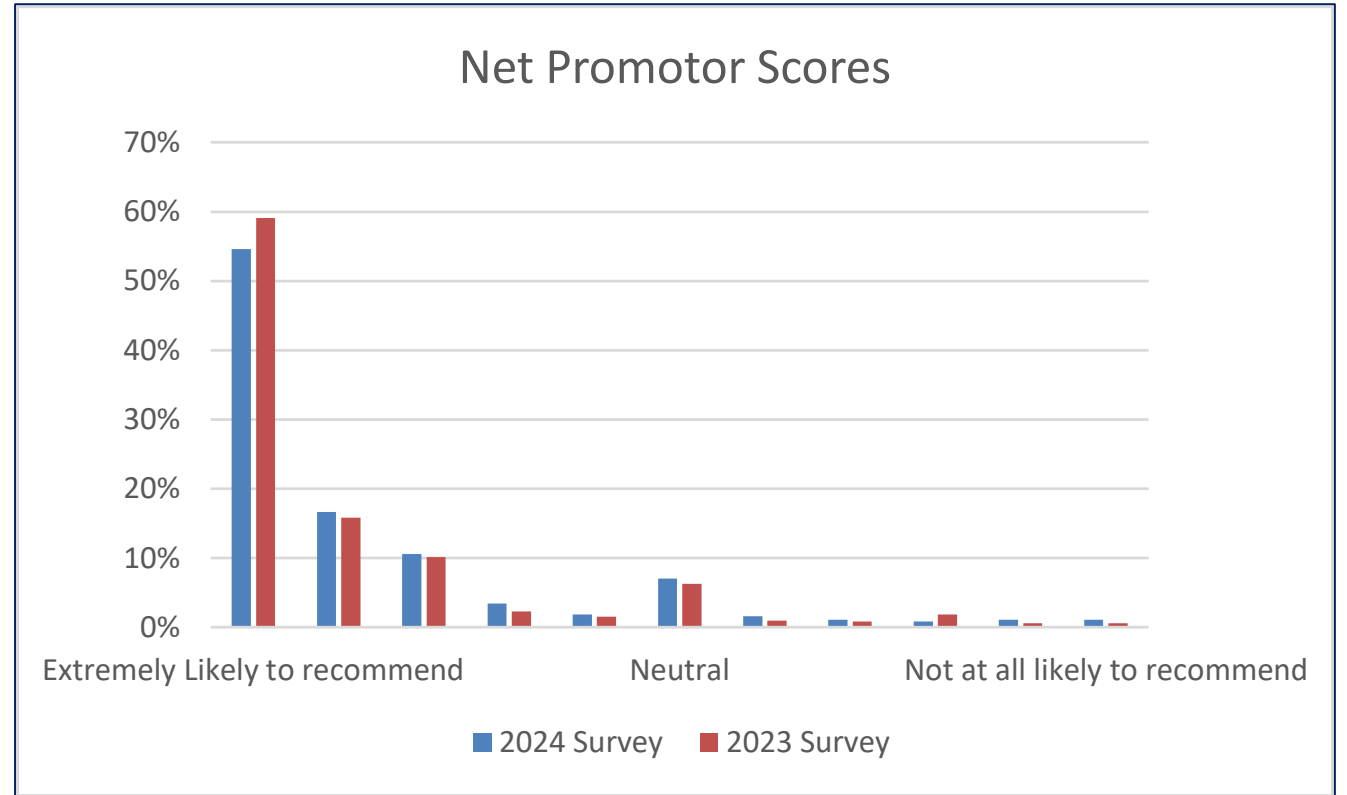
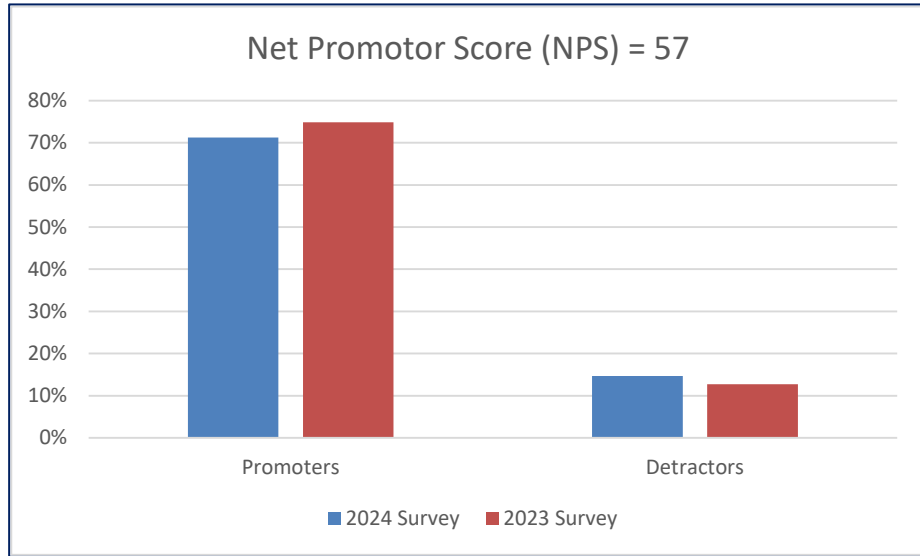
**The number of “full time” residents (9 months or longer) decreased slightly. However, there are still MORE full time residents than part-time residents (52% are full time).**

# Rentals Demographics Summary



**The percentage of residents who rent out their property dropped in the 2024 survey but this still represents a very small portion of the residents.  
The trend toward longer rental periods continued as those who do rent out their property appear to be renting for longer periods of time.**

# Net Promotor Score (NPS)

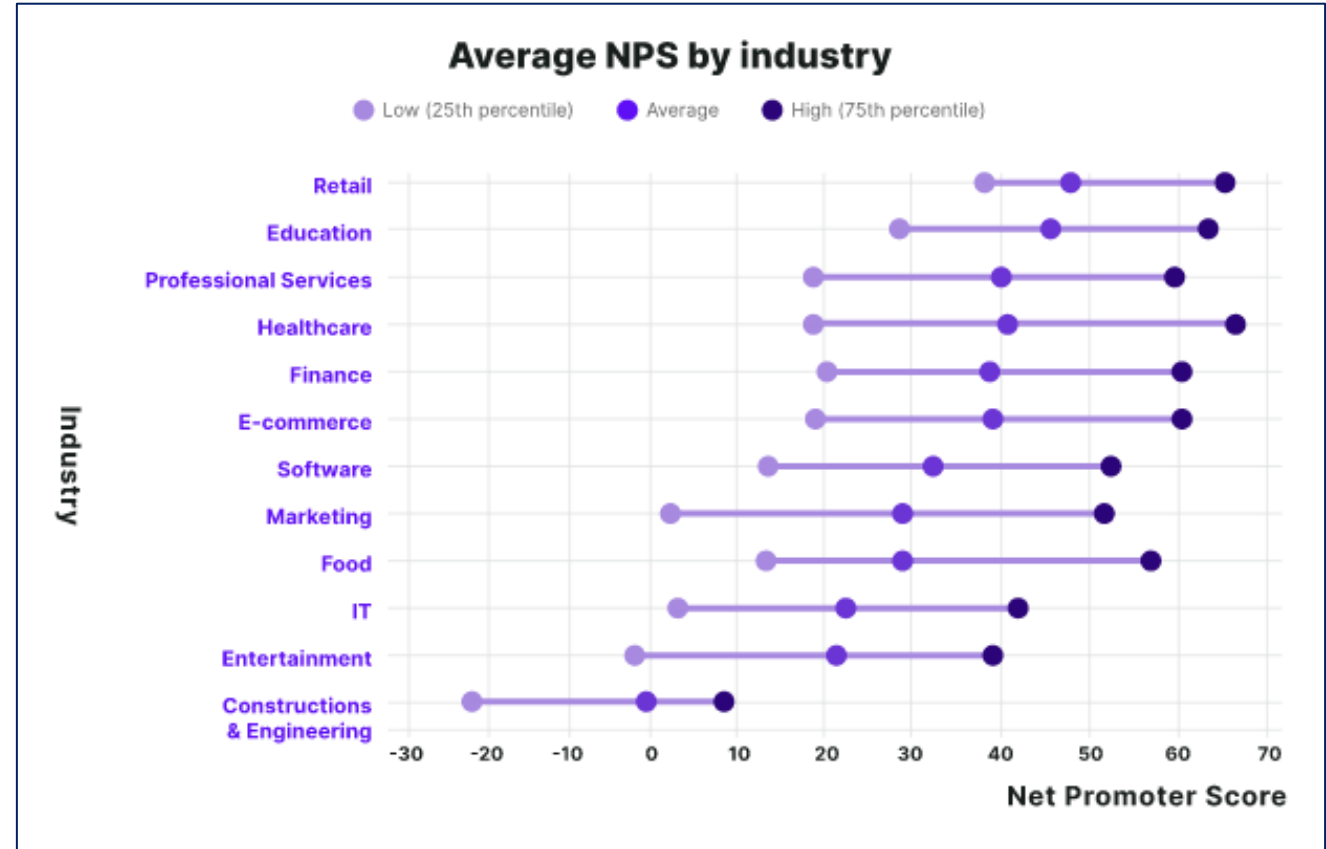
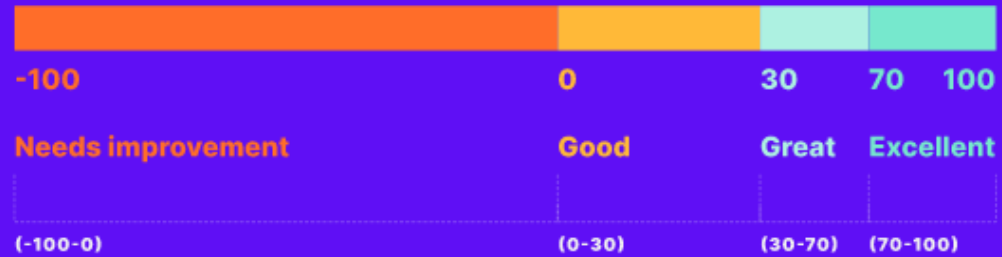


Score			2023 Survey		2024 Survey	
			%		%	
10	Extremely Likely to recommend	Promoters	59%	75%	71%	55%
9			16%			17%
8		Passives	10%			11%
7			2%			3%
6			2%			2%
5	Neutral		6%			7%
4			1%			2%
3		Detractors	1%	13%	15%	1%
2			2%			1%
1			1%			1%
0	Not at all likely to recommend		1%			1%

The Net Promotor Score (NPS) for Herons Glen decreased slightly in 2024 (HGRD NPS of 57 in 2024 versus 62 in 2023) as the number of “Extremely Likely to recommend” responses was down by 4%. That said, this NPS score should be considered a top tier performance (see next slide). Review of the NPS comments should provide a more contextual insight into the reasoning for this change.

# Net Promotor Score (NPS) explained

## What is a good NPS?



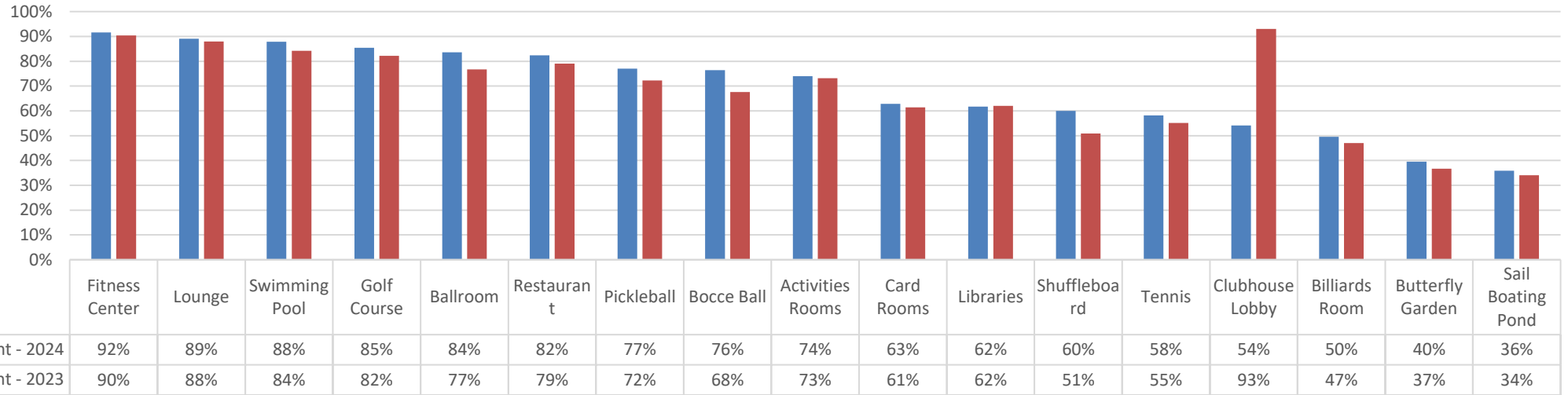
The Net Promotor Score (NPS) is a widely used measure of overall client satisfaction which provides a "top of the mind", consistent trending metric for annual surveys. The NPS is calculated as Promoters (9's and 10's) - Detractors (0 through 6's).

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



# Amenity Importance

Amenity Importance (Important + Very Important)

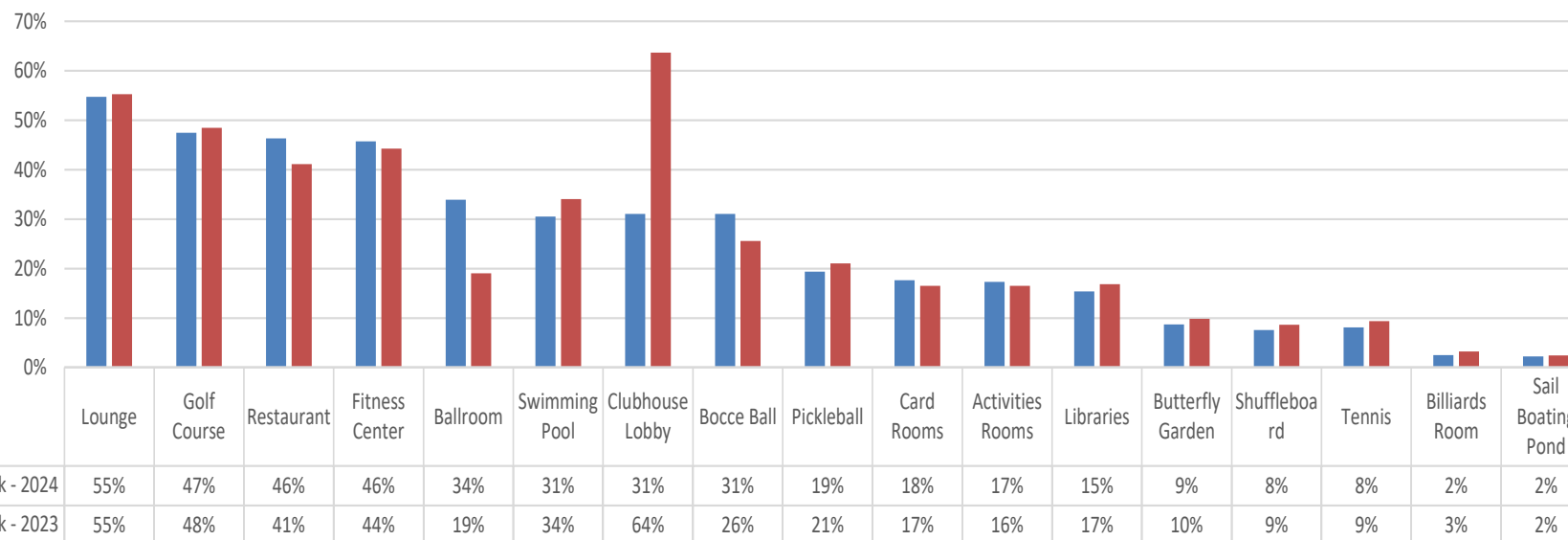


■ Important + Very Important - 2024    ■ Important + Very Important - 2023

The order of importance for the various amenities did not change significantly except for the Clubhouse Lobby. This is likely due to a difference in understanding of the “Clubhouse” (2023 survey description) versus the “Clubhouse Lobby” (2024 survey description). All amenities showed an increase in the % of Important and Very Important ratings except the Clubhouse Lobby.

# Amenity Utilization

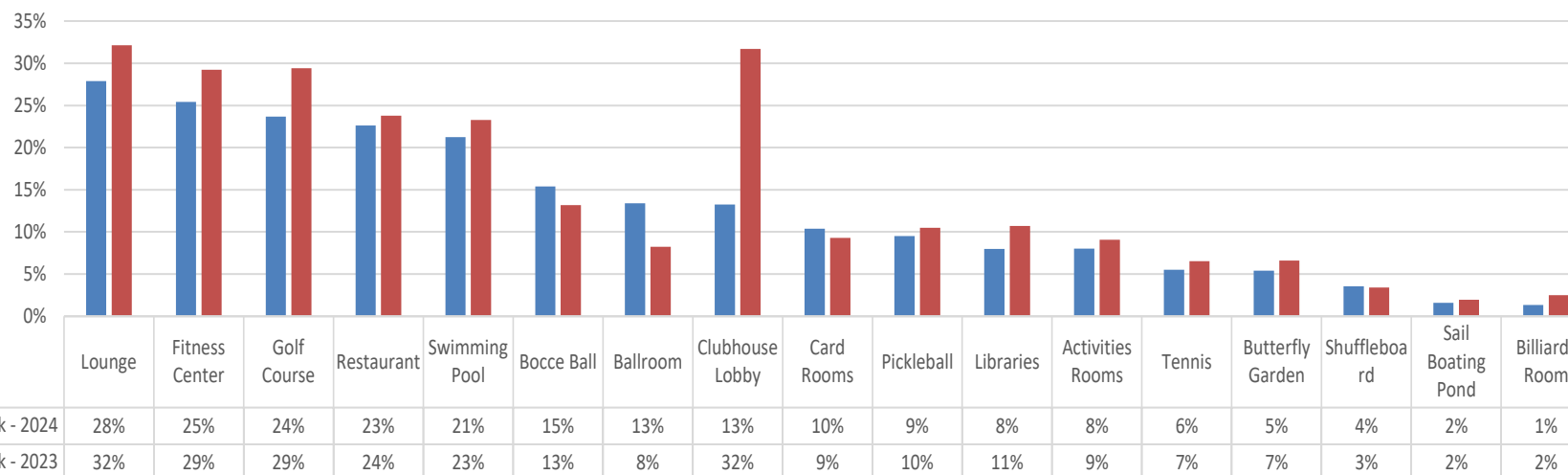
Amenity Utilization during Season (at least once per week)



**Interesting changes from 2023:**

- Ballroom utilization increased in 2024
- Restaurant utilization increased
- Bocce utilization increased

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

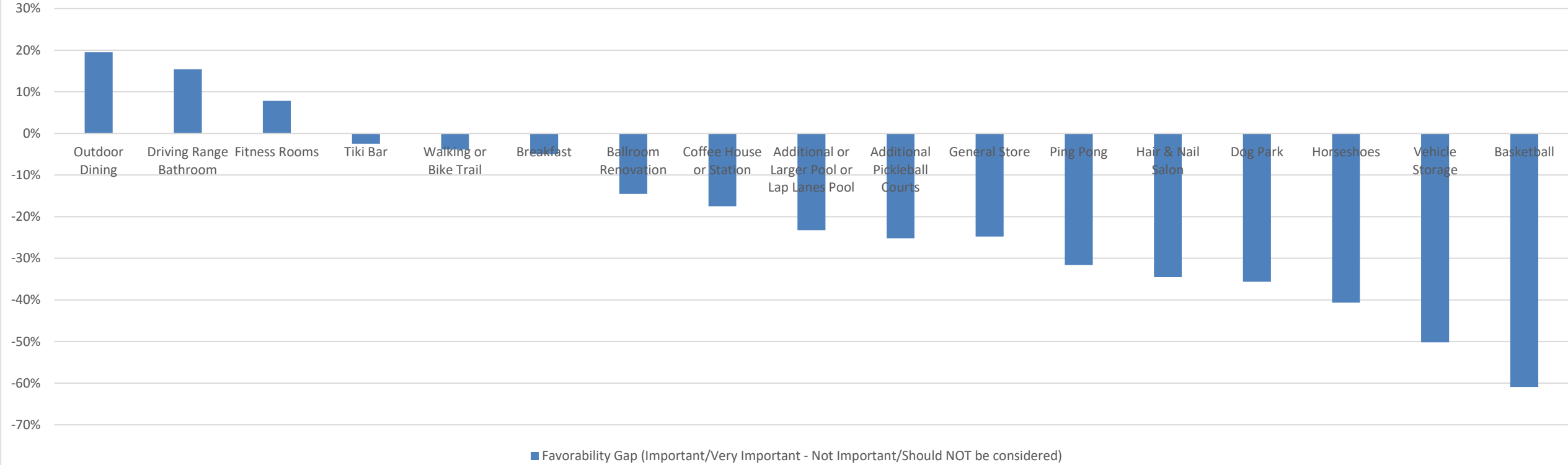


**Interesting changes from 2023:**

- Utilization in the off-season dropped for all amenities except the Ballroom, Bocce and the Card Rooms.

# Favorability of Potential New/Additional Amenities

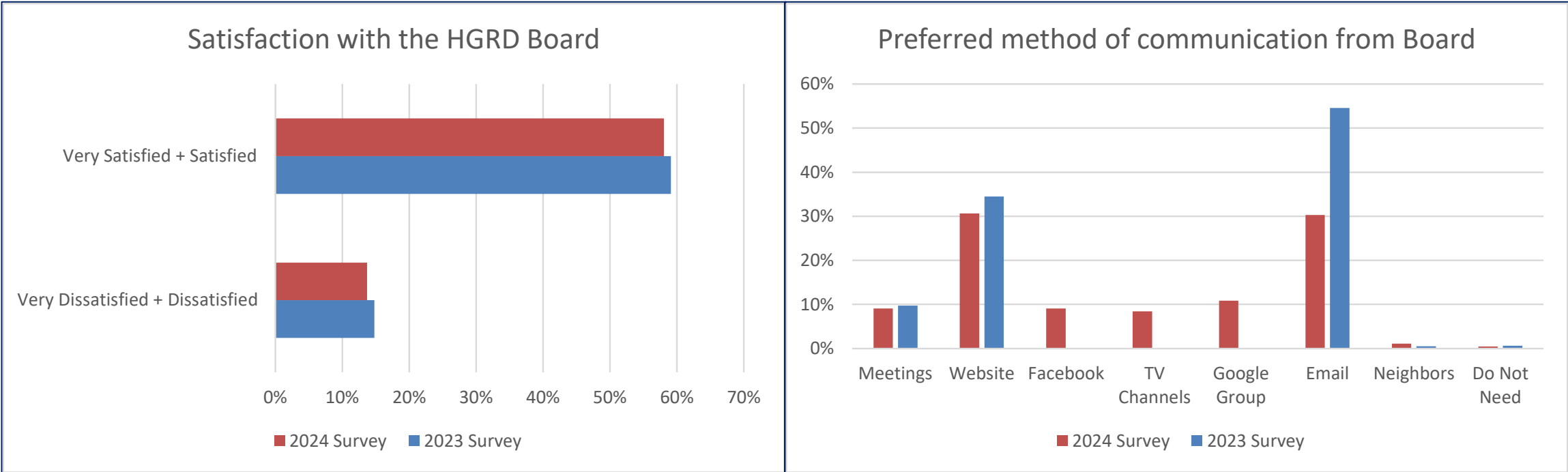
Importance of Potential New/Additional Amenities



Three potential new/changed amenities received more “Important/Very Important” responses than “Not important/Should NOT be considered”; including Outdoor Dining, Driving Range Bathrooms, and additional Fitness Rooms.

Three potential amenities were close to positive; including a Tiki Bar, Nature Trail for walking or biking, and breakfast offering.

# Satisfaction with the HGRD Board



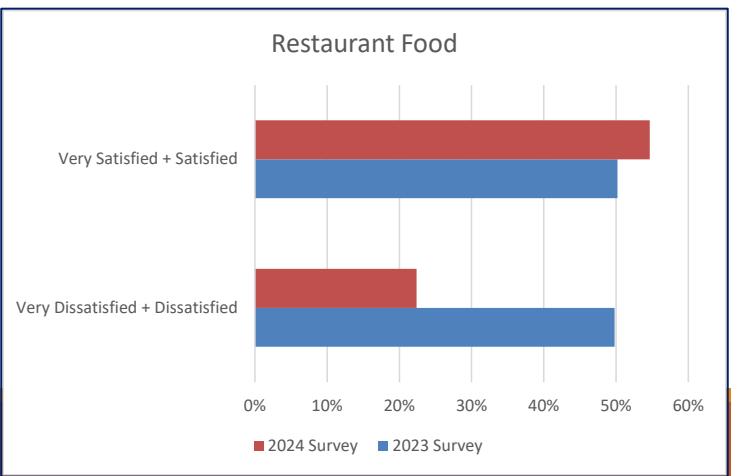
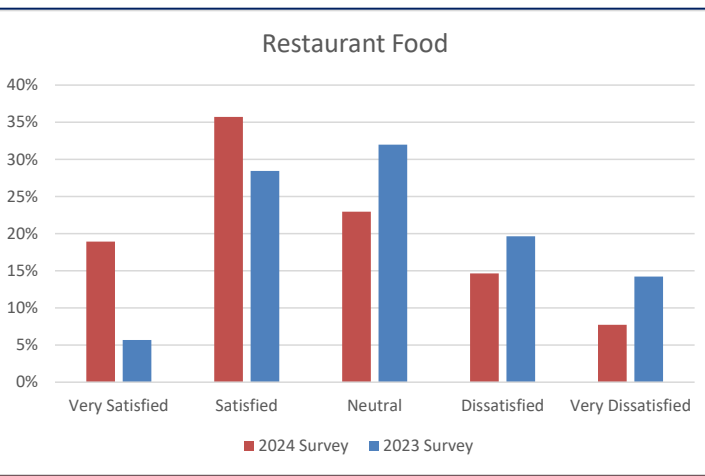
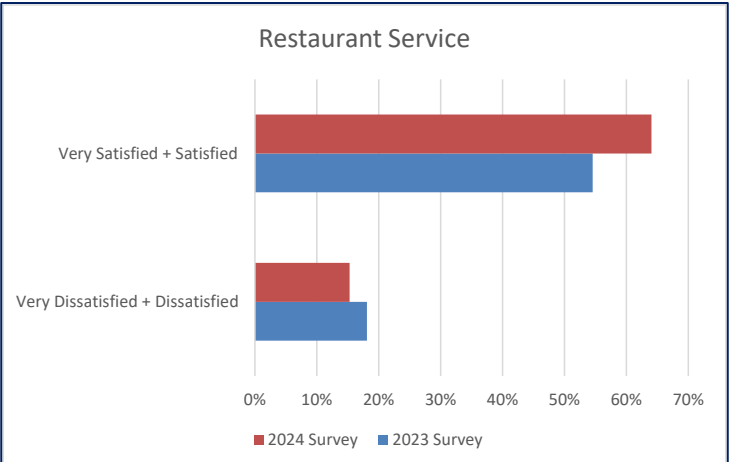
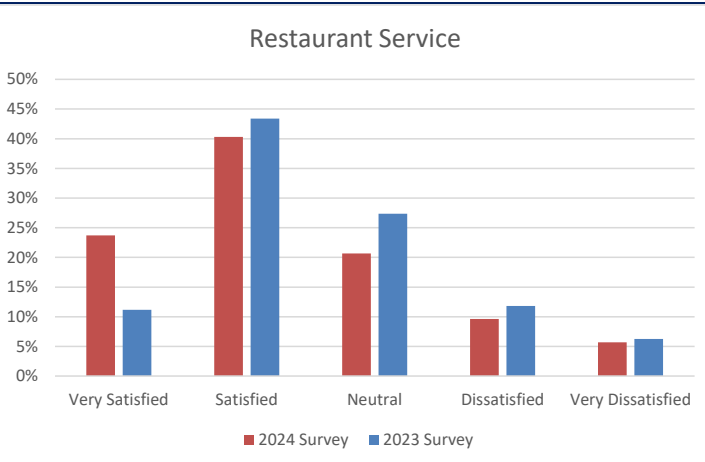
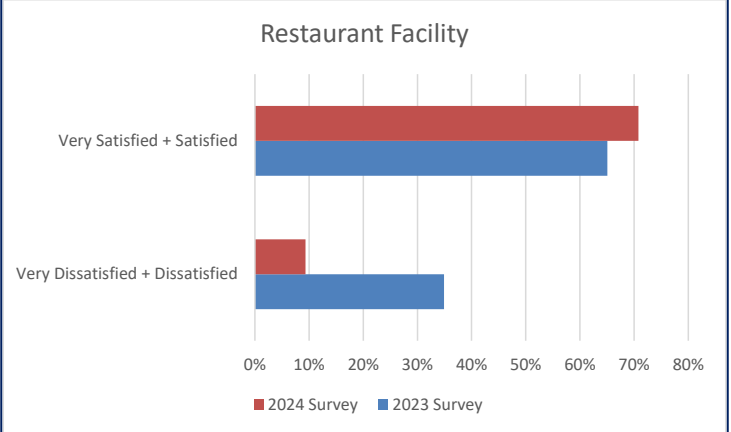
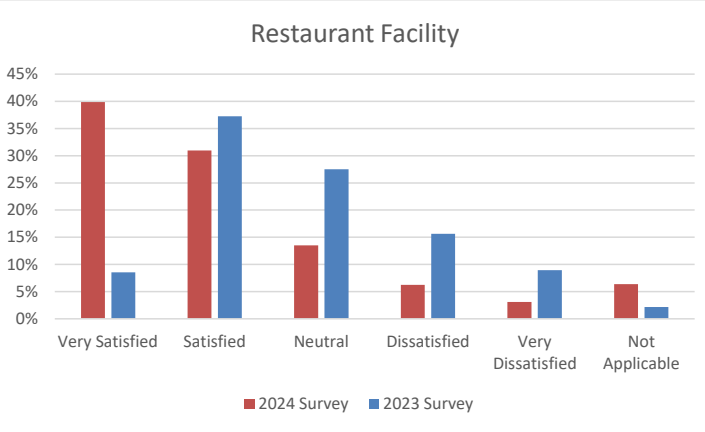
**Satisfaction with the board decreased slightly while the amount of dissatisfaction also decreased. Overall, the net satisfaction with the Board remains overwhelmingly positive. The preferred method of communicating with residents remains to be via email and the HGRD website.**

# Satisfaction with the Restaurant

**Satisfaction with all aspects of the Restaurant improved dramatically with significant improvements in the “Very Satisfied” responses.**

**Net Satisfaction (Very Satisfied + Satisfied less Dissatisfied + Very Dissatisfied) with the Restaurant food showed an especially strong improvement with a significant reduction in the dissatisfied ratings.**

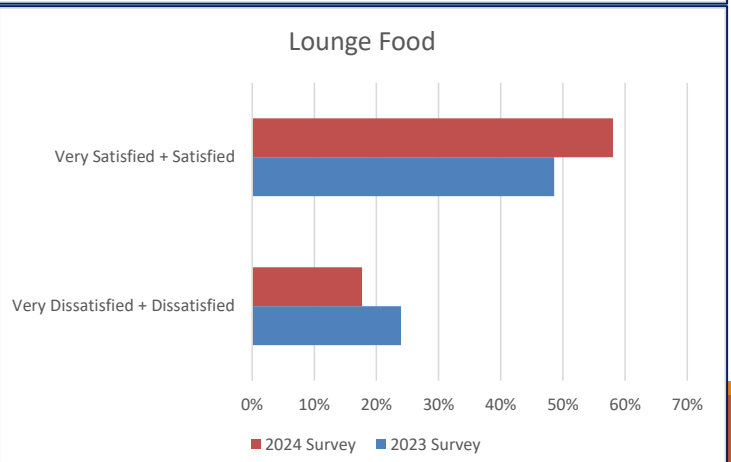
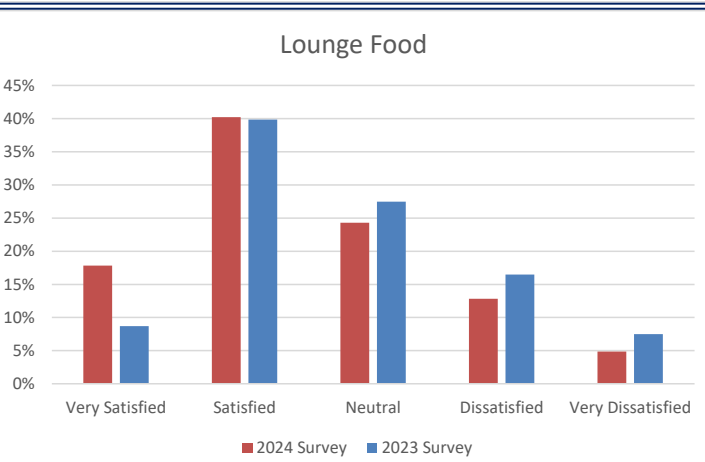
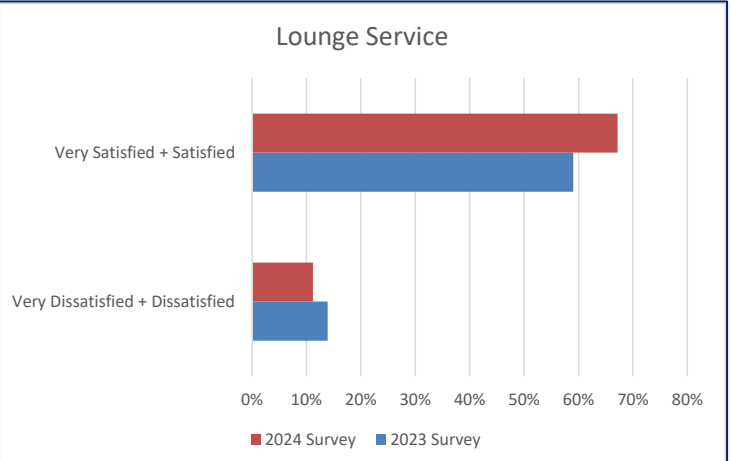
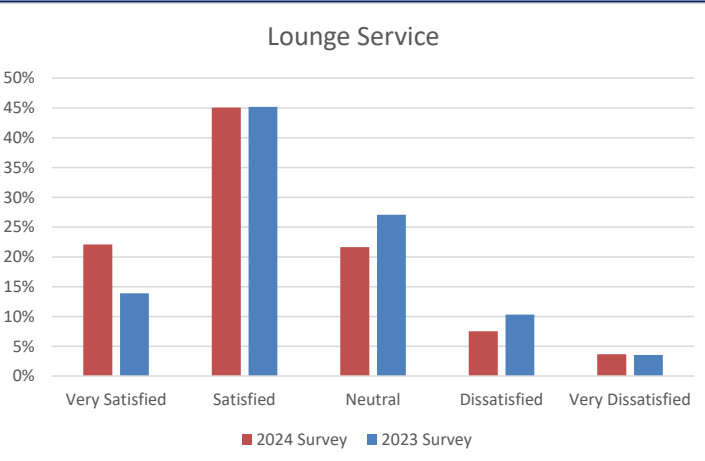
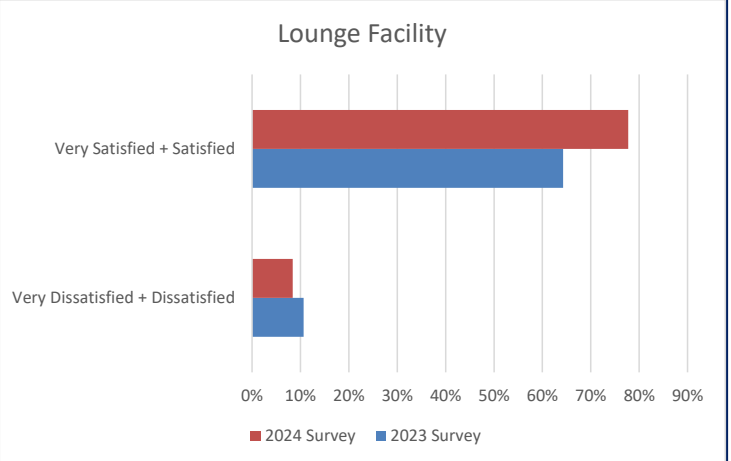
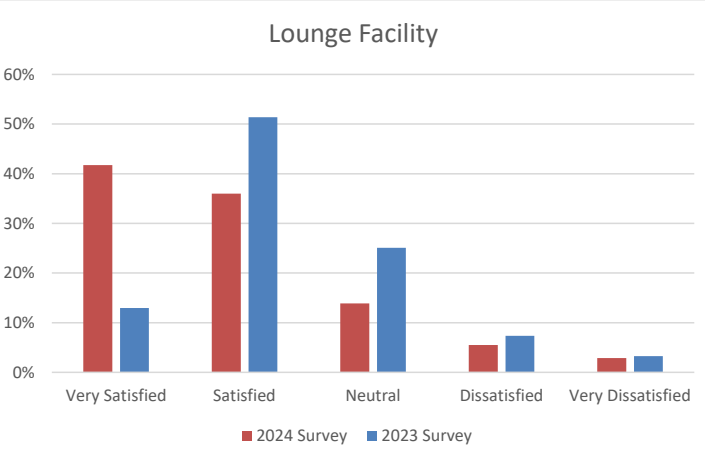
**Net Satisfaction with the facility also showed strong improvement with a similar significant reduction in the dissatisfied ratings.**



# Satisfaction with the Lounge

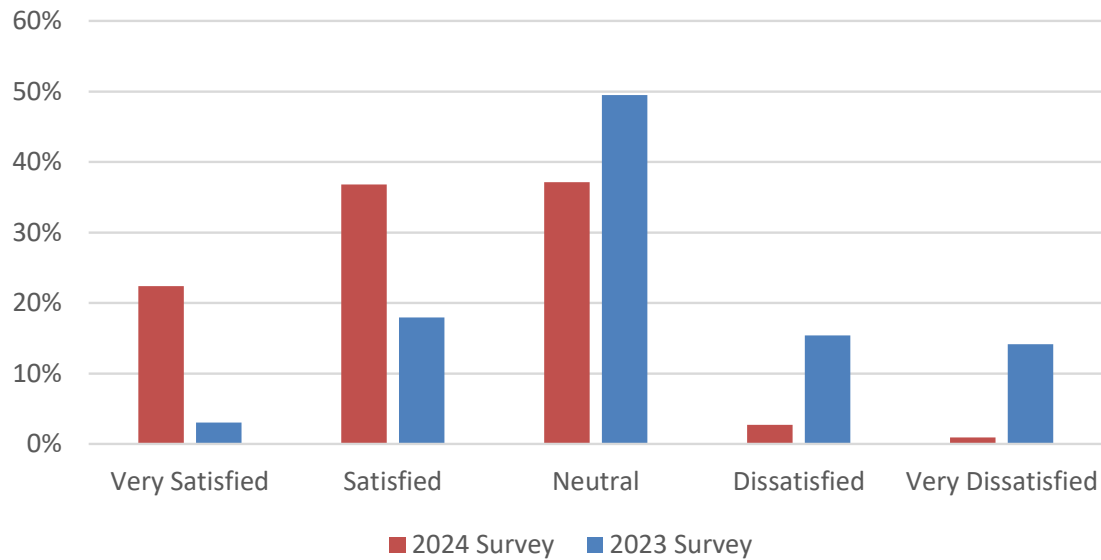
**As with the restaurant, satisfaction with all aspects of the Lounge also improved dramatically with significant improvements in the “Very Satisfied” responses.**

**Net Satisfaction (Very Satisfied + Satisfied less Dissatisfied + Very Dissatisfied) with the Lounge facility is especially strong.**

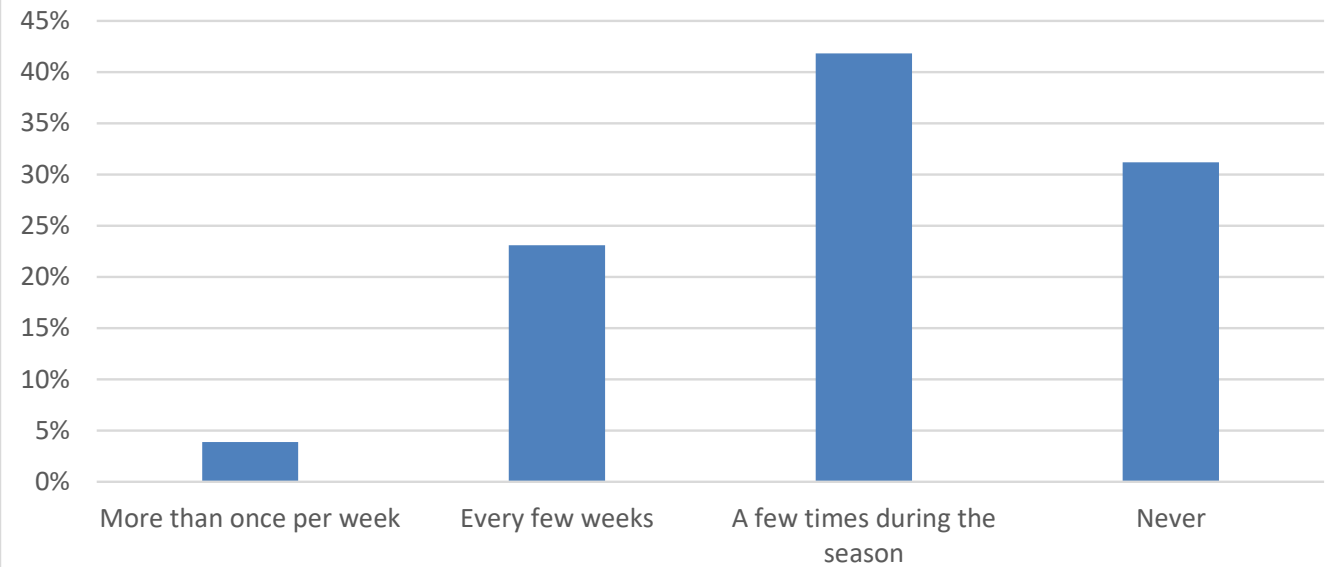


# Satisfaction with the Pool Deck Service

## Pool Deck Service



## Do you plan to utilize the Pool Deck dining service?



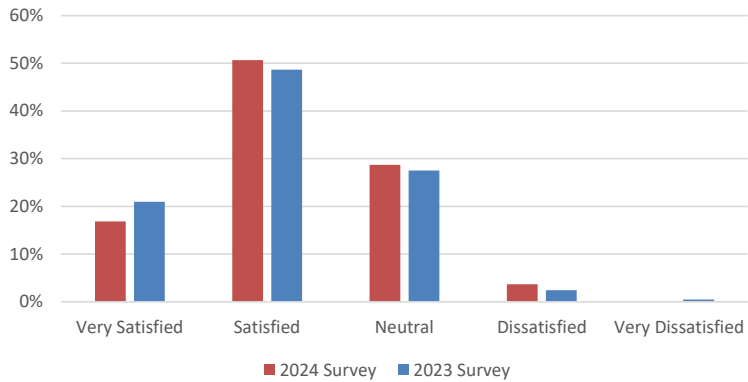
**Satisfaction levels for the Pool Deck improved significantly. The improvement in ratings is assumed to be strongly influenced by the upgrades to the Pool Deck itself rather than simply the pool deck food service. The new question regarding intent to utilize the Pool Deck dining service revealed only a moderate intent for future utilization.**

# Satisfaction with the Ballroom

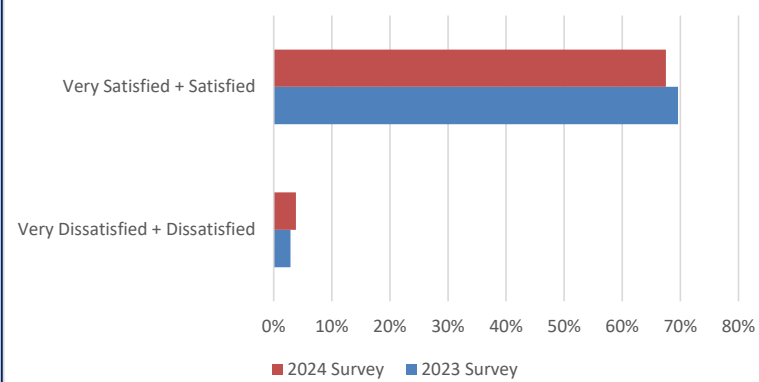
**Satisfaction with the Ballroom facility and services is especially favorable with very few dissatisfied responses.**

**Satisfaction with the Ballroom Food improved with dissatisfaction levels reduced as well.**

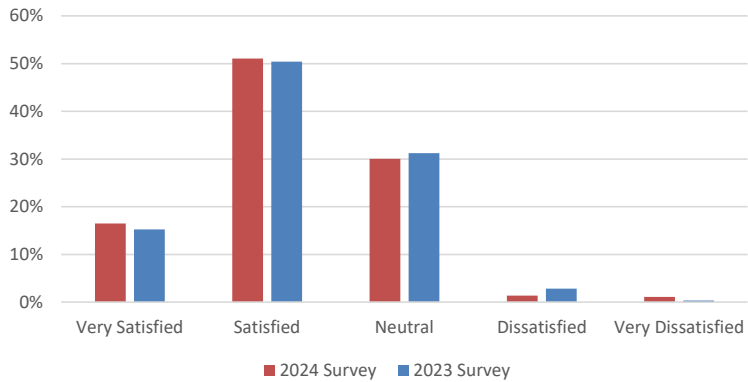
### Ballroom Facility



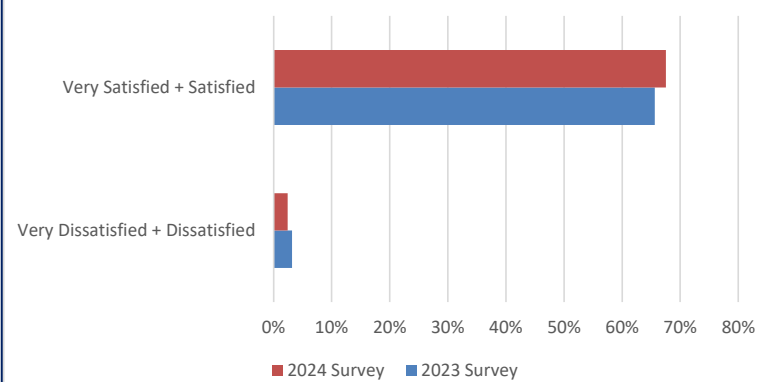
### Ballroom Facility



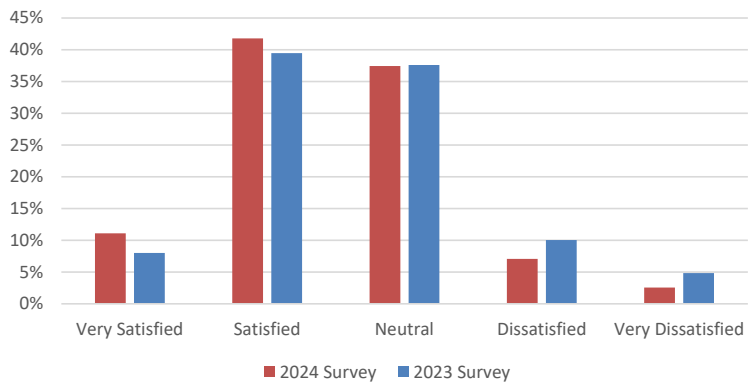
### Ballroom Services



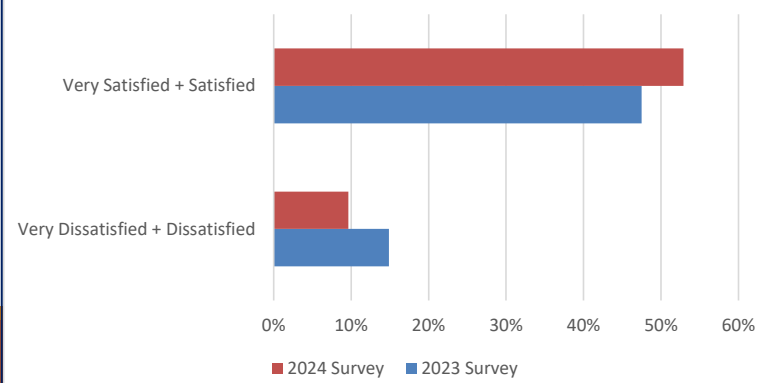
### Ballroom Services



### Ballroom Food

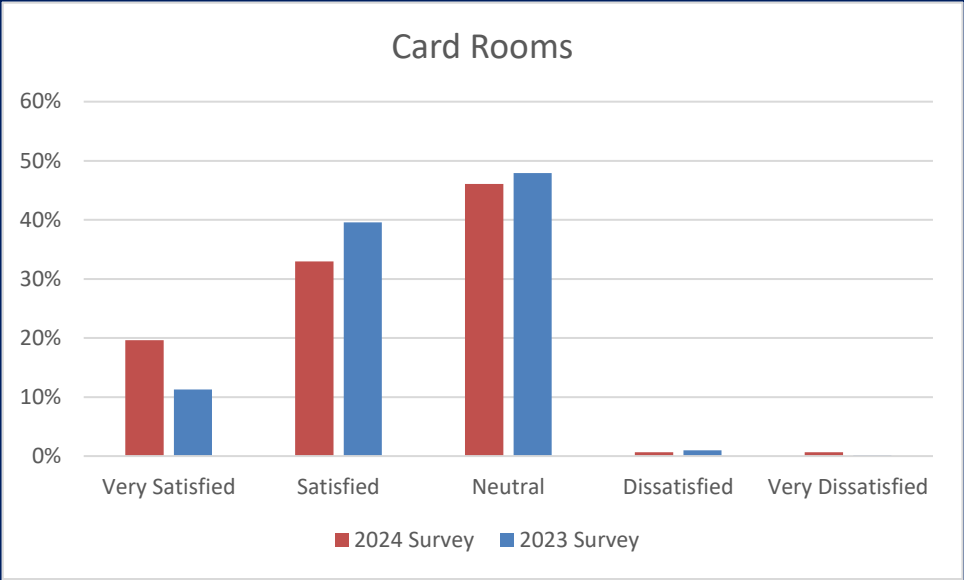
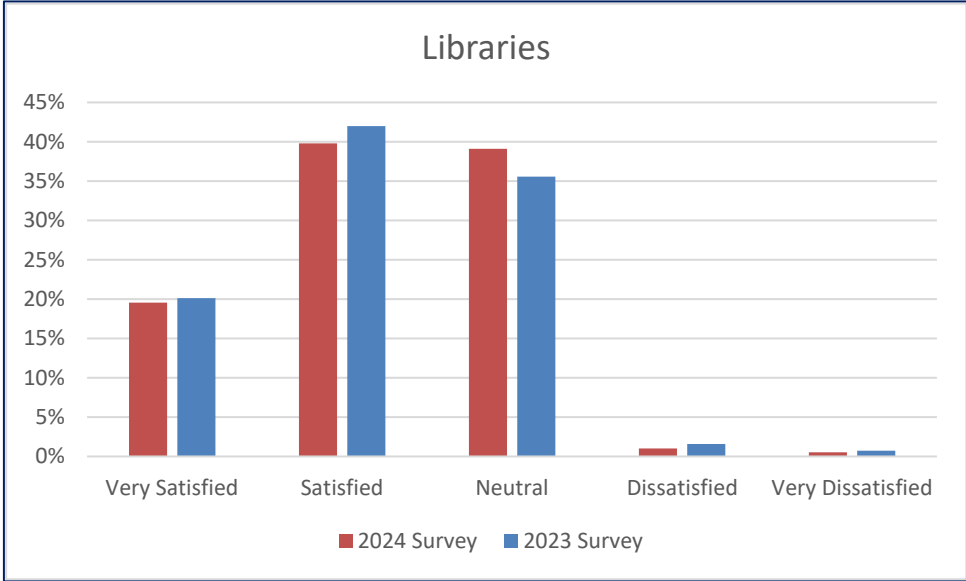
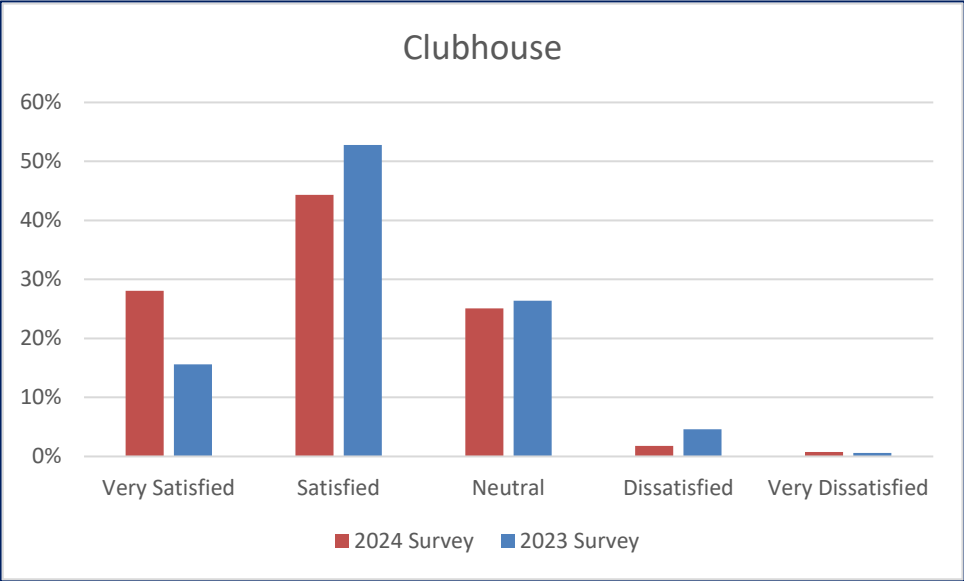


### Ballroom Food





# Satisfaction with the Clubhouse, Libraries, and Card Rooms



**Strong satisfaction with the Clubhouse as this is likely due to the recent lobby renovation.**

**Continued strong satisfaction with the libraries and card rooms while the card rooms have a high Neutral rating.**

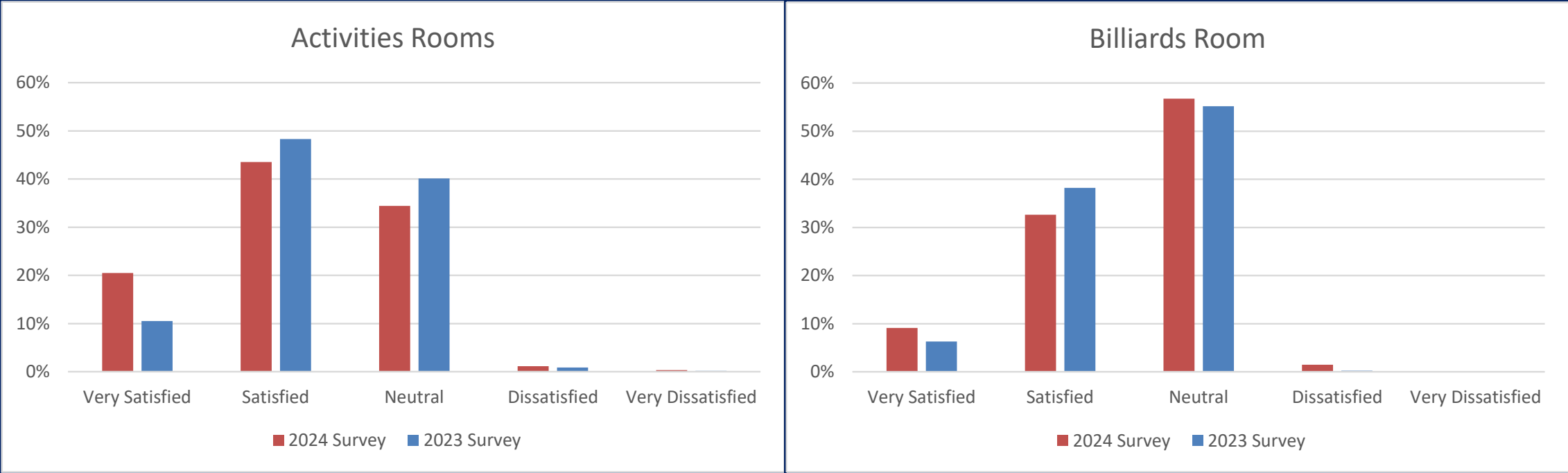
## Usage of the Libraries

	Hard Cover books		Paperback books		Puzzles		Games		Playing Cards	
More than once per week	23	3%	29	4%	5	1%	5	1%	29	5%
About once per week on average	40	6%	39	6%	18	3%	6	1%	27	4%
A few times during the season	195	29%	173	26%	103	16%	67	11%	71	11%
Every few weeks	118	17%	96	14%	32	5%	13	2%	20	3%
Never	307	45%	326	49%	485	75%	544	86%	497	77%
	683	100%	663	100%	643	100%	635	100%	644	100%

**The greatest regular utilization of the Libraries (at least once per week) is for Books (10%) and Playing Cards (9%)**

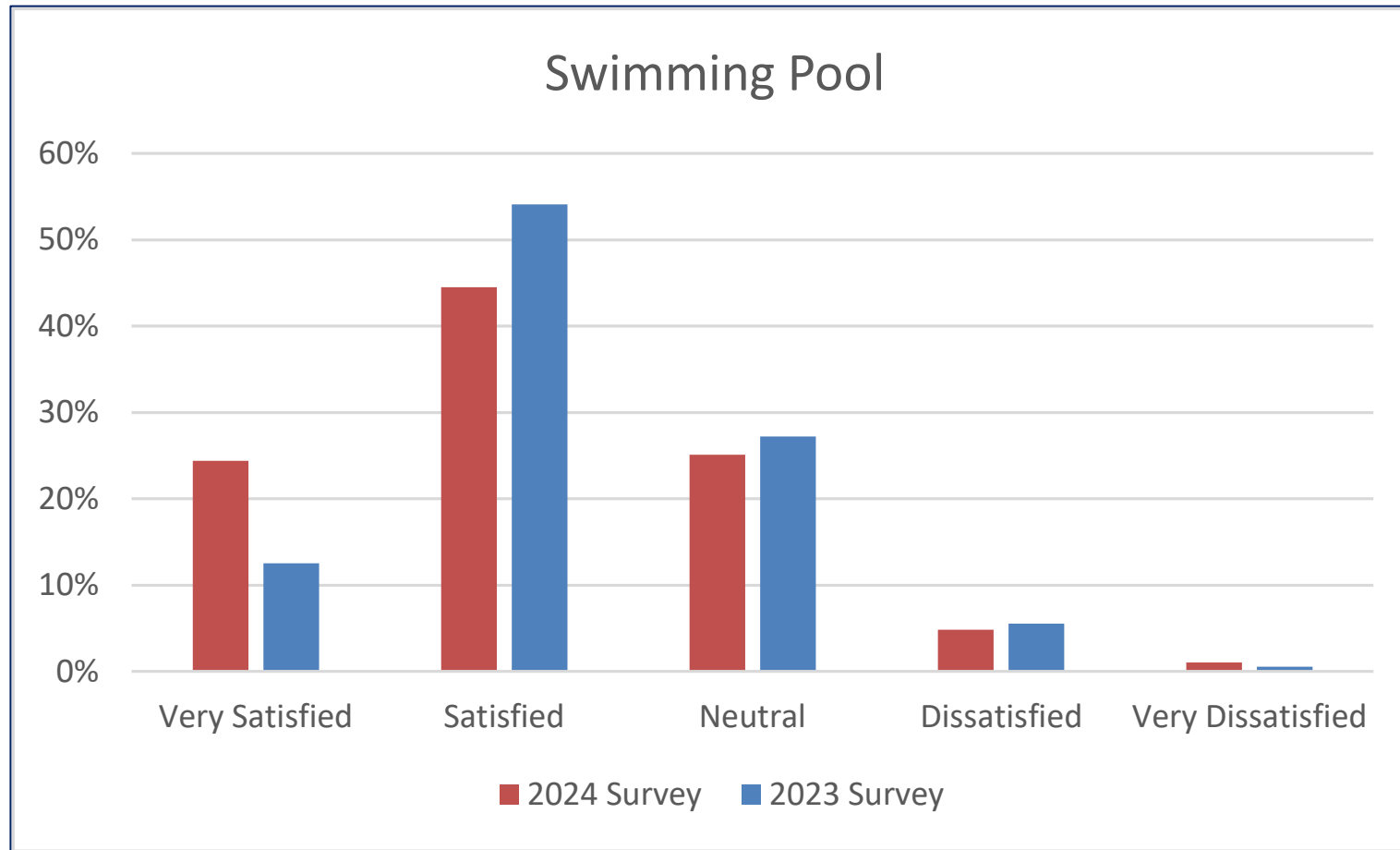
**Puzzles and Games are used far less on a regular basis (at least once per week) at 4% and 2% respectively.**

# Satisfaction with the Activities Rooms and Billiards Room



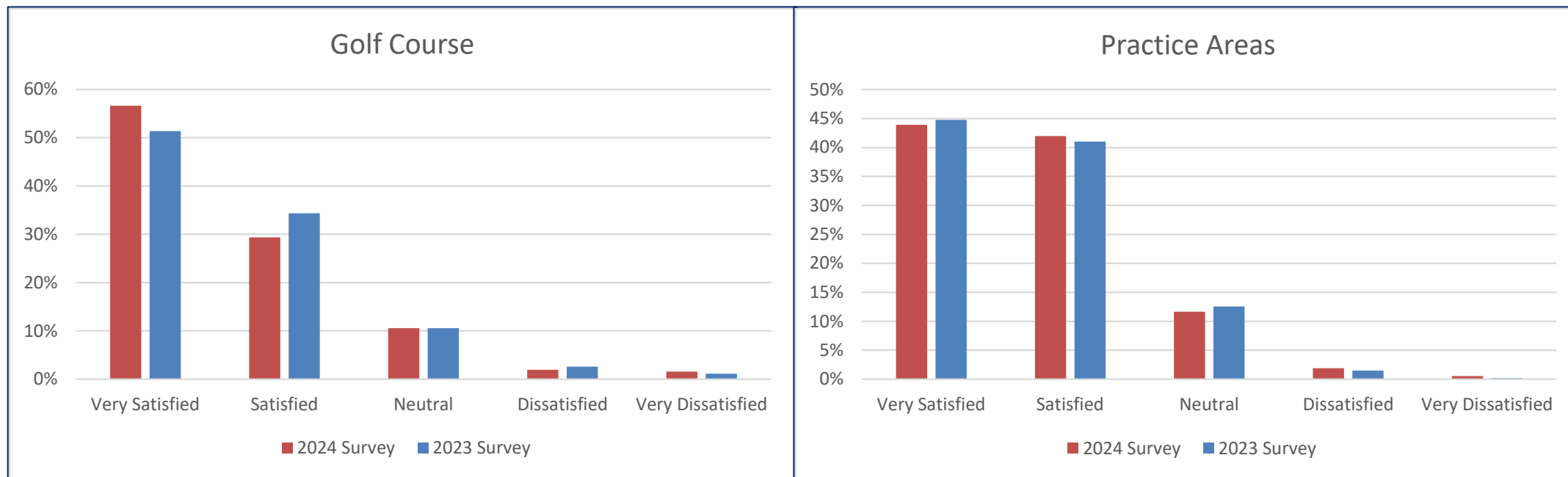
**Continued satisfaction with the Billiards room and Activities rooms with improved “Very Satisfied” ratings for both. Billiards still has a very high “Neutral” response rate which correlates with the low utilization rate of the billiards room.**

# Satisfaction with the Swimming Pool



**Strong satisfaction with the Swimming Pool with a strong shift from the “Satisfied” to the “Very satisfied” responses. It is assumed that this is strongly influenced by the recent pool deck renovations.**

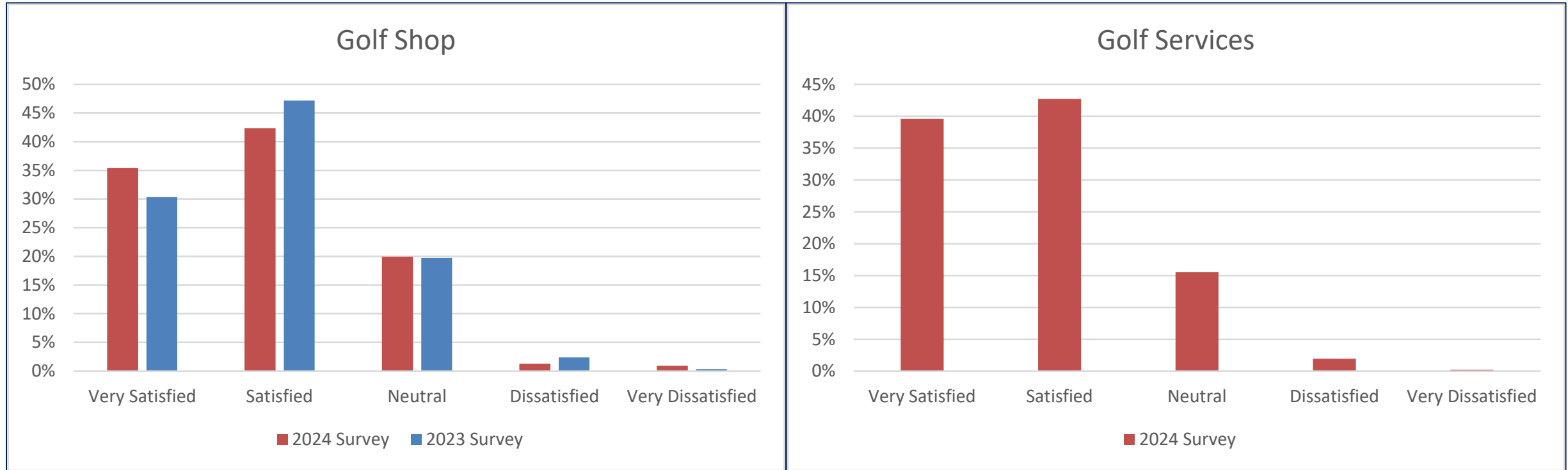
# Satisfaction with the Golf Course & Practice Areas



**The golf course again showed one of the highest responses for “Very Satisfied”. This validates the strong perception of the course by members and resident golfers.**

**The Practice Areas also continue to demonstrate strong user satisfaction.**

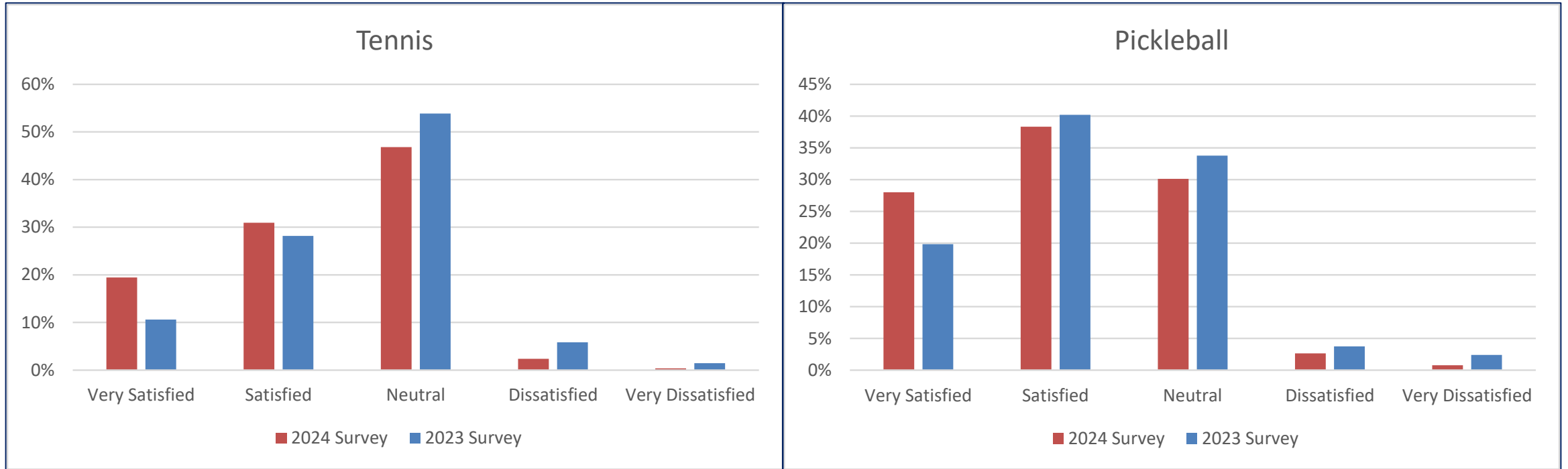
# Satisfaction with the Pro Shop & Golf Services



**The Golf Shop received a strong shift from “Satisfied” to “Very Satisfied” responses showing a shift toward greater satisfaction in 2024.**

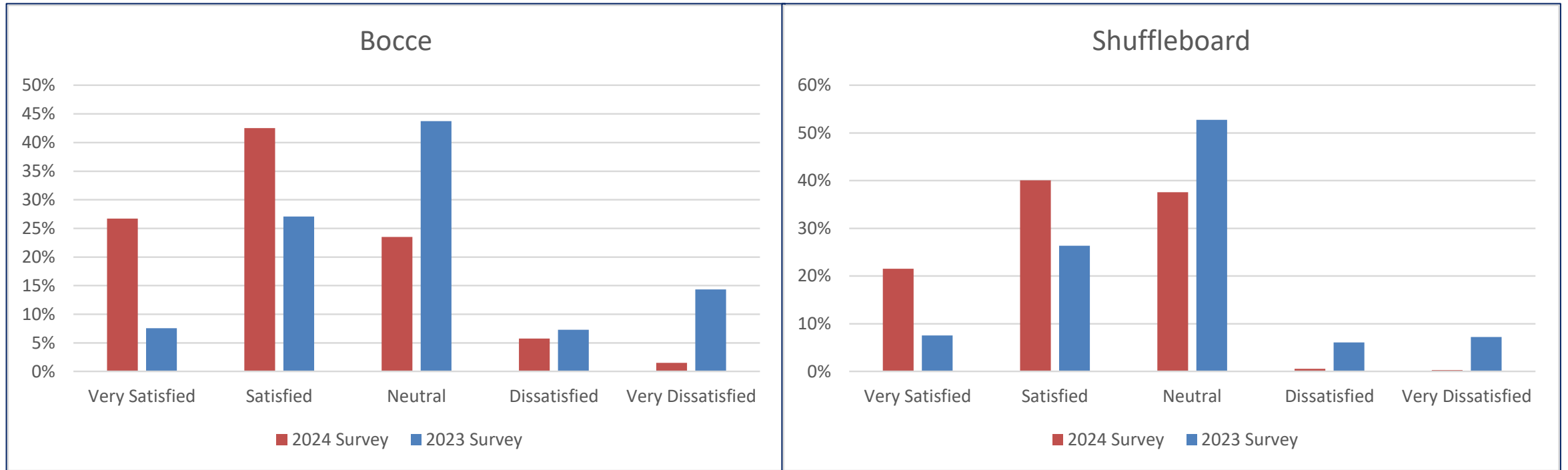
**A new question in the 2024 survey revealed strong satisfaction with the golf services provided.**

# Satisfaction with the Tennis & Pickleball



**Strong satisfaction for Tennis Courts and Pickleball courts but not as overwhelming as other key amenities. Both have very low dissatisfaction responses. Tennis showed a continued, significant Neutral responses which also correlates to a lower utilization rate.**

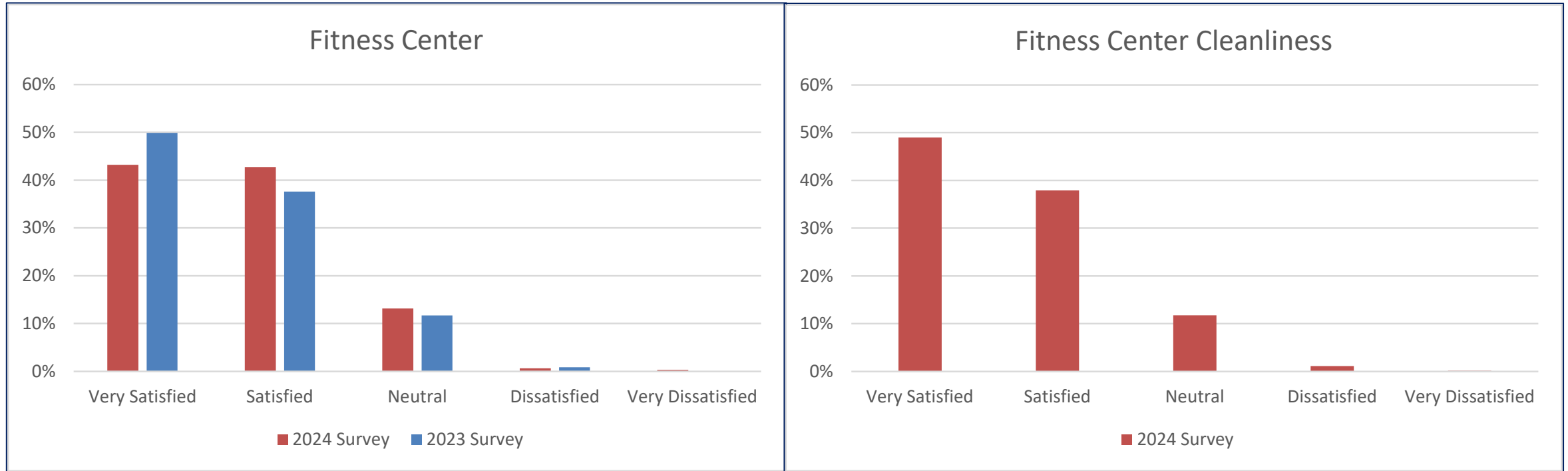
# Satisfaction with the Bocce & Shuffleboard



**Bocce and Shuffleboard both showed very significant improvements in resident satisfaction in both categories indicating a likely strong response to the completion of the Sports Complex court upgrades.**



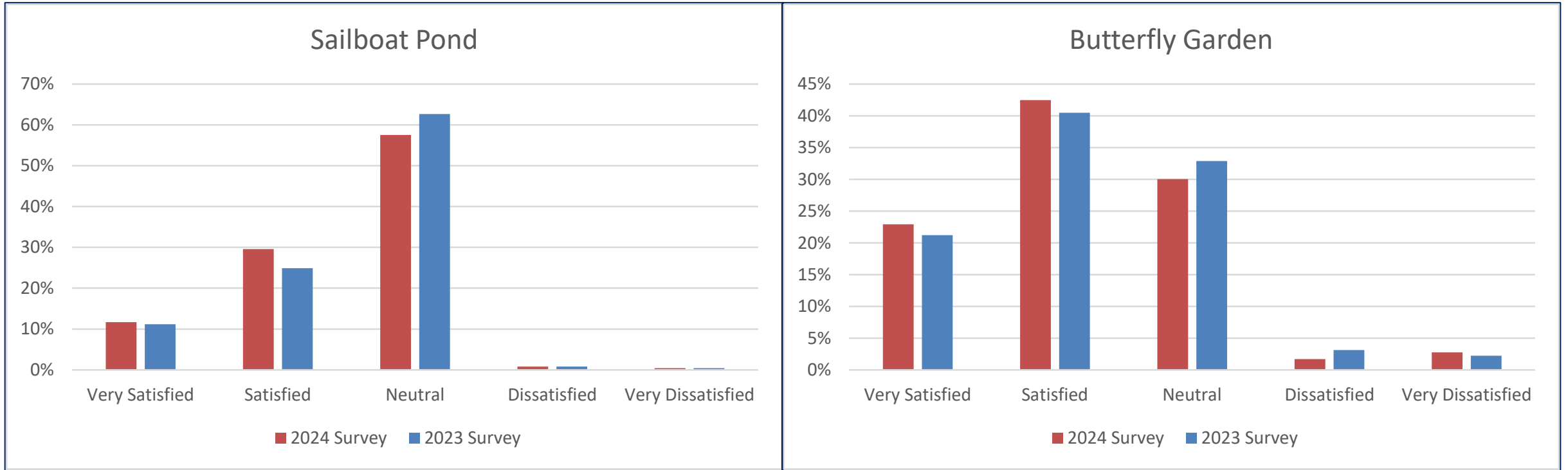
# Satisfaction with the Fitness Center



**The fitness center was one of the few amenities to show a slight shift from Very Satisfied down to simply Satisfied. That said, the overall satisfaction remains very strong and the dissatisfaction responses were very few.**

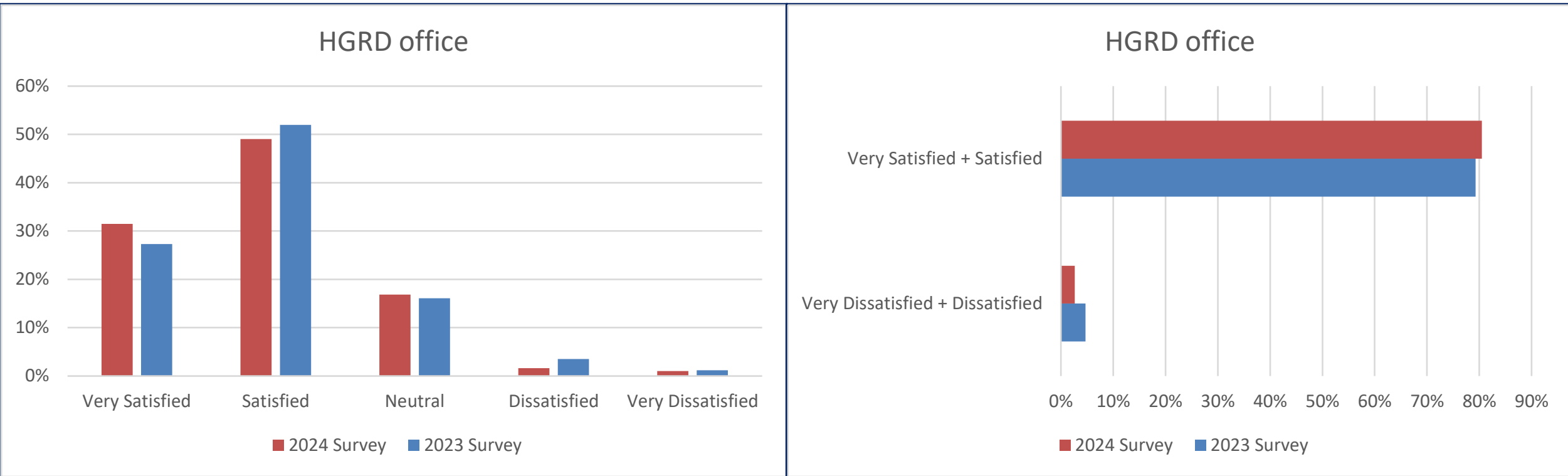
**A new question in the 2024 survey confirms a high level of satisfaction with the cleanliness of the fitness center.**

# Satisfaction with the Sailboat Pond & Butterfly Garden



**Continued strong satisfaction with both the Sail Boat Pond and the Butterfly Garden with very few dissatisfaction responses for the Sailboat Pond. That said, the sample size for the Sail Boat Pond was very small with a very high Neutral response and very low resident utilization.**

# Satisfaction with the services provided by the HGRD Office



**The overall satisfaction with the services provided by the HGRD office remains very strong with very few dissatisfied responses.**