

2012



SURVEY REPORT

2011 Member Survey¹

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Executive Summary

The Executive Summary

The purpose of this Executive Summary is to provide key conclusions and insights from the survey data for specific areas at Fairfield Glade. PCA has separated the data by demographic type on key subjects to provide a better understanding of the results. PCA recommends that Owners be given access to the survey ratings and comments via a link to the survey website.

This Report should be read in its entirety to obtain the most complete understanding of the data and information provided.

Background

Private Club Associates (PCA) developed and facilitated the 2011 Member survey for Fairfield Glade. The survey questions were developed by PCA and customized for Fairfield Glade using the input from Focus Groups, the Board of Directors, Community Management and PCA. The survey development process consisted of the following:

- **Discussion Groups held with approximately 100 randomly selected club members, directors and staff on October 5-7, 2011, prior to the survey instrument development.**
- **Survey instrument feedback was provided by the General Manager; the management staff and the Board of Directors.**
- **The revised final survey document was reviewed with the GM prior to its launch on the Fairfield Glade website November 7, 2011. The survey response period ended November 28, 2011. 78 hardcopy surveys were received by PCA and these surveys were included in the report results.**
- **2524 total responses were received. This response provides data that is statistically significant and provides adequate confidence that the results of the survey accurately reflect the opinions of the master population (membership). (see chart below)**
- **Fairfield Glade has approximately 7100 residents. 1,953 responses came from respondents who indicated that they had a home at FG. This is a response rate of 27.5% of homeowners in Fairfield Glade.**

- A response rate above 10% provides, within the margin of error, a valid result. A response above 20% of total owners substantially increases the level of confidence with the survey results.

Respondents Needed at Error of ±3%, ±5%, & ±10%			
Population	±3%	±5%	±10%
500	345	220	80
1,000	525	285	90
3,000	810	350	100
5,000	910	370	100
10,000	1,000	385	100
100,000	1,100	400	100
1,000,000	1,100	400	100
10,000,000	1,110	400	100

Source: Survey Monkey

Interpreting Fairfield Glade Survey Results

It is important that Fairfield Glade Community Club charts its future and evaluates its current progress for the “Owner Experience,” and that its efforts are measured against a baseline established by previous surveys. The ratings and comments generated by this survey should be used to develop action plans addressing specific opportunities to enhance the “Owner Experience” at Fairfield Glade.

- **Understanding the Ratings**
 - Total “Disappointed” or “Very Disappointed” responses for any question of less than 15% are viewed as positive and acceptable. 65% or more of responses as “Delighted” or “Very Delighted” is viewed as positive and acceptable.
 - An Overall Rating of 3.50 or greater to any individual question or Overall Member Experience area is viewed as a positive/acceptable response. PCA recommends a minimum 4.0 rating as the community’s goal.
- **Development of Action Plans from Survey Results**
 - Fairfield Glade should develop Action Plans for any area that meets any one of the following criteria:

- A cumulative 16% or more of the responses were Disappointed or Very Disappointed
- 64% or less of the responses were Delighted or Very Delighted
- The overall rating was less than 3.50

Survey Rating Methodology

The primary rating scale utilizes a five-point gradation from Very Disappointed to Very Delighted allowing survey respondents the opportunity to evaluate a facility, service, or program in question. *Table 1* shows the survey scale and their corresponding weights.

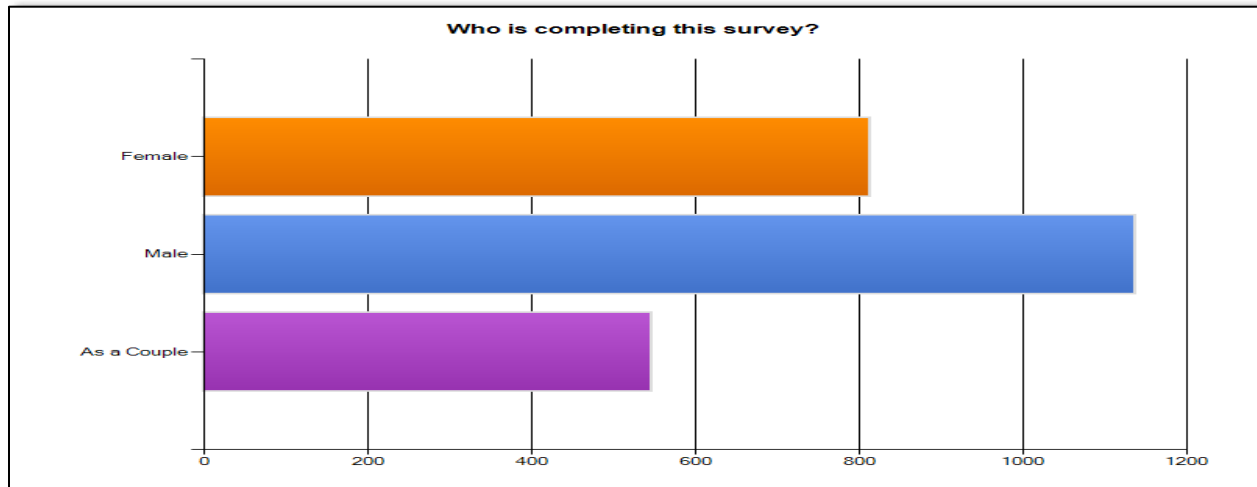
- *Table 1: Weights for Ratings Scale*

Rating Scale	Very Disappointed	Disappointed	Neither Delighted/Nor Disappointed	Delighted	Very Delighted
Weight	1	2	3	4	5

Ratings: Effective viewing of the results is through an examination of the scores or percentages found in the TOP TWO box scores of 4 & 5's and the BOTTOM TWO box scores of 1 & 2's. Respectively, general marketing research theory suggests a total of 65% of survey responses found within these two boxes is positive and 70% or above as very positive. Likewise, when examining the BOTTOM TWO box scores of 1&2's, a total percentage of respondents greater than 15% is cause for concern and 20% or above requires corrective action. An overall score for any section or question below 3.5 would indicate room for improvement and the need to develop an action plan to address the issue.

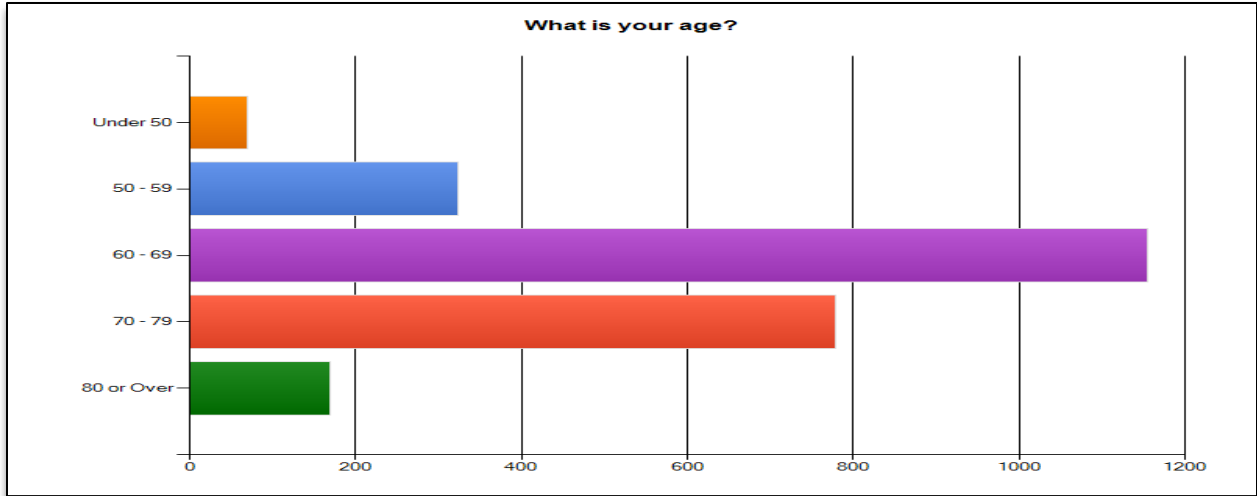
Private Club Associates recommends that a survey be conducted in 2012 or 2013 at this same date in order to measure progress accomplishing the Action Plan steps and in improving the “Owner Experience” at Fairfield Glade. This next survey should focus more on progress against key opportunities within the community and less about purchase intent or how owners value certain amenities at Fairfield Glade

Member Demographics



Of the 2524 responses to the survey, the demographics were as follows:

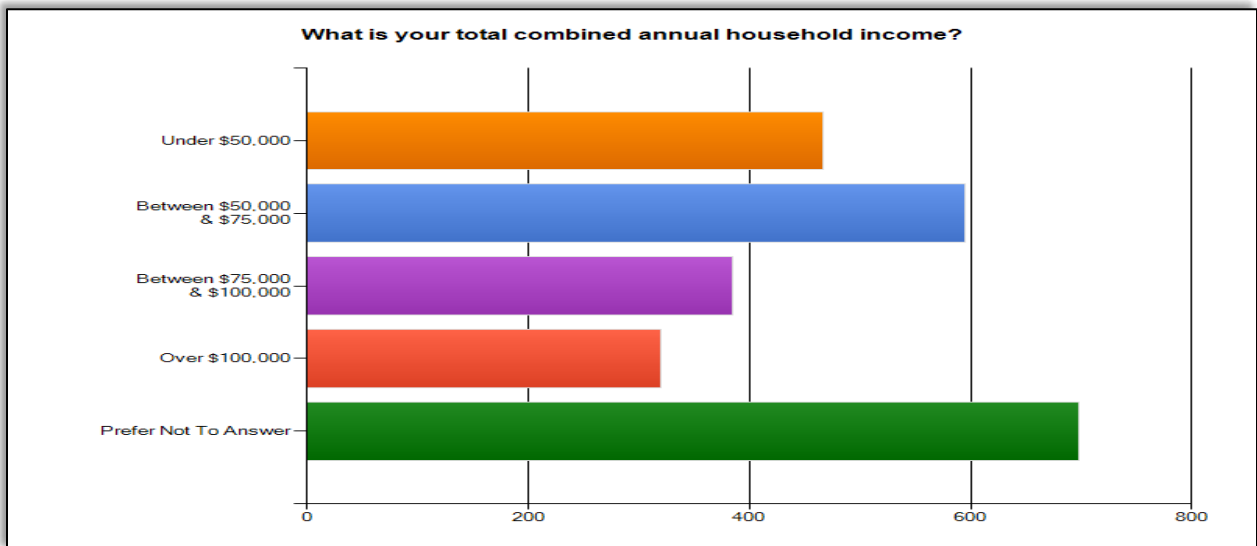
- **Who Took the Survey**
 - 32.6% were Female
 - 45.6% were Male
 - 21.9% were Couples
- **Children (Under 18)**
 - 98.5% of Owners do not have children under 18 living with them
 - 25.5% of respondents indicated amenities and activities for those under 12 were important (19.2%) or very important (6.3%)
 - 24.0% of respondents indicated amenities and activities for those 13-17 were important 19.1%) or very important (4.9%)
- **Households**
 - 87.7% have 2 people living in their home
 - 9.1% have one person living in their home
 - 3.2% have 3 or more people living in their home



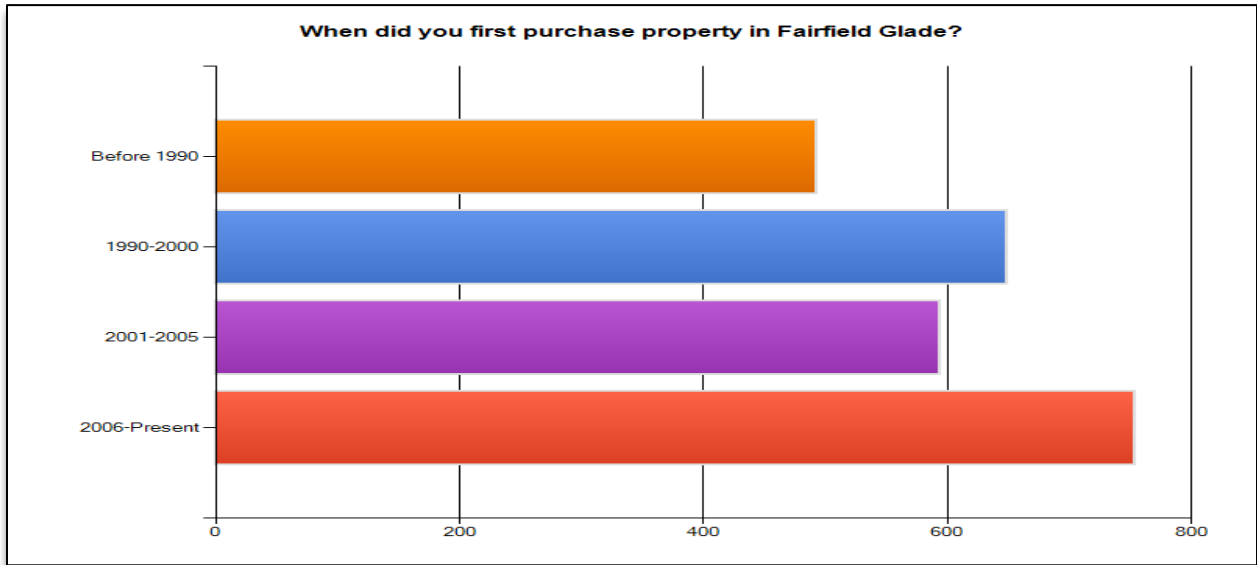
- **Age Profile**

- 2.8% 50 or under
- 13.0% between 50 and 59
- **46.3% between 60 and 69**
- 31.2% between 70 and 79
- 6.8% 80 or over

- **These age demographics are very similar to other retirement communities in the Southeast**

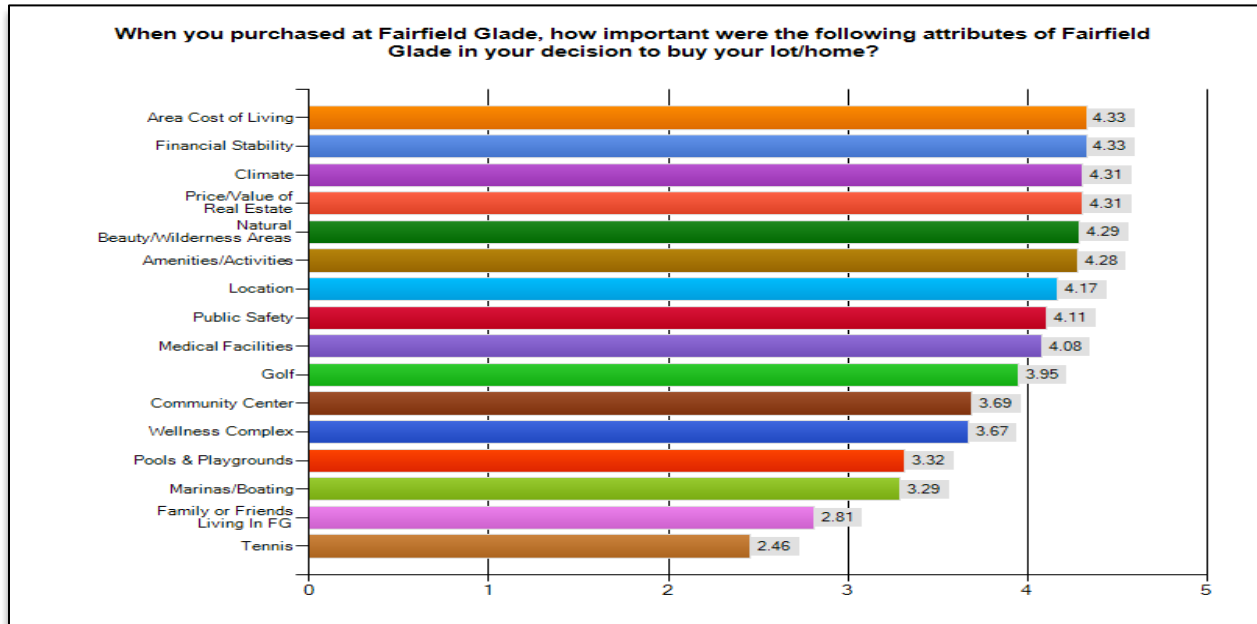


- **Income Profile (Calculated after taking out those who preferred not to answer)**
 - 26.1% \$50K or under
 - **33.3% between \$50k and \$75k**
 - 21.5% between \$75k and \$100k
 - 17.9 % over \$100k per year
- **This income spread is not unusual given the fact that most respondents are retired**



- **Purchase Timeline**
 - 19.8% before 1990
 - 26.1% between 1990 and 2000
 - 23.8% between 2001 and 2005
 - **30.3 % between 2006 and Present**
- Over 54% have purchased in the last ten years
- **How did you first hear about Fairfield Glade?**
 - **41.1% Through Friends or Relatives**
 - 21.6% Stayed at FG Timeshare
 - 11.0% Where to Retire Magazine
 - 26.3% All other sources

Purchase Demographics



- **Top five areas of importance of attributes are:**
 - Area Cost of Living
 - Financial Stability
 - Climate
 - Price Value of Real Estate
 - Beauty/Wilderness Areas

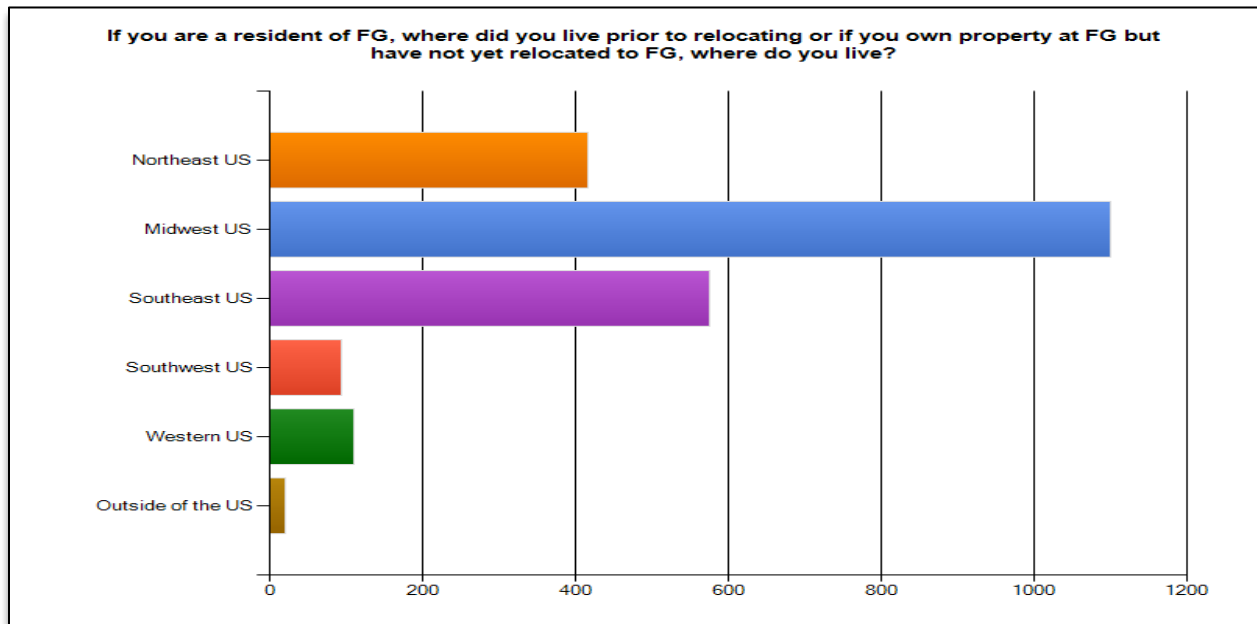
- **Differences between respondent groups (see Appendix A)**
 - **Females vs. Men vs. Couples**
 - All rated Financial Stability as very high
 - Females rated Natural Beauty higher than Men
 - Area Cost of Living and Price Value of Real Estate was similar across all groups

 - **Homeowners versus Lot owners**
 - Homeowners rated Area Cost of Living and Price Value of Real Estate as more important than lot owners
 - Homeowners put a higher premium on climate

 - **Differences by Income**
 - Price value of Real Estate and Area Cost of Living were similar across all income levels below \$100k

- Financial Stability was slightly higher among the >\$75 income level
- Golf courses were more important as income levels rose
- **By Date of Purchase of real estate (2006-Present vs. Norm)**
 - Higher rating for financial stability with the 2006-present respondents
 - Amenities rated higher with 2006-present respondents
 - Cost of Living and Price Value of Real Estate more important with this buying group than the average
- **Year around vs. Partial Year**
 - Amenities are rated higher for Partial Year than Year around
 - Golf is more important for Partial Year than Year around
 - Financial Stability was the same for all respondents

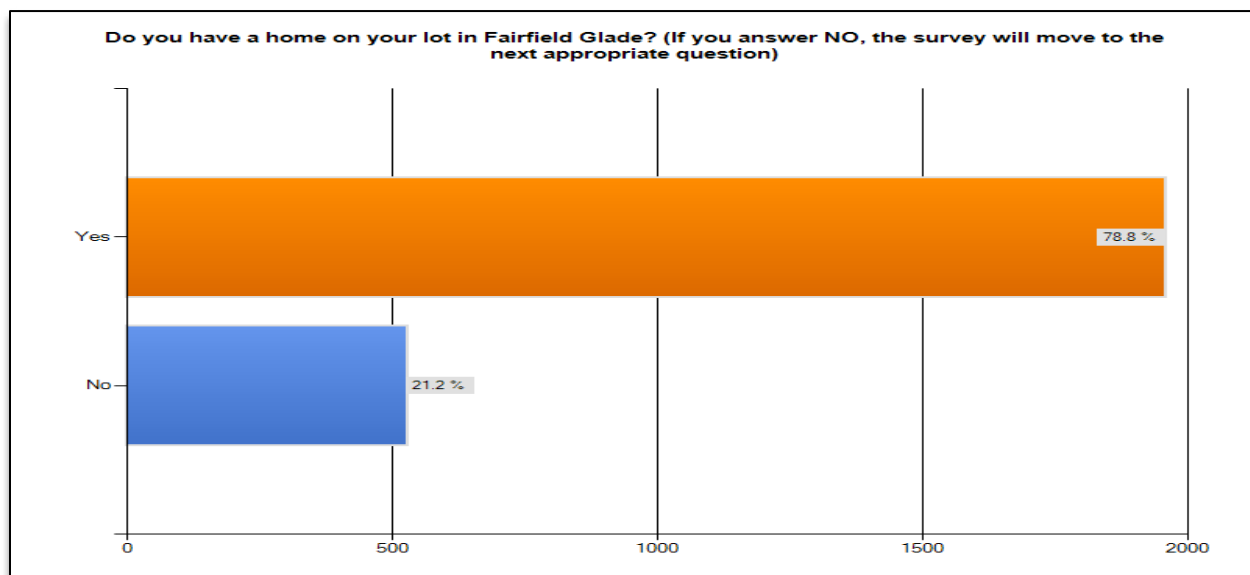
Ownership Demographics



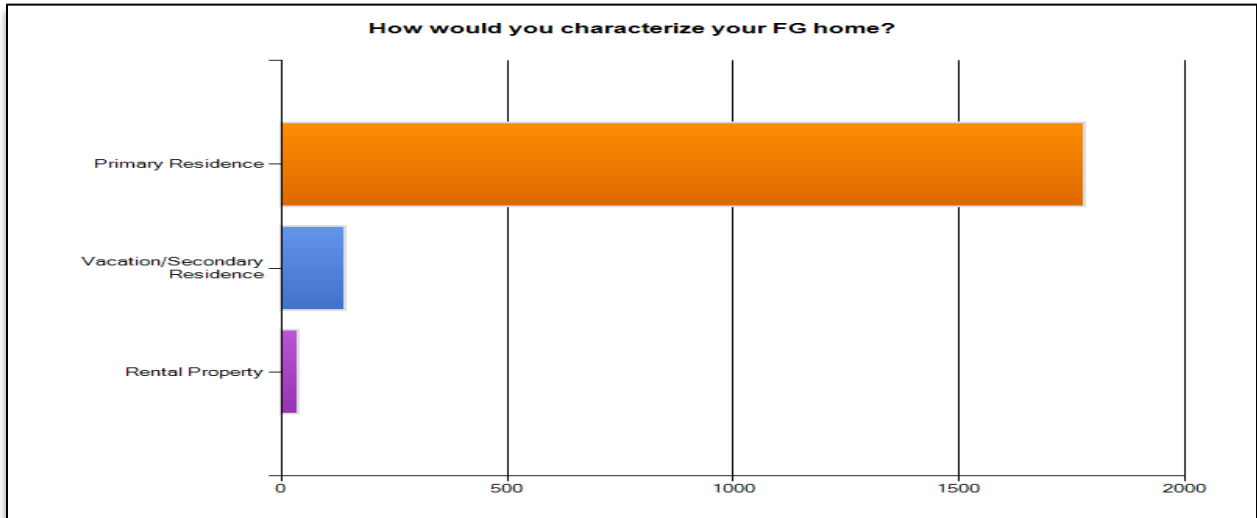
- **Where did you live or where do you live now?**
 - 17.9%- Northeast US
 - **47.5%- Midwest US**
 - **24.9%-Southeast US**
 - 4.1%-Southwest US
 - 4.8%- Western US
 - 0.8%-Outside of the US

Where did you live or do you live sorted by date of purchase	Before 1990 %	Between 1990 & 2000 %	Between 2001 & 2005 %	Between 2006 & present %
Northeast US	15.0	15.1	18.3	21.9
Midwest US	57.2	58.8	44.3	35.3
Southeast US	23.1	19.1	27.6	28.2
Southwest US	1.7	2.3	4.4	6.6
Western US	2.2	3.8	4.7	7.0
Outside of the US	0.7	0.8	0.7	1.0

- **The Midwest and Southeast continue to be the major sources for new owners at Fairfield Glade?**
 - Northeast percentage has grown over time
 - **Midwest has declined but still biggest source**
 - Southeast has grown since 2000



- **Do you have a home on your lot in Fairfield Glade? (2482 responses)**
 - **78.8% (1956) -Yes**
 - 21.2 % (526) – No



- **Residence Status**

- 68.6% have Fairfield Glade as their Year round residence
- 19.0 % do not reside at Fairfield Glade at any time
- The 12.4% of owners (286 responses) who are partial year residents do so according to the table below:

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
% at FG	16.4	14.0	29.4	60.5	71.0	75.2	78.7	71.7	74.5	75.5	49.0	35.3

- **Planning to Move**

- 92.2% of respondents are not planning to move in the next three years
- 7.8 % or 151 responses were yes and the reasons were as follows:
 - 41.3% (59) will be moving closer to family
 - 34.3% (49) found another community
 - 13.3% (19) will be moving for economic reasons

- **Planning to Build if they do not have a home on their lot now (29 responses)**

- 86.2% do not plan to build

- **Planning to Sell their property (171 responses)**

- 29.2% (50) - Yes

- 32.7% (56)-No
- 16.4 (28)- No but will within a year
- 21.6% (37)- No but will within three years

Importance vs. Experience of Amenities/Activities

Amenities/Activities	Column A Experience rating	Column Importance rating	Rank of importance
Golf Course	4.43	4.18	2
Outdoor Tennis Courts	3.37	2.80	17
Indoor Tennis Courts	3.40	2.80	17
Outdoor Pools	3.61	3.43	8
Indoor Pools	3.76	3.63	6
Pickleball	3.29	2.79	18
Marinas/Boating	3.87	3.68	5
Fishing Areas	3.58	3.41	9
Parks	3.65	3.84	4
Playgrounds	3.33	3.12	13
Walking/Hiking/Biking Trails	3.52	3.96	3
Gymnasium	3.60	3.52	7
Wellness Complex owned by CMC	3.98	3.96	3
Restaurants	3.65	4.29	1
Arts & Carts	3.40	3.29	11
Bus Tours	3.47	3.38	10
Library	3.61	3.68	5
Stables	3.31	2.99	14
Dog Park	3.29	2.94	15
Community Gardens	3.30	3.13	12
Spa Services	3.17	2.93	16

- **Top Five Areas of Importance**
 - Restaurants (4.29)
 - Golf Courses (4.18)
 - Wellness Complex & Walking Trails (3.96-tie)
 - Parks (3.84)
 - Library/Marina & Boating (3.68-Tie)
- **Top Five Areas with highest “Experience Rating”**
 - Golf Courses (4.43)
 - Wellness Complex owned by CMC (3.98)
 - Marinas/Boating (3.87)

- Indoor Pools (3.76)
- Parks/Restaurants (3.65)
- **Summary**
 - #1 rated item-Restaurants received a 3.65 rating which is lower than needed for an item rated as the most important by all respondents
 - #2 rated item-Golf Courses receive a very favorable score of 4.43 which is a good match between “importance” and “experience”
 - #3 rated item-Walking Paths/Hiking/Bike Trails received a marginal score of 3.52
 - #3 rated item-Wellness Complex received a positive score of 3.98
 - #4 rated item-Parks received a 3.65 which is slightly above average
 - #5 rated item- Marinas/Boating received a 3.87 which is a positive score
 - #5 rated item –Library received a rating of 3.61

Experience of Amenities/Activities-All Members

Amenities/Activities	Very Delighted %	Delighted %	Neither Delighted/nor Disappointed	Disappointed %	Very Disappointed %	N/A
Golf Course	48.0	23.9	10.1	0.4	0.4	17.2
Outdoor Tennis Cts	4.9	8.7	30.7	1.0	0.3	54.5
Indoor Tennis Cts	5.1	9.1	30.3	0.5	0.3	54.4
Outdoor Pools	8.2	27.9	30.2	2.2	0.2	31.2
Indoor Pools	13.0	31.8	25.8	1.4	0.6	27.4
Pickleball	3.1	9.1	34.4	0.7	0.4	52.3
Marinas/Boating	16.8	41.1	23.8	1.1	0.6	16.7
Fishing Areas	8.4	26.4	30.7	1.9	0.8	31.9
Parks	9.3	41.1	31.0	2.9	0.7	15.0
Playgrounds	3.9	18.1	38.7	2.5	1.0	35.8
Walking/Hiking/ Biking Trails	10.7	36.8	25.6	8.5	2.8	2.8
Gymnasium	9.0	28.4	32.9	1.4	0.8	27.4
Wellness Complex owned by CMC	25.2	34.0	21.1	1.6	1.0	17.2
Restaurants	17.1	44.5	20.1	9.1	4.0	5.2
Arts & Carts	5.2	20.7	39.8	2.1	1.0	31.3
Bus Tours	5.9	25.1	37.6	1.7	0.9	28.7
Library	10.8	29.8	33.3	2.9	0.6	22.5
Stables	4.0	16.3	38.4	2.4	1.3	37.7
Dog Park	5.7	12.7	31.0	2.7	2.7	45.2
Community Gardens	3.9	15.6	38.1	2.5	1.3	38.7
Spa Services	2.5	10.3	39.7	2.6	1.6	43.5

Importance vs. Experience of Services provided in FG

Services Provided in FG	Column A Experience rating	Column Importance rating	Rank of importance
Public Safety-Law Enforcement	4.25	4.76	1
Public Safety-Resident Assistance	4.18	4.65	4
Health & Wellness	4.06	4.46	8
Home Delivered Meals	3.12	3.48	19
Care for Caregivers	3.20	3.64	18
Vial of Life	3.47	3.66	17
Continuing Learning Seminars	3.58	3.71	16
Volunteer Fire Department	4.32	4.71	2
Waste Water Treatment & Disposal	4.14	4.69	3
Common Area Landscape	3.87	4.31	9
Common Area Signage	3.72	4.14	13
Facilities Maintenance & Appearance	3.93	4.52	7
Architectural Control	3.68	4.25	11
Roads & Bridges Maintenance	3.61	4.59	5
Lakes & Dams Maintenance	3.82	4.55	6
Community Club Website	3.78	4.06	14
Email Blasts	3.71	3.85	15
Member Communication	3.75	4.19	12
Neighborhood Watch	3.83	4.27	10

- **Top Five Areas of Importance for Services in Fairfield Glade**

- Public Safety-Law Enforcement (4.76)
- Volunteer Fire Department (4.71)
- Waste Water Treatment & Disposal (4.69)
- Public Safety-Resident Assistance (4.65)
- Road & Bridges (4.59)

- **Top Five Areas with highest “Experience Rating”**

- Volunteer Fire Department (4.32)
- Public Safety-Law Enforcement (4.25)
- Public Safety-Resident Assistance (4.18)
- Waste Water Treatment & Disposal (4.14)
- Health & Wellness (4.06)

- **Summary**

- All of the top five items rated in “Important” to the respondents of FG received scores above 4.00 with the exception of “Roads and Bridges Maintenance
- Roads & Bridges Maintenance was in the “Top Five” in “Importance but ranked in the “Bottom Five” in “Experience” rating

Experience of Services Provided in FG-All Members

Amenities/Activities	Very Delighted %	Delighted %	Neither Delighted/nor Disappointed	Disappointed %	Very Disappointed %	N/A
Public Safety-Law Enforcement	39.5	30.6	13.6	1.5	0.5	14.1
Public Safety-Resident Assistance	33.0	28.4	16.0	0.9	0.4	21.2
Health & Wellness	27.5	32.4	19.0	1.1	0.6	19.4
Home Delivered Meals	1.1	3.5	29.3	0.5	0.4	65.3
Care for Caregivers	1.7	5.4	28.9	0.6	0.4	62.9
Vial for Life	5.5	11.3	28.5	0.4	0.2	54.2
Continuing Learning Seminars	7.8	20.8	30.0	1.1	0.3	40.1
Volunteer Fire Dept	38.7	24.9	12.4	0.6	0.2	23.2
Waste Water Treatment	33.9	33.1	16.7	1.5	0.6	14.3
Common Area Landscaping	20.1	43.8	20.6	4.1	1.0	10.3
Common Area Signage	15.9	39.4	27.9	4.6	1.4	10.8
Facilities Maint. & Appearance	22.2	46.7	18.7	3.6	0.9	7.8
Architectural Control	16.4	39.5	25.3	6.4	2.5	9.9
Roads & Bridges Maint.	17.7	38.9	22.1	10.4	3.6	7.3
Lakes & Dam Maint.	19.0	42.4	24.7	3.6	1.2	9.2
Community Website	15.9	42.0	29.0	2.0	0.8	10.3
Email Blasts	14.0	34.8	33.5	1.4	0.8	15.5
Member Communication	16.0	42.8	27.6	3.4	1.7	8.5
Neighborhood Watch	17.5	35.3	26.8	1.6	0.6	18.2

Importance vs. Experience of Additional Services provided

Services Provided in FG	Column A Experience rating	Column Importance rating	Rank of importance
Post Office	3.92	4.40	3
Retail Shops	3.65	4.20	6
Churches	4.13	4.25	5
Banks	4.24	4.43	2
Yard/Garage/Moving Sales	3.46	3.32	10
Broadband Internet Services	3.69	4.43	2
Cell phone Service	3.78	4.55	1
Good Samaritan's Continuing Care	3.86	4.09	7
Sportsman Club	3.37	3.31	11
Medical Facilities	3.83	4.55	1
Life-Long Learning	3.51	3.73	9
Restaurants Not Owned by FG	3.66	4.27	4
Medical Care Transportation	3.28	4.25	5
Elderly Care (e.g.: Meals on Wheels)	3.26	3.86	8

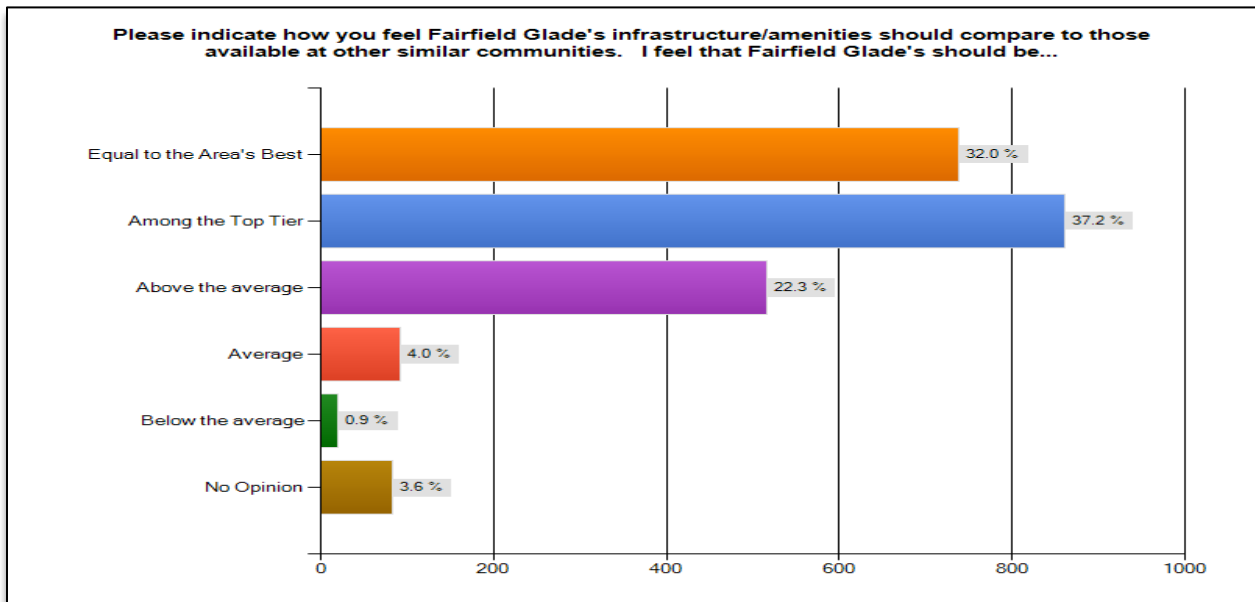
- **Top Five Areas of Importance of additional services provided in and near FG**
 - Medical Facilities and Cell phone Service (4.55-tied)
 - Banks and Broadband Internet Services (4.43- tied)
 - Post Office (4.40)

- **Top Five Areas of with highest “Experience Rating”**
 - Banks (4.24)
 - Churches (4.13)
 - Post Office (3.92)
 - Good Samaritan’s Continuing Care (3.86)
 - Medical Facilities (3.83)

- **Summary**
 - Medical Facilities that were rated as a tie for most important received a 3.83 rating which is positive but the objective is 4.0 or higher

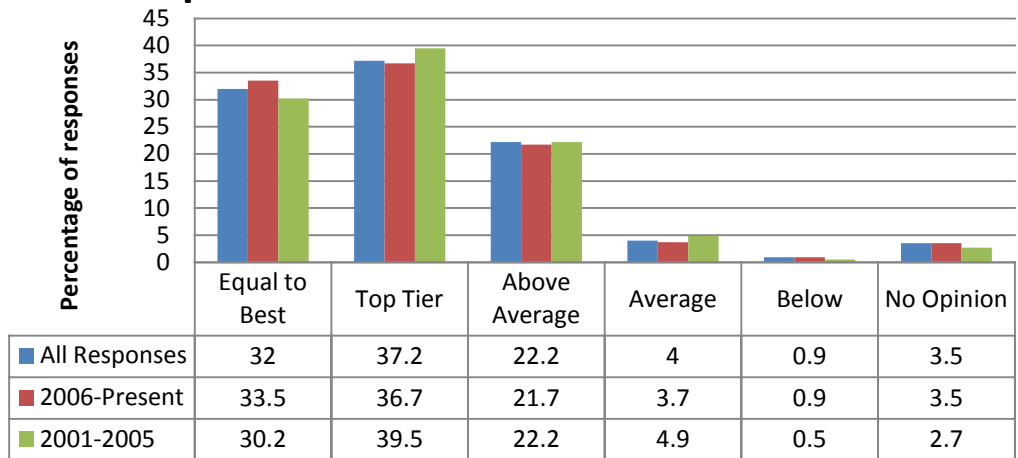
- The ratings for “experience” in Broadband Internet and Cell phone Service should be addresses as they were rated as very important but the experience rating could be improved

How Should FG Compare to other Similar Communities



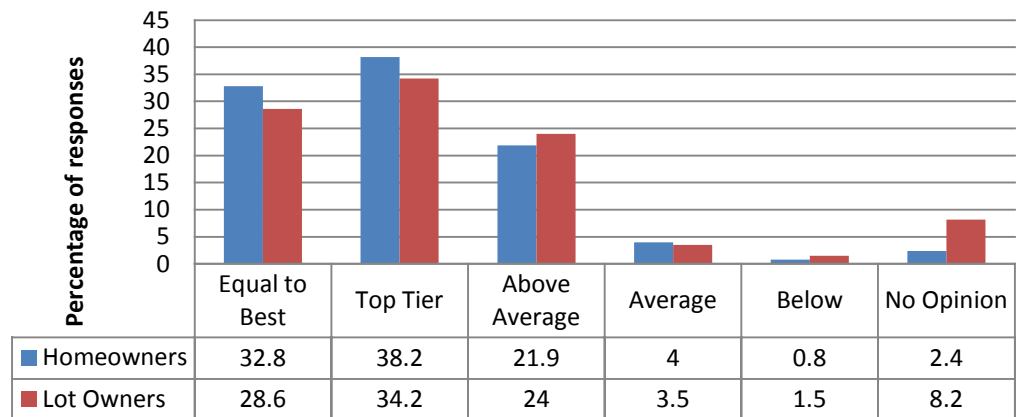
- **How should Fairfield Glade compare to similar communities?**
 - 91.5% of respondents believe that FG should be above the average or better
 - 69.7% believe it should be “Among the Top Tier” or “Equal to the Area’s Best”
 - Respondents with Incomes above \$75k want FG to be Equal to the Area’s Best by 4 to 6 points higher than those with incomes below \$75k
 - Respondents who have purchased since 2006 rated their desires for FG in a similar fashion to all respondents (See chart below)
 - 71% of Homeowners want FG to be Equal to the Area’s Best of Top Tier compared to 62.8% for Lot owners

Desired Comparison of FG to Other Communities



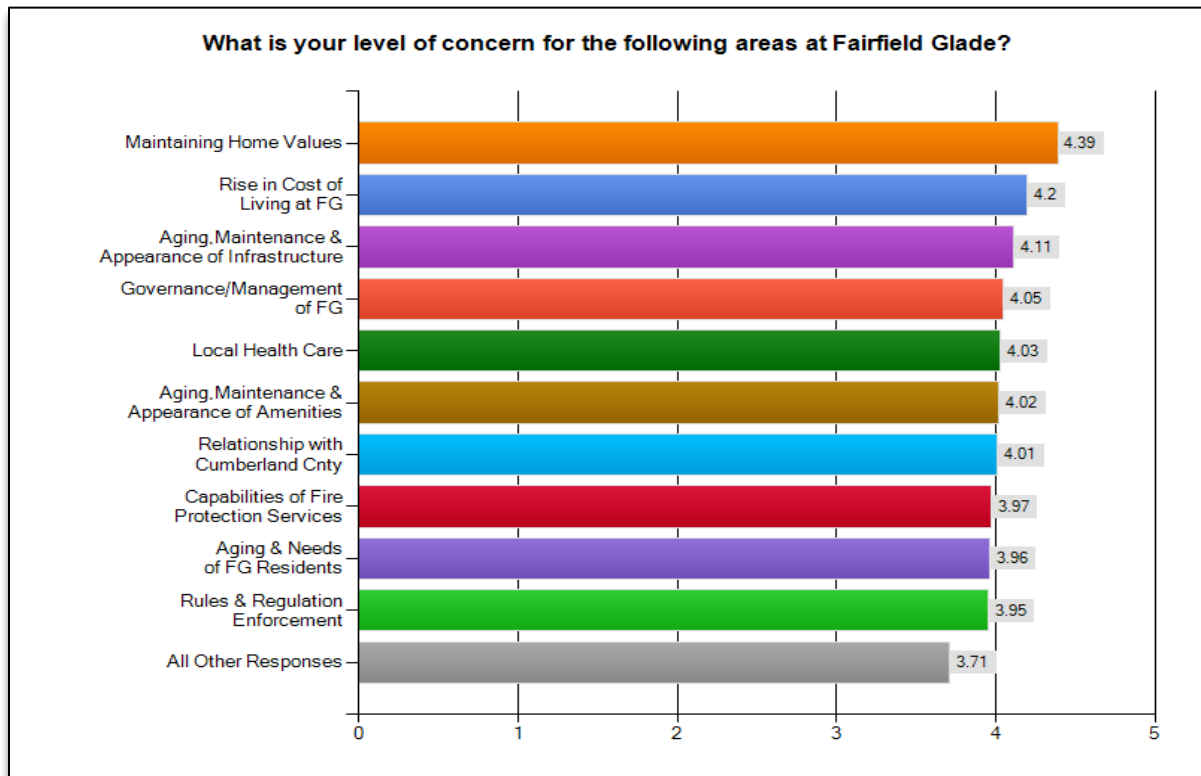
- Ratings are very similar for those who have purchased since 2001.

Desired Comparison of FG to Other Communities



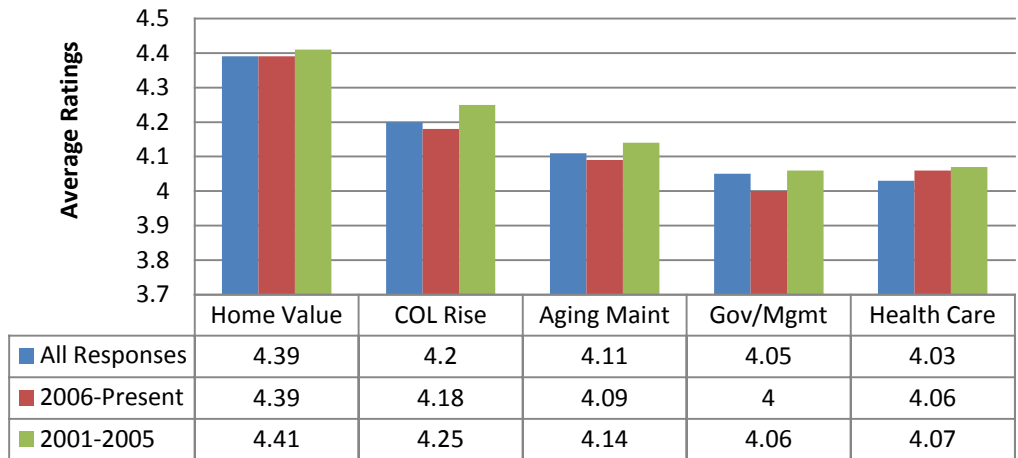
- Homeowners have a slightly higher rating than lot owners for the top two categories which is somewhat surprising given some of the other scores in the survey.

Level of Concern at Fairfield Glade



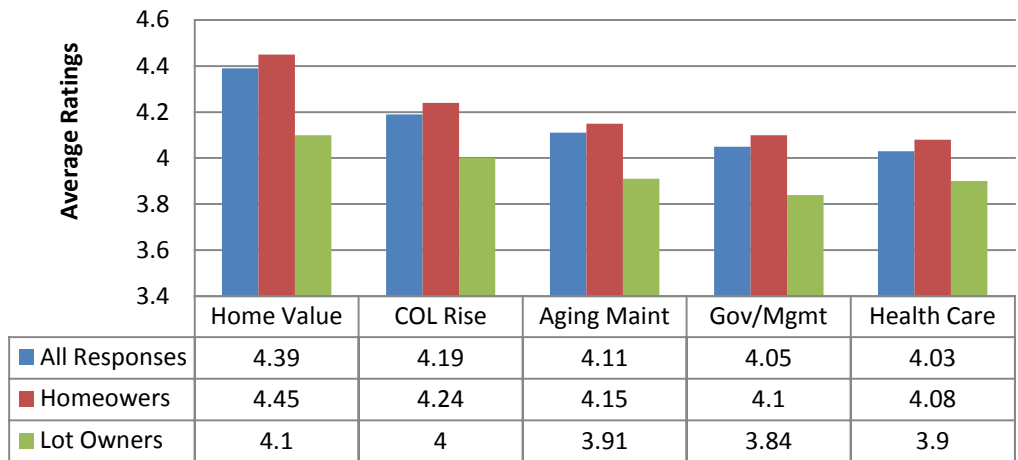
- **Top Five Areas of Concern at Fairfield Glade**
 - Maintaining Home Values
 - Rise in the Cost of Living at FG
 - Aging Maintenance & Appearance of Infrastructure
 - Governance/Management of FG
 - Local Health Care

Areas of Concern at FG



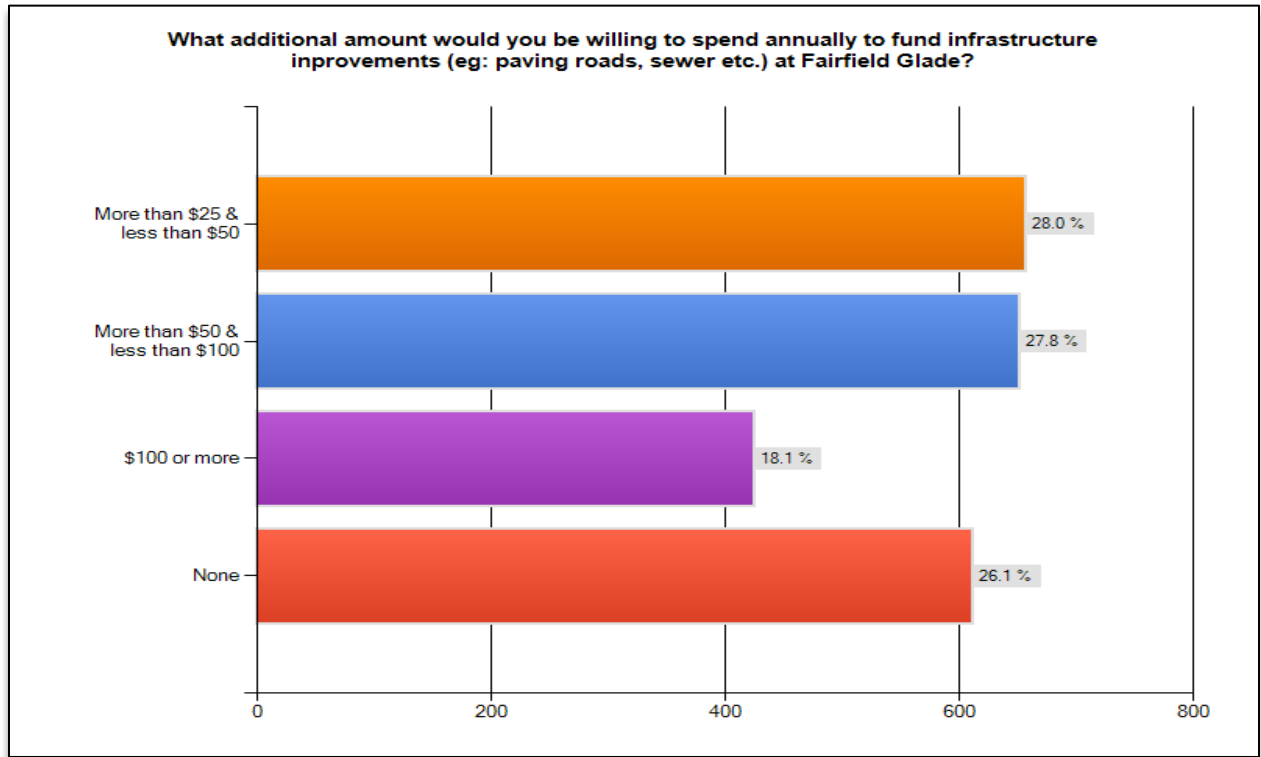
- Owners from 2001-2005 are more concerned in all areas of the top five than are the more recent owners (2001-Present).

Areas of Concern at FG



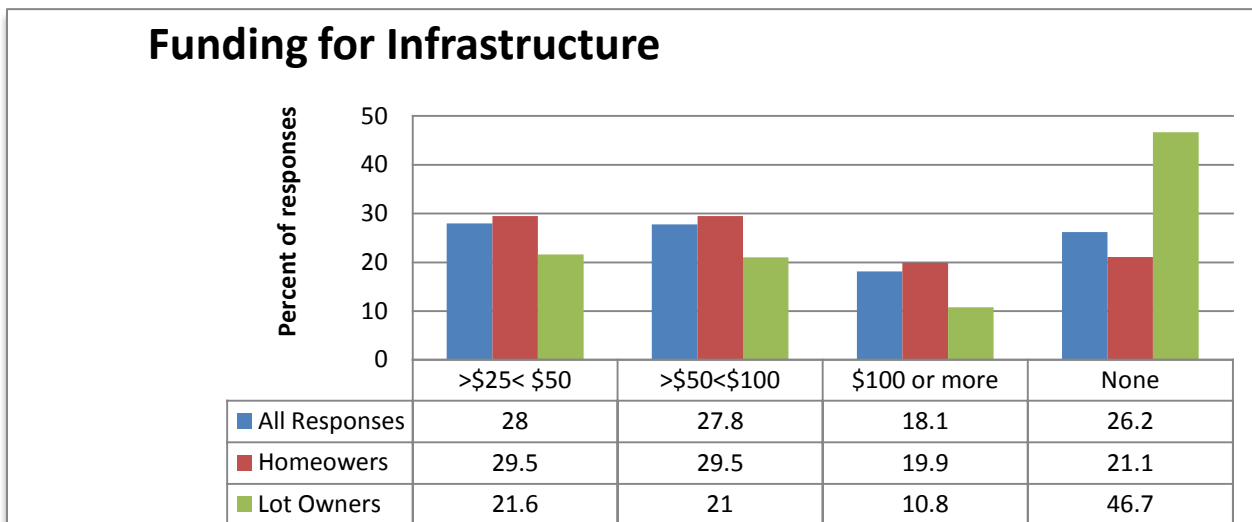
- It is not surprising that homeowners are more concerned in all areas compared to lot owners.

Willingness to Fund Infrastructure

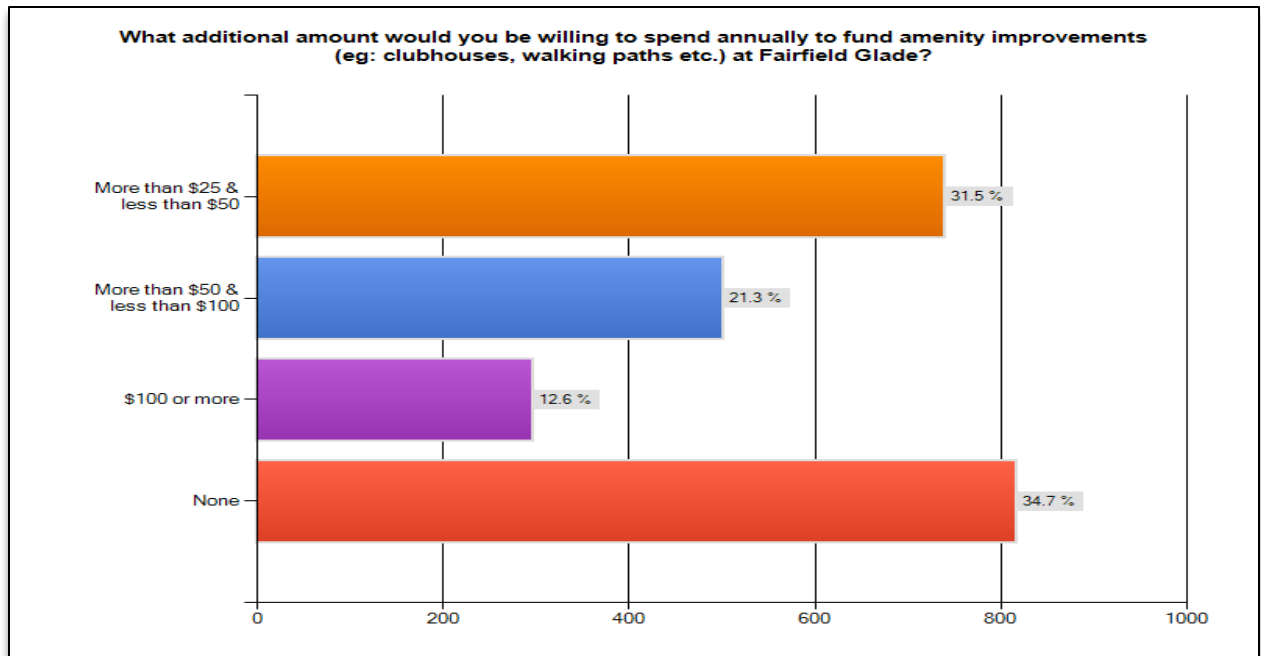


- **Comparisons between Respondents**

- 78.9% of Homeowners are willing to fund infrastructure improvements.
- 53.4% of Lot owners are willing to fund infrastructure improvements.

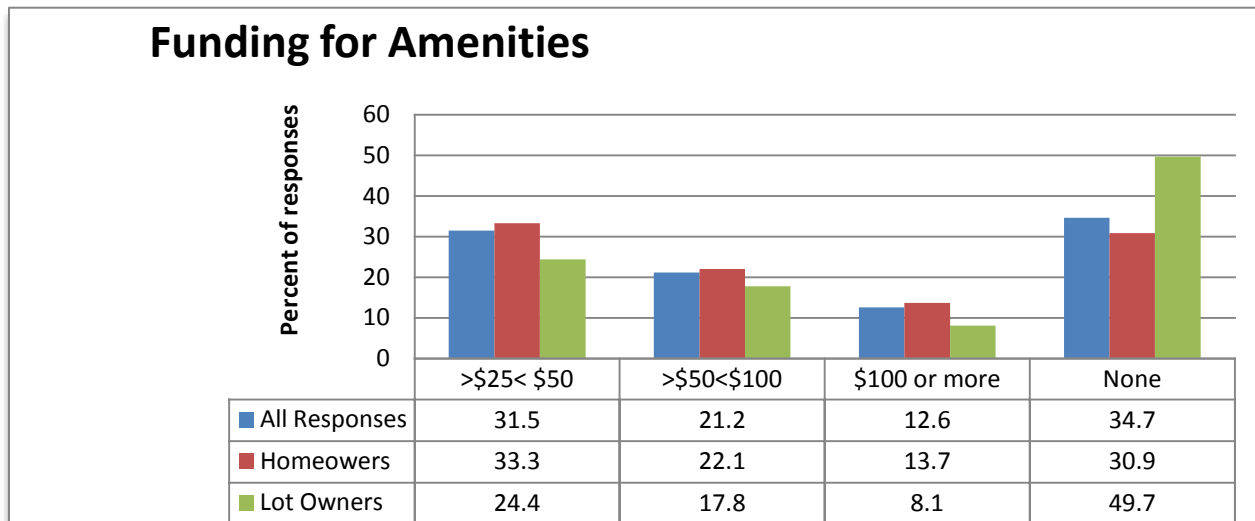


Willingness to Fund Amenity Improvements



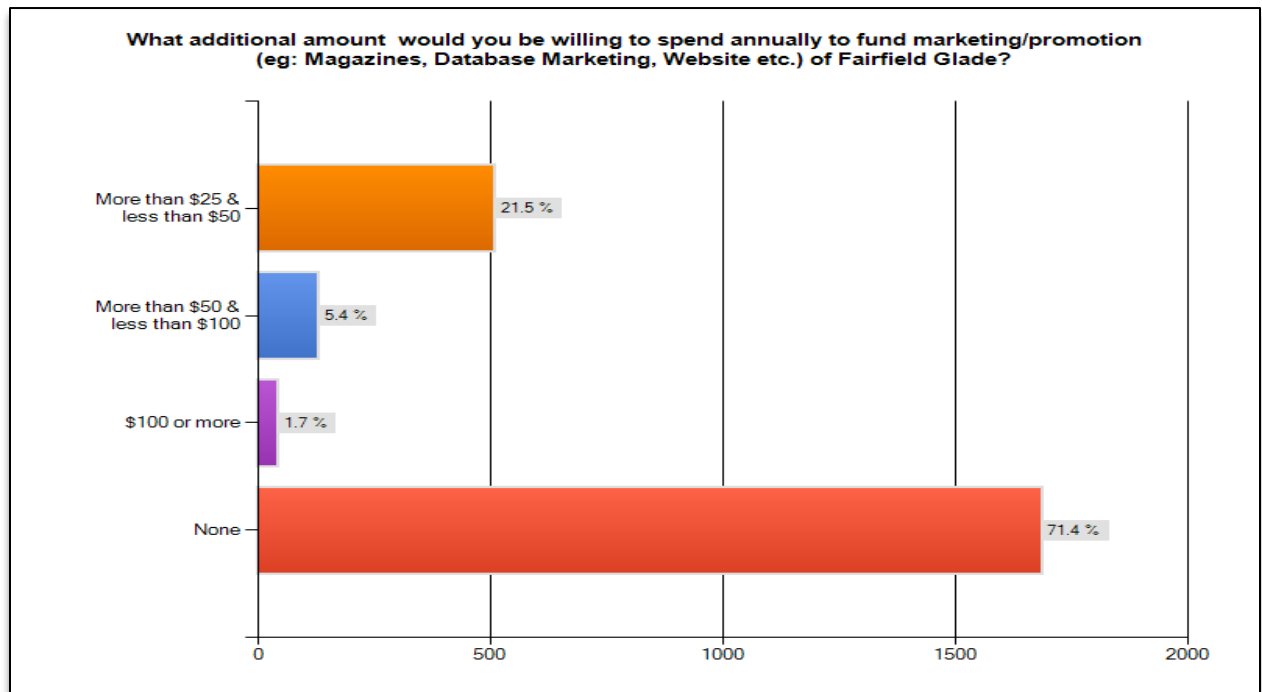
- **Comparisons between Respondents**

- 69.1% of Homeowners are willing to spend some amount on improvements.
- 53.4% of Lot owners are willing to fund improvements.



- More homeowners are willing to fund amenities and at higher levels than lot owners

Willingness to Fund Marketing/Promotions

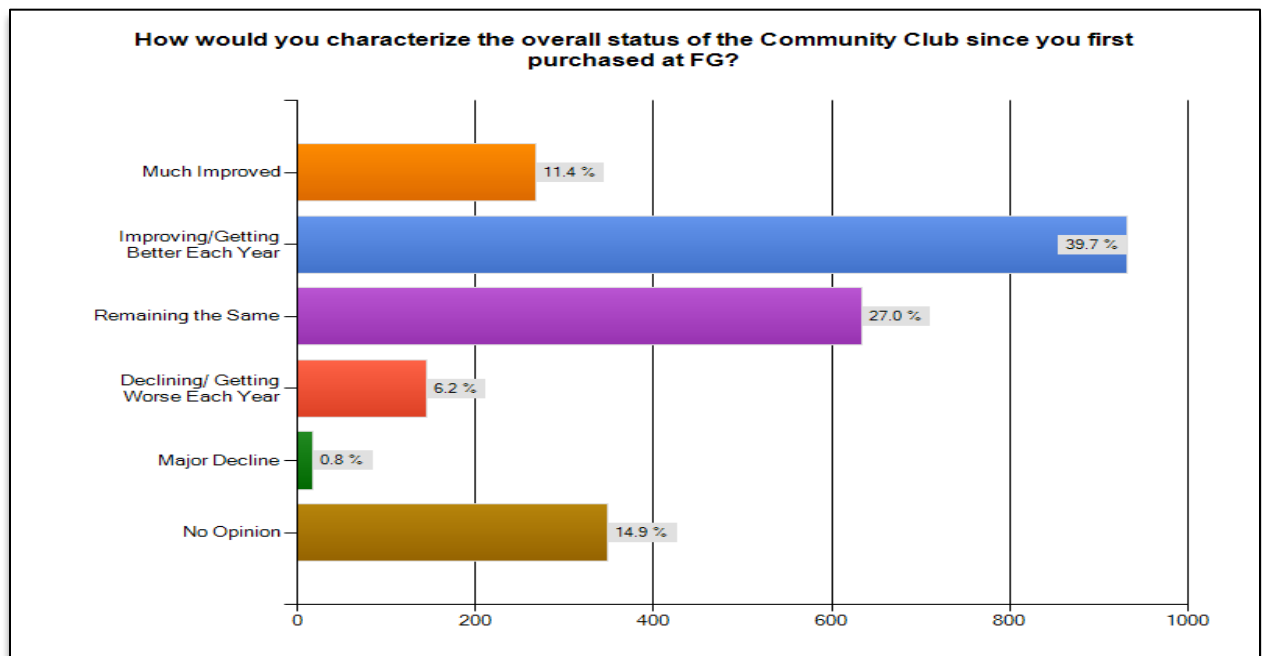


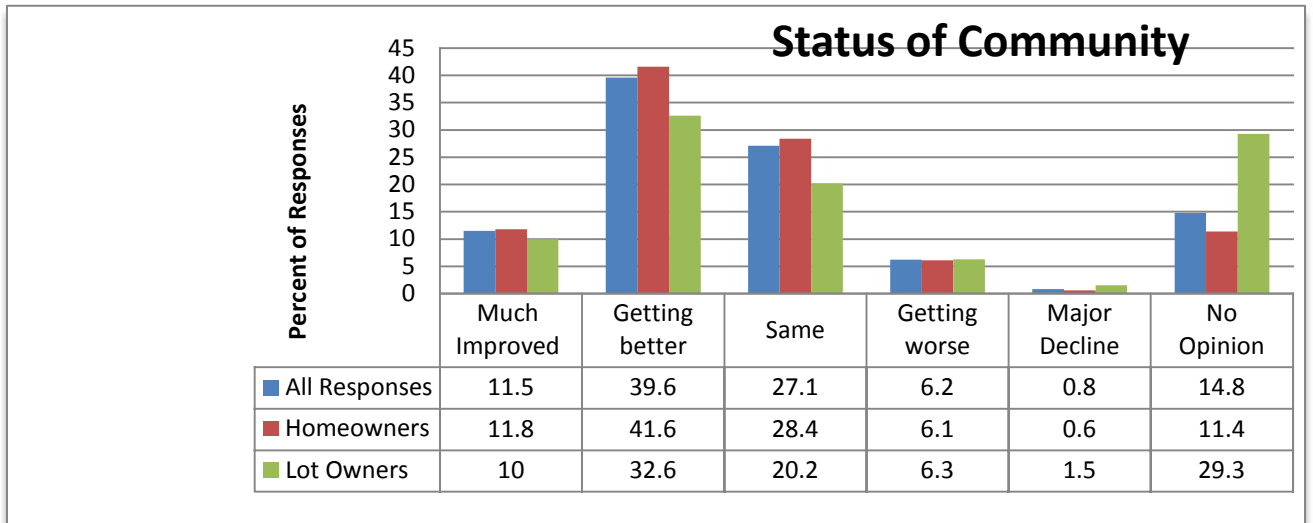
- **There is very little appetite to fund marketing or promotion at FG**
 - 71.4% are not willing to fund at any level
 - 21.5% are willing to fund a nominal amount (\$25.00)
- **Summary of Funding for FG**
 - Respondents are more willing to fund infrastructure than amenities
 - Respondents are willing to fund at higher levels for infrastructure
 - Respondents are willing to fund amenities improvements but at lower dollar levels
 - Respondents are not willing to fund marketing or promotional costs

Community Staff Ratings-All Respondents

Experience Area	Very Delighted %	Delighted %	Neither Delighted/nor Disappointed	Disappointed %	Very Disappointed %	Overall Rating
Member Recognition	11.8	32.3	50.6	4.1	1.1	3.50
Professional Appearance	14.5	43.7	38.3	2.8	0.7	3.69
Visibility	12.6	40.1	43.1	3.6	0.6	3.60
Politeness	20.2	47.3	28.2	3.0	1.3	3.82
Professionalism	19.2	44.2	30.7	4.6	1.4	3.75
Responsiveness	16.4	43.1	34.5	4.5	1.6	3.68
Availability	15.1	42.4	38.1	3.5	0.9	3.67
Training	10.5	32.8	50.1	4.7	1.8	3.45
Job Knowledge	13.5	39.5	41.7	3.9	1.5	3.60
Enforcement of Rules	10.5	34.5	45.1	7.1	2.8	3.43
Overall Opinion	16.2	44.7	33.9	4.1	1.1	3.71

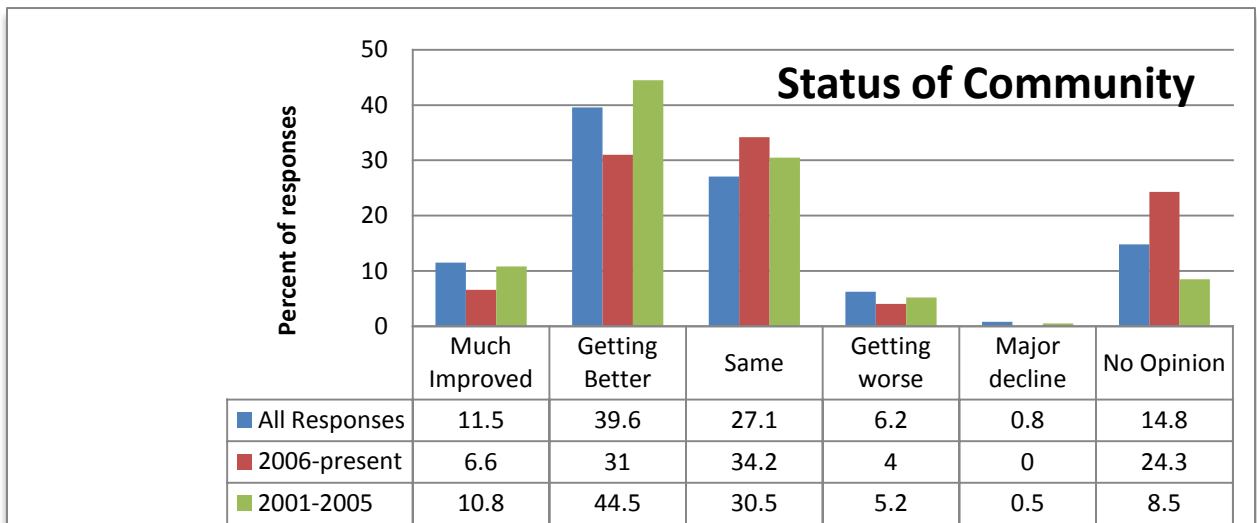
- **Community Staff Ratings**
 - Top two areas are politeness and professionalism
 - No ratings are at the 4.0 desired threshold





- **Homeowners versus lot owners**

- Homeowners and lot owners have similar ratings for “Much Improved”.
- A higher percentage of homeowners believe that FG is “Getting Better”.
- Similar percentages of homeowners and lot owners believe that things are “Getting Worse”.



- **Date of Purchase comparison**

- 2001-2005 purchasers believe that FG is getting better.

- This same group believes that things are “Much Improved” which is higher than 2006-present purchasers.
- 2006-present purchasers believe things are remaining the same which is higher than the 2001-2005 group

Net Promoter Score

NPS Question: How likely are you to recommend the community to a friend or colleague?

This is one of the most important questions that a community/club can ask of its members. The true level of member satisfaction with the club is most accurately measured by this key question. As such, PCA has stratified the responses to this question by key demographic separations. The Net Promoter Score (NPS) is used for this critical question as an indicator of the number of “Raving Fans” compared to the number of “Detractors”.

The Net Promoter Score (NPS), considered the “Ultimate Question,” asks participants how likely they are to recommend Fairfield Glade to their friends and colleagues on a scale of zero to ten where zero (0) is “Highly Unlikely” and ten (10) is “Very Likely”. Those who are Very Likely to recommend the club answered nine or ten and are Promoters (Raving Fans). Those who are unlikely to recommend the Club answered zero to six and are Detractors. Those who answered seven or eight are considered Passives and are not included in calculating the NPS.

- Answers to this question form the net promoter score, or NPS. The NPS is equal to the percentage of promoters minus the percentage of detractors:
-

Table 2: The Net Promoter Scale

Scale	Highly Unlikely				Neutral				Very Likely		
	0	1	2	3	4	5	6	7	8	9	10
	Detractors						Passives		Promoters		

Fairfield Glade's Net Promoter Score of 28.1 is a very impressive rating from the residents

Scale	Highly Unlikely			Neutral				Very Likely			
	0	1	2	3	4	5	6	7	8	9	10
				22.6%					26.7%		50.7%

- As a point of comparison, one of the best companies with many “Raving Fans” is Harley Davidson with the highest known NPS of over 80 whereas the average American company averages 10% NPS or lower.

Owner Promoters: (Selected Comments)

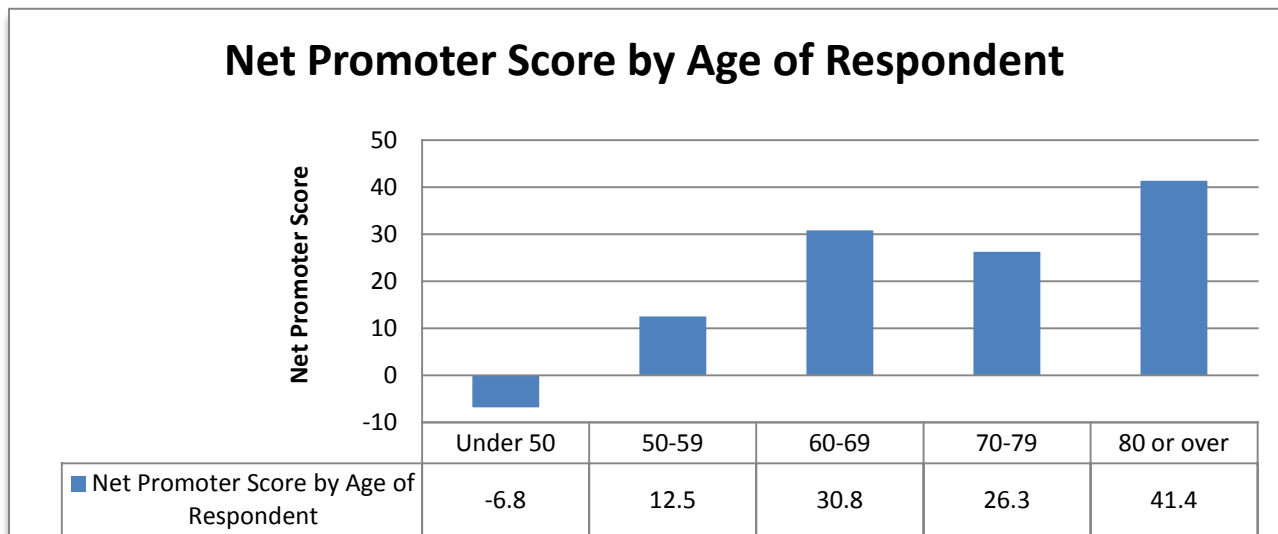
{There were 214 comments made to this question from all respondents }

- “ I like the location and mild climate and cost of living ie: re taxes”
- “ friendly, safe, conservative, active with great atmosphere”
- “FFG is the best decision we have made. We would love to have family and friends live in the community. we love it here”
- “If anyone asked my opinion I would not hesitate to recommend the Glade as it is an affordable place to retire and still be active”
- “Area is beautiful, real estate is affordable”
- “Would recommend to any golfer. FFG is a golfer's paradise. Excellent, friendly staff at the courses which certainly is a plus”

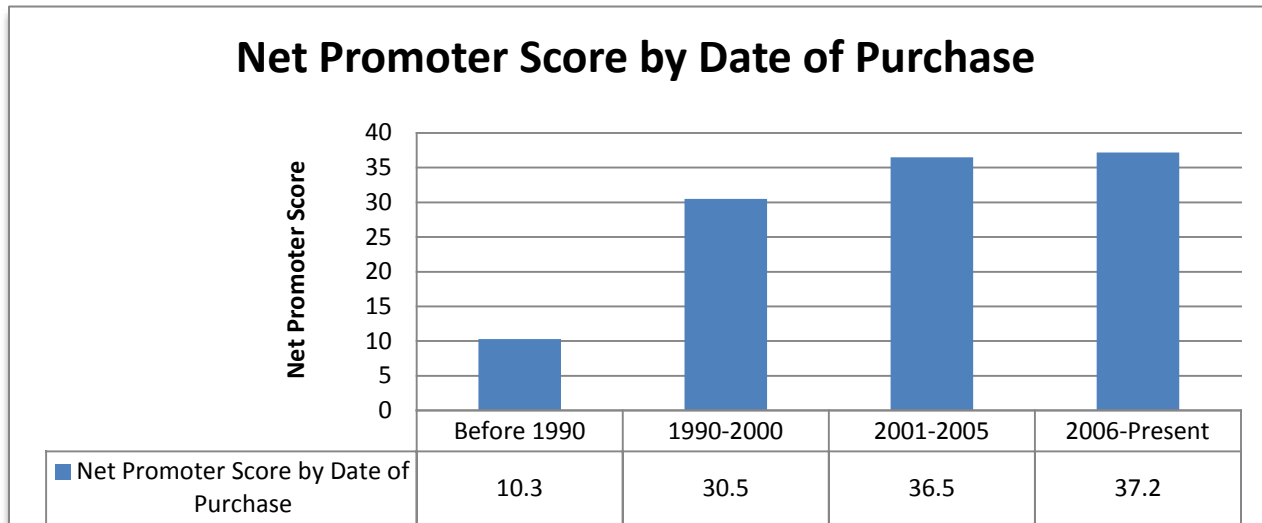
Owner Detractors: (Selected Comments)

- **“Purchased a lot in, I believe, the 1970's and have not been back probably since then. However, we have continued paying dues all these years why, I don't know. No development as far as I know has started in the Windor Bluff section. You may address this, in one of your newsletters. I don't want to pay more!”**
- **“ when we purchased we were told that roads, power, water and sewer would be expanded to include the area where we purchased it has been over 20 years and still need a 4 wheel drive to get to the lot”**
- **“Since Wyndam took over, there seems to be an inordinate amount of attention paid to time share guests at the expense of catering to full time residents. For example, time share guests can book tee times ahead of residents, the community club caters to time share guests rather than residents in terms of fees for use. “**
- **“ If I am disappointed in my investment, I cannot recommend it to someone else “**
- **“We have enough people already. We are straining our capabilities to the breaking point”**

Net Promoter Score

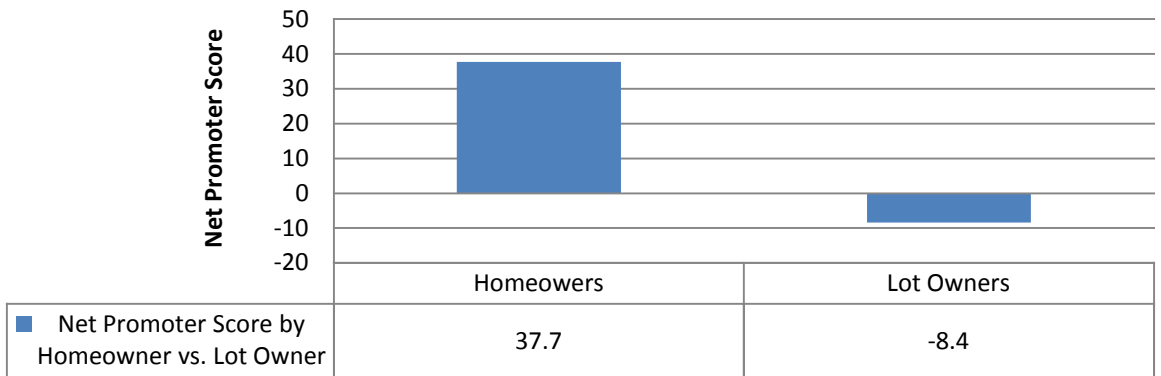


- The Total NPS for Fairfield Glade of 28.1 is driven higher primarily by members between 60-69 and those over 80 years of age who gave Fairfield Glade extremely high ratings.
- The NPS of owners under 50 years of age who represented had the lowest opinion of the community.



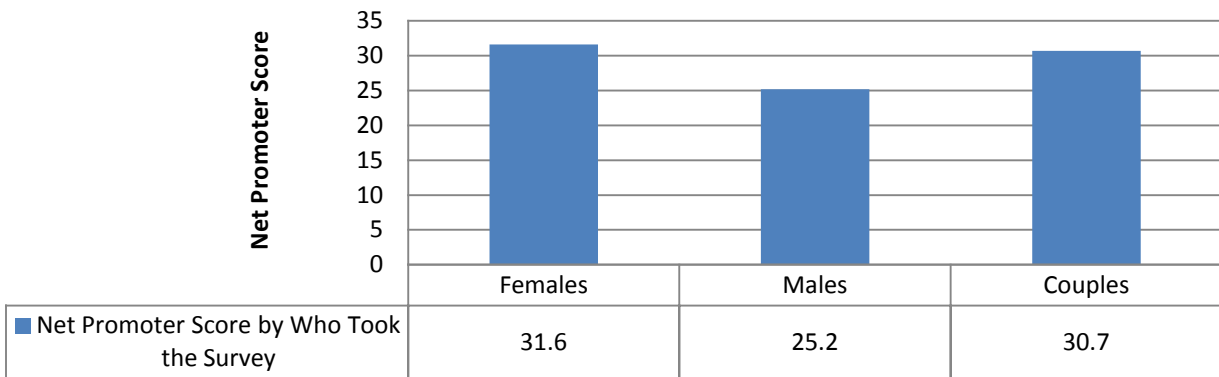
- The Total NPS for Fairfield Glade of 28.1 is driven higher primarily by owners who bought after 1990.
- The NPS of the community was boosted by those who have purchased since 2001 which has helped offset the low NPS before 1990.

Net Promoter by Homeowners vs. Lot owners

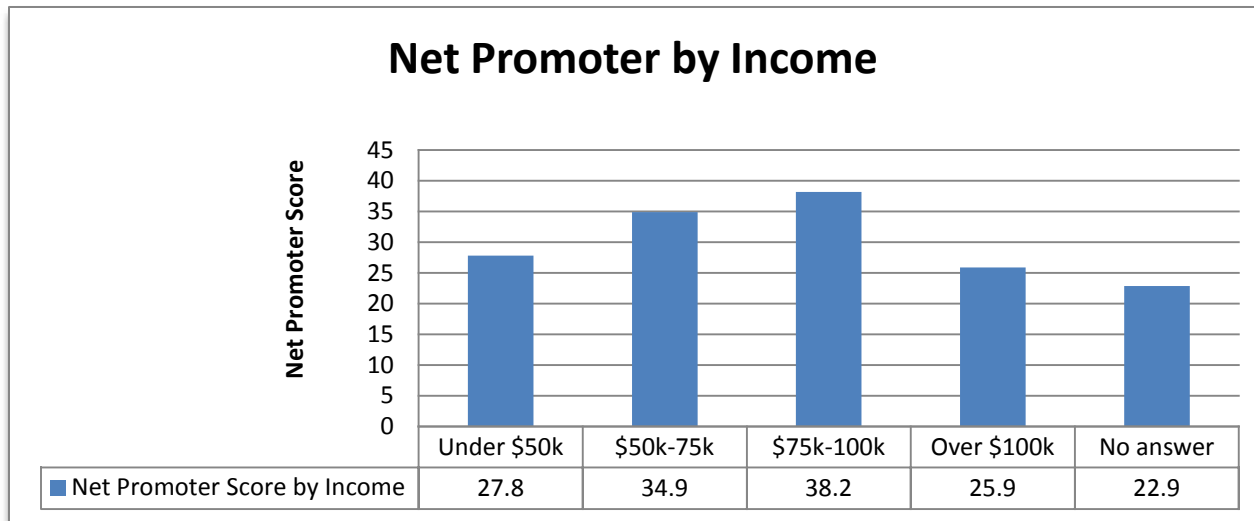


- The Total NPS for Fairfield Glade of 28.1 is driven higher primarily by homeowners who gave Fairfield Glade extremely high ratings.

Net Promoter by Who Took the Survey



- The Total NPS for Fairfield Glade of 28.1 is driven higher primarily by females and couples who gave Fairfield Glade high ratings.



- The Total NPS for Fairfield Glade of 28.1 is driven higher primarily by those with income levels between \$50k and \$100k.

Comments for Board and Management to assist in “Strategic Plan”

{There were 1,118 comments made to question 35 from all respondents }

- **“We need more hiking/biking trails and/or sidewalks so that we can walk without going in the street. With so many beautiful lakes in FFG, it's a shame there are no walking paths around some of them.”**
- **“A plan to solve the delinquent lot payment problem. A better job of marketing FFG to promote growth. A comprehensive lot use study, so new areas can be developed”**
- **“ I am concerned that Incorporation will lead to the problems other communities have faced with deterioration of amenities, infrastructure, etc”**
- **“Market to younger groups as a vacation spot, yes there are elderly residents but that is ok, generally older residents means a safer and quieter experience. Fairfield needs the help of younger people to create a nice balance of activities, not all activities are for everyone, diverse events would help each age group feel special but also inclusive to the resort as a whole”**

Summary-What has been learned from the Survey Results?

General Summary of Owner Responses:

- **Demographics of those who responded**
 - 77.5% of owners are between 60 and 79 years of age
 - 15.8% are under 59 years of age
 - The biggest age group is between 60 and 69 (46.3%)
 - Fairly even distribution between the following:
 - Females (32.6%)
 - Males (45.6%)
 - Couples (31.9%)
 - 98.5% do not have any children under 18 living with them
 - Largest income group is between \$50k & 75K (33.3%)
 - Largest group of owners originate from the Midwest (47.5%)
 - 78.8% of respondents have a home on their lot
 - 90.9% of those homeowners have FG as their primary residence
 - 68.6% of all respondents (1,695) indicated they live at FG Year around
 - 92.2% of those respondents are not planning to move

- **Purchase Demographics**
 - **Top five areas of importance of attributes for all owners are:**
 - Area Cost of Living 4.33
 - Financial Stability 4.33
 - Climate 4.31
 - Price Value of Real Estate 4.31
 - Beauty/Wilderness Areas 4.29
 - Ratings were similar across all types of groups
 - Natural Beauty/Wilderness has become more important to buyers since 2001

- **Top five amenity areas of importance by owners are:**
 - Restaurants 4.29
 - Golf Courses 4.18
 - Wellness Complex(tie) 3.96
 - Walking/Hiking /Biking Trails(tie) 3.96
 - Parks 3.84
 - Marinas/Boating 3.68
- Rankings were the same between homeowners and lot owners
- Rankings were the same by date of Purchase of Real Estate

- **Top five services in FG of importance by owners are:**
 - Public Safety-Law Enforcement 4.76
 - Volunteer Fire Department 4.71
 - Waste Water Treatment & Disposal 4.69
 - Public Safety-Resident Assistance 4.65
 - Roads and Bridges Maintenance 4.59
- Rankings were the similar between homeowners and lot owners
- Rankings were the similar by date of Purchase of Real Estate

- **Fairfield Glade Community Club**
 - 69.7% of respondents believe FG should be “Among the Top Tier” or “Equal to the Area’s Best”
 - Homeowners feel a little more strongly about quality than do lot owners
 - Owners are concerned about:
 - Maintaining home values
 - Rise in the Cost of Living
 - Age Maintenance & Appearance of Infrastructure Governance/Management of FG
 - Local Health Care
 - Only 7.0% of the respondents believe the community is getting worse
 - It is only slightly higher for lot owners 7.8%
 - Owners are more concerned about infrastructure than amenities

- Owners are more willing to fund improvements to infrastructure than amenities and not willing to fund marketing/promotion
- **Community Staff Ratings**
 - Overall ratings were below the threshold of 4.0 but some of this is expected with the high percentage that rated “neither delighted nor Disappointed”
 - **This is an opportunity for the management team to move these respondents to Delighted or Very Delighted in the future**
- **Net Promoter Score**
 - 28.1% is an acceptable score but the goal should be higher
 - 50.1% of all respondents were considered “Raving Fans”
 - The core age group of FG gave an NPS of 30.8
 - Purchasers from 2001-present gave an NPS of 37.2
 - Lot owners are not happy as they gave an NPS of (8.4)
 - NPS scores above the average were given by income groups \$50k-\$75k (34.9) and \$75-100k (38.2)

This survey provides valuable insights for Club Management, the Board of Directors and the Strategic Planning Committee regarding the current owner values and experiences at Fairfield Glade. As with any community, there is a wide range of opinions and expectations for Fairfield Glade. This information will serve as a foundation for the completion of a “Strategic Plan “at Fairfield Glade.

On behalf of the Board of Directors, the management team at Fairfield Glade and Private Club Associates, we would like to thank each of you for your participation in this survey.

Appendix A-Reason for Buying (Question #6)

**Yellow highlighted ratings indicate the top 5 highest ratings in each age category*

Average Rating	Under 50	50-59 Yrs	60-69 yrs	70-79 yrs	80 or Older	Overall
Climate	4.02	4.25	4.35	4.31	4.26	4.31
Location	4.06	4.18	4.18	4.17	4.17	4.17
Public Safety	3.87	4.14	4.14	4.08	4.10	4.11
Family or Friends Living in FG	3.21	2.88	2.73	2.84	2.88	2.81
Area Cost of Living	4.03	4.32	4.39	4.31	4.20	4.33
Price/Value of Real Estate	4.32	4.28	4.34	4.30	4.23	4.31
Amenities/Activities	3.93	4.27	4.37	4.21	4.13	4.28
Golf	3.85	3.81	4.01	3.92	3.96	3.95
Tennis	2.57	2.50	2.47	2.42	2.46	2.46
Marinas/Boating	3.33	3.58	3.33	3.16	3.01	3.29
Medical Facilities	3.37	4.00	4.12	4.11	4.08	4.08
Natural Beauty/Wilderness Areas	4.08	4.36	4.34	4.23	4.09	4.29
Pools & Playgrounds	3.53	3.45	3.36	3.22	3.12	3.32
Wellness Complex	3.24	3.72	3.72	3.65	3.48	3.67
Community Center	3.57	3.73	3.73	3.62	3.63	3.69
Financial Stability	4.07	4.35	4.38	4.28	4.17	4.32

Average Rating	Before 1990	1990 to 2000	2001 to 2005	2006 to present	Overall
Climate	4.33	4.33	4.39	4.40	4.37
Location	4.20	4.20	4.18	4.19	4.19
Public Safety	4.14	4.11	4.14	2.73	4.15
Family or Friends Living in FG	2.97	2.78	2.82	2.73	2.78
Area Cost of Living	4.30	4.36	4.44	4.47	4.43
Price/Value of Real Estate	4.26	4.27	4.39	4.39	4.36
Amenities/Activities	4.22	4.21	4.24	4.39	4.29
Golf	4.06	4.12	3.94	3.78	3.93
Tennis	2.52	2.49	2.45	2.41	2.44
Marinas/Boating	3.26	3.22	3.27	3.40	3.31
Medical Facilities	4.10	4.12	4.13	4.19	4.15

Natural Beauty/Wilderness Areas	4.16	4.20	4.29	4.39	4.30
Pools & Playgrounds	3.43	3.23	3.23	3.32	3.27
Wellness Complex	3.46	3.46	3.65	3.84	3.69
Community Center	3.66	3.49	3.56	3.87	3.67
Financial Stability	4.19	4.26	4.35	4.42	4.35

Average Rating	Females	Males	Couples	Overall
Climate	4.37	4.26	4.34	4.31
Location	4.23	4.12	4.19	4.17
Public Safety	4.21	4.00	4.19	4.11
Family or Friends Living in FG	2.85	2.77	2.83	2.81
Area Cost of Living	4.41	4.24	4.40	4.33
Price/Value of Real Estate	4.40	4.23	4.36	4.31
Amenities/Activities	4.33	4.24	4.29	4.28
Golf	3.84	4.04	3.91	3.95
Tennis	2.50	2.42	2.52	2.46
Marinas/Boating	3.33	3.25	3.33	3.29
Medical Facilities	4.19	3.97	4.17	4.08
Natural Beauty/Wilderness Areas	4.42	4.20	4.28	4.29
Pools & Playgrounds	3.42	3.20	3.40	3.32
Wellness Complex	3.75	3.58	3.76	3.67
Community Center	3.76	3.60	3.76	3.69
Financial Stability	4.40	4.25	4.37	4.33

**Yellow highlighted ratings indicate the highest ratings in each age category*

Average Rating	Homeowner	Lot Owner	Overall
Climate	4.38	4.07	4.31
Location	4.19	4.11	4.17
Public Safety	4.15	3.95	4.11
Family or Friends Living in FG	2.79	2.88	2.81
Area Cost of Living	4.42	3.97	4.33
Price/Value of Real Estate	4.35	4.17	4.31
Amenities/Activities	4.29	4.24	4.28
Golf	3.93	4.04	3.95
Tennis	2.44	2.52	2.46
Marinas/Boating	3.31	3.23	3.29
Medical Facilities	4.15	3.83	4.08

Natural Beauty/Wilderness Areas	4.30	4.25	4.29
Pools & Playgrounds	3.28	3.46	3.32
Wellness Complex	3.68	3.64	3.67
Community Center	3.67	3.72	3.68
Financial Stability	4.35	4.24	4.32

**Yellow highlighted ratings indicate the highest ratings in each age category*

Average Rating	< than \$50k	Between \$50k& \$75k	Between \$75k & \$100k	Over \$100k	Prefer not to Answer
Climate	4.30	4.33	4.40	4.27	4.28
Location	4.17	4.18	4.22	4.18	4.14
Public Safety	4.12	4.07	4.08	4.03	4.19
Family or Friends Living in FG	2.95	2.72	2.78	2.74	2.81
Area Cost of Living	4.42	4.36	4.37	4.11	4.34
Price/Value of Real Estate	4.38	4.32	4.33	4.18	4.32
Amenities/Activities	4.19	4.27	4.37	4.31	4.27
Golf	3.78	4.00	4.11	4.24	3.81
Tennis	2.46	2.45	2.46	2.65	2.37
Marinas/Boating	3.23	3.29	3.30	3.46	3.25
Medical Facilities	4.08	4.09	4.03	3.94	4.17
Natural Beauty/Wilderness Areas	4.28	4.28	4.31	4.27	4.30
Pools & Playgrounds	3.35	3.34	3.27	3.29	3.30
Wellness Complex	3.60	3.62	3.68	3.79	3.72
Community Center	3.65	3.65	3.67	3.74	3.73
Financial Stability	4.26	4.29	4.38	4.37	4.34

Appendix B-Importance of Amenities (Question #21)

Between Homeowner and Lot Owner

Amenities/Activities	Homeowners	Lot Owners	All Responses
Golf Course	4.16	4.24	4.17
Outdoor Tennis Courts	2.80	2.79	2.80
Indoor Tennis Courts	2.80	2.80	2.80
Outdoor Pools	3.39	3.59	3.43
Indoor Pools	3.60	3.76	3.63
Pickleball	2.81	2.70	2.79
Marinas/Boating	3.69	3.61	3.68
Fishing Areas	3.37	3.53	3.41
Parks	3.83	3.91	3.74
Playgrounds	3.10	3.21	3.13
Walking/Hiking/Biking Trails	3.95	4.00	3.96
Gymnasium	3.49	3.67	3.52
Wellness Complex owned by CMC	3.98	3.85	3.96
Restaurants	4.31	4.21	4.29
Arts & Carts	3.28	3.31	3.29
Bus Tours	3.40	3.31	3.38
Library	3.68	3.66	3.68
Stables	2.99	2.99	2.99
Dog Park	2.91	3.06	2.94
Community Gardens	3.08	3.32	3.13
Spa Services	2.87	3.15	2.93

By Date of Purchase of Real Estate

Amenities/Activities	Before 1990	1990 to 2000	2001 to 2005	2006 to present	Overall
Golf Course	4.25	4.27	4.19	4.03	4.17
Outdoor Tennis Courts	2.84	2.80	2.81	2.76	2.80
Indoor Tennis Courts	2.84	2.83	2.81	2.76	2.81
Outdoor Pools	3.50	3.39	3.34	3.47	3.42
Indoor Pools	3.64	3.60	3.53	3.71	3.63
Pickleball	2.66	2.72	2.77	2.94	2.79
Marinas/Boating	3.61	3.61	3.65	3.78	3.67
Fishing Areas	3.44	3.32	3.33	3.52	3.52
Parks	3.78	3.73	3.75	4.05	3.84
Playgrounds	3.25	3.18	3.03	3.07	3.12
Walking/Hiking/Biking Trails	3.84	3.79	3.94	4.20	3.96
Gymnasium	3.50	3.37	3.50	3.67	3.52
Wellness Complex owned by CMC	3.87	3.93	3.91	4.07	3.96
Restaurants	4.27	4.22	4.27	4.38	4.29
Arts & Crafts	3.34	3.21	3.24	3.37	3.29
Bus Tours	3.34	3.28	3.34	3.53	3.38
Library	3.62	3.55	3.67	3.83	3.68
Stables	3.05	2.92	2.93	3.05	2.99
Dog Park	2.90	2.80	2.87	3.13	2.94
Community Gardens	3.17	2.97	3.02	3.32	3.13
Spa Services	2.91	2.83	2.89	3.07	2.93

- Top Five Areas of Importance in each section are highlighted in YELLOW
- The same areas that were important in 1990 are still important today!

Appendix C-Importance of Services (Question #23)

Between Homeowner and Lot Owner

Services provided in FG	Homeowners	Lot Owners	All Responses
Public Safety-Law Enforcement	4.81	4.56	4.76
Public Safety-Resident Assistance	4.72	4.36	4.65
Health & Wellness	4.50	4.28	4.46
Home Delivered Meals	3.51	3.33	3.47
Care for Caregivers	3.68	3.46	3.63
Vial for Life	3.70	3.47	3.66
Continuing Learning Seminars	3.75	3.55	3.71
Volunteer Fire Dept	4.80	4.35	4.71
Waste Water Treatment	4.74	4.45	4.69
Common Area Landscaping	4.35	4.13	4.31
Common Area Signage	4.18	3.99	4.14
Facilities Maint & Appearance	4.56	4.34	4.52
Architectural Control	4.30	4.03	4.25
Roads & Bridges Maint	4.62	4.44	4.59
Lakes & Dam Maint	4.58	4.41	4.55
Community Website	4.09	3.94	4.06
Email Blasts	3.90	3.67	3.85
Member Communication	4.23	4.00	4.19
Neighborhood Watch	4.30	4.11	4.27

By Date of Purchase of Real Estate

Services Provided in FG	Before 1990	1990 to 2000	2001 to 2005	2006 to present	Overall
Public Safety-Law Enforcement	4.71	4.80	4.74	4.78	4.76
Public Safety-Resident Assistance	4.60	4.69	4.65	4.66	4.65
Health & Wellness	4.36	4.48	4.45	4.51	4.46
Home Delivered Meals	3.44	3.50	3.49	3.48	3.48
Care for Caregivers	3.59	3.66	3.69	3.61	3.64
Vial for Life	3.60	3.71	3.65	3.67	3.66
Continuing Learning Seminars	3.57	3.69	3.76	3.79	3.72
Volunteer Fire Dept	4.62	4.77	4.73	4.71	4.71
Waste Water Treatment	4.62	4.69	4.74	4.69	4.69
Common Area Landscaping	4.18	4.26	4.34	4.40	4.31
Common Area Signage	4.03	4.10	4.14	4.25	4.14
Facilities Maint & Appearance	4.44	4.49	4.54	4.57	4.52
Architectural Control	4.21	4.25	4.24	4.30	4.25
Roads & Bridges Maint	4.52	4.62	4.60	4.61	4.59
Lakes & Dam Maint	4.46	4.57	4.53	4.61	4.55
Community Website	3.91	4.03	4.07	4.17	4.06
Email Blasts	3.67	3.80	3.85	4.00	3.85
Member Communication	4.09	4.19	4.19	4.25	4.19
Neighborhood Watch	4.25	4.22	4.22	4.35	4.26

- Top Five Areas of Importance in each section are highlighted in YELLOW
- The same areas that were important in 1990 are still important today!