

Sea Pines Property Owner Survey Presentation

February 18th, 2016

Key Points For Review

- Developed RFP in 2014 and in 2015 contracted with Story Powered and Percept for two key communication objectives.
 1. Help CSA engage with and improve communications to owners by expanding the owner profile information in our database.
 2. Gather information and feedback on several key services and initiatives that are currently being provided or considered for the future.
- Today's Presentation is a summary of the profile data collected during the survey and key findings.
- The survey data you will see today is information that will assist committees and board members in making better decisions.
- We believe these two objectives will help us continue to evaluate the current services we provide and possible future services beneficial to the community.

Property Owner Survey Presentation

Introductions

Bill Borg, StoryPowered, President

Gretchen Grabowski, Percept Research
Senior Project Manager (Presenter)

Sea Pines Community Survey 2015

Bill Borg, Storypowered
Gretchen Grabowski, Percept Research
February 18, 2015



About Percept Research

- 🌀 Market research and communications consultancy
- 🌀 Founded in 2003
- 🌀 Based in Charlotte, North Carolina
- 🌀 Clients include a diverse array of academic institutions, non-profit organizations, and corporations
- 🌀 Work examples include:
 - 🌀 Secondary analysis; qualitative and quantitative primary research
 - 🌀 Customized client portal development, maintenance, and innovation

Survey results are representative of Sea Pines owners



Two-part survey fielded Oct. 5 - Nov. 2, 2015

- Owner Profile
- Community Survey
- Surveys were comprised of close-ended, open-ended, and rating scale questions.



There were 2,472 completed surveys

- Response rate of 35.2%



Completed surveys from Primary and Secondary owners/contacts

- Primary owners completed the Owner Profile and Community Survey
- Secondary owners/contacts (787) completed the Community Survey

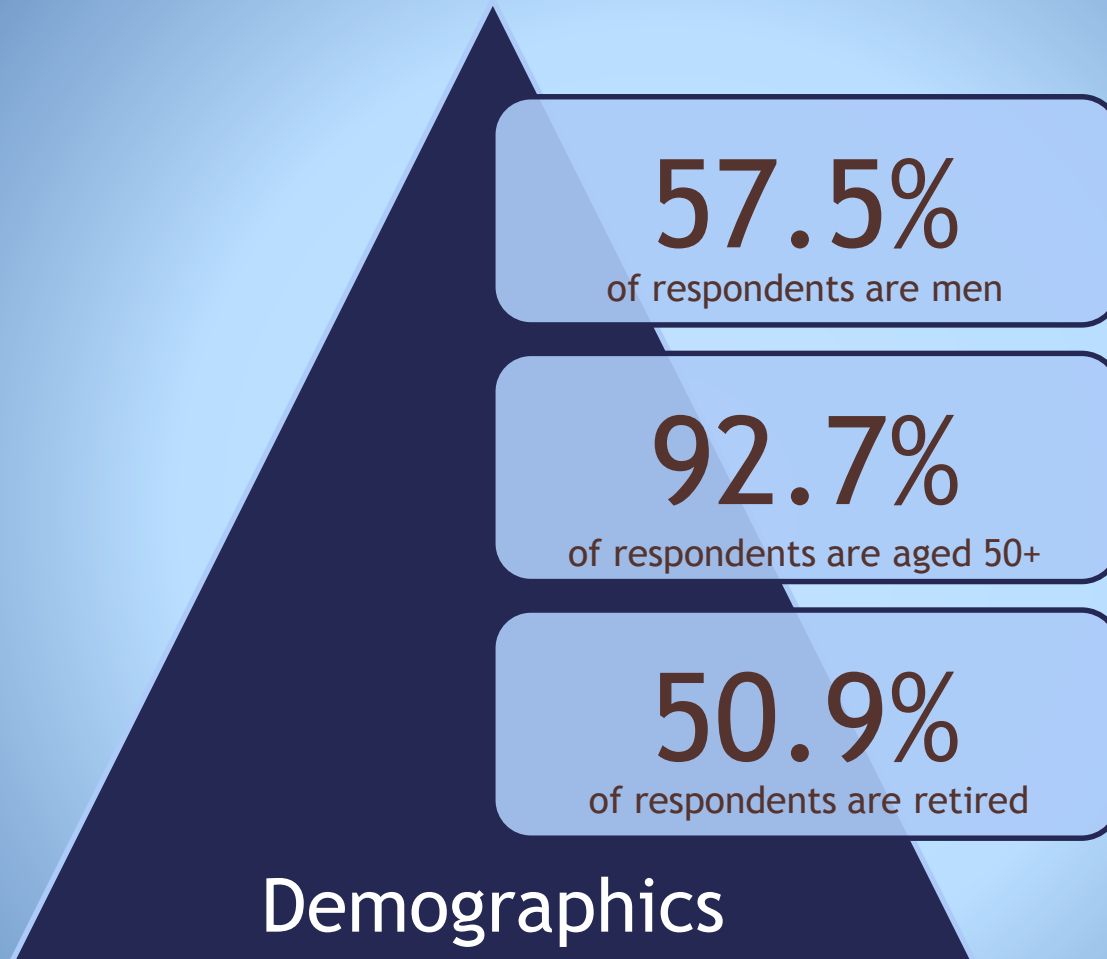


- **Who are the Sea Pines Owners?**
- **Overall Sea Pines Assessment**
- **Sea Pines Amenity Usage and Awareness**
- **Maintenance and Security Operations**
- **Proposed Strategic Initiatives**
- **Communication with Sea Pines CSA**

Who are the Sea Pines owners?

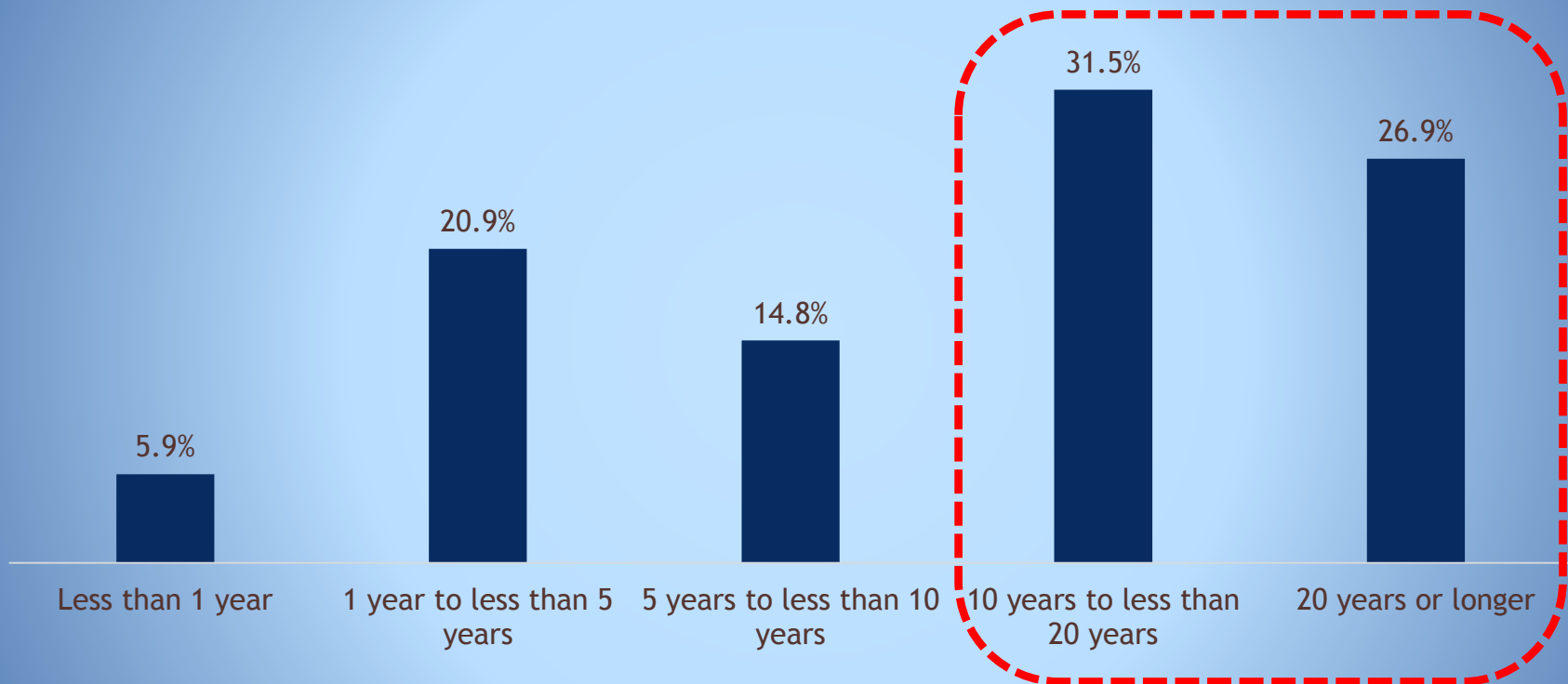


Survey respondents are representative of Sea Pines owners



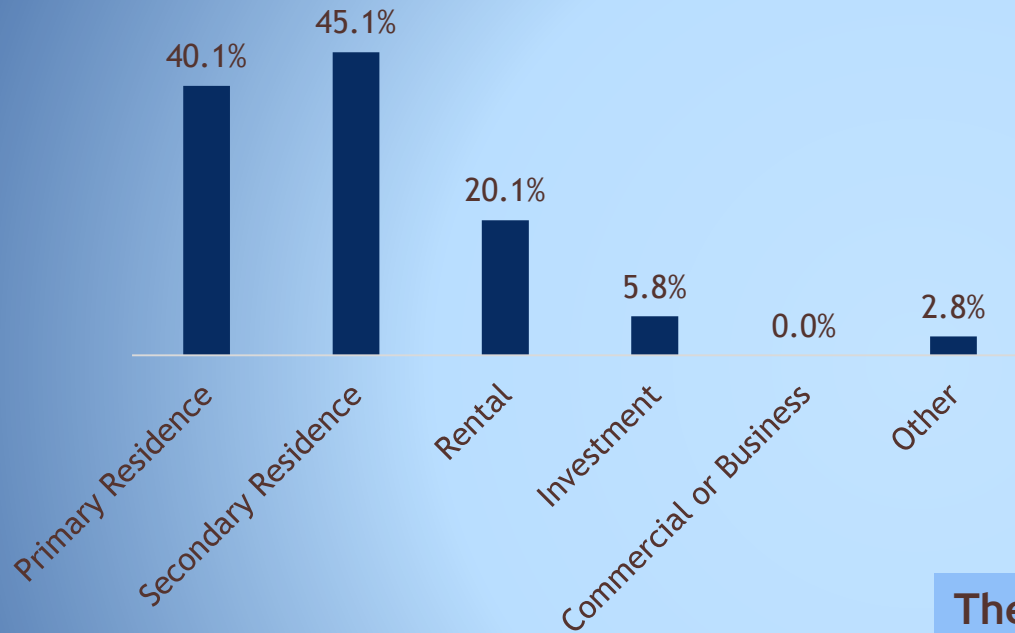
Most are longtime property owners

Total Length of time Property Owned at Sea Pines



They are slightly more likely to own secondary residences at Sea Pines

Property Use(s)



The largest share of owners are in residence in **April and October.**

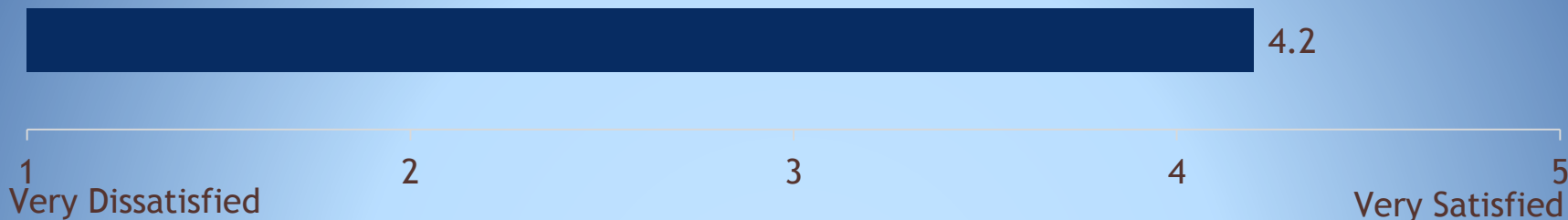


Overall Sea Pines Assessment

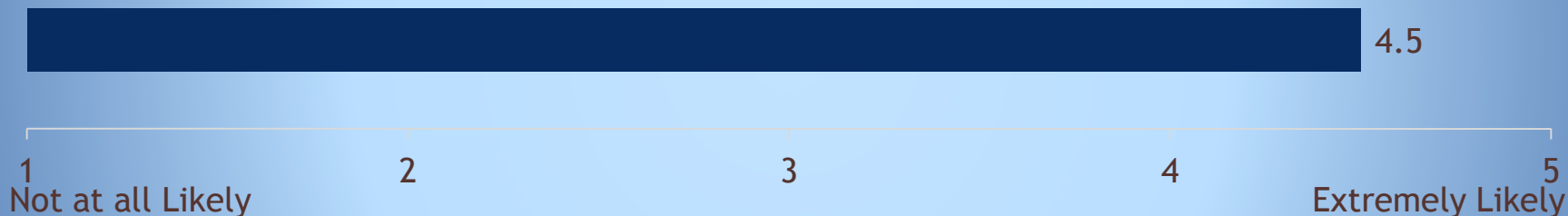


Sea Pines owners are satisfied with their community experience

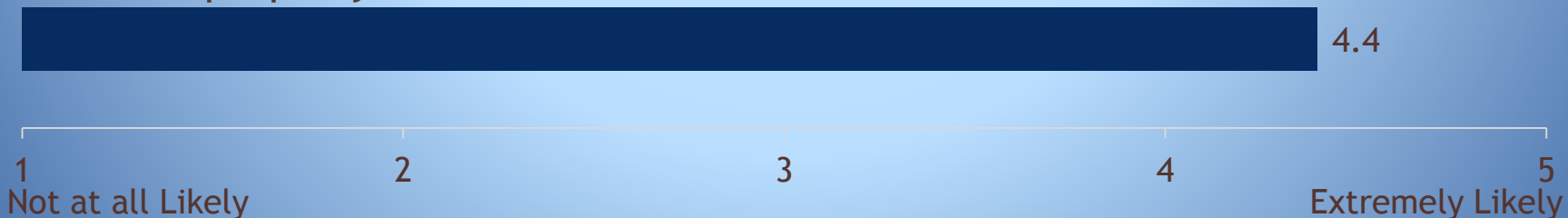
How satisfied are you with the services provided by Sea Pines CSA?



How likely are you to recommend Sea Pines to a friend or colleague?



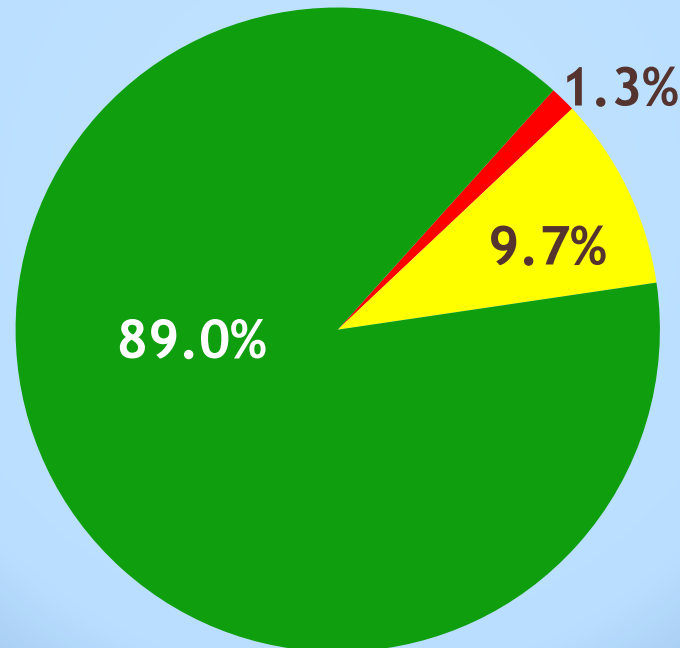
If you were seeking to purchase a property again, how likely would you be to choose a property in Sea Pines?



The vast majority are community Champions

Owner Loyalty Index

■ Detractors ■ Neutral ■ Champions



Sea Pines Amenity Usage and Awareness



Beaches and trails are the most influential on property purchases



74.8%
Beach Access

53.1%
Biking/leisure/
hiking trails



Which of the following factors were the most influential on your decision to purchase property in Sea Pines?

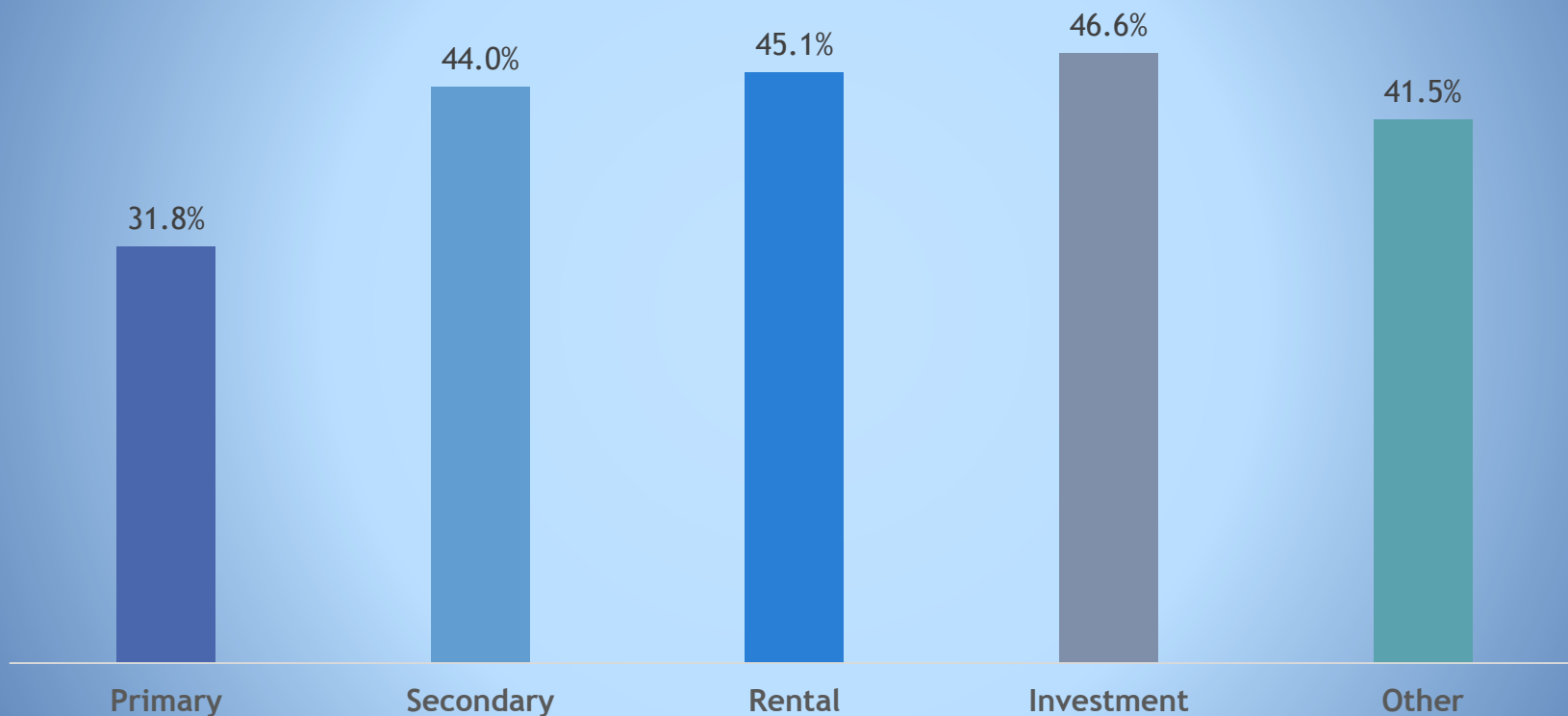
The natural environment is especially influential among long-time owners



Which of the following factors were the most influential on your decision to purchase property in Sea Pines?

Vacations are more influential among non-primary owners

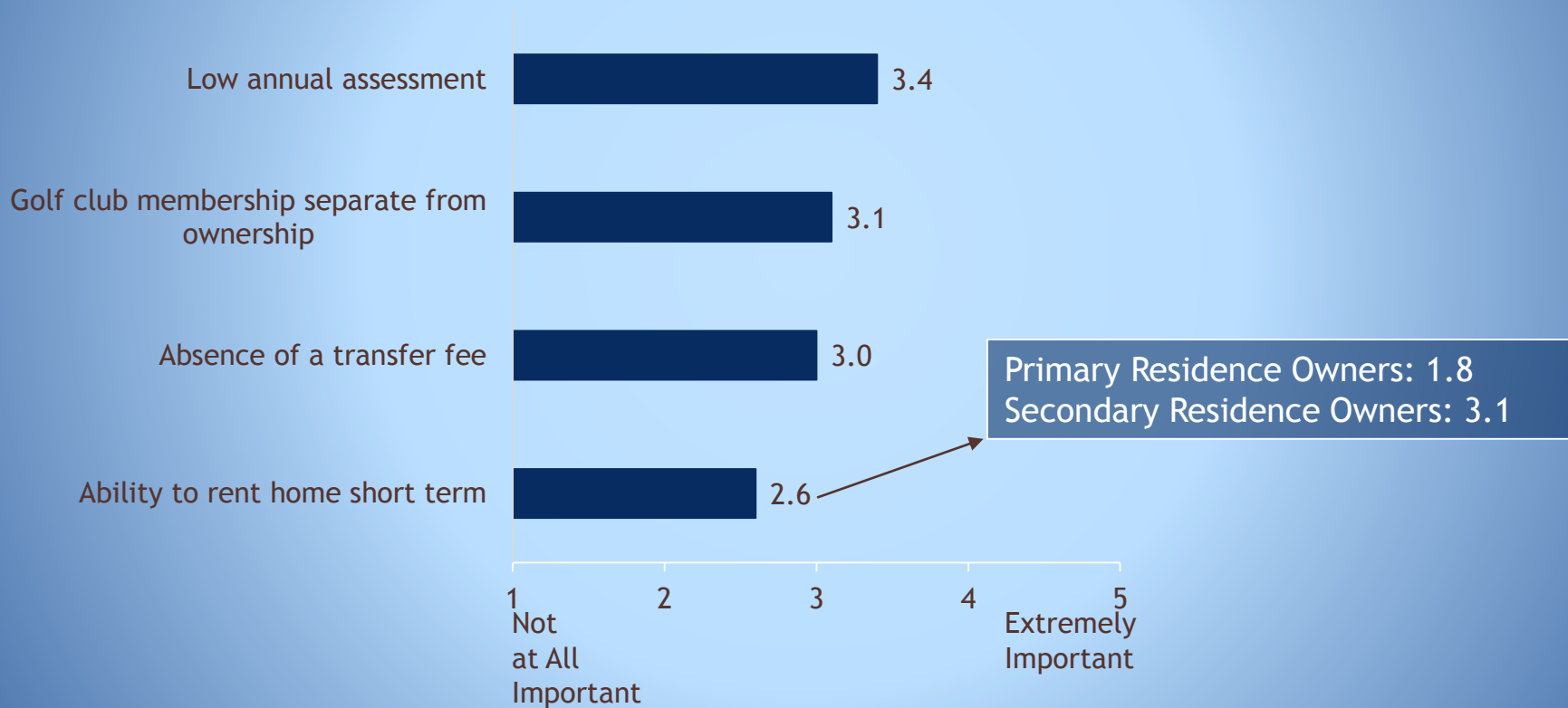
I/members of my household vacationed here before buying



Which of the following factors were the most influential on your decision to purchase property in Sea Pines?

Low annual assessments are important in the decision to purchase

Important Factors in Purchasing at Sea Pines vs. Another Hilton Head Island Community



How important were each of the following factors in your decision to purchase property in Sea Pines versus another Hilton Head Island Community?

Restaurant and shopping amenities are used at least once a month

Frequency of Using Restaurant and Shopping Amenities

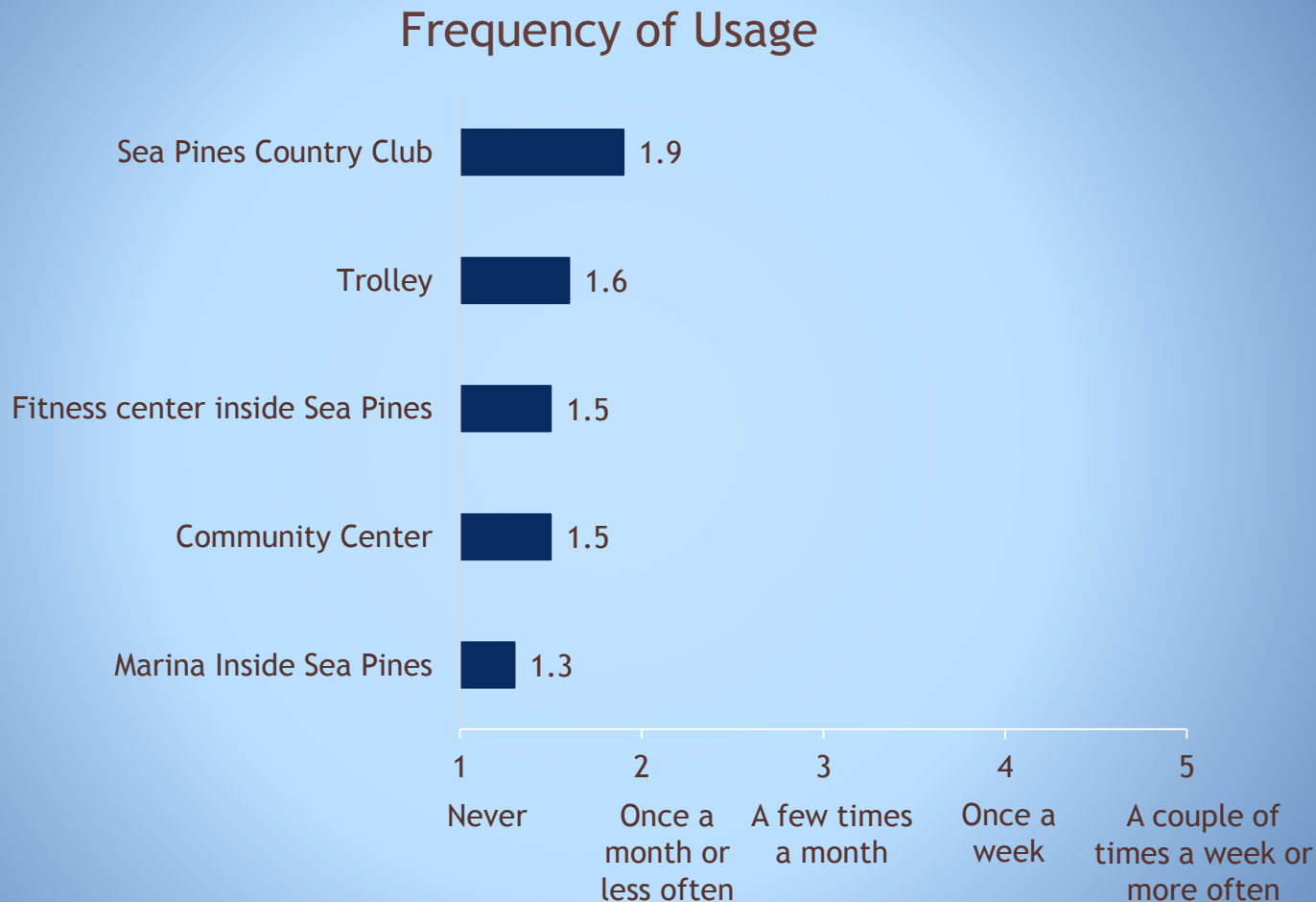


Primary owners and those owning property more than 10 years are more likely to use the Sea Pines Country Club.

Non-Primary owners are more likely to use the restaurant and shopping amenities.

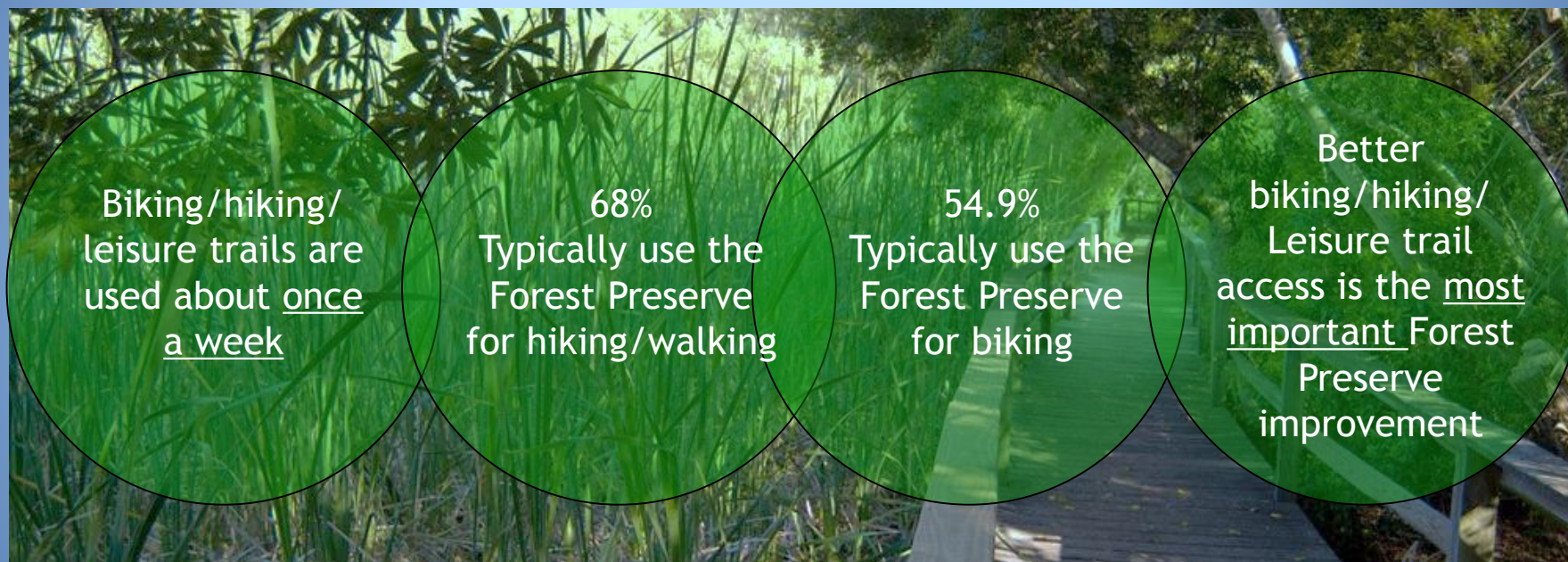
How often do you use the following restaurant and shopping amenities when at Sea Pines?

Other Sea Pines amenities are used infrequently



How often do you use the following when at Sea Pines?

Trails at Sea Pines are an important amenity for owners



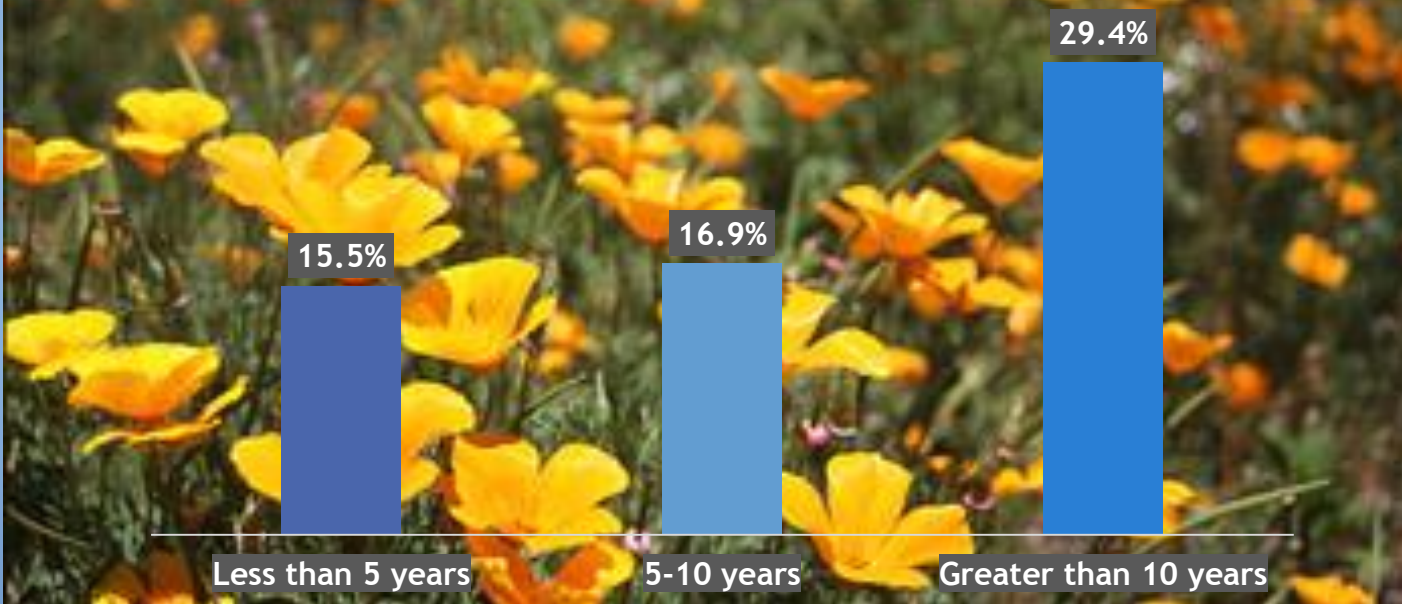
How often do you use the following outdoor amenities when at Sea Pines?

How do you typically use the Forest Preserve?

How important do you feel each of the following improvements are to the Sea Pines Forest Preserve?

The wildflower field is more of a draw for long-time Sea Pines owners

Visit the Warner W. Plahs Wildflower Field



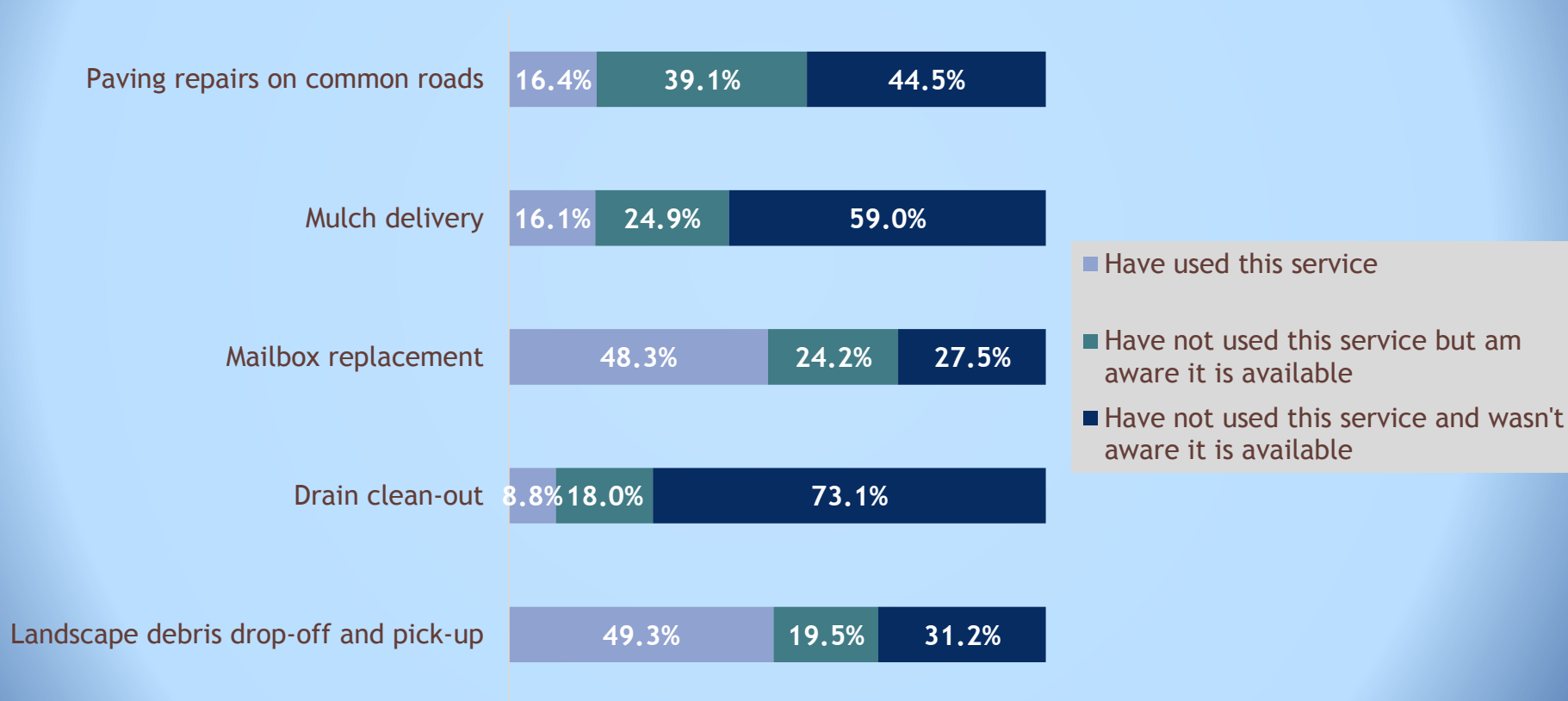
How do you typically use the Forest Preserve?

Maintenance and Security Operations



Landscape and mailbox replacement offerings are the most commonly-used maintenance services

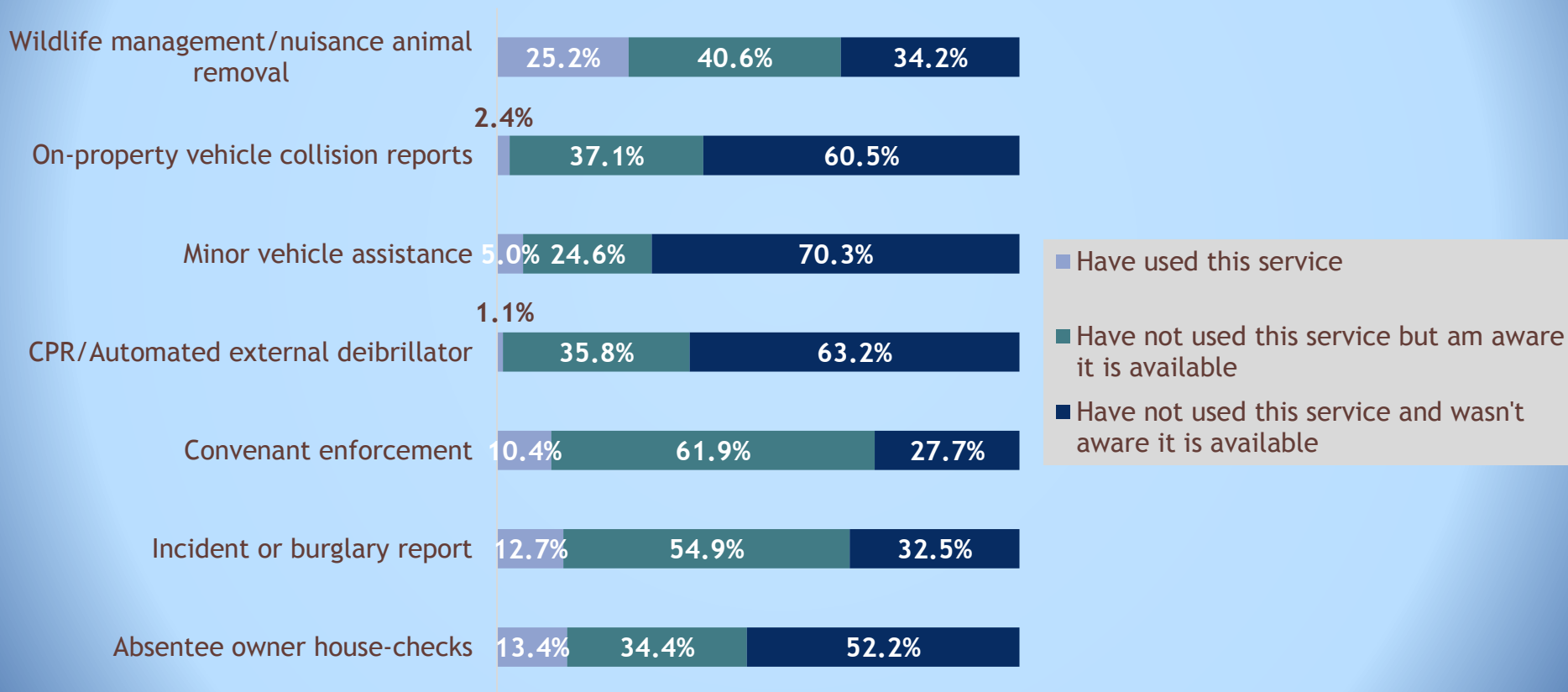
Awareness and Usage of Maintenance Services



Please describe your awareness and usage of the following CSA maintenance services.

Few use the security services, or even know they are available

Awareness and Usage of Security Services

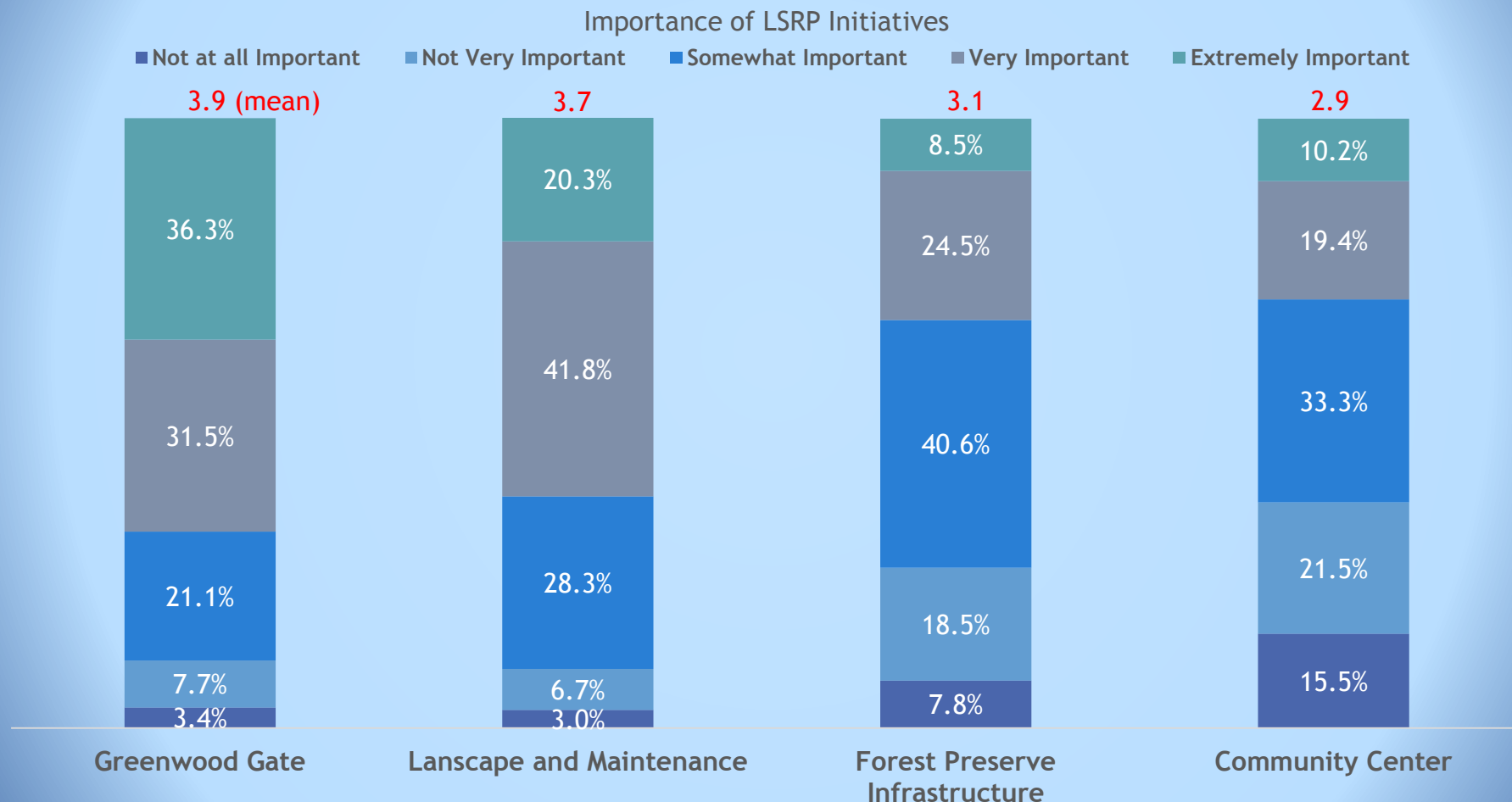


Please describe your awareness and usage of each of the following CSA security services.

Proposed Strategic Initiatives



Owners prioritize Greenwood Gate and landscape and maintenance improvements

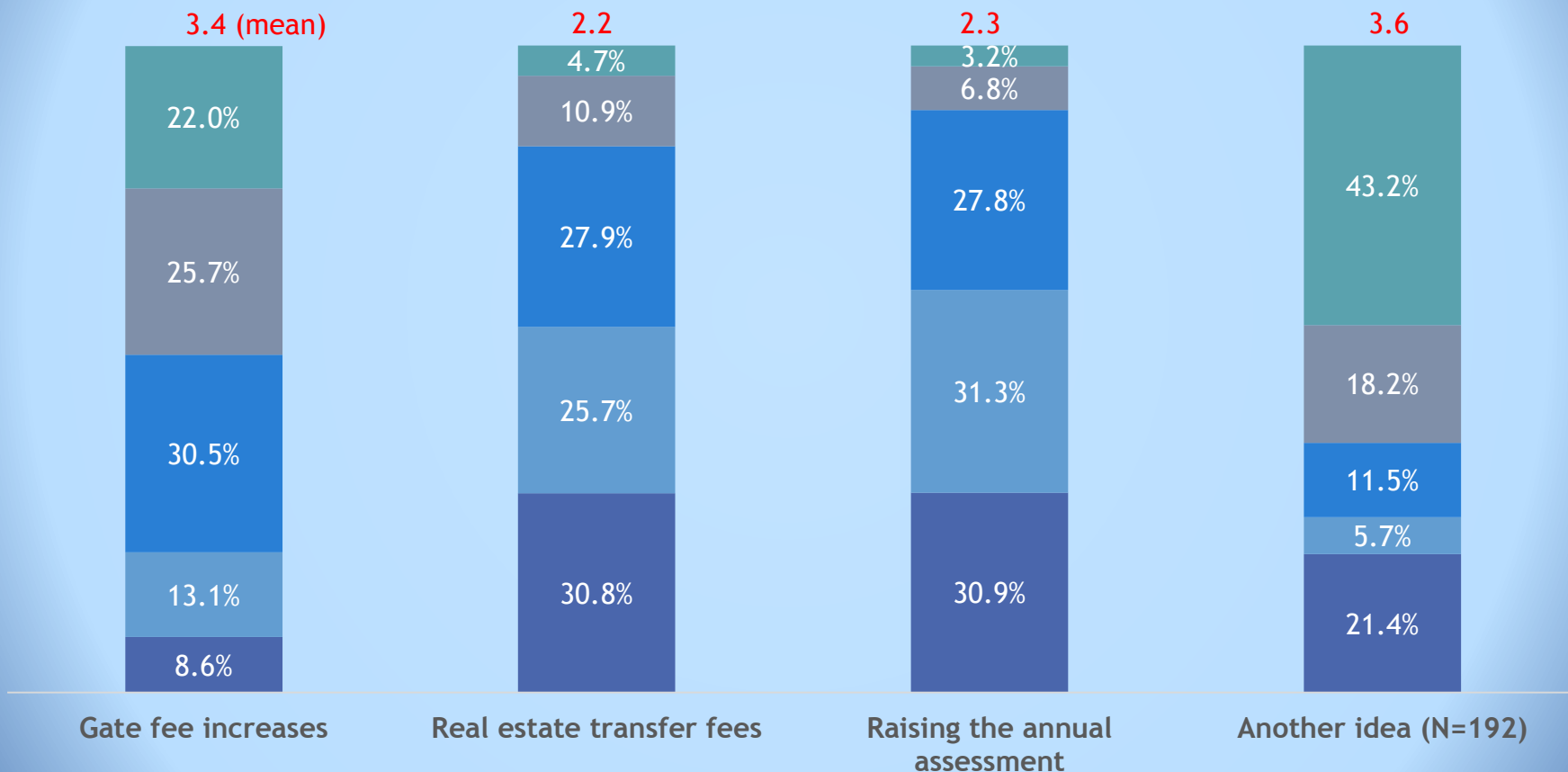


We ask that you help us prioritize the following LSRP initiatives by telling us how important each initiative is to you.

Should additional amenity funding be required, gate fee increases have the most support

Support for Funding

■ Not at all Supportive ■ Not Very Supportive ■ Somewhat Supportive ■ Very Supportive ■ Extremely Supportive



If it is determined that additional funding is required to enhance services or amenities for property owners, how much do you support implementing each of the following?

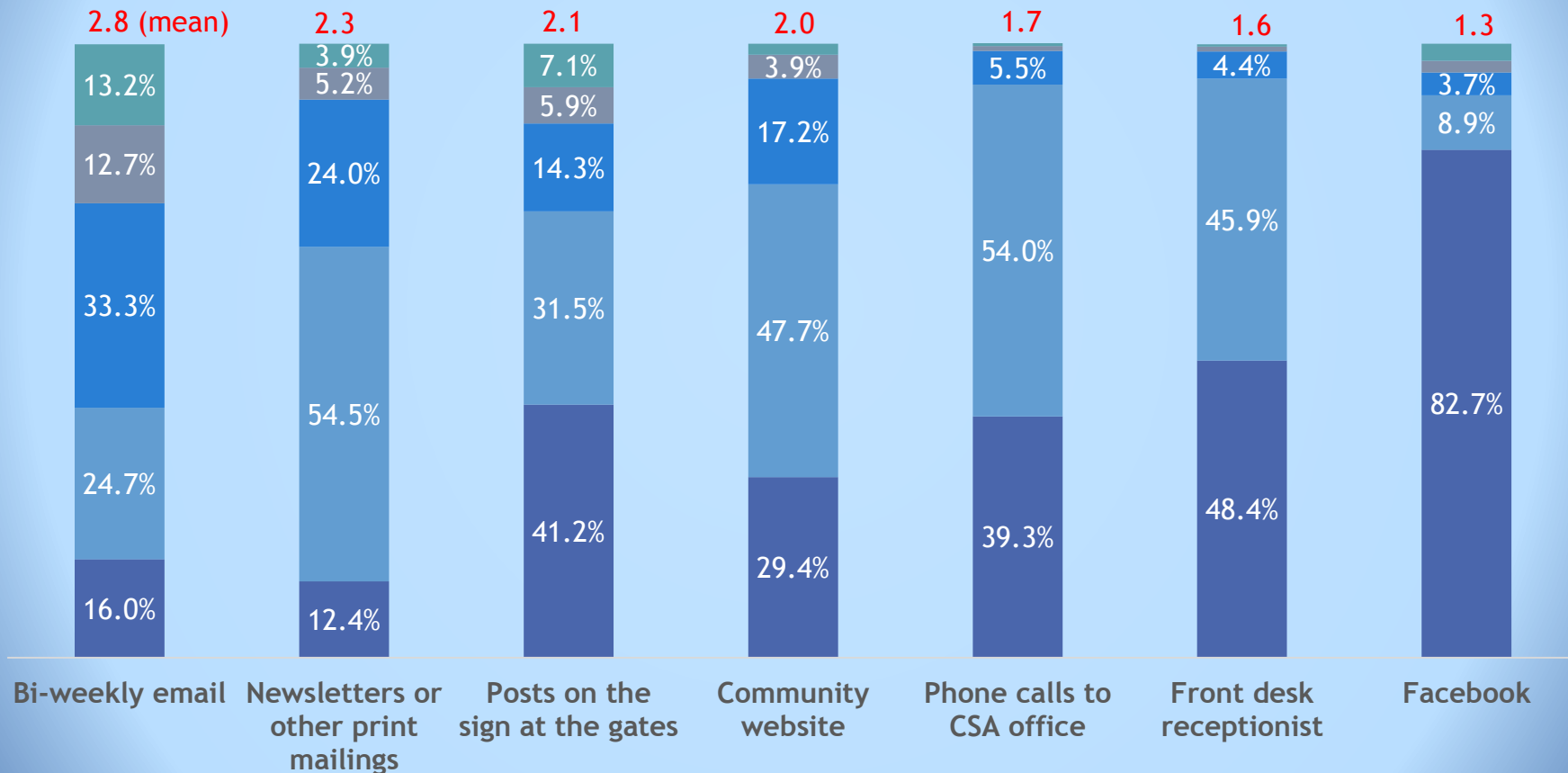
Communication with Sea Pines CSA



Email communication from CSA has the most regular usage

Frequency of Usage

■ Never ■ Once a month or less often ■ A few times a month ■ Once a week ■ A couple of times a week or more often



How often do you use the following channels to get news and information from Sea Pines CSA?

Next Steps

- Provide survey and profile data to committee and board members and to all owners.
- Continue to improve database & update profiles for all owners.
- Utilize survey results to provide more efficient communication to owners
 - 33% of Property Owners Utilize our mass emails for updates
 - In December 2015, updated email format to mobile friendly version
- Realized the need to communicate/ educate property owners on the services that are available for the community.
- Complete additional surveys and focus groups on topics you expressed an interest in.
- Utilize this database and owner profile to keep you better informed and provide you with a greater means for feedback.
- Provide additional follow up on profile data and survey results.

SEA PINES

COMMUNITY SERVICES ASSOCIATES



Questions?

