

AMELIA ISLAND CLUB MEMBER SURVEY



prepared for amelia island club september 18, 2012
prepared by permar inc.

STUDY OBJECTIVES

Determine club member demographics and market segmentation

Determine factors important to membership

Identify additional member needs and concerns



METHODOLOGY AND PARTICIPATION

Member records provided by client

Via email	1,353
Via postal mail	35
Number of respondents	717
Email	708
Letters	9
Response rate	52%
Email	53%
Letters	26%

Response rate is strong. Typical member survey response ranges from 25% to 30%.

KEY FINDINGS

Overall, members are pleased with their membership and believe it is a good value

Among those indicating it is not a good value, cost/use benefit (limited time on property = limited use) mentioned most frequently

Most facilities received high ratings from members

Improvements to Ocean Clubhouse and Long Point Clubhouse well received
Health & fitness received lowest “Excellent” ratings; also mentioned in unaided questions as in need of improvement

Members derive greatest personal value from dining, Omni discounts, health & fitness, beach and golf

Beach, pools, and dining create greatest value for entertaining extended family

Member profile is older than comparable coastal resort communities

Typical member is 68 years old, retired, with no children at home
Older profile indicative of base less willing to support change; challenge to club sustainability

There is minimal interest in additional facilities or programs

Vast majority have no plans to change their membership status

MEMBER PROFILE

	Total	Level of Membership			AIP Property Owner	
		Social	Tennis	Golf	Yes	No
Age (median)	68	67	67	68	66	68
Household income (median)	\$251k	\$274k	\$235k	\$282k	\$276k	\$241k
Net worth (median)	\$3.8m	\$3.3m	\$3.7m	\$4.5m	\$3.8m	\$3.7m
Household Size						
1 person	12%	14%	15%	9%	12%	10%
2 persons	74%	70%	66%	81%	73%	82%
3+ persons	14%	16%	19%	10%	15%	8%
No children at home	93%	91%	98%	95%	93%	94%
Retired	57%	53%	46%	64%	57%	61%
Year Joined Club						
2010-2012	8%	9%	0%	6%	7%	13%
2005-2009	19%	22%	29%	13%	18%	29%
2000-2004	22%	20%	29%	25%	23%	8%
1999 or before	51%	49%	42%	56%	52%	50%
BASE	710	389	41	280	660	50

MEMBER PROFILE – AGE

64% of members are 65 years old or older; social, AIRPO members likely to be younger

	Total	Level of Membership			AIP Property Owner		AIRPO Member
		Social	Tennis	Golf	Yes	No	
Age (median)	68	67	67	68	66	68	63
Respondent Age							
<55	7%	11%	2%	4%	9%	9%	12%
55-64	29%	29%	34%	28%	29%	22%	38%
65-74	45%	39%	51%	51%	42%	49%	38%
75-79	9%	9%	7%	9%	8%	10%	7%
80+	10%	12%	5%	8%	12%	10%	4%
BASE	710	389	41	280	660	50	99

MEMBER PROFILE – AIP PROPERTY OWNERSHIP

<i>Among AIP Property Owners</i>		Level of Membership		
		Total	Social	Tennis
Principal Property Type Owned				
Single-family home	44%	37%	54%	57%
Condo/villa	50%	58%	38%	41%
Homesite	3%	2%	8%	2%
Osprey Village	3%	3%	0%	0%
Current Estimated Value of Property	\$746k	\$676k	\$847k	\$930k
Principal Property Use				
Primary home	45%	32%	49%	62%
<i>Year-round</i>	68%	75%	84%	60%
<i>6-8 months/yr.</i>	22%	17%	11%	27%
Seasonal home (1-5 months/yr.)	18%	20%	18%	17%
Pre-retirement	20%	25%	24%	14%
Vacation home	15%	22%	8%	7%
BASE	660	389	41	280

TIME SPENT IN AMELIA ISLAND AREA – NON-RESIDENTS

Among AIP property owners not using their property as a primary home (55%), the vast majority spend less than 3 months a year at AIP

	AIP Property Owner		Level of Membership		
	Yes	No	Social	Tennis	Golf
<i>Among AIP Property Owners Not Using Property as a Primary Residence/Non AIP Property Owners</i>					
Less than 1 month/yr.	26%	4%	26%	18%	13%
1 to <3 months/yr.	44%	14%	43%	45%	45%
3 to <6 months/yr.	22%	12%	18%	27%	26%
6 to 11 months/yr.	4%	14%	5%	5%	7%
I live in the Amelia Island area year round	2%	56%	8%	0%	9%
I do not spend time at AIP or Amelia Island area	2%	0%	0%	5%	0%
BASE	446	51	273	22	117

Among non AIP property owner club members, more than half live in the area year round, 14% spend 6-11 months a year in the area, 30% less than 6 months a year.

AMELIA ISLAND CLUB – REASONS FOR BECOMING MEMBER

For all members, access to facilities in general, dining, and the social camaraderie were among top mentions

Access for those renting their property more important to Social members

<i>Reasons for Becoming Member (Unaided – more than one response allowed)</i>	Total	Social	Tennis	Golf
<i>Golf</i>	38%	23%	29%	60%
<i>Access to facilities & amenities</i>	23%	24%	31%	21%
<i>Dining</i>	22%	24%	17%	19%
<i>Social aspects/activities</i>	18%	16%	20%	19%
<i>Access for renters</i>	12%	17%	11%	6%
<i>Tennis</i>	8%	3%	51%	11%
<i>Pool</i>	8%	11%	3%	4%
<i>Ocean Club</i>	8%	8%	11%	7%
BASE	671	366	35	290

AMELIA ISLAND CLUB – REASONS FOR BECOMING MEMBER

In their own words.....

Financially it made sense because we are golfers and I was a tennis player. I don't think that I would live on the Plantation and not join, I like the convenience of the availability of functions and dining close by.

Membership required to make full use of all facilities on the Plantation at that time----for us as members and for renters of our condo.

Social interaction with family, friends and neighbors.

Ocean Club, golf, taking advantage of all that AIP had to offer.

AMELIA ISLAND CLUB – NON MEMBERS

For non-members, decision is more about dues, fees, and limited time at AIP than about the Club's offerings

<i>Reasons Why Not a Member of Amelia Island Club (Aided- more than one response allowed)</i>	Total Non Members	Never Member	Resigned Members
<i>Monthly dues too high</i>	53%	50%	59%
<i>Do not visit often enough to justify the cost</i>	50%	50%	50%
<i>Initiation fee (membership deposit) too high</i>	47%	58%	28%
<i>Use alternate facilities (golf, tennis, dining) elsewhere in the Amelia Island area</i>	35%	36%	33%
<i>Club does not offer facilities I would use</i>	13%	15%	9%
BASE	180	116	64

AMELIA ISLAND CLUB – NON MEMBERS

Not surprisingly, those who have never been a member of Club more likely to join in next 5 years than resigned members; most interested in Social membership

<i>Likelihood of Joining Club in Next 5 Years</i>	Total Non Members	Never Member	Resigned Members
<i>Very likely</i>	6%	9%	2%
<i>Somewhat likely</i>	16%	19%	11%
<i>Somewhat unlikely</i>	23%	26%	17%
<i>Not at all likely</i>	55%	47%	70%
<i>BASE</i>	180	116	64
<i>Membership Level of Interest</i>			
<i>Social</i>	65%	63%	75%
<i>Tennis</i>	3%	3%	0%
<i>Golf</i>	33%	34%	25%
<i>BASE</i>	40	32	8

* Apply caution when using small bases (<30). Responses may not be statistically significant.

AMELIA ISLAND CLUB – USE AND PARTICIPATION

Members most frequently use private dining, fitness center machines & equipment

<i>Frequency of Use (Base=714)</i>	Frequently	Occasionally	Seldom	Never
<i>Ocean Clubhouse – Dining</i>	66%	28%	4%	2%
<i>Ocean Clubhouse – Pool</i>	28%	34%	24%	14%
<i>Ocean Clubhouse – Beach</i>	31%	30%	25%	14%
<i>Long Point Golf Course</i>	42%	22%	15%	21%
<i>Long Point Golf Course – Dining</i>	42%	38%	15%	5%
<i>Fitness Center – Machines & Equipment</i>	50%	25%	15%	10%
<i>Fitness Center – Pool</i>	15%	22%	29%	34%
<i>Fitness Center – Classes</i>	9%	15%	30%	46%
<i>Racquet Park</i>	14%	16%	23%	47%

AMELIA ISLAND CLUB – USE AND PARTICIPATION

Members least likely to participate in tennis, enrichment activities

<i>Frequency of Use (Base=714)</i>	Frequently	Occasionally	Seldom	Never
Golf events & activities	26%	18%	19%	37%
Social activities	19%	38%	30%	13%
Tennis activities	9%	11%	20%	60%
Member enrichment activities	7%	25%	35%	33%

AMELIA ISLAND CLUB – USE AND PARTICIPATION

Among Omni facilities & benefits, members most frequently use the 20% discounts at restaurants and shops

<i>Frequency of Use (Base=714)</i>	Frequently	Occasionally	Seldom	Never
20% Discount @ Omni Restaurants	43%	35%	16%	6%
20% Discount @ Omni Spa & Shops	34%	35%	21%	10%
Oak Marsh Golf Course	19%	37%	21%	24%
Ocean Links Golf Course	14%	30%	31%	25%
Omni Beach Club – Pool	17%	29%	31%	23%
Omni Beach Club – Beach	13%	25%	31%	31%

AMELIA ISLAND CLUB – USE AND PARTICIPATION

Tennis members most likely to indicate they frequently use the fitness center machines; Social members the pool and beach

<i>Frequency of Use - % "Frequently"</i>	Total	Social	Tennis	Golf
<i>Ocean Clubhouse – Dining</i>	66%	63%	61%	71%
<i>Ocean Clubhouse – Pool</i>	28%	34%	20%	22%
<i>Ocean Clubhouse – Beach</i>	31%	36%	34%	24%
<i>Long Point Golf Course</i>	42%	16%	7%	84%
<i>Long Point Golf Course – Dining</i>	42%	29%	22%	63%
<i>Fitness Center – Machines & Equipment</i>	50%	48%	71%	50%
<i>Fitness Center – Pool</i>	15%	16%	12%	12%
<i>Fitness Center – Classes</i>	9%	8%	17%	9%
<i>Racquet Park</i>	14%	7%	88%	13%
BASE	714	389	41	282

AMELIA ISLAND CLUB – USE AND PARTICIPATION

Golf members most likely to participate in not only golf, but social activities

<i>Frequency of Use - % "Frequently"</i>	Total	Social	Tennis	Golf
Golf events & activities	26%	7%	5%	56%
Social activities	19%	12%	17%	30%
Tennis activities	9%	4%	63%	9%
Member enrichment activities	7%	5%	5%	11%
BASE	714	389	41	282

AMELIA ISLAND CLUB – USE AND PARTICIPATION

Among Omni facilities & benefits, members most frequently use the 20% discounts at restaurants and shops

<i>Frequency of Use - % “Frequently”</i>	Total	Social	Tennis	Golf
20% Discount @ Omni Restaurants	43%	45%	49%	38%
20% Discount @ Omni Spa & Shops	34%	37%	44%	28%
Oak Marsh Golf Course	19%	11%	2%	24%
Ocean Links Golf Course	14%	9%	0%	23%
Omni Beach Club – Pool	17%	23%	12%	23%
Omni Beach Club – Beach	13%	17%	10%	8%
BASE	714	389	41	282

Members under the age of 55 more likely to use pools, dining discounts, fitness center machines & equipment than those over 55.

AMELIA ISLAND CLUB – EVALUATION

Tennis programs & Links Pro Shop received highest ratings; Ocean Links Course, fitness center pool and classes received lowest ratings

<i>Evaluation (Among those using facility)</i>	Excellent	Good	Fair	Poor	Base
Fitness Center – condition of machines & equipment	19%	56%	19%	5%	549
Fitness Center – pool	15%	52%	28%	5%	389
Fitness Center – adequacy of classes & offerings	10%	54%	28%	8%	368
<i>Golf & Tennis Members (Among those using facility)</i>					
Racquet Park – condition of courts	29%	61%	9%	1%	152
Racquet Park – lessons & program quality under Drysdale Tennis Mgt.	54%	38%	8%	1%	106
Ocean Links Golf Course- condition, playability	21%	42%	31%	6%	259
Oak Marsh Golf Course – condition, playability	26%	52%	20%	2%	261
Links Pro Shop – professionalism of staff	45%	47%	8%	1%	275

AMELIA ISLAND CLUB – WEBSITE EVALUATION

Majority (79%) use the website, and nearly all rate the 4 factors evaluated as “good” or “excellent”

	Excellent	Good	Fair	Poor
<i>Evaluation of Website (Among those using website)</i>				
<i>Base = 563</i>				
Speed	44%	53%	3%	0%
Member’s only section	40%	55%	5%	0%
Content	40%	53%	7%	0%
Ease of use	40%	52%	7%	1%

AMELIA ISLAND CLUB – OCEAN CLUBHOUSE

Nearly all (93%) have used Ocean Club since its March reopening, giving it high marks for overall atmosphere and quality of service

<i>Evaluation</i> (Base = 660)	Excellent	Good	Fair	Poor	Have Not Used
Overall quality of service	60%	34%	5%	1%	0%
Overall atmosphere/ambiance	58%	37%	4%	0%	0%
Pool & deck area	62%	27%	2%	0%	7%
Outdoor dining area	59%	32%	3%	0%	6%
Beach amenities & programs	33%	28%	4%	1%	34%

Empty-nesters, and members 55+ more likely to rate the factors as “Excellent” than those with children at home and those <55 years old.

AMELIA ISLAND CLUB – OCEAN CLUBHOUSE

Among those having visited the Sea Oats café since its reopening, vast majority give it high ratings

<i>Evaluation (Base = 660)</i>	Excellent	Good	Fair	Poor	Have Not Used
Sea Oats Café – quality of food & beverage	38%	48%	9%	2%	3%
Sea Oats Café – lunch menu	36%	48%	9%	2%	5%
Sea Oats Café – quality of facilities	35%	49%	12%	2%	2%
Sea Oats Café – dinner menu	26%	44%	12%	3%	15%

AMELIA ISLAND CLUB – OCEAN CLUBHOUSE

Sandpiper and Ocean View Bar received high marks among those having used it since reopening

<i>Evaluation</i> (Base = 660)	Excellent	Good	Fair	Poor	Have Not Used
Sandpiper - quality of food & beverage	57%	32%	6%	0%	5%
Sandpiper - quality of facilities	54%	34%	7%	1%	5%
Sandpiper - dinner menu	53%	33%	7%	1%	6%
Ocean View Bar - quality of facilities	55%	27%	6%	2%	10%
Ocean View Bar – tapas menu	31%	27%	6%	2%	35%

AMELIA ISLAND CLUB – LONG POINT CLUBHOUSE

3/4 have used Long Point Clubhouse since its April reopening, particularly complimentary of overall atmosphere & quality of service

<i>Evaluation (Base=534)</i>	Excellent	Good	Fair	Poor	Have Not Used
Overall atmosphere/ambiance	81%	17%	1%	0%	1%
Overall quality of service	66%	29%	4%	0%	0%
Dining – quality of facilities	74%	23%	1%	0%	1%
Dining – quality of food & beverage	49%	39%	8%	2%	2%
Dining– lunch menu	43%	36%	4%	1%	16%
Dining – dinner menu	41%	38%	9%	1%	11%

Golf members more likely to have used the Long Point Clubhouse and to rate the overall atmosphere and quality of service as “Excellent” than Social or Tennis members.

AMELIA ISLAND CLUB – LONG POINT CLUBHOUSE

Copper Top Bar, outdoor patio and porch well received by those having used the Clubhouse since its reopening

<i>Evaluation</i> (Base=534)	Excellent	Good	Fair	Poor	Have Not Used
Copper Top Bar – quality of facilities	65%	17%	2%	0%	16%
Copper Top Bar – menu	38%	27%	5%	0%	29%
Outdoor patio	49%	23%	1%	0%	27%
Screened-in porch	49%	18%	1%	0%	32%

AMELIA ISLAND CLUB – ENRICHMENT PROGRAMS

Members most likely to participate in local tours and theater, sporting events or shows

<i>Likelihood to participate</i> (Base=714)	Very Likely	Likely	Only Slightly Likely	Not at All Likely
Tours of local areas of interest (e.g. Mayport, Whit Oak, Mayo Clinic, Fort Clinch)	16%	32%	29%	24%
Theater, sporting events or shows	14%	32%	32%	21%
Classes & lessons (e.g. photography, bridge, chess, computers)	14%	31%	32%	23%
Day trips (e.g. Savannah, St. Augustine, Jekyll Island)	13%	26%	32%	29%
Health care (e.g. Mayo Clinic lectures, CPR, diet, weight loss)	12%	27%	34%	26%
Automotive events in conjunction with Concours d'Elegance (e.g. member car shows, exotic cars, classic cars)	10%	16%	31%	43%

AMELIA ISLAND CLUB – ADDITIONAL FACILITIES

Nearly half indicated there are no additional facilities or programs they would use; limited interest in a variety of other programs

***Other programs or facilities would use if offered by the Club
(Unaided – more than one response allowed)***

None/not sure	49%
Educational events/lectures	6%
Day trips	4%
More exercise classes	4%
Cooking	4%
Dancing	3%
Bridge	3%
Live music/concerts	3%
Base	339

AMELIA ISLAND CLUB SENTIMENT

In general, members are pleased with the Club, with vast majority indicating they would recommend joining now to a friend considering membership

<i>Level of Agreement</i> Base =714	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
<i>The current direction of the Club is consistent with my view of how the Club should be managed</i>	53%	40%	5%	2%
<i>I am confident in the financial stability of the Amelia Island Club</i>	44%	46%	8%	2%
<i>Amelia Island Club financial resources are allocated properly</i>	36%	53%	8%	2%
<i>My Amelia Island Club membership is a good value</i>	47%	40%	10%	3%
<i>I would recommend joining the Amelia Island Club now to a friend considering membership</i>	56%	33%	8%	3%

AMELIA ISLAND CLUB SENTIMENT

Golf members most likely to indicate membership is good value

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	BASE
<i>My Amelia Island Club membership is a good value</i>					
<i>Total Members</i>	47%	40%	10%	3%	714
<i>Social members</i>	40%	43%	13%	4%	389
<i>Tennis members</i>	51%	27%	15%	7%	41
<i>Golf members</i>	55%	37%	7%	1%	282
<i>AIRPO members</i>	31%	41%	22%	5%	99

AMELIA ISLAND CLUB – REASONS NOT GOOD VALUE

Among those indicating their club membership is not a good value, use/cost benefit, and high food minimums mentioned as reasons why

Reasons Club Membership is Not a Good Value (Unaided – more than one response allowed)

<i>Don't use enough/not there enough to justify the cost</i>	34%
<i>Cost for what I get</i>	16%
<i>Food minimum too high</i>	14%
<i>Base</i>	86

In their own words....

\$100 a month for food when we aren't living in Amelia. We still both work full time and make quick trips, not too often.

I do not live at AIP. I visit for at most 2+ weeks a year. The Club is designed for long retired people who live at AIP and not for working people who live elsewhere and visit once in a while. It is just a way for us condo owners to subsidize the lifestyle of the people who live at AIP full time. Owners who live elsewhere have been and remain second class citizens .

It is too expensive for what it offers. Namely the gym; hours are too limited and some equipment is in disrepair. Further, there isn't any handicap accessible treadmills. Getting on and off a treadmill and controlling it is a very dangerous issue.

AMELIA ISLAND CLUB – REASONS WOULD NOT RECOMMEND

Among those indicating they would not recommend club membership to a friend now, cost/value benefit, uncertain future, and leadership were mentioned as reasons why

Reasons Would Not Recommend Joining the Club Now (Unaided – more than one response allowed)

<i>Cost/value</i>	59%
<i>Uncertainty of future</i>	14%
<i>Leadership</i>	12%
<i>Base</i>	69
<i>In their own words....</i>	

The services received for what the cost is does not measure up.

There is not value for the cost unless you are there every week.

Too risky. I wouldn't tell them not to join, would tell them to be careful.

Inflexible leadership unwilling to look at change needed to survive and attract baby boomers and gen xers.

OMNI SENTIMENT

Members are confident in Omni's commitment to AIP and believe that their presence enhances property values

<i>Among AIP Property Owner Club Members</i> (Base=667)	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Don't Know
<i>I believe that Omni as the resort operator enhances my property value</i>	73%	19%	1%	1%	5%
<i>Overall, I am pleased with Omni's performance to date</i>	69%	23%	4%	1%	2%
<i>I am confident in Omni's long term commitment to Amelia Island Plantation</i>	68%	24%	2%	1%	6%
<i>Omni is a good steward of the land</i>	48%	31%	5%	3%	13%

AMELIA ISLAND CLUB - WHAT CREATES VALUE

Overall, dining, discounts, fitness & beach valued most for personal use
Pools & tennis more valued for use by extended family

Valued for Use By:

<i>All Members (more than one response allowed)</i> Base=714	Valued for Use By:			Does Not Create Value
	Member	Extended Family	Friends	
Dining	88%	69%	45%	5%
Omni discounts	75%	47%	18%	15%
Health & fitness	70%	54%	20%	13%
Beach access	69%	70%	39%	13%
Golf	63%	55%	40%	16%
Pools	56%	75%	34%	10%
Tennis	26%	40%	24%	40%

WHAT CREATES VALUE – GOLF MEMBERS

Not surprising, golf is of great personal value for nearly all Full Golf members; tennis of no value to two-fifths

More likely than members in general to personally value dining

Valued for Use By:

<i>Golf Members (more than one response allowed)</i> <i>Base=280</i>	Valued for Use By:			Does Not Create Value
	Golf Member	Extended Family	Friends	
Golf	95%	64%	48%	1%
Dining	93%	66%	43%	3%
Omni discounts	77%	47%	16%	16%
Beach access	69%	72%	38%	11%
Health & fitness	69%	51%	15%	13%
Pools	51%	75%	31%	10%
Tennis	25%	40%	21%	41%

WHAT CREATES VALUE – TENNIS MEMBERS

Health & fitness and tennis top the list of facilities of great personal value to Tennis members

Pools, dining create greatest value for use by extended family

<i>Tennis Members (more than one response allowed)</i> Base=41	Valued for Use By:			Does Not Create Value
	Tennis Member	Extended Family	Friends	
Health & fitness	90%	51%	17%	5%
Tennis	83%	63%	34%	2%
Omni discounts	83%	54%	10%	5%
Dining	76%	71%	41%	2%
Beach access	71%	68%	41%	15%
Pools	44%	78%	29%	12%
Golf	32%	49%	34%	27%

WHAT CREATES VALUE – SOCIAL MEMBERS

For social members, dining, beach, and pools greatly valued for personal use and for use by extended family

Tennis creates no value for nearly half

Valued for Use By:

<i>Social Members (more than one response allowed)</i> Base=389	Valued for Use By:			Does Not Create Value
	Social Member	Extended Family	Friends	
Dining	86%	71%	46%	6%
Omni discounts	73%	47%	19%	16%
Beach access	69%	68%	40%	14%
Health & fitness	68%	55%	24%	13%
Pools	60%	75%	37%	10%
Golf	44%	50%	35%	26%
Tennis	20%	37%	25%	44%

WHAT CREATES VALUE – NEW MEMBERS

For those joining since 2010, dining, beach, pools and golf as valued for use by extended family than for personal use

Tennis creates no value for nearly half

<i>Members First Joining Club Since 2010 (more than one response allowed)</i> Base=55	Valued for Use By:			Does Not Create Value
	New Member	Extended Family	Friends	
Dining	87%	82%	56%	4%
Beach access	78%	76%	44%	9%
Omni discounts	76%	51%	15%	15%
Health & fitness	71%	60%	16%	9%
Pools	71%	82%	36%	7%
Golf	58%	75%	44%	13%
Tennis	27%	45%	16%	42%

WHAT CREATES VALUE – BY AGE

Omni discounts, beach access and health and fitness more important to younger members; dining most important factor by far for older members

<i>Creates Personal Value</i>	Total	Member Age				
		<55	55-64	65-74	75-79	80+
Dining	88%	86%	90%	86%	89%	94%
Omni discounts	75%	85%	79%	74%	68%	71%
Health & fitness	70%	80%	77%	70%	63%	46%
Beach access	69%	81%	75%	68%	61%	51%
Golf	63%	76%	70%	61%	60%	45%
Pools	56%	71%	62%	53%	55%	39%
Tennis	26%	42%	30%	24%	21%	10%
Base	712	59	203	317	62	69

AMELIA ISLAND CLUB – MEMBERSHIP STATUS

Vast majority of members have no plans to change their current membership status

Likelihood to:	Very Likely	Likely	Only Slightly Likely	Not at All Likely	BASE
<i>Upgrade Membership</i>					
Tennis members	0%	10%	15%	76%	41
Social members	2%	3%	19%	76%	389
<i>Downgrade membership</i>					
Golf members	1%	8%	13%	79%	280
Tennis members	2%	0%	15%	83%	41
<i>Resign membership</i>					
Golf members	1%	2%	5%	92%	280
Tennis members	0%	2%	15%	83%	41
Social members	2%	3%	19%	76%	389

BEST HOPES FOR AMELIA ISLAND PLANTATION - UNAIDED

Members hope for continued improvements and maintenance of the natural beauty and quality of life

Best Hopes for future of Amelia Island Plantation (More than one response allowed)

Continue improvements/upgrades (both community and individual properties)	27%
Maintain natural beauty	26%
Improved property values	22%
Maintain quality of life	13%
Successful resort operations	12%
Financially stable community	12%
Do not overbuilt/become overcrowded	12%
Continue on current path	7%
Attract new/younger members	7%
Retain low-key/casual atmosphere	5%
BASE	544

BEST HOPES FOR AMELIA ISLAND PLANTATION - UNAIDED

In their own words....

A financially stable, nature conscience environment which is constantly assessing and updating based on the changes and desires of the members.

Maintain a beautiful environment, managed resources, financial stability, attract new, younger members, (45-65), upkeep of all facilities and common elements.

Omni's investment and performance will revive interest in the plantation and help real estate values rebound.

CONSIDERATIONS

Significantly increase focus on multi-generational experiences

Club, Omni, AIPCA must look to expand multi-generational appeal of community and Club Gather input/ideas from members with kids, grandkids, other children visiting them at AIP Programming around club element families with kids/younger members value most – beach activities, kid-friendly dining, family friendly pool and golf activities

Explore viability of additional membership categories to address members “aging out”

Younger, second home buyers time crunched, unwilling to pay for what they don't use – desire flexibility and choice

Leadership – Club, AIPCA, & Omni - need to collaborate to encourage owners to make improvements to their properties, landscaping; upgrades through regimes/HOA

Integrated updates key to:
Attracting younger buyers/members
Sustainability of membership and community

Explore potential upgrades to health and fitness

One of most valued club elements to younger members
Gather additional input from members on most important areas of focus

KEY MARKET SEGMENTS

By Age Cohort	Total	Level of Membership		
		Social	Tennis	Golf
% of Members – Today				
<55	7%	11%	2%	4%
55-64	29%	29%	34%	28%
65-74	45%	39%	51%	51%
75+	19%	21%	12%	17%
% of Members – within 5 years				
<55	15%	20%	10%	10%
55-64	40%	40%	40%	40%
65-74	35%	25%	40%	35%
75+	10%	15%	10%	15%

OBSERVATIONS

Focus on what it takes to attract tomorrow's members

For younger second home buyers, it's about contrast to everyday life, choice, variety of experiences, ease of use

- Pools & beach – active, family-friendly, fun

- Health & fitness – state of the art, new, fresh

- Outfitters - Being able to actively use and connect with natural environment, ICW, marshes, ocean – biking, kayaking, paddle boarding, canoeing, fishing

Involve younger, second-home owner members in planning, committees, new member initiatives

Facilitate non-resident member connections and engagement with others when on-property

- Through website, members' only page, Facebook, to network, plug in socially

Focus on enhancing value of membership compared to other resort community clubs

- Complex structure of AIP makes it difficult to understand from buyer/new member perspective

- Study best practices of both resort club and non-club models

AMELIA ISLAND CLUB MEMBER SURVEY



prepared for amelia island club september 18, 2012
prepared by permar inc.