

OCEAN REEF CLUB

CENSUS 2020



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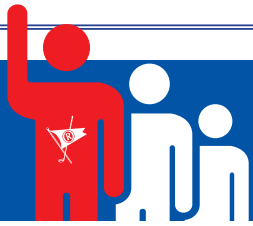


FINAL RESULTS

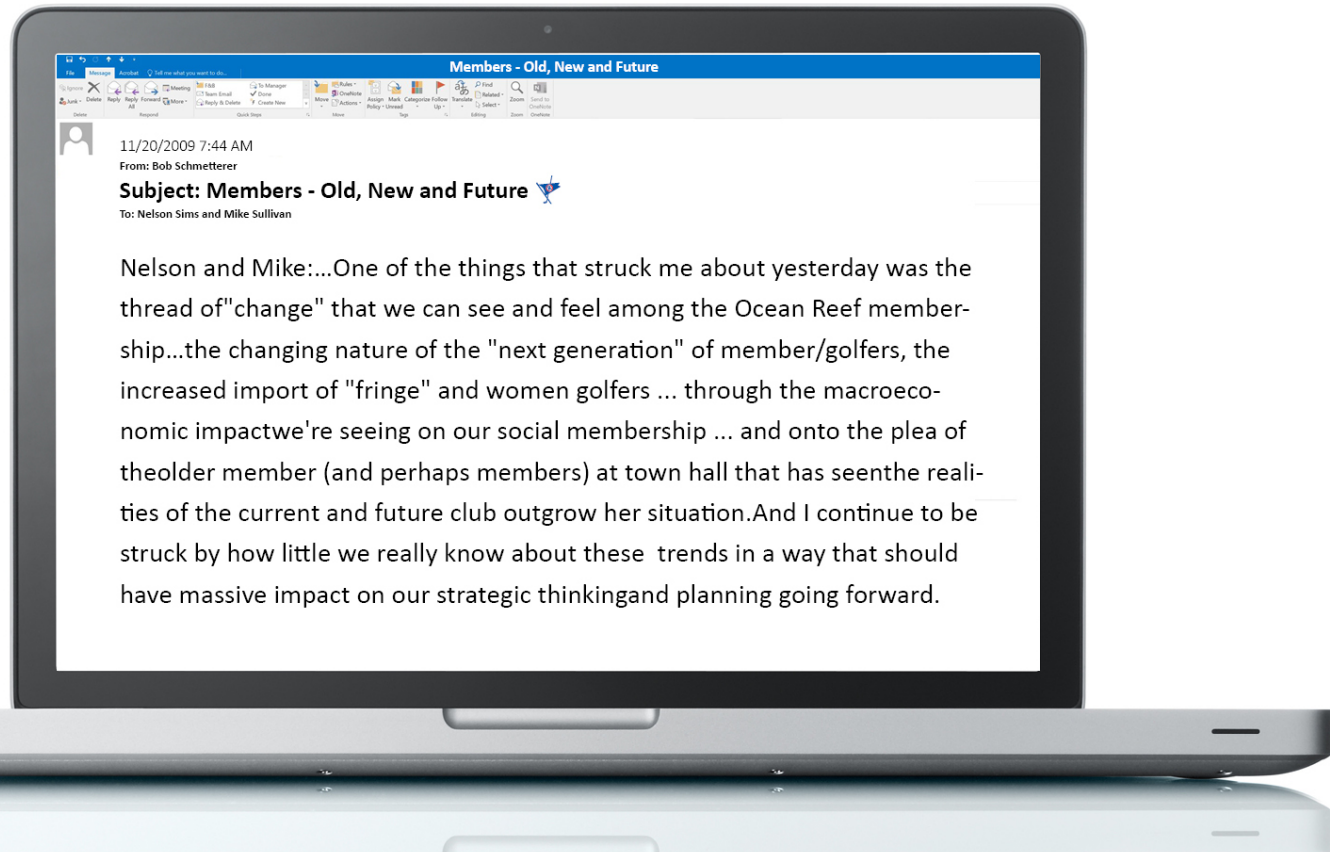
The 2020 Ocean Reef Club Census

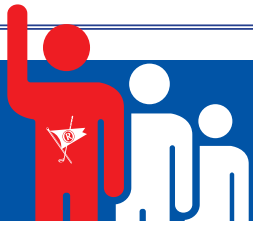


WHY WAS A CLUB CENSUS SO IMPORTANT...
10 YEARS AGO

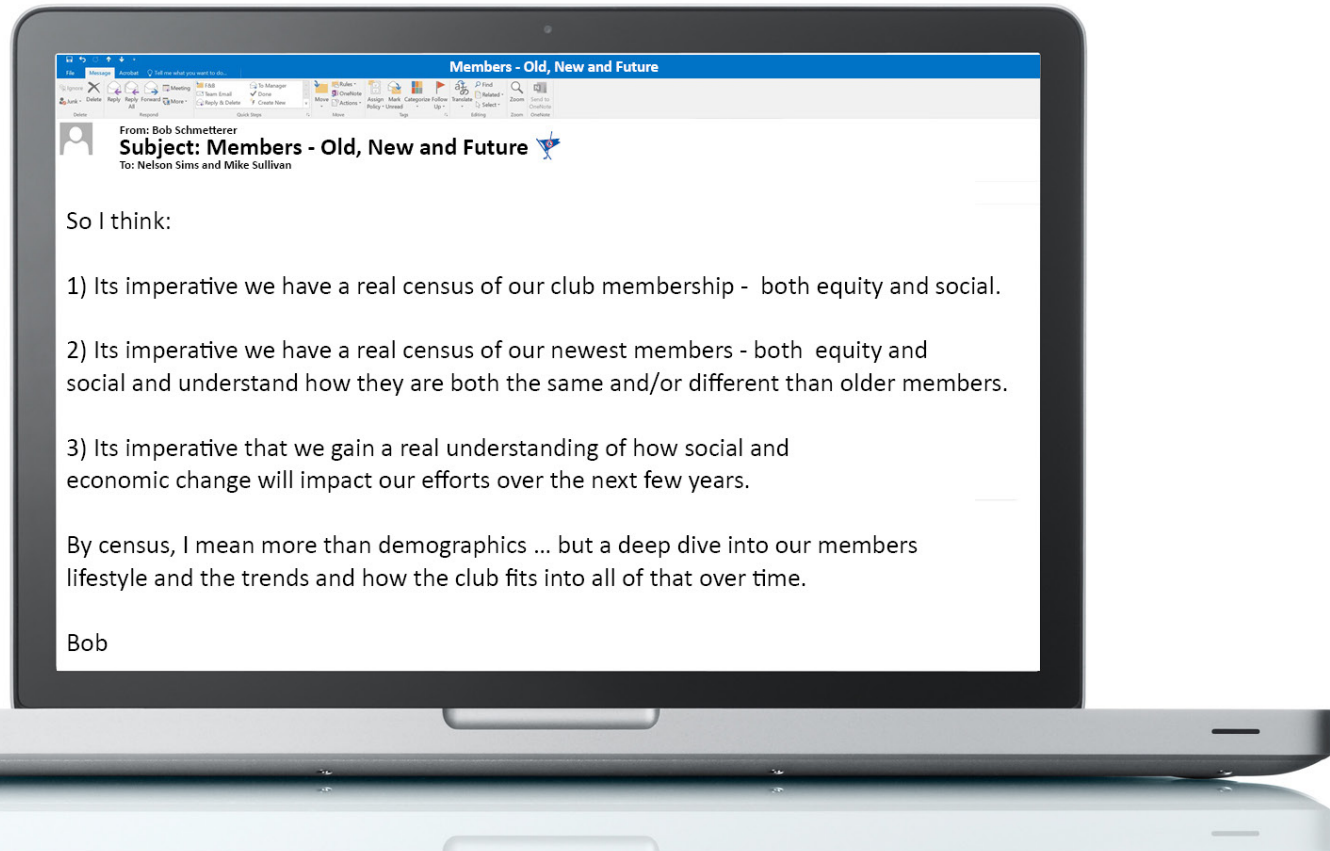


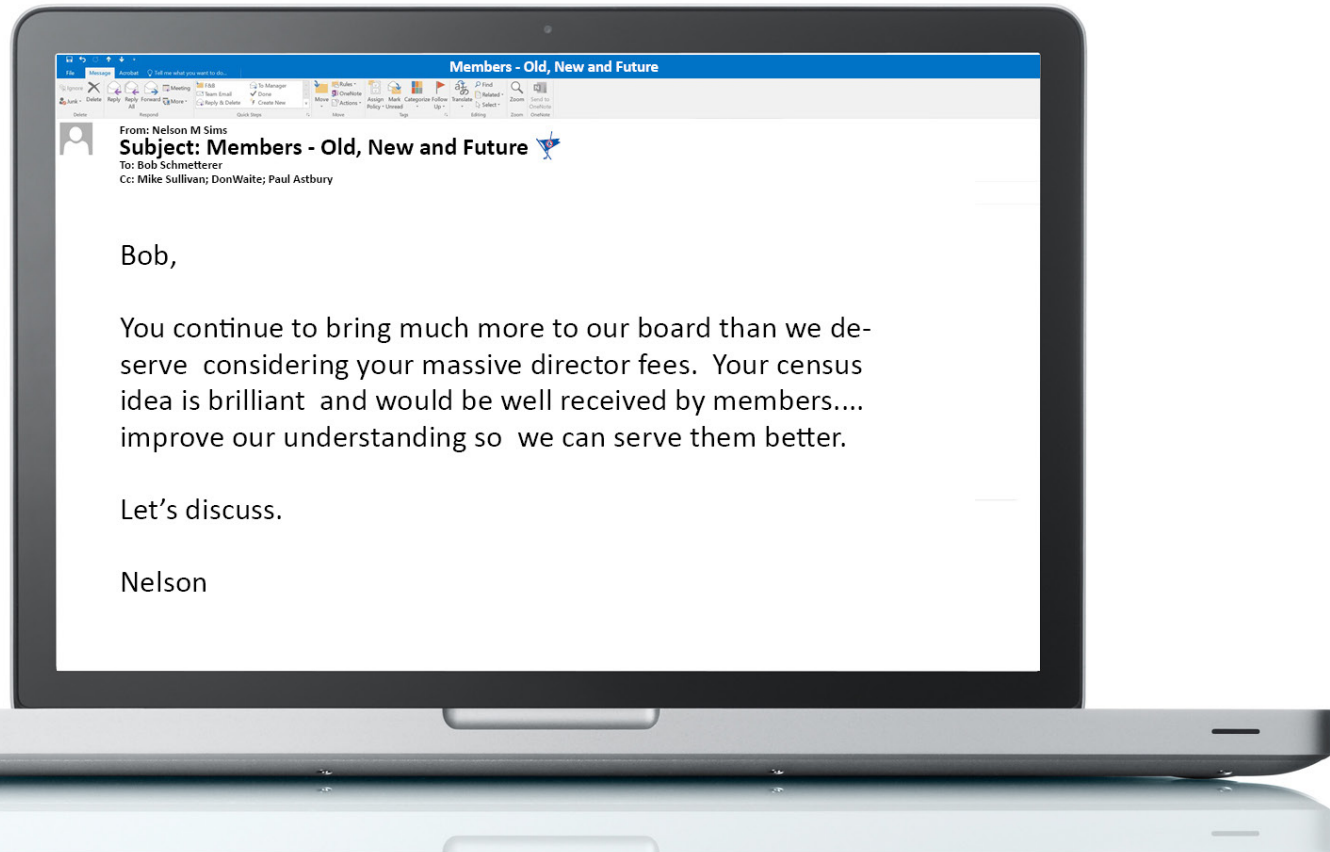
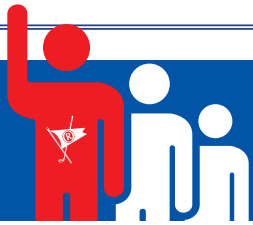
ORIGINS {2009}

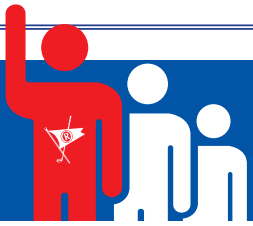




ORIGINS {2009}







WHY IS THE CENSUS SO IMPORTANT?

2010

FIRST ORC CENSUS

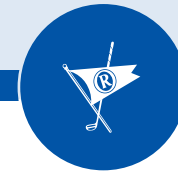
Became a fact based “guiding light” to the Board and to the Management bringing real credibility to decisions ... and to our members ...



2020

THIRD ORC CENSUS

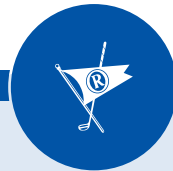
After a decade of learning .. Is the nature of our Membership the same or different than 5 and 10 years ago? Now we have the answers...

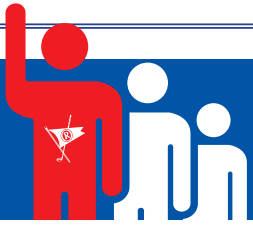


2015

SESCOND ORC CENSUS

Based on learning, benchmarks and insights...trends emerged offering the ability to project future behavior





CENSUS RESPONSE

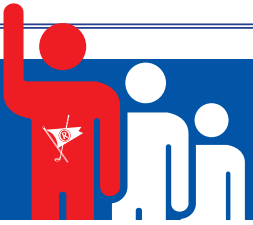
A GREAT RESPONSE ... **OVER 50%**
OF OUR TOTAL MEMBERSHIP.

Data was compiled via online survey between
JANUARY 8 AND FEBRUARY 26, 2020.

2430 FAMILIES representing **5311 MEMBERS** have responded.

Significance tests were run at a **95% CONFIDENCE LEVEL**
for extrapolating to the full Membership.





AREAS OF DISCOVERY

THE WAY WE WERE AND THE WAY WE ARE

SHARED BELIEFS AND CULTURE

HOW WE VALUE OUR LIFESTYLE

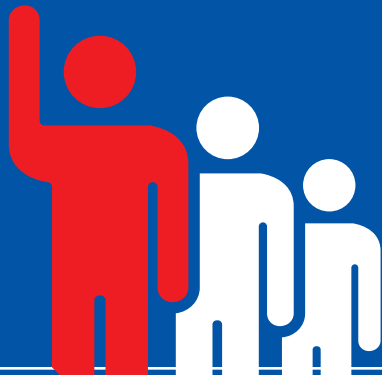
THE FUTURE



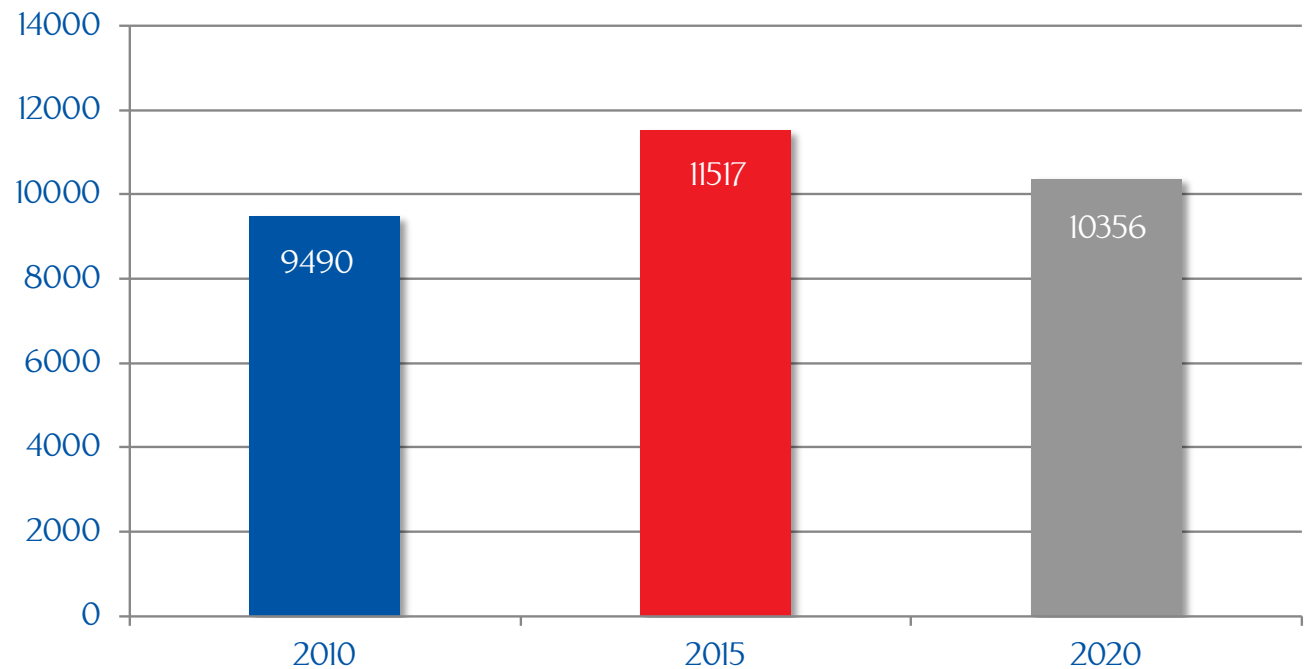
THE WAY WE WERE & THE WAY WE ARE
A LOOK AT THE MEMBERSHIP OVER A DECADE

WHO
WE ARE
NOW...

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2020



TOTAL CHILDREN ALL MEMBERS



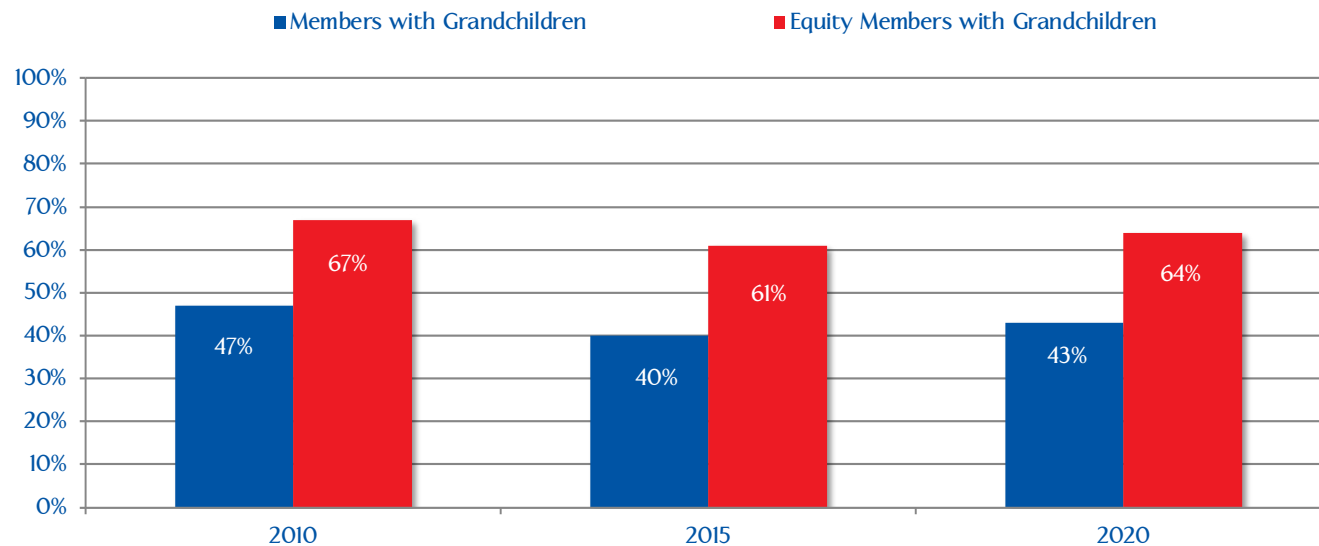
TAKEAWAY

We are still very much a family Club.

...AND
FAMILIES
ARE
GROWING

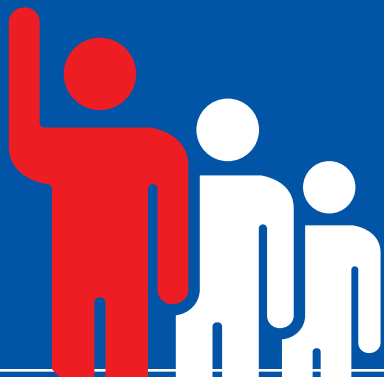
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MEMBERS WITH GRANDCHILDREN

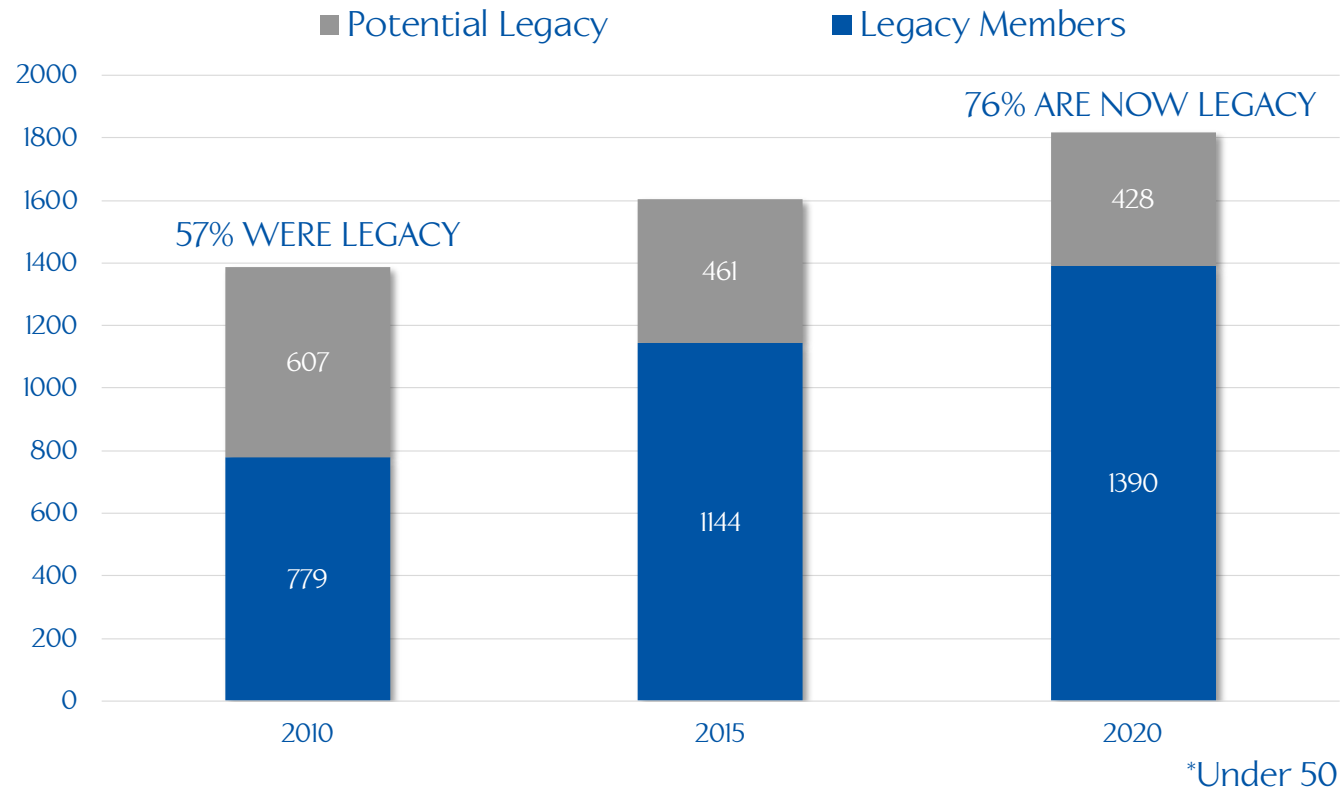


OUR LEGACY CONTINUES

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2020



LEGACY MEMBERS



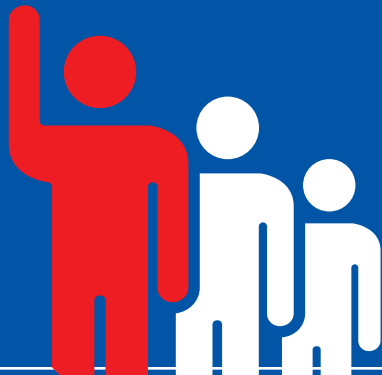
TAKEAWAY

In 2010 Legacy Members were all Under 50 years of age and we had 57% of the potential. In comparison looking at the potential Legacy Members under 50 today we have almost 80% of that potential population. Further testament to the family nature of the Club and value of this Equity Member benefit.

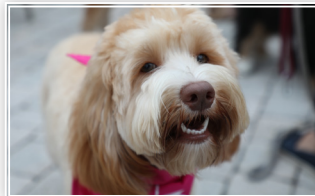
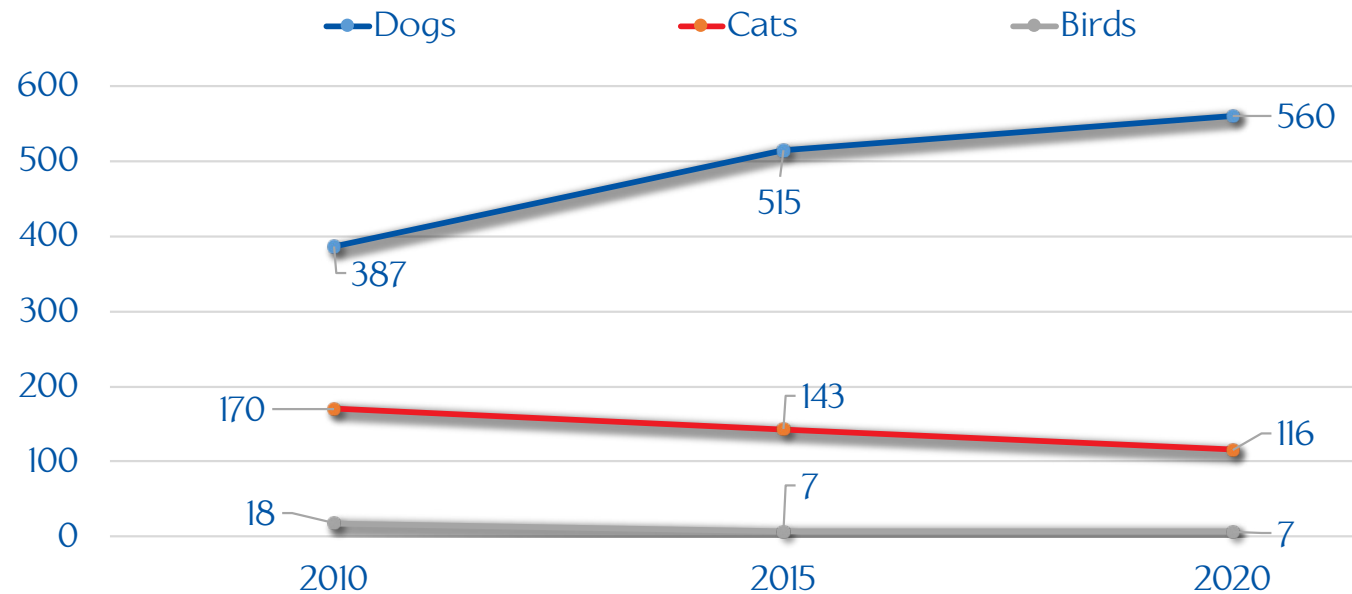


CATS ARE NICE
BUT WE
LOVE OUR
DOGS
NOW MORE
THAN EVER!

CENSUS
2020

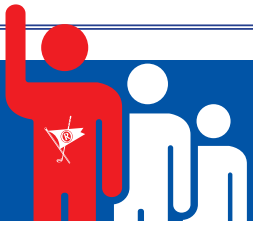


PETS REPORTED AT ORC:

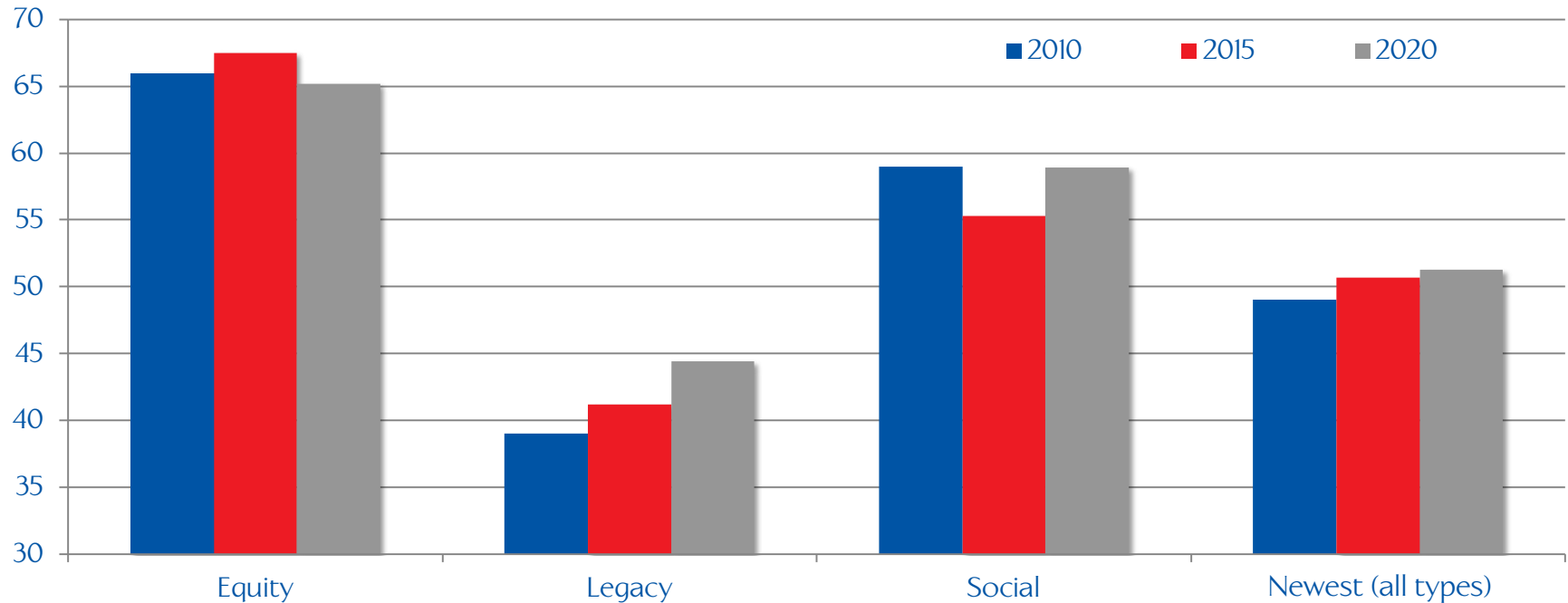


TAKEAWAY—
Dogs are truly our best
friends and the numbers
continue to grow.

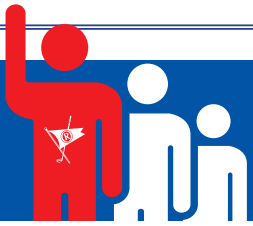




MEDIAN AGE IS SAME AS 10 YEARS AGO



THE OVERALL MEDIAN AGE OF ALL MEMBERS IS
58.7 UP FROM 56



WHAT WE USE THE MOST

TOP 5 REGULAR USE BY ALL MEMBERS

#1

Fishing Village Shops
79%



#2

Member Fitness Center
71%



#3

Buccaneer Island
Pool Deck & Chairs
69%



#4

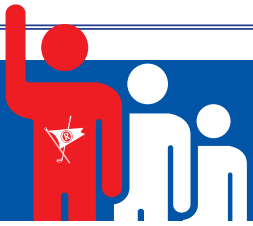
Buccaneer Island
Beach Area
69%



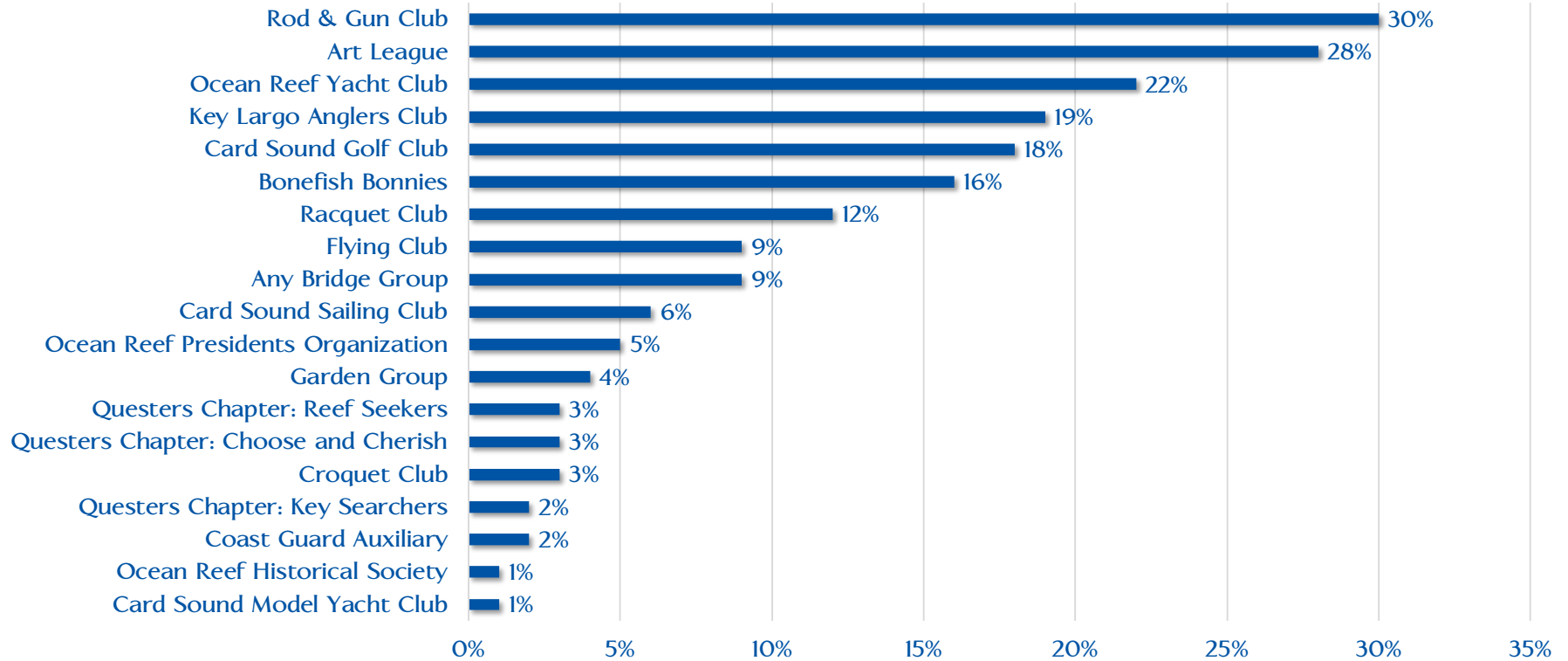
#5

The Spa
57%



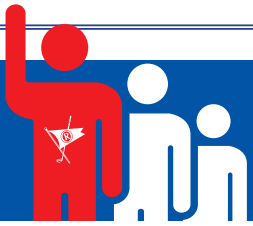


CLUBS WITHIN THE CLUB



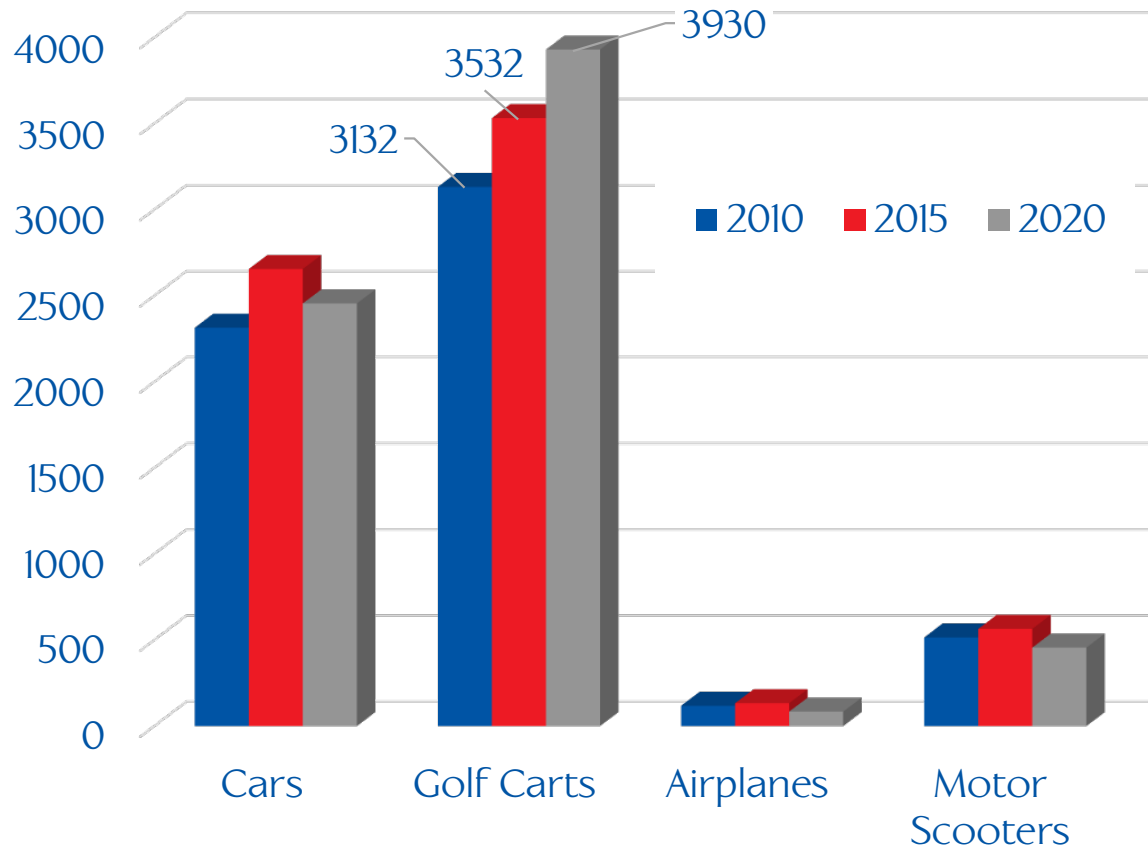
Participation continues strong over the last 10 years and is a big part of what makes this a unique Club.





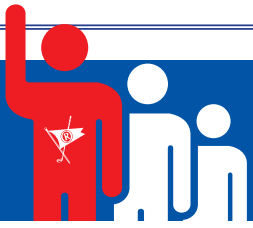
CARS, CARTS AND MORE

MORE GOLF CARTS ON THE ROAD

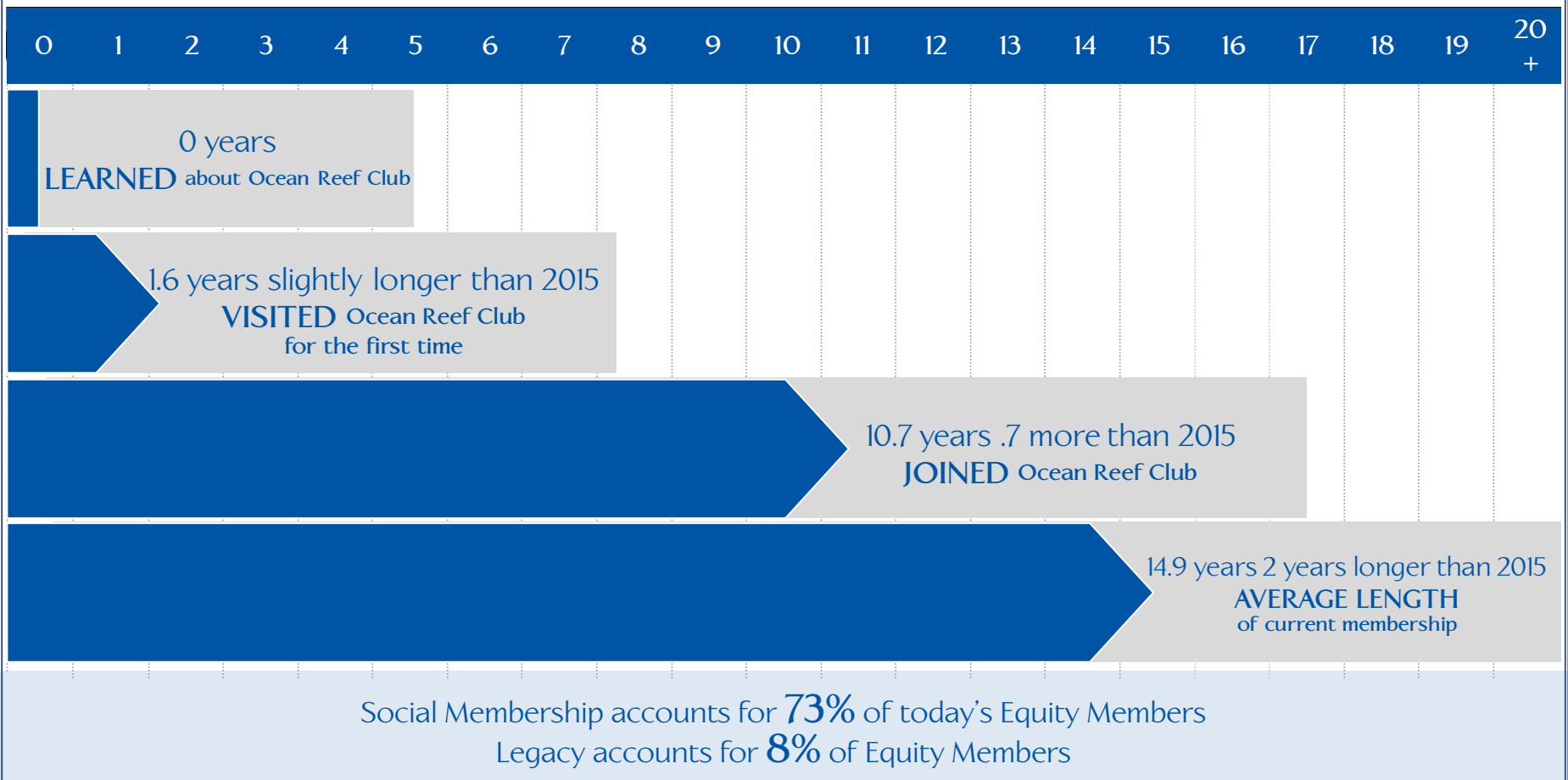


TAKEAWAY

The increase in carts and cars since 2010 led to the development of an Associate Parking Garage. This opens up more space for Members and their guests throughout the Club.

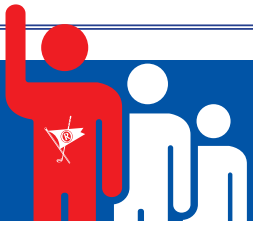


MEMBERSHIP DEVELOPMENT AND THE IMPORTANCE OF SOCIAL MEMBERS



TAKEAWAY

The journey to Membership still takes about 10 years from the first time someone learns about Ocean Reef Club. Current length of Membership has increased. The vast majority of Equity Members started with the Club as a Social Member.



HOW WE LEARNED ABOUT OCEAN REEF



Marketing and Membership Development including Events, Conferences, Marina and other introduction sources

Member Referral



51%

of all Members already belonged to 2 or more clubs (62% For Equity Members and very similar for Social).

81%

of current Members were already a Member of another club when they joined Ocean Reef Club.

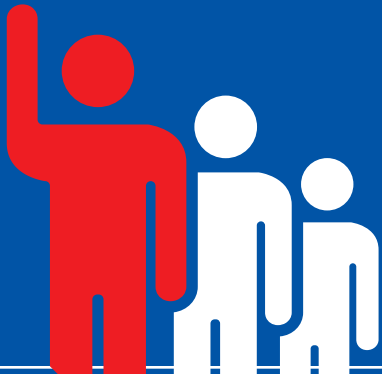
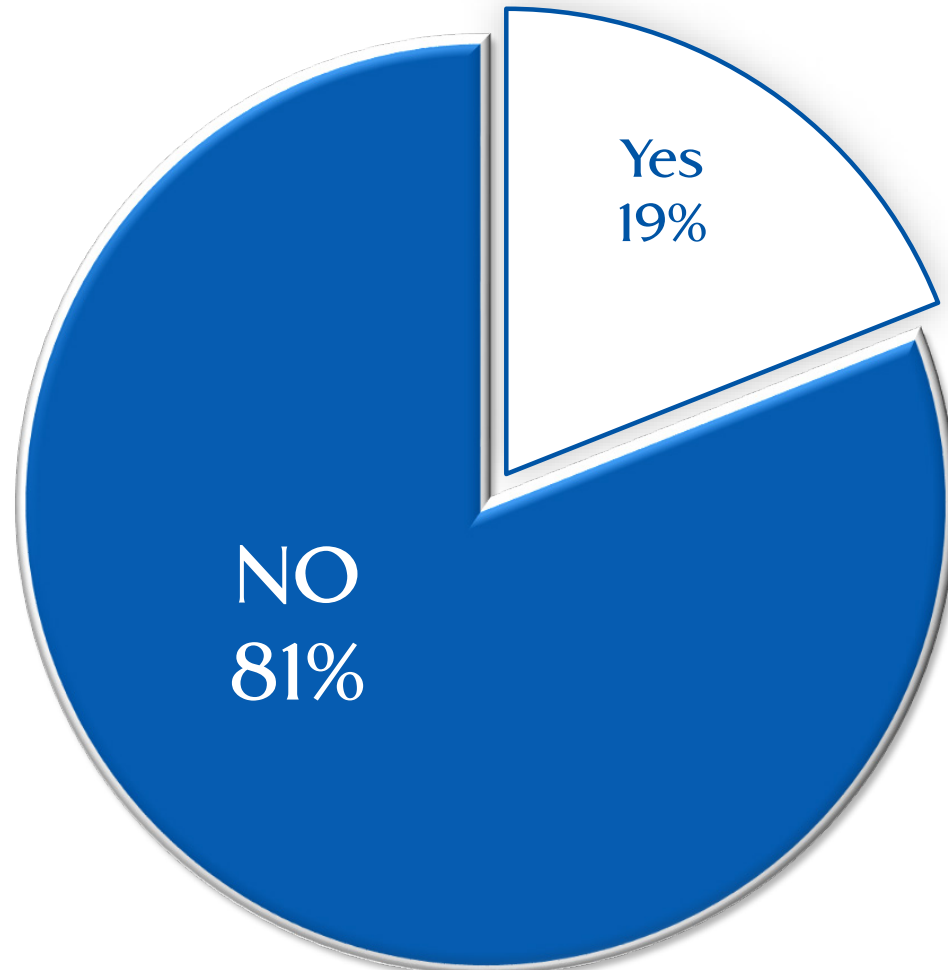
TAKEAWAY

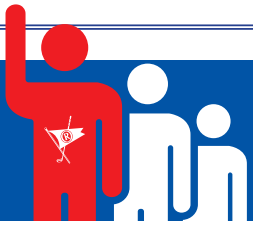
Member referrals continue to broaden the social experience of the Club. Marketing, communications and branding play a critical role in supporting those referrals and creating organic prospective Member opportunities.

WHY OCEAN REEF IS REMARKABLE

CENSUS
2020

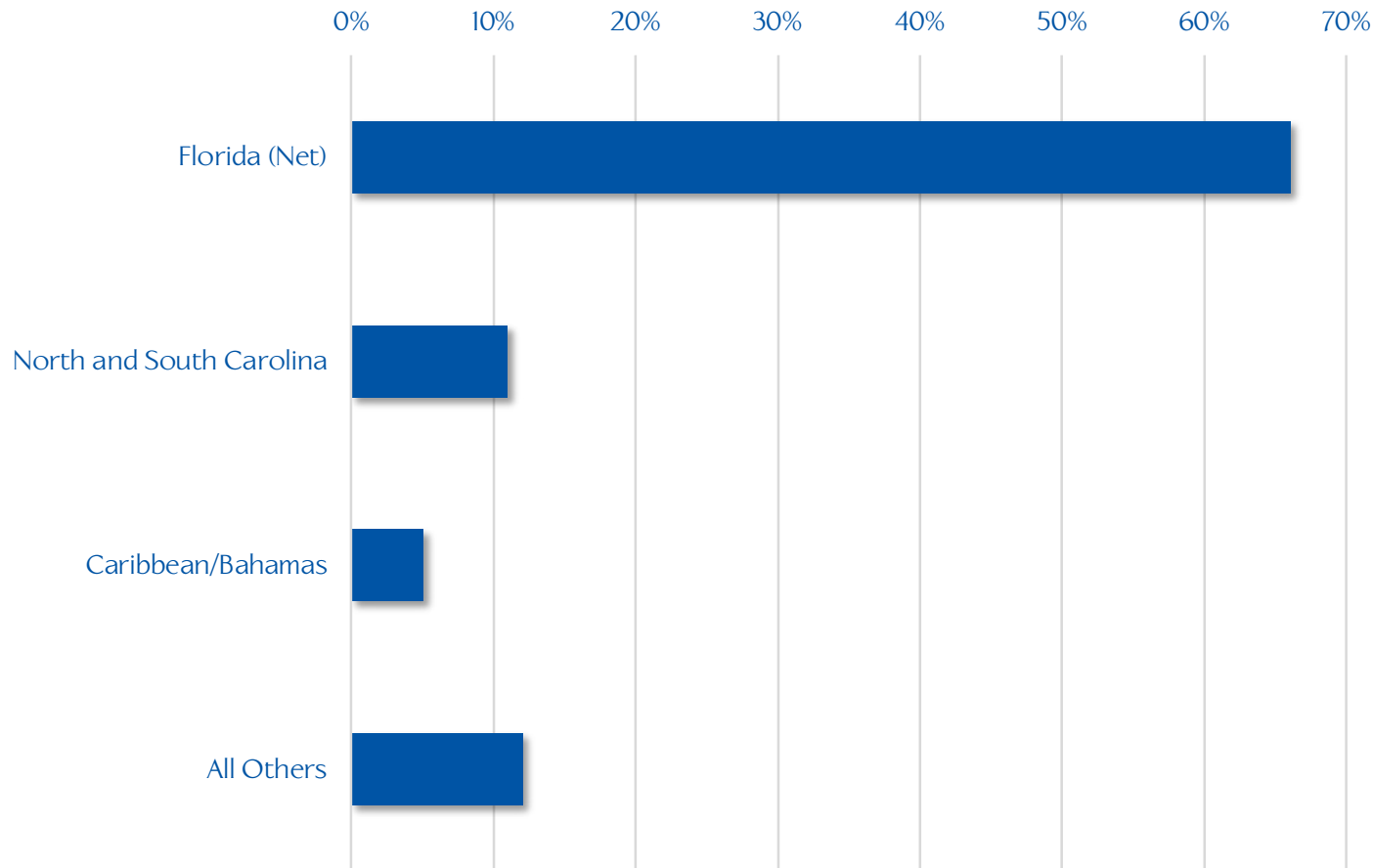
DID YOU CONSIDER OTHER PLACES?





OCEAN REEF: LIKE NO OTHER CLUB

WHERE DID YOU CONSIDER?



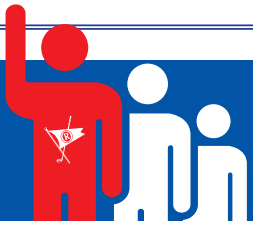
OF THE 66% FLORIDA
32% are in Naples, Palm
Beach, Vero and Jupiter
with Naples at 17%

NORTH & SOUTH CAROLINA

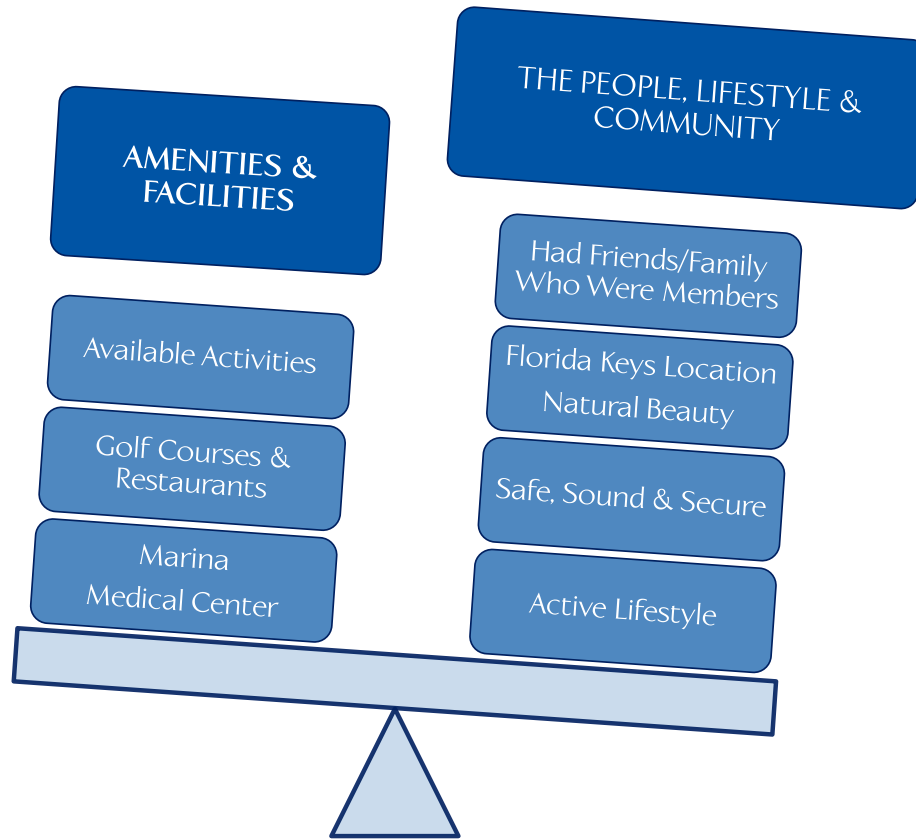
John's Island 5%
Kiawah Island 2%
Hilton Head 1%

BAHAMAS

Baker's Bay 1%
Cat Cay 1%
Lyford Cay 1%

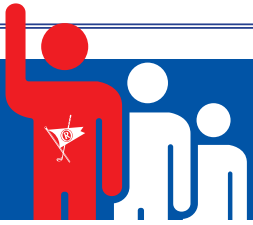


REASON FOR CHOOSING ORC



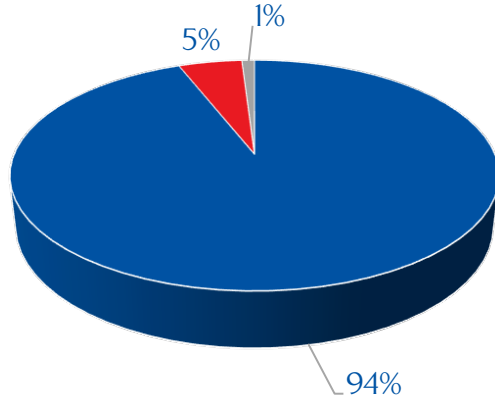
MOST IMPORTANT REASONS



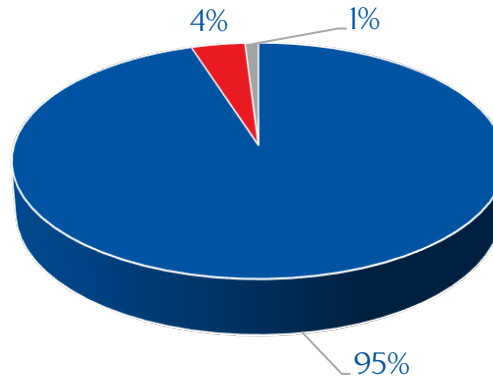


THE IMPORTANCE OF OUR SURROUNDING ENVIRONMENT

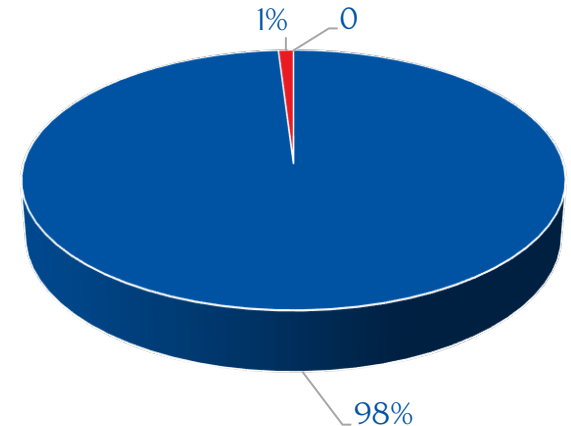
Coral Restoration and the Work the Club Supports at Carysfort Reef



Use of Time Release Fertilizer on the Golf Course



The Club's Effort to Clean Plastic Debris from the Ocean Near Buccaneer Island



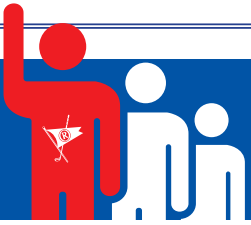
 Somewhat to very important

 Not too important

 Not at all important

TAKEAWAY

Members care passionately about where they live and the wildlife that shares that environment.



WE ARE WELL INFORMED ABOUT ISSUES AND CLUB GOVERNANCE

MAJORITY (OVER 80%) OF EQUITY MEMBERS FEEL SOMEWHAT WELL INFORMED



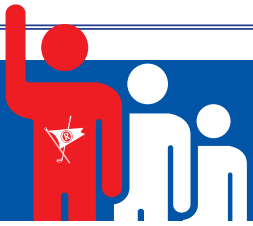
Town Hall



Ocean Reef Press



Email Communications



WHAT WE USE THE MOST

TOP 5 REGULAR USE BY ALL MEMBERS

#1 Ocean Reef Press



#2 Emails



#3 ORCA TORN Newsletter

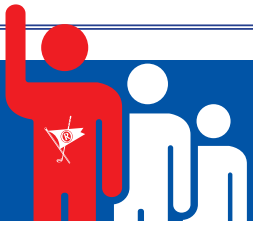


#4 Club Calendar



#5 Home Mailings

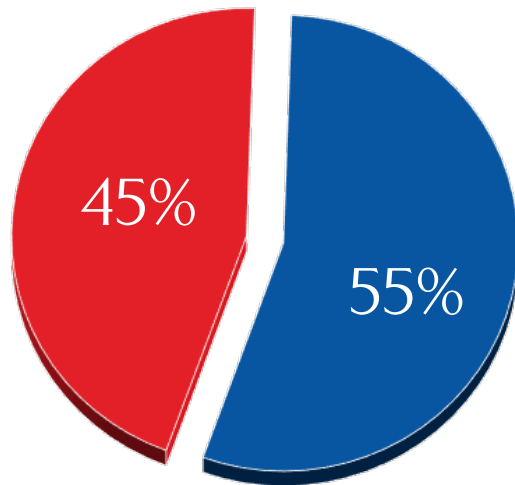




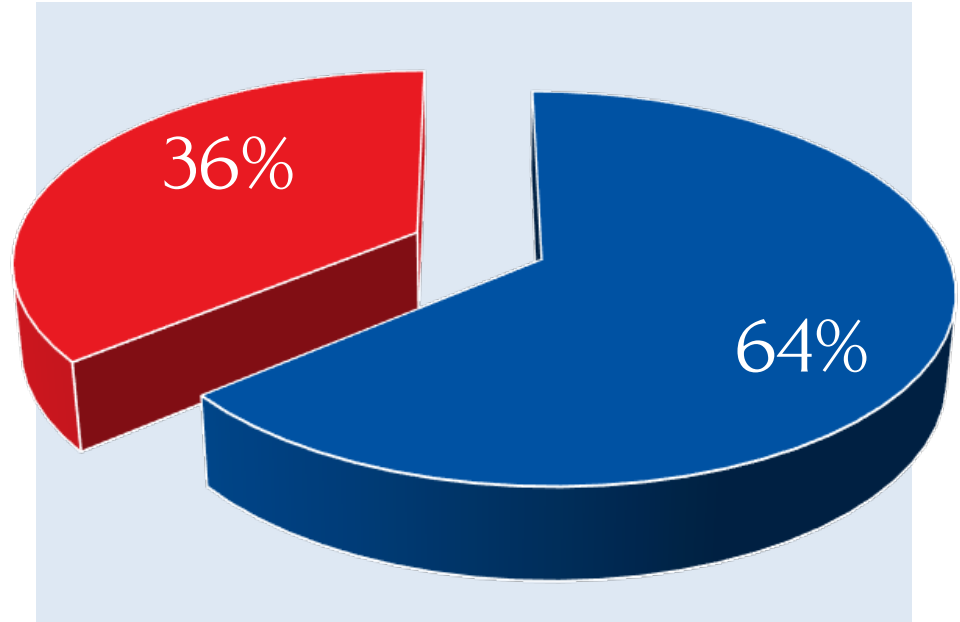
CLUB AND COMMUNITY ENGAGEMENT (EQUITY)

72% OF EQUITY MEMBERS ARE SOMEWHAT (31%) OR VERY (41%) **ENGAGED** WITH THE CLUB AND COMMUNITY

2015
Attend Town Hall Meetings



2020
Attend Town Hall Meetings



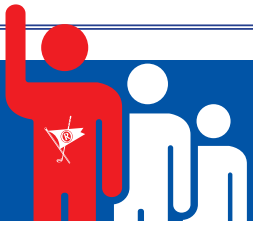
■ YES ■ NO

TAKEAWAY

With more ways to attend Town Hall including in person, live and recorded video online, Members want to attend and learn more. This enables the Club Board to keep Members well informed and provide transparency in their leadership.

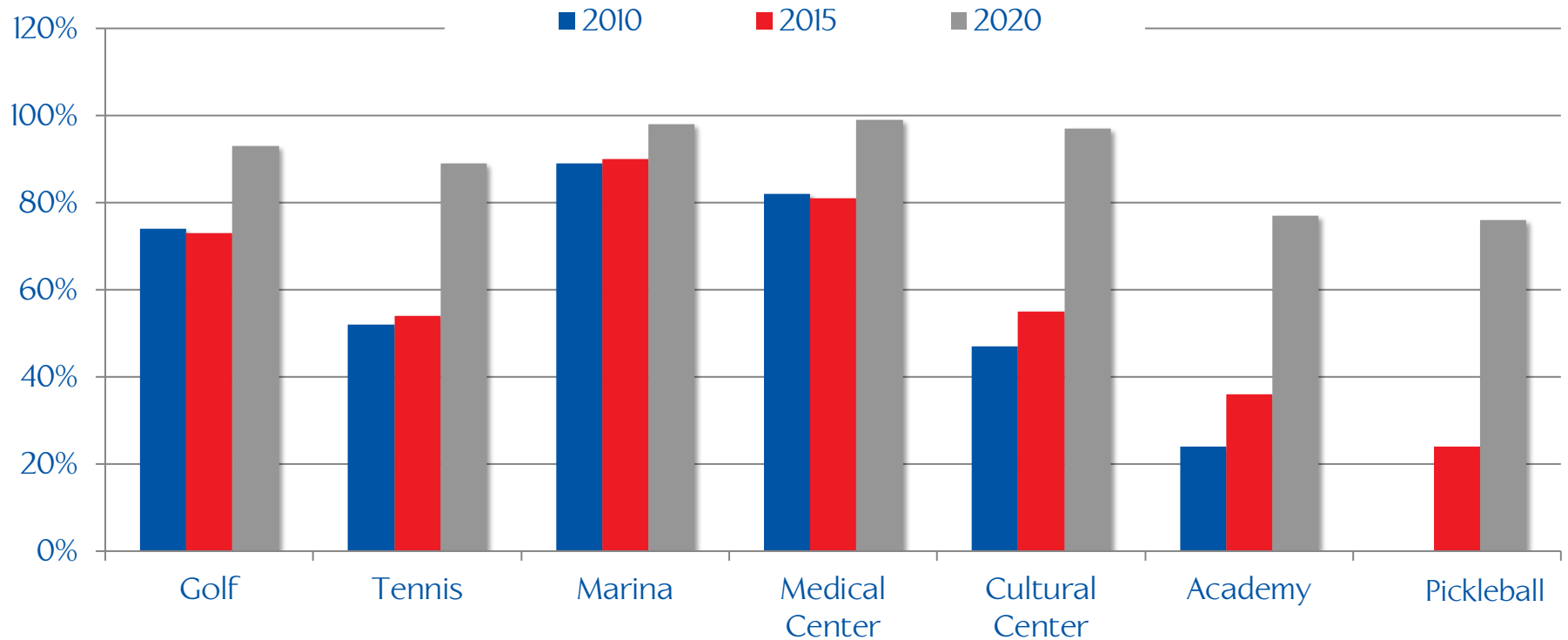


HOW WE VALUE OUR INVESTMENTS IN OUR
CLUB, OUR COMMUNITY, AND REAL ESTATE



WHAT WE VALUE HIGHLY AT THE CLUB

ALL MEMBERS & EQUITY ALMOST IDENTICAL



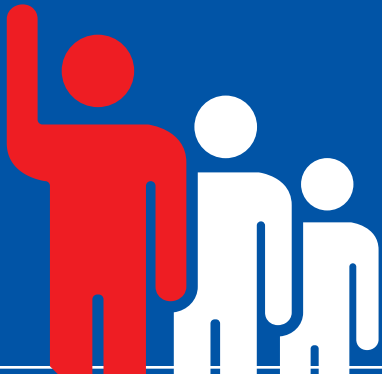
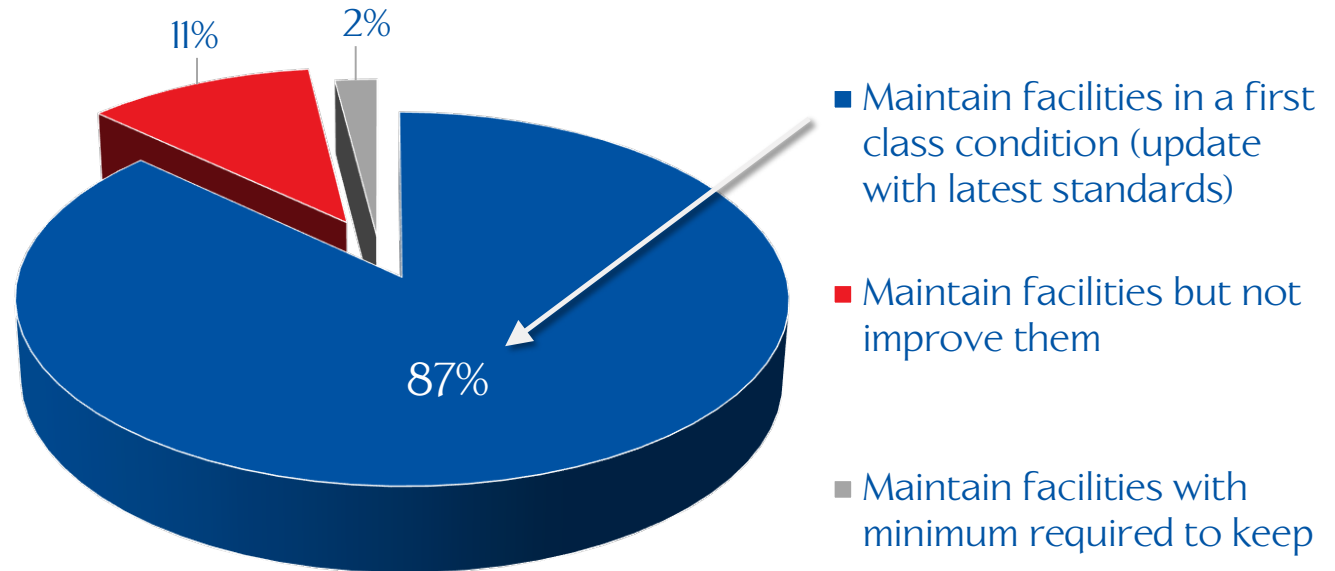
TAKEAWAY

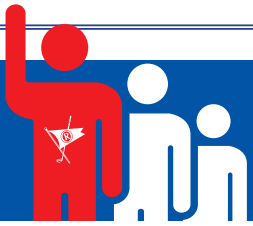
These special amenities are all highly valued by the vast majority of Members regardless of their everyday use. They add value to the Members' investment in the Club.

THE
CONTINUED
IMPORTANCE
OF OUR
MAJOR
CAPITAL
PROJECTS

CENSUS
2020

OVER THE NEXT 5 YEARS THE CLUB
SHOULD MAINTAIN FACILITIES IN A
FIRST CLASS CONDITION
UNCHANGED AT 87% FROM 2015





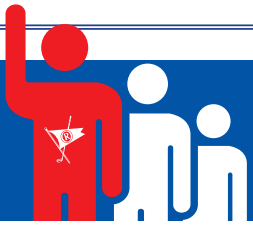
MAJOR CAPITAL PROJECTS

2010 CENSUS RESPONSES RESULTED IN:



TAKEAWAY

In 2010, Members responded with the capital projects that were most important for the future. With the Golf Clubhouse completion in 2021, all projects on that list will have been completed.

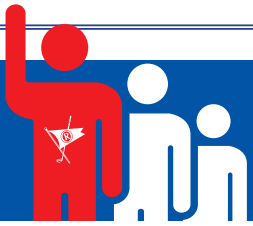


ABOUT GOLF

More are intermediate and advanced than 2015
32% belong to MGA, LGA or 9-Hole golf groups



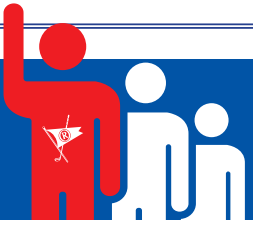
No material change since 2010



ABOUT TENNIS



No material change since 2010

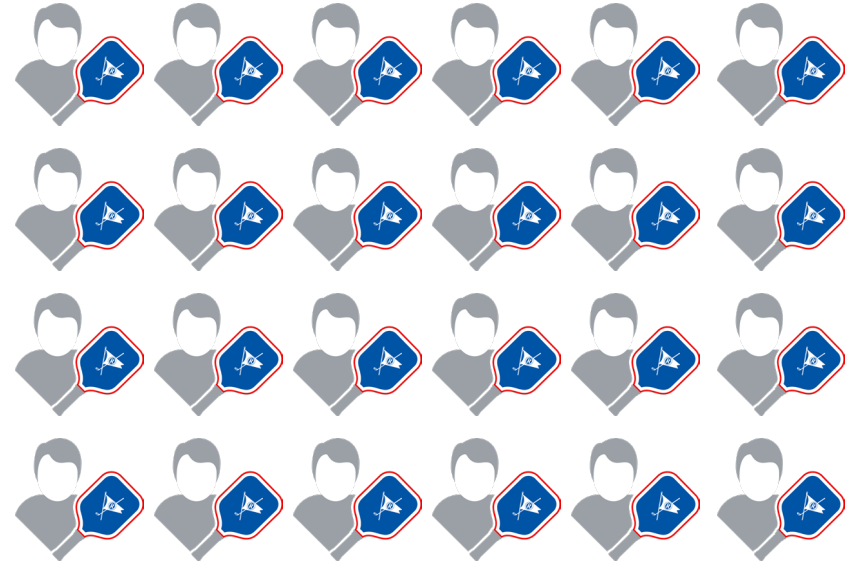


ABOUT PICKLEBALL

2015: 8% were playing



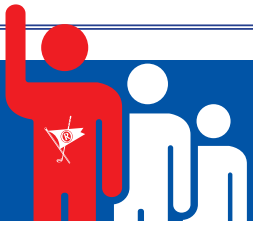
2020: 47% were playing



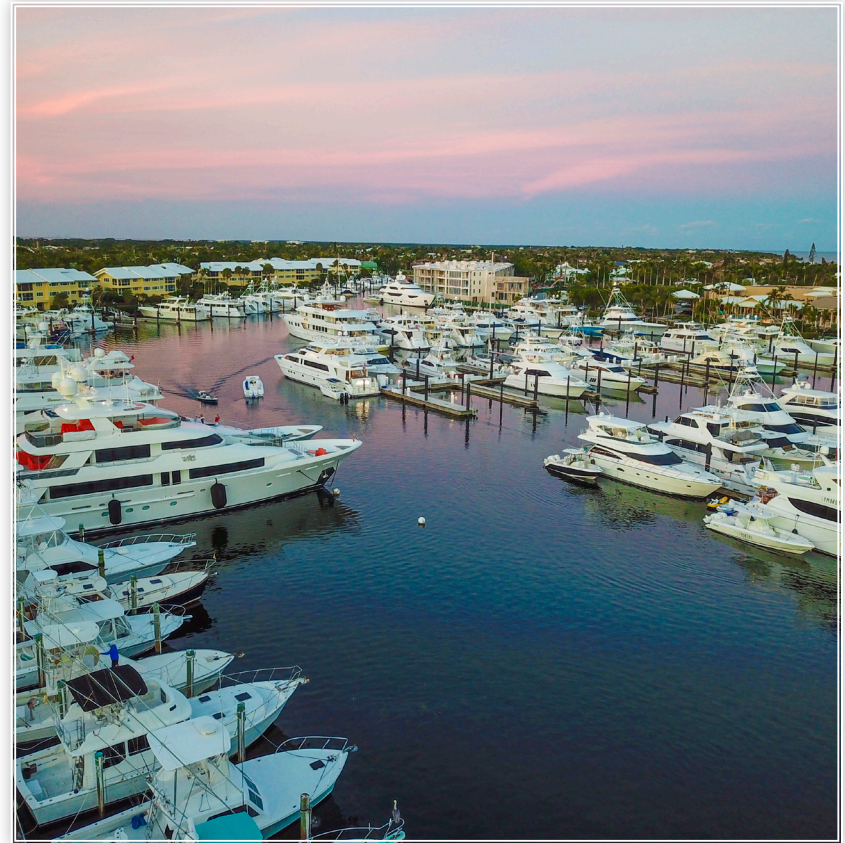
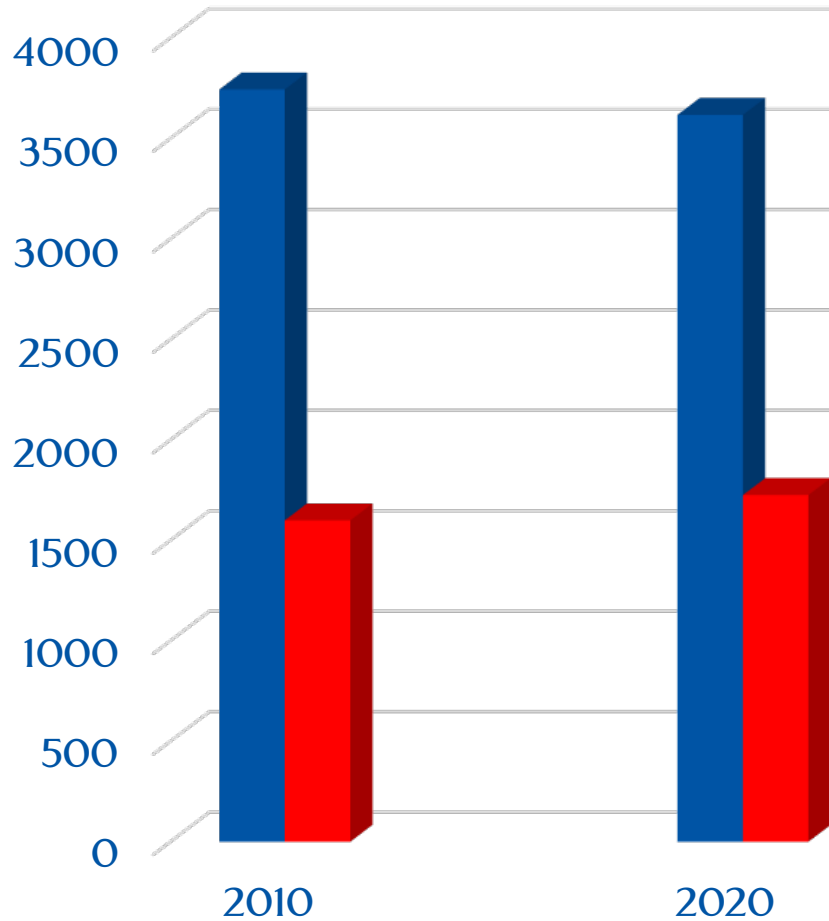
580% INCREASE FROM 2015!

TAKEAWAY

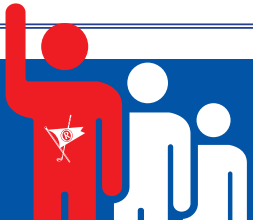
Dramatic change from 2015. Didn't exist in our conscious in 2010. Now even more family members are learning to enjoy this growing sport.



BOAT OWNERSHIP



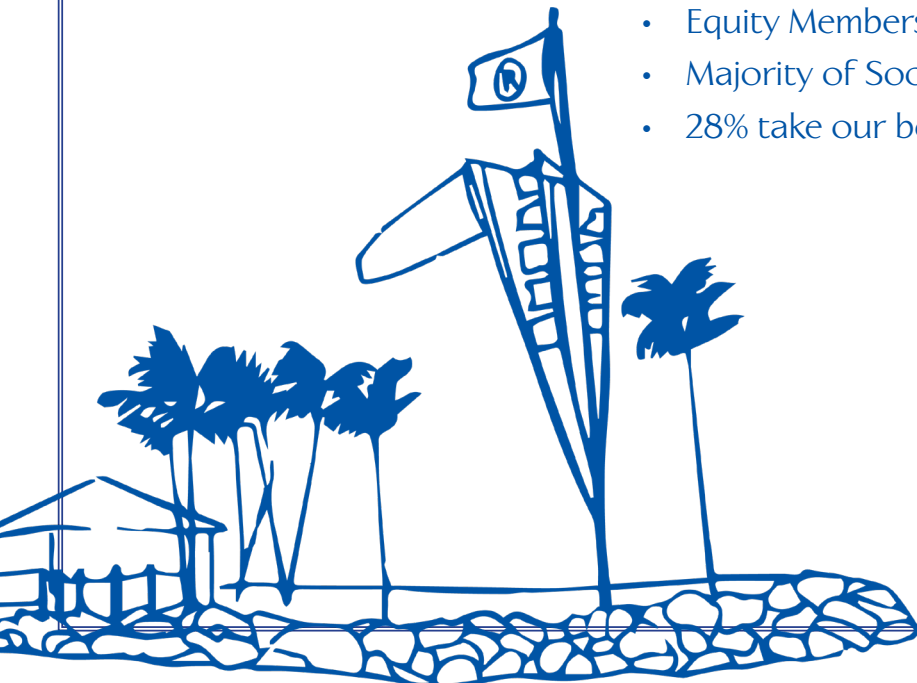
TAKEAWAY ———
Similar but just as strong since 2010.



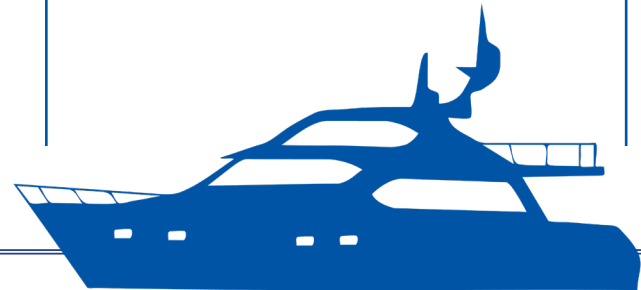
ABOUT BOATS AND BOATING

MEMBERS (ALL TYPES) OWN 3,618 BOATS
DOWN FROM OVER 4,000 IN 2015

- Equity Members keep 859 at ORC sometime during the year and 442 elsewhere
- Majority of Social Member boats are kept elsewhere
- 28% take our boats with us when we leave

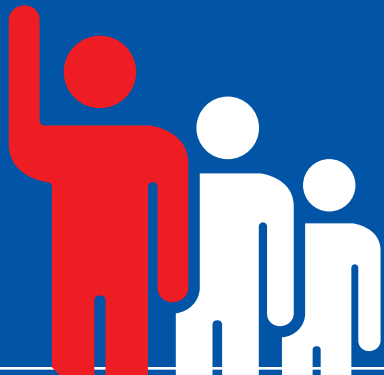


Average size is 35.4 FEET



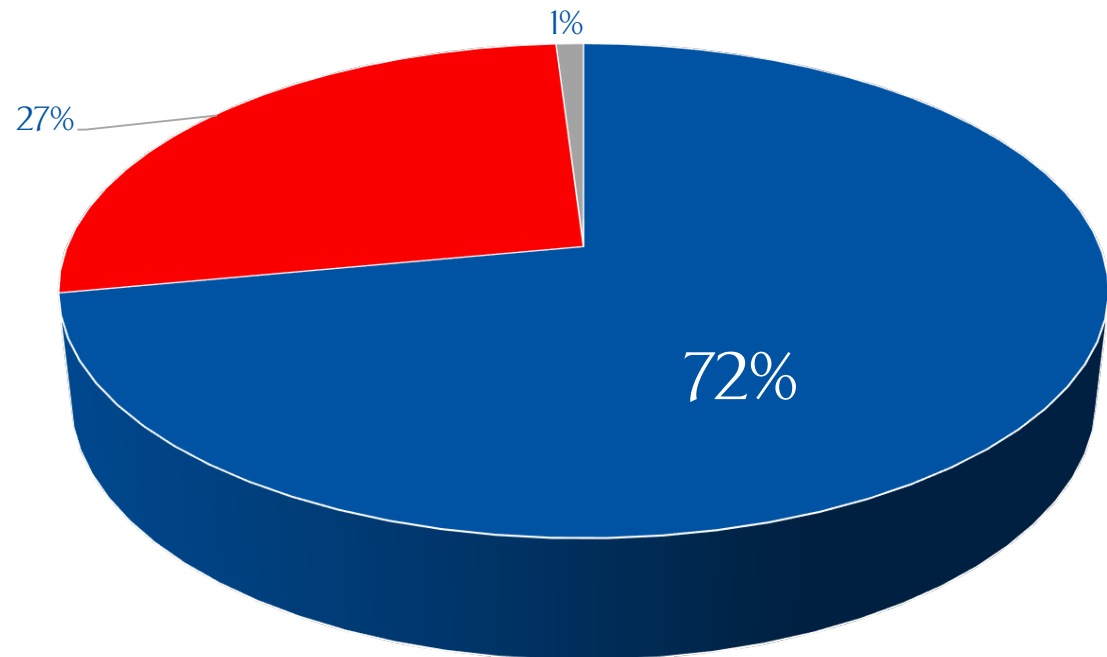
SAFETY AND SECURITY

CENSUS
2020



THE TRADITION FOR SAFETY AND SECURITY IN THE COMMUNITY REMAINS...

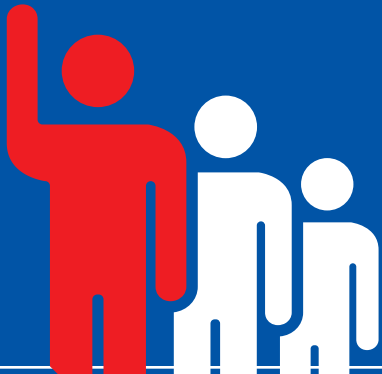
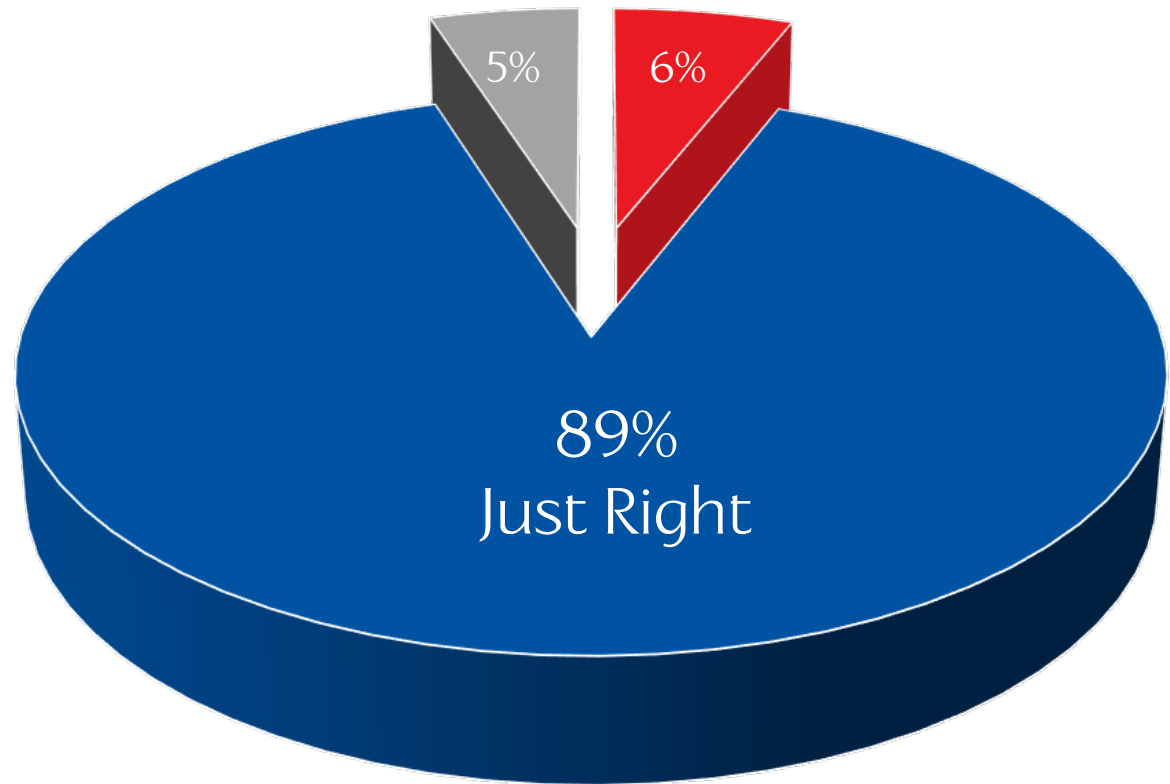
■ More important than ever ■ The same ■ Less important than it used to be

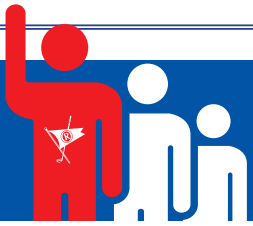


PRESENCE OF PUBLIC SAFETY PATROLS

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2020

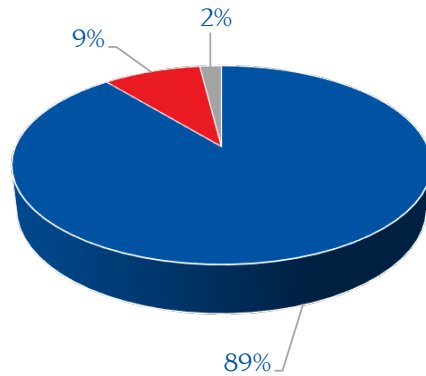
■ Too frequent ■ Just right ■ Not enough



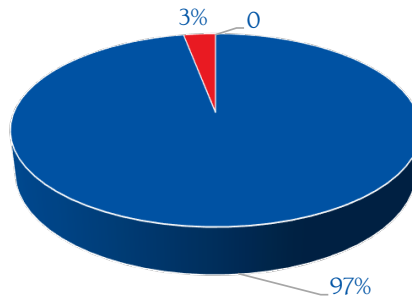


SAFETY AND SECURITY

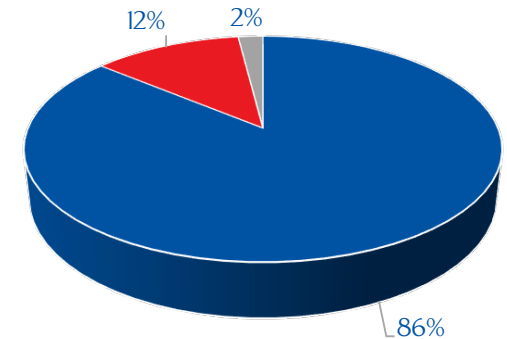
Law Enforcement Officers in the Community



Importance of Very Strict Background Checks at the Front Gate



Improved Card Sound Road Conditions



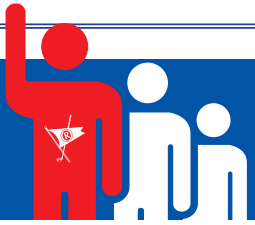
 Somewhat to very important

 Not too important

 Not at all important

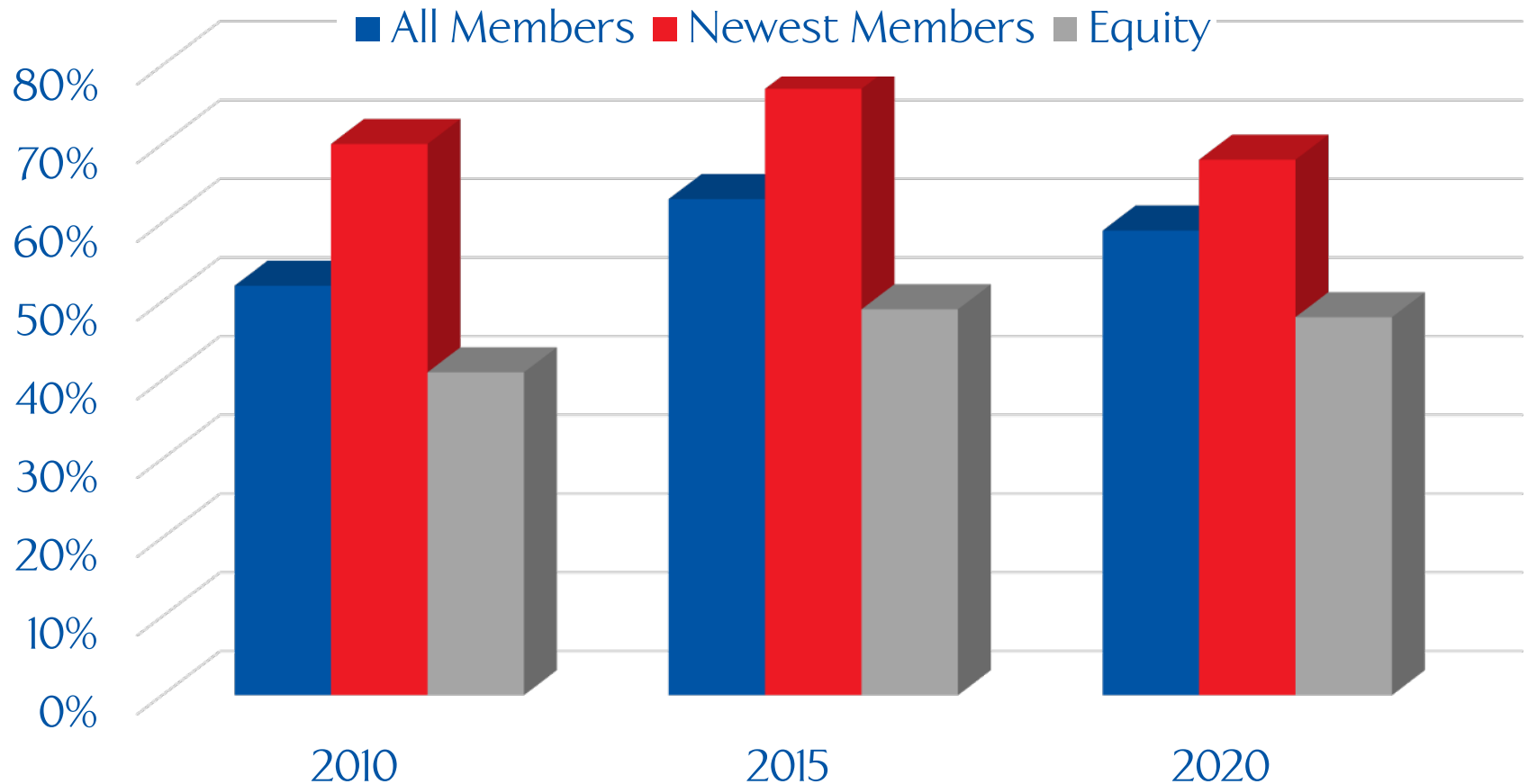


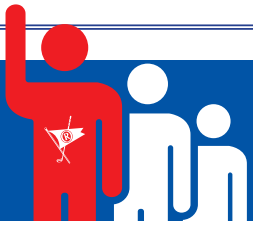
HOW WE SEE AND BELIEVE
IN THE FUTURE OF OUR CLUB



HOW MUCH WE EXPECT TO USE THE CLUB IN THE FUTURE

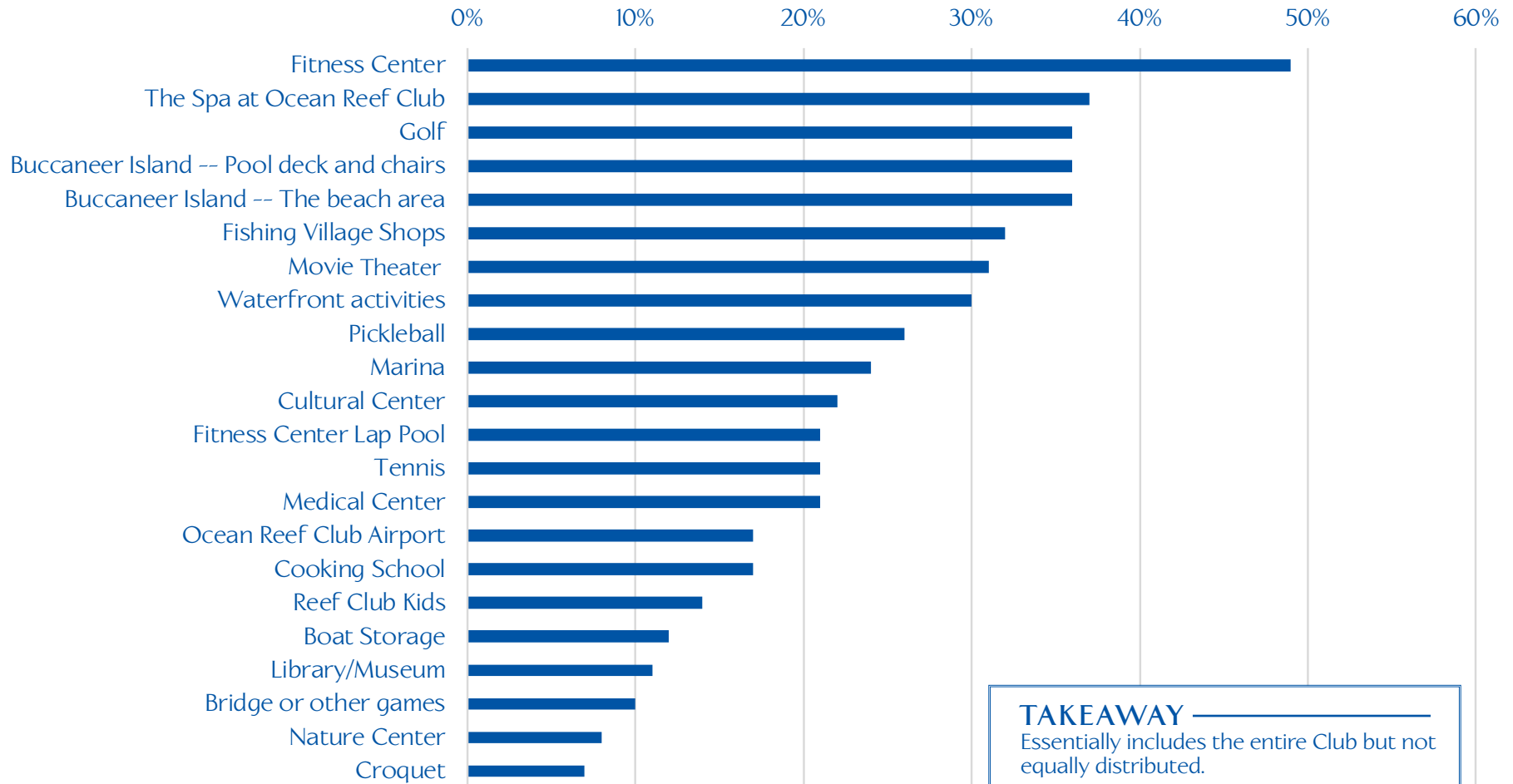
EXPECT TO USE THE CLUB MORE IN THE
NEXT 3-5 YEARS:

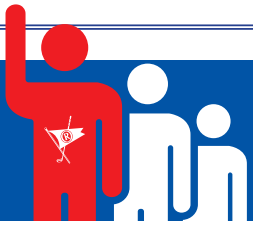




HOW MUCH WE EXPECT TO USE THE CLUB IN THE FUTURE

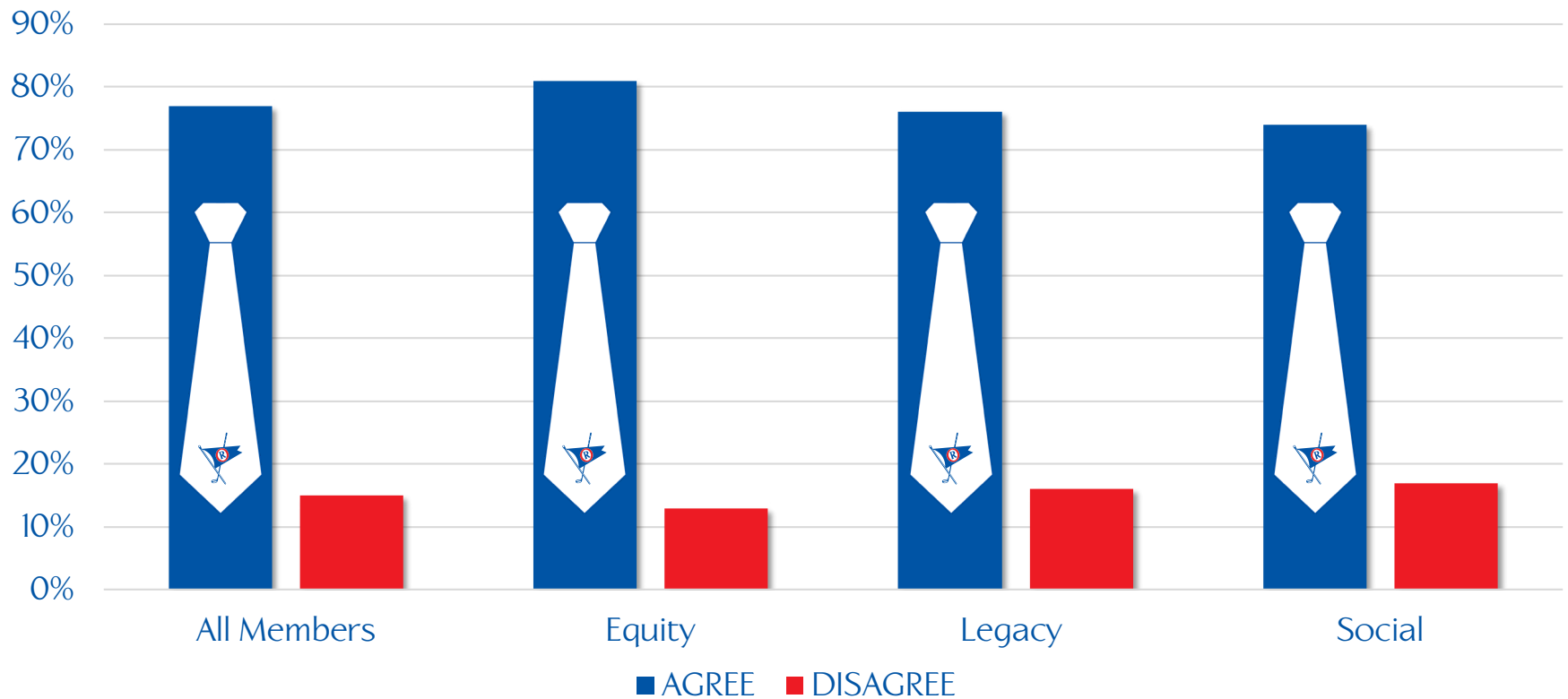
WHERE ADDITIONAL USE WILL TAKE PLACE





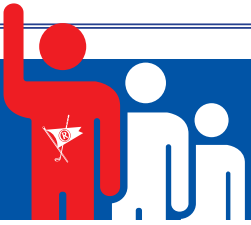
STILL AN IMPORTANT TRADITION

THE DRESS CODE SHOULD REMAIN AS A KEY CLUB TRADITION



TAKEAWAY

The formality of a Club Dress Code is important to all Members.



STILL AN IMPORTANT TRADITION

EQUITY MEMBERS STAYING BETWEEN 3-7 MONTHS

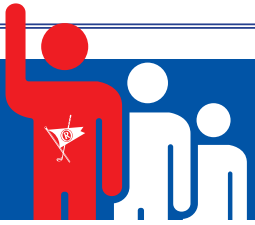
2010: 54%

2020: 60%



TAKEAWAY

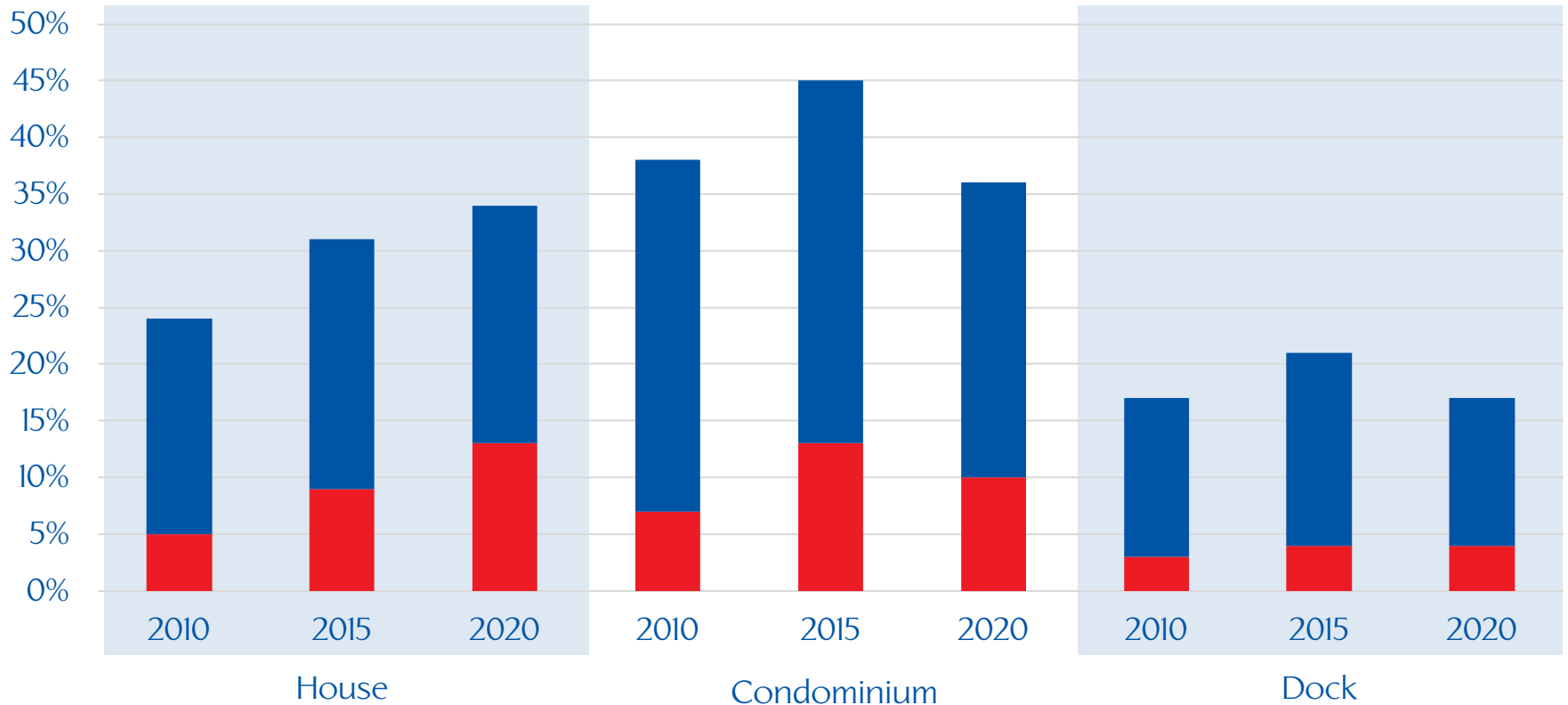
Tradition speaks to the many things that have remained relatively the same for the past 10 years. While the world around us changed, Ocean Reef retained the key traditions and culture that Members cherish.

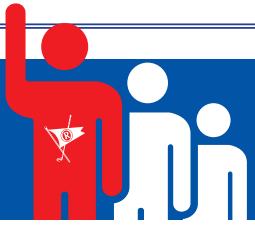


OUR VIEW OF OUR OWN FUTURE REAL ESTATE PLANS

PERCENT OF MEMBERS INTERESTED IN PROPERTY PURCHASE

■ Maybe ■ Yes



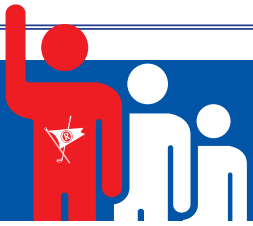


IF OCEAN REEF DID NOT EXIST...

MOST (25%) DON'T
KNOW WHERE
THEY WOULD GO
IF OCEAN REEF DID
NOT EXIST.

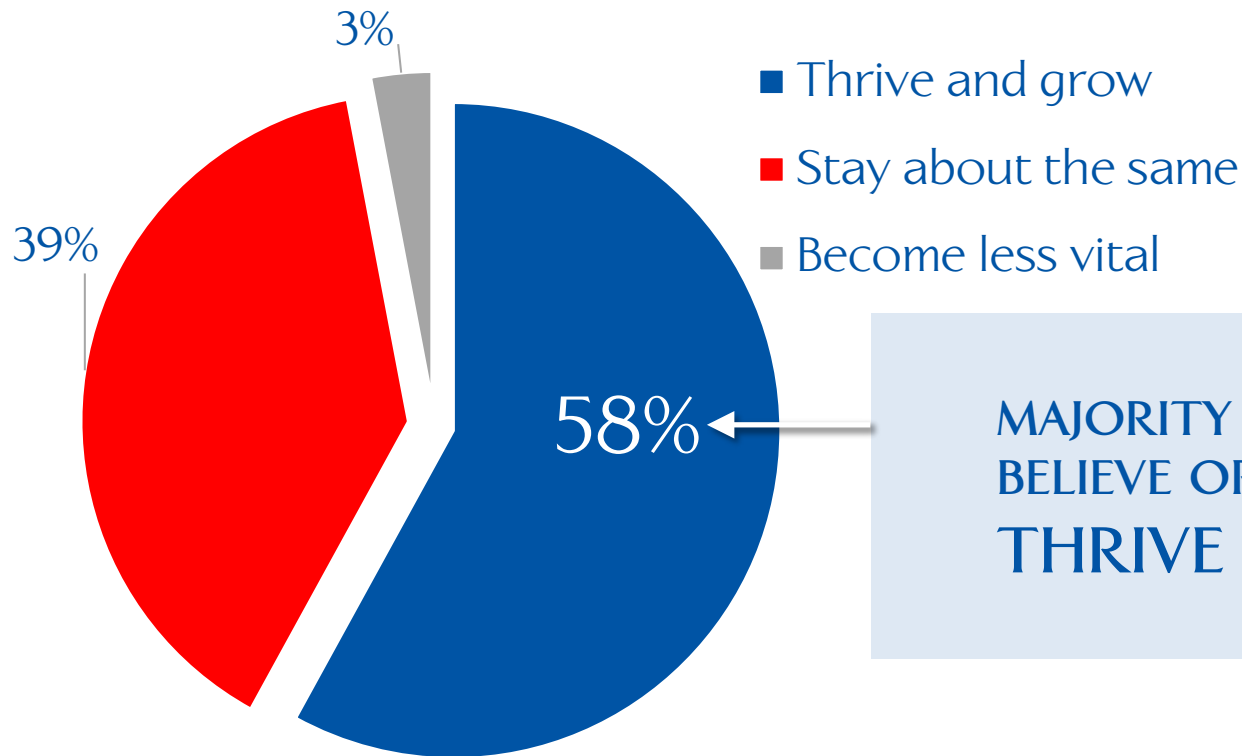
TAKEAWAY _____

"Don't know" is another way of saying there is nothing quite like Ocean Reef Club.



HOW WE VIEW THE FUTURE SUCCESS OF ORC

OVERALL DO YOU BELIEVE DURING THE NEXT 5 YEARS, ORC WILL:

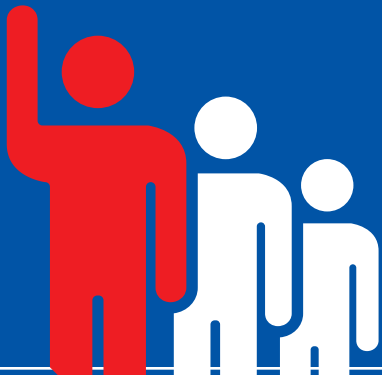
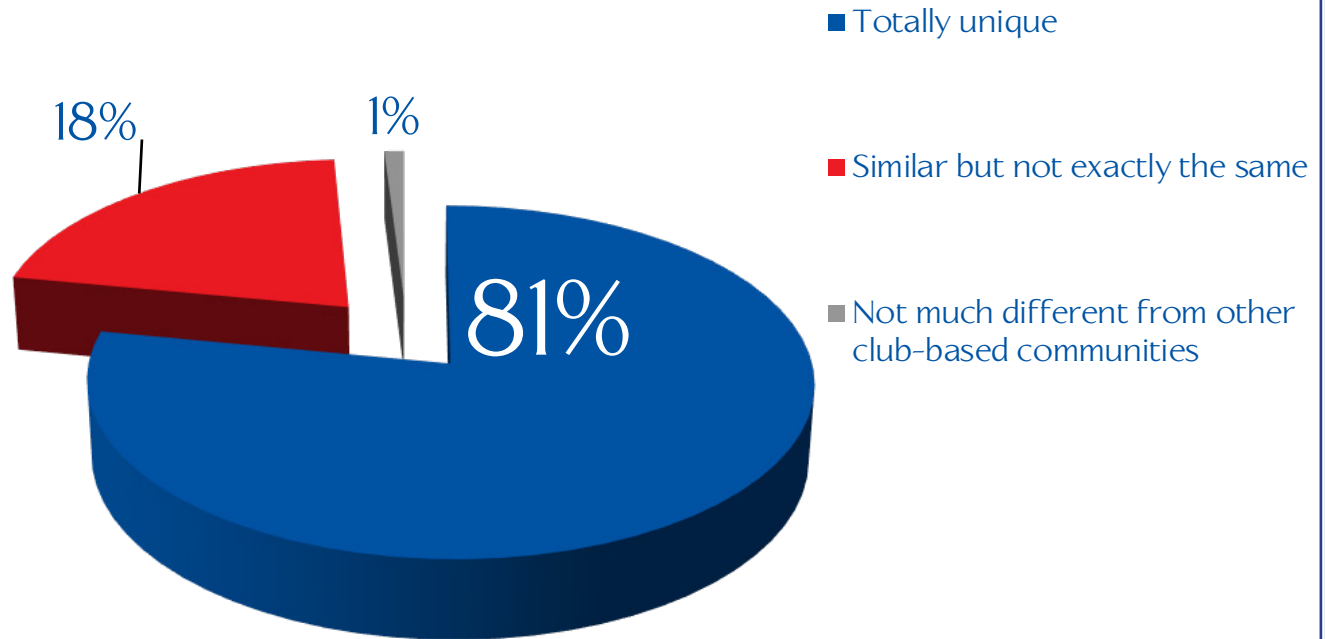


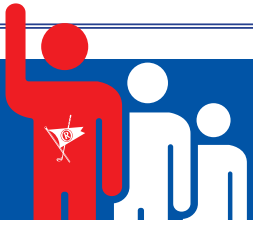
MAJORITY OF MEMBERS
BELIEVE ORC WILL
THRIVE AND GROW

HOW UNIQUE IS ORC?

CENSUS
2020

THE VAST MAJORITY OF MEMBERS BELIEVE THE CLUB
IS **TOTALLY UNIQUE**, 3% MORE THAN IN 2015.





FOUR KEY TAKEAWAYS

#1

Members regularly engage with the array of offerings at the Club creating an active and intellectually stimulating environment that adds to the vitality of the overall community.

#2

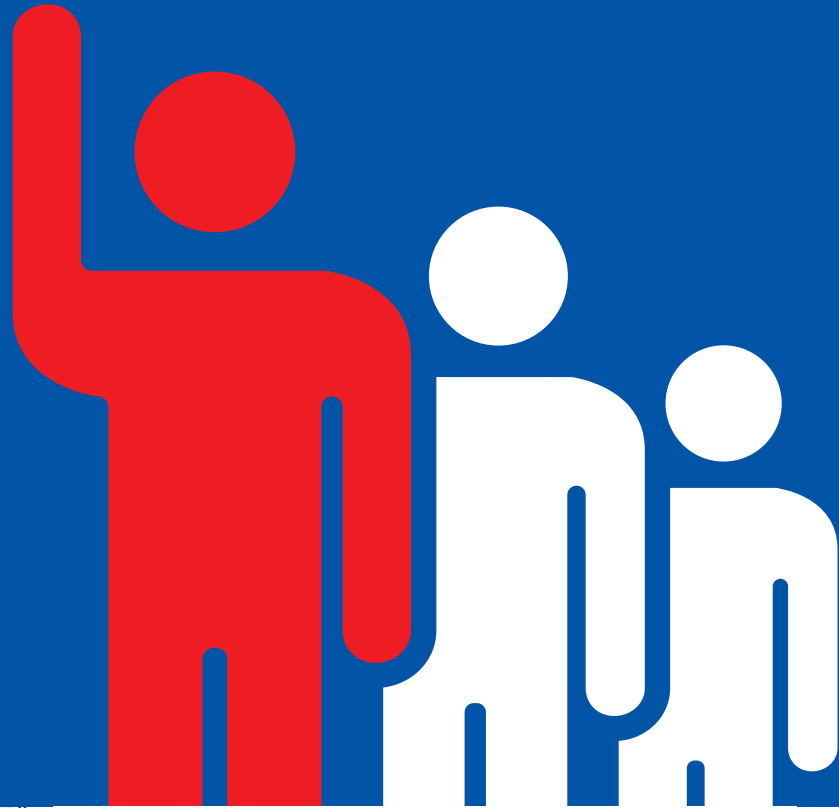
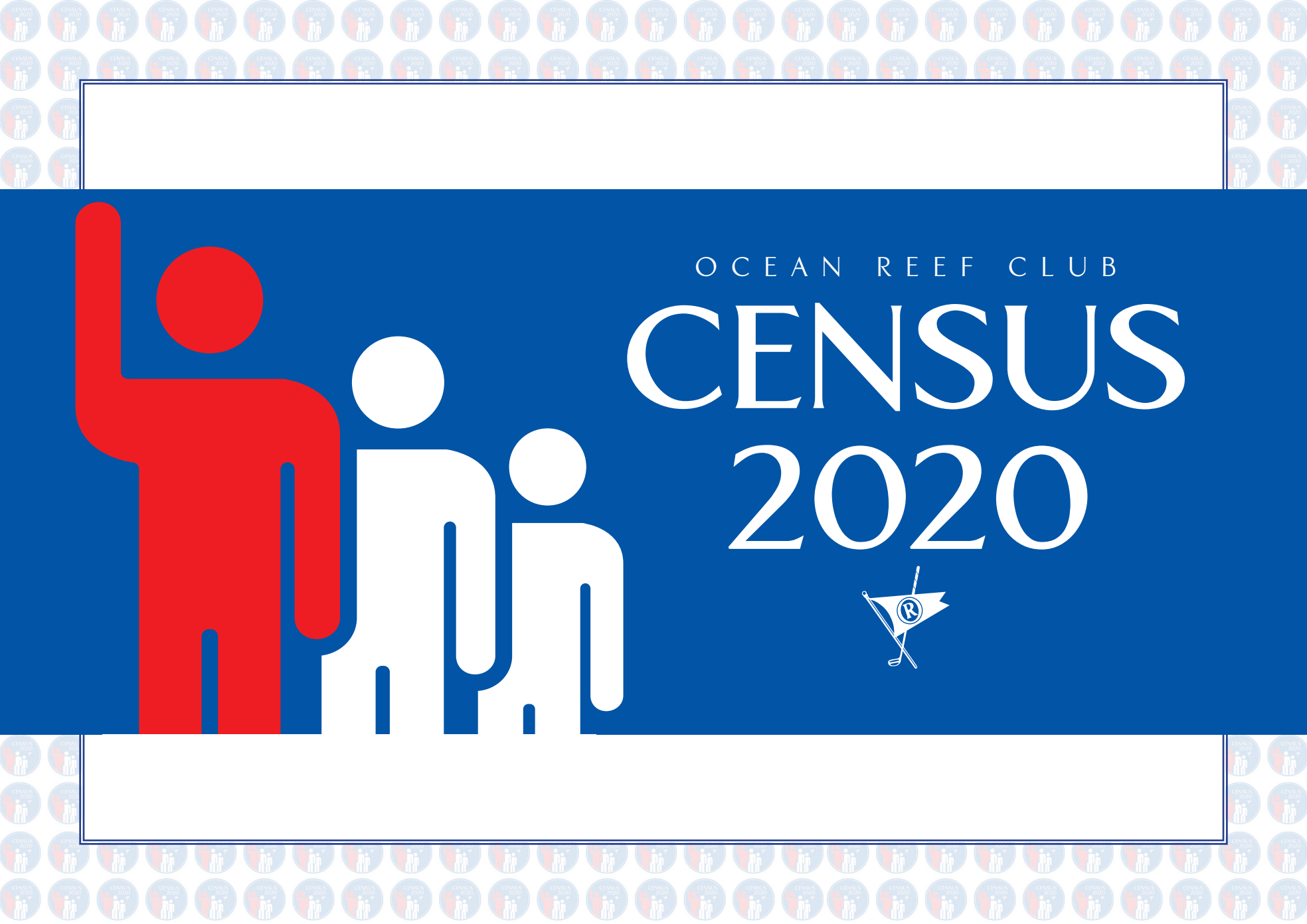
The Club provides great value to the Members across all experiences.

#3

Confidence in the future is very high.

#4

The Census results act as a guide for future programs and capital investments.



OCEAN REEF CLUB

CENSUS 2020



