

Data Gathering and Analysis Report

Property Owner Survey 2020 – Final

Introduction

According to the Comprehensive Plan adopted by the Seabrook Island Property Owners Association (SIPOA) Board of Directors in 2019, a full island opinion survey was to be completed every other year with other information gathering techniques to be employed in the intervening years. For 2020, the goal was to use an island wide survey where property owners could express opinions on a broad range of topics covering the full scope of SIPOA activities. Questions were submitted to the Data Gathering and Analysis (DG&A) Subcommittee by the Board, SIPOA Committees, and professional staff for inclusion in the survey. The SIPOA Long Range Planning Committee and the Board reviewed the survey before distribution to Property Owners. The approach was similar as was used in 2014, 2016 and 2018 which consists of a series of categorical questions along with open-ended questions to provide Property Owners the chance to express their opinions freely.

The Process

Property owners were asked to complete the survey as announced in various communications vehicles (e-Blasts, Tidelines, etc.). The survey was open to responses during the month of October 2020 and was closed to responses on November 18th.

Over the next few months, the DG&A and the SIPOA Long Range Planning Committee worked to review the data to identify significant results. Comparisons were made to previous years responses to identify trends. The open-ended questions were reviewed and categorized by subject. This remains the most difficult part of the analysis since each of many thousands of comments must be read and reviewed. Since the survey was organized by committee responsibility, the results of questions and the comments made will be distributed to the corresponding Chairs of each Committee following the 2021 Annual Meeting for their review before being released to all property owners.

The Results

A total of 930 property owners responded to the survey yielding a response rate of approximately 40 percent. Statistically, the accuracy of the survey data is 95 percent plus or minus 3 percent. Seabrookers can feel confident that the survey results accurately reflect the characteristics, attitudes, activities, and opinions of all Seabrook property owners. Not every property owner responded to every question, in many cases because the question was not applicable to them.

All open-ended responses will be shared with the Board of Directors and committee chairs. All significant responses will be addressed where deemed appropriate and will be used to inform updates to SIPOA's Strategic Plan. This reflects a continuance of the practice used in past surveys. These reviews and outcomes will be communicated to property owners as they are addressed.

The distribution of property owners by residence type as of December 31, 2020 is shown in Table 1. The data reflect the addition of Salt Marsh units, new home builds, consolidation of properties, and Greenspace donations.

Table1. Property Type on Seabrook Island by Year

Property Type	2020	2018	2016
Total Properties	2,589	2,595	2,598
Total Villas	1,124	1,118	1,107
Total Single Family Homes	1,128	1,105	1,072
Undeveloped Lots	337	370	419
Full-time Villa Residents	235	234	183
Full-time Single Family Home Residents	592	580	548

Here are a few highlights from the current survey. The average years of property ownership was 12 years with a range of 1 to 40 years. Only 54 percent of owners are full-time residents and most of them, 61 percent, plan on keeping Seabrook Island as their residence for the next five years. Two-thirds of owners who are part-time residents plan on becoming full-time residents within the next 10 years. Respondents' ages ranged from under 40 to over 80, with 43 percent in the 60 to 69 age range and 28 percent in the 70 to 79 age range. The most prevalent area of concern was related to island water issues - flooding, drainage, tidal flooding, etc. The survey results are grouped into categories based upon the associated SIPOA Committee and the details of each group are shown below in the body of the report

SIPOA Administration

Property owners were asked to rate their level of satisfaction with SIPOA administration functions. The ratings of most of SIPOA functions were higher in 2020 than in the previous survey as shown in Table 2. In addition, 88 and 71 percent of respondents were highly satisfied or satisfied with hurricane response and COVID-19 response in 2020 respectively.

Table 2. Percent Responding Highly Satisfied or Satisfied by SIPOA Administration Function, 2020 and 2018

SIPOA Administrative Function	2020	2018
Administrative Staff	73	67
Security	72	69
Engineering/Maintenance	78	69
Communications	78	71
ARC	41	49
Finance	63	66

A total of 521 comments were received. Comment categories included: ARC 25 percent, COVID response 19 percent, administrative services 19 percent, Safety/Security 11 percent, Board Governance/Communications 10 percent, gate access issues 9 percent, flooding 1 percent, and other 8 percent. The executive director will review all of these responses.

Activities

Respondents were asked to identify the Lake House facilities and activities they used and the frequency of utilization. Respondents were asked to answer relative to their “pre-COVID” facility use.

Table 3. Frequency of Utilization of the Lake House by Facility/Activity

Facility/Activity	1-2 Times Per Month	3-10 Times Per Month
Library	31%	12%
Outdoor Pool	30%	17%
Special Interest Group Meetings	28%	6%
Fitness Center	23%	23%
Indoor Pool	23%	15%
Massage	13%	1%
Playground	17%	4%
Basketball	12%	3%
Exercise Class	11%	10%
Personal Trainer	3%	4%

Seventy-five percent of respondents indicated that the Lake House schedule met their needs, compared to 42 percent in 2018. Similarly, 97 percent of respondents said that the Lake House staff was responsive and courteous, compared to 83 percent in 2018.

**Table 4. Desired Level of Activity at the Lake House by Type of Activity
Percentage of Respondents**

Lake House Activity	More	Less	About Right
Number of family-friendly activities at the Lake House	18	56	26
Number of seminars, lectures, social events at the Lake House	35	3	62
Number of outside activities at the Lake House	33	1	65

There were 495 comments received in the following categories: Specific activities such as cultural events and social gatherings, general positive comments about the facility (including the library), hours of operation, and COVID restrictions.

Only 43 percent of respondents had been to the Oyster Catcher Community Center/Pool in 2020 compared to 57 percent in 2018. Eighty-seven percent of those who did use the Center/Pool were satisfied with the complex.

Table 5. Percentage of Respondents Using the Oyster Catcher Community Center/Pool by Type of Activity and Frequency

Type of Activity	1-2 times per month	3+ more times per month
Meeting	44	3
Private Party	20	1
SIPOA Event	28	1
Pool	30	42

Respondents indicated that the greatest areas of concern were: update the facility and enhance maintenance – 26 percent; increase hours and availability – 8 percent; improve restroom availability – 8 percent; and heating and cooling issues – 5 percent. 33 percent of respondents thought no changes were need. 16 percent desired new activities specifically oriented to children. These activities included: camps, clubs, and social events;

instruction in golf, tennis, and other sports; and environment and nature Programs. Finally, a large number of respondents listed a wide range of other activities that they would like to see in the SIPOA portfolio. The choices of 425 respondents are summarized in the table below:

Table 6. Desired New Activities

Activity	Percentage Interested
Social/Entertainment Property Owner Events, Movies, Orientation	13
Kids/Teen Events - sporting, games, etc.	2
More Games/Competition - Shuffleboard, Bocce, Cornhole, Team Activities	7
More Exercise Classes - early morning, low impact for Seniors	2
Educational - Couples/Group Dancing, Cooking, Water Instruction, Historical, Environmental, Wellness, Life Satisfaction	10
More Amenities - Dog Park, Hot Tub, Fire Pit, Rock Climbing Wall, Sauna, Squash, Racquetball	4
Bike Paths	2
Water/Beach Access/Parking - kayak/paddleboard storage, fishing, crabbing)	4

ARC

Only respondents with contact or involvement with the ARC during the past two years were asked to comment on their experiences. A total of 320 mentioned any ARC activity during this period of time. The reasons for contact were many and varied, as shown in the Table 7 below.

Table 7. Reasons for ARC Contact

Reason for ARC Contact	Number of Responses
Permits for tree removal or other landscaping	123
House painting or outside maintenance	126
Approval for home alteration or addition to an existing home	138
New home construction	44
Representative of a villa or regime	32
Other	44

Respondents with ARC contact were asked about the nature of their interactions with the ARC. Just over half, 54 percent, of respondents thought the ARC staff was readily accessible and helpful, compared to 67 percent in the 2018 Survey. Sixty-seven percent of respondents thought that the ARC rules or requirements were fair and reasonable compared to 57 percent in the 2018 Survey. Those respondents who replied no to this question thought the rules were too restrictive or unfair. These responses will all be evaluated by the ARC. Finally, respondents were asked if they personally attended any ARC meetings. Only 19 percent responded yes to this question although about 20 percent attended through Zoom. Respondents who attended ARC meetings overwhelmingly (95 percent) believed they were treated fairly and understood the reasons for the ARC's decisions.

Communications

The Communications section addressed the use of various outlets to find information about the SIPOA Board and committees. As shown in Table 8, respondents used several media to get information on SIPOA Board and Committee events.

**Table 8. Percentage Utilization of Media to Assess
SIPOA Board and Committee Events**

Medium	Percentage Utilization in Past Few Months		
	Never	1-2 Times	3+ Times
Sipoa.org	30	46	24
Tidelines Blog	19	32	49
<i>Currents</i> Newsletter	16	46	39
SIPOA Eblast	22	38	40
Other*	83	10	7

*Other included personal contacts, the Seabrooker, Next Door, Gate Access, and NA.

A minority of respondents, 156, said that they used Zoom to access SIPOA Board meetings. Most of these respondents (80 percent) viewed SIPOA Board meetings only 1 - 3 times. Roughly half viewed the entire meeting and about 25 percent viewed for less than an hour.

When asked about the technology used to view the *Currents* newsletter, 146 respondents viewed *Currents* via email, 377 via the sipoa.org website, and 407 respondents do not view *Currents*.

Environmental

Respondents were asked, “Over the past two years, how often have you walked any of the nature trails on Seabrook Island?” A total of 829 responses were received and are shown in the Table 9.

Table 9. Utilization Nature Trails During the Past Two Years

Trail	Percentage of Respondents Using Trails During the Past two Years			
	Never	1-2 Times	3-4 Times	5+ Times
Hidden Oaks	57	26	8	9
Six Ladies	66	22	5	6
The Lake House	40	29	12	19
Bobcat Dune	64	22	6	8
Old Drake	77	16	3	4

In addition, respondents were asked “Have you or your exterminator service provider placed baited traps on your property to control rodents?” Of the 826 responses received 73 percent answered no.

Planning

Respondents were asked to rank 4 important issues as identified by the Planning Committee. The issues were to be ranked by owners from 1 – 4, with 1 being the most important. The 4 issues were:

- Seabrook Island-specific living costs and property values compared to other relatively similar, private communities on the Southeast coast over time.
- Flooding mitigation plans and related communications.
- Improvements/upgrades to SIPOA facilities including the Lake House, Oyster Catcher Community Center, Amenity Access, etc.
- Monitoring emerging technologies to ensure residents have access to state-of-the-art communication infrastructure including video, voice, data, wired, and wireless options, gigabit + connectivity, etc.

As shown in Table 10, flooding was the most pressing issue with 70 percent of respondents ranking it first among the listed issues.

Table 10. Ranking of Most Important Issues 2020 and 2018

Issue	2020 Rank	2018 Rank
Flooding	1 (70%)	#1
Living Costs/Property Values	2 (24%)	#3
Communications Infrastructure	3 (23%)	#4
Facilities Updates	4 (18%)	
Property Maintenance		#2

When asked to identify the most important topic facing Seabrook Island over the next five years, a total of 601 responded. Table 11 shows the distribution of these issues.

Table 11. Most Important Topic Facing Seabrook Island in the Next Five Years

Topic	Percentage response
Flooding and drainage	49
Infrastructure/facilities improvement/beach access/quality of life	12
Property values/island update/aging properties/growth/build out	7
Internet speed and connectivity	5
Traffic/parking/safety/transportation/short-term rentals/access control	4
Costs of management fees	3
Beach erosion/Cap'n Sams Inlet	2

Safety and Security

Safety and security questions fell into four domains: ABDI gate pass system; security personnel; speed enforcement; and beach parking. Eighty-four percent of respondents have used the ABDI gate pass system to prearrange passes and 61 percent have the Gate Access app on their smart devices. Sixty-eight percent of respondents recognize that Fast Access QR code vouchers are required for rental companies and VRBO guests.

Forty-six percent of respondents only interact with security personnel at the gatehouse. However, 22 percent of respondents have interacted with security personnel on SIPOA roads and 18 percent at their home. Thirty-three percent of respondents had no interaction with security personnel. Regardless of the level of interaction most respondents think security personnel are courteous (84 percent), responsive (83 percent), and effective (81 percent).

A majority of respondents, 61 percent, supported the addition of temporary speed monitors on the island. When asked about beach parking issues specifically, roughly half of respondents, 52 percent, supported a shuttle service to alleviate beach parking problems.

A total of 549 property owners replied to the open-ended “What changes would you like to see implemented to improve traffic flow on the island and improve safety?” Their responses are shown in Table 12.

Table 12. Desired Changes to Enhance Traffic Flow and Safety

Topic	Percentage of Respondents
Create Bicycle/pedestrian paths	22
Enforce speed limits	20
Enhance bicycle/pedestrian safety	16
Improve gate access	13
Road enhancement	6
Shuttle service	4
None needed	20

Tidelines Blog

Over 80 percent of respondents said that they subscribed to the Tidelines blog. Of the 123 respondents that did not subscribe to Tidelines, many were new to Seabrook Island and were unaware of the blog (34 percent), some were too busy or got too much email (16 percent), some were not interested (13 percent) and some had various other reasons (19 percent). Table 13 shows the content areas that respondents rated as very interesting or interesting.

Table 13. Respondents Interest in Tidelines Content

Area of Interest	Percentage very interested or interested
Severe weather warnings & updates	96
Emergency situations	88
Information on events at Freshfields including business openings/closings	88
Cultural events in the Seabrook/Kiawah area	85
SIC news and events that are open to all residents	83
Notice of upcoming Town and SIPOA meetings/agendas	76
“Do You Know” topics on community rules, safety, etc.	74
Cultural events in the greater Charleston area	71
SIPOA Board and Committee minutes	69
Lake House fitness information	67
Sporting events in the Charleston area	48
Posts about what Seabrookers are reading	32

When asked to identify other topics in which they wish to be kept informed, respondents listed many and varied areas, including: Board governance information (17 percent); security incident reporting (15 percent); reports on wildlife (10 percent); Seabrook Island/Charleston events (8 percent); flooding and weather-related events (8 percent); real estate data (6 percent); and other (23 percent). All of these comments will be evaluated by the Tidelines team.

When asked what they liked best about Tidelines, respondents indicated that it was informative (41 percent), timely (14 percent), and with a good breadth of topics (7 percent). Other comments included that Tidelines is well-written. Respondents appreciated posts about traffic, weather, photos, what Seabrookers are reading, and updates on Freshfields.

Demographics

A majority of respondents, 58 percent, were male. As seen in Table 14, a majority of respondents are between ages 60 to 70.

Table 14. Age Category of Respondents

Age Category	Percentage of respondents
Under 40	1
40-49	5
50-59	16
60-69	44
70-79	29
80 +	5

However, there are children living on Seabrook Island. Roughly one in ten respondents indicated children resided in their household. Children’s ages ranged from under 5 (19 percent), age 5 to 9 (16 percent), age 10 to 14 (35 percent), and age 15 and over (70 percent). Many families had more than one child in the household.

Table 15. Number of Respondents by Years on Seabrook Island

Years on Seabrook Island	Number of Residents
1-5	271
6-10	118
11-15	131
16-20	137
21-25	77
26-30	32
31-35	11
36-40	10
Over 40	8

A majority of respondents owned single family residences and some respondents owned multiple residences, as seen in Table 16.

Table 16. Number of Housing Units Owned by Type of Housing Unit

Housing Unit	1	2	3	4	5	Total
Single Family Home	520	19	4	2	2	547
Regime/Association	312	8	1	1	1	323
Unimproved Lot	64	4	1	1	1	71

Just over half of the respondents, 54 percent, said that they are full time residents of Seabrook Island. For the 46 percent of respondents who are not full-time residents, many indicated that they are seasonal residents. However, a number of respondents have a nearby primary residence and use Seabrook Island as a weekend vacation spot. Table 17 shows the number of months part-time residents spend on Seabrook Island. Over 60 percent of the part-time residents plan on making Seabrook Island their full-time residence, most within the next 5 years. On the other hand, only 16 percent of full-time residents plan on moving from Seabrook Island within the next five years.

Table 17. Number of Months Spend on Seabrook Island for Part-Time Residents

Number of Months on Seabrook	Number of Part-Time Residents
0	3
1	34
2	63
3	68
4	42
5	33
6	53
7	10
8	13
9	5
10	3
11	2
12	38

Approximately 20 percent of respondents rented their Seabrook Island property during the past year. Nearly

two-thirds utilized a rental agency; Coastal Getaways, Seabrook Exclusives, and Vacasa were the most frequently mentioned rental agencies.

Volunteerism

Only 17 percent of respondents indicated that they had ever served on a SIPOA standing/special committee or as a member of the SIPOA Board of Directors. SIPOA Committee membership is shown in Table 18, below.

Table 18. Number of Respondents Serving on SIPOA Committees

SIPOA Committee	Number of Respondents
Activities	25
ARC	14
Board of Directors	26
Communications	14
Elections	8
Environmental	18
Finance	14
GOMC	11
Legal	8
Long Range Planning	26
Nominating	16
Safety and Security	15

When asked why they have not served on any SIPOA committees respondents gave many and varied reasons, as shown in Table 19.

Table 19. Reasons for Not Serving on SIPOA Committees

Reason for Not Serving on SIPOA Committees	Percentage of Respondents
Time constraints	25
Too new to the Island to contribute meaningfully	3
Part-time resident	23
Health/family reasons	2
Put off by Island politics	12
Just not interested	11
Not now, maybe in the future	11
Volunteered in the past, time for others	5
Only a lot owner	1
Don't like the process	4
Other	3

Finally, as Chair of the SIPOA Long Range Planning Committee and member of the Data Gathering and Analysis Subcommittee, I would like to express my personal thanks to the members of the subcommittee (volunteers all): George Reinhart, Sam Dolinsky and Carl Voelker, and to Rhiannon Schalaudek, the SIPOA Communications Administrator and Heather Paton, Executive Director of SIPOA for their hard work and perseverance to prepare, distribute and analyze the Survey responses and to prepare this report. , Of course, I would also like to thank property owners who took the time to respond to the survey. Your inputs form the basis for planning and prioritizing the things that SIPOA does so please consider it time well spent.

Respectfully submitted,

John Kinne

On behalf of the DG&A Subcommittee and the Long Range Planning Committee