

Data Collection and Analysis Report

2022 SIPOA Property Owner Survey

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 2022, 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 Collection Subcommittee (DCS), a subcommittee of the Long Range Planning Committee (LRP) by the Board, committees, and professional staff for inclusion in the survey. The LRP and the Board reviewed the survey before distribution to Property Owners. The approach was similar to what was used in 2014, 2016, 2018 and 2020 which provided a rating system for questions and an opportunity for open-ended responses to a topic.

The Survey Process

Property Owners were asked to complete the survey as announced in various communications vehicles (eBlasts, Tidelines, etc.). The survey was open to responses during the month of October 2022 and was closed to responses on November 18th.

Over the subsequent few months, the DCS and the LRP worked to review the data to identify significant results. Comparisons were made to previous years' responses to identify trends. The open-ended question responses were reviewed and categorized. This dataset is the most time-consuming analysis because each of the 700+ 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 2023 Annual Meeting for their review before being released to Property Owners.

Key Survey Findings

The survey was comprised of multiple-choice questions and one open text question. Respondents were also asked to rank the most important issues identified by the Long Range Planning committee. As indicated in the 2018 and 2020 surveys, Flooding Mitigation was again ranked as #1 in importance by 50% of the respondents. Rankings are listed in Table 9.

Respondents were also asked to comment on: *If you could make only one improvement on Seabrook Island that would have a significant and positive impact on our "quality of life", what would that be?* A summary of those responses is included in Chart 1 and Tables 19-24.

The 2022 Result Details

A total of 1,146 Property Owners responded to the survey yielding a response rate of approximately 47%. Statistically, this means that the accuracy of the survey data is 95% plus or minus 3%. Property Owners can feel confident that the survey results accurately reflect the characteristics, attitudes, activities, and opinions of all Seabrook Island Property Owners. Not every Property Owner responded to every question, in many cases because the question was not applicable to them.

The distribution of Property Owner by residence type as of December 31, 2022, is shown in Table 1.

Table 1: Property Type on Seabrook Island by Year *

Property Type	2022	2020	2018	2016
Total Properties	2,590	2,589	2,595	2,598
Total Villas	1,104	1,124	1,118	1,107
Total Single-Family Homes	1,201	1,128	1,105	1,072
Undeveloped Lots	285	337	370	419
Full-time Villa Residents	273	235	234	183
Full-time Single Family Home Residents	675	592	580	548

*The data excludes Greenspace donated properties and combined properties.

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. 52% of owners are full-time residents. Most owners, 68%, plan on keeping their Seabrook Island property for the next five years. Of the non-full-time residents, 36% indicated they plan to make Seabrook Island their full-time residence. 74% of those owners stated they plan on becoming full-time residents within the next 10 years.

The survey results are grouped into categories based upon the associated SIPOA Committee, and the details of each group are shown below:

SIPOA Administration

Property Owner were asked to rate their level of satisfaction with SIPOA administration functions. 1,142 responses were received.

**Table 2: Percent Responding Highly Satisfied or Satisfied with SIPOA Administration
2022, 2020 and 2018**

SIPOA Administration	2022	2020	2018
Administrative Staff	72%	73%	67%
Safety & Access Control	53%	72%	69%
Engineering/Maintenance	63%	78%	69%
Communications	70%	78%	71%
ARC	26%	41%	49%
Finance	47%	63%	66%

The 2022 survey also asked for the Property Owner to rate their satisfaction with the major SIPOA support services provided for Property Owners. The feedback for 2022 was very positive for the four (4) main services included in the survey.

Table 2.1: Percent Responding Highly Satisfied or Satisfied by SIPOA Administration Support Services in 2022:

SIPOA Support Service	2022
Trash, recycling, yard debris and black/white pick-up services	87%
Landscaping of common areas (islands, shared spaces, etc.)	86%
Hurricane/Storm Response	83%
Lake House and Oyster Catcher Community Center Operations	79%

Activities

Respondents were asked to identify the Lake House areas and activities they used and the frequency of utilization. The table below provides the number and levels of utilization.

Table 3: Frequency of Utilization of the Lake House by Facility/Activity for 2022 Survey

Facility/Activity	1-4 Times/Month	5-10 Times/Month	More than 10
Library	33%	6%	1.5%
Outdoor Pool	31%	7%	3%
Special Interest Group Meetings	32%	3%	2%
Fitness Center	32%	14%	14%
Indoor Pool	23%	6%	5%
Massage	9%	.3%	.35%
Playground	16%	2%	7%
Basketball	11%	1%	1%
Exercise Class	11%	4%	4%
Personal Trainer	4%	1%	2%
Billiards	6%	1%	.5%
Table Tennis	.5%	1%	.2%
Card Games	4%	2%	.5%
Volleyball	3%	.51%	.3%
Soccer	4%	.5%	.25%

83% of respondents said that the Lake House staff was courteous and responsive.

Table 4: Number of Respondents Using the Oyster Catcher Community Center/Pool by Type of Activity and Frequency in 2022

Type of Activity	1-2 times per month	3+ more times per month
Meeting	248	29
Private Party	101	6
SIPOA Event	124	3
Pool	147	124

Respondents were asked to rank other activities that they would like to see in the SIPOA portfolio. Outdoor seating with sun covering and food services by the outdoor pool were closely ranked the highest over the other five (5) options. The choices of 1,019 respondents are summarized in the table below:

Table 5: 2022 Desired New Activities

Activity	Response Highest (1-7)
Outdoor seating with sun covering	1
Food Offerings available at outdoor pool area	2
Firepit seating	3
More space for fitness and wellness activities	3
Bring your own beverage to outdoor seating area	4
Spa Services (massage, facials, etc.)	5
Bocce ball	6

ARC

Respondents with contact or involvement with the ARC during the past two years were asked to comment on their experiences. 376 Property Owners with a total of 629 requests mentioned any ARC activity during this period of time. The number of responses related to working with ARC for new home construction increased 75% from 2020. The other reasons for contact were many and varied, as shown in Table 6 below.

Table 6: Reasons for ARC Contact

Reason for ARC Contact	2022 Number of Responses	2020 Number of Responses
Permits for tree removal or other landscaping	141	123
House painting or outside maintenance	180	126
Approval for home alteration or addition to an existing home	185	138
New home construction	75	44
Representative of a villa or regime	34	32
Other	14	44

- 55% of respondents thought that the ARC rules or requirements were fair and reasonable compared to 67% in the 2020 Survey. Those respondents who replied no to this question thought the rules were too restrictive or unfair.

- 45% of the respondents felt they were treated fairly and understood the ARC decisions.
- Respondents were asked “The ARC staff was readily accessible and helpful while providing clear, timely answers to my/our questions.” 45% agreed or somewhat agreed out of 399 responses, and 38% of respondents disagreed with the statement.

Communications

The Communications section addressed the use of various outlets to find information about the SIPOA Board committees and other information. As shown in Table 7, respondents ranked the importance of several topics.

Table 7: Communications Topics

Topic	% Important/Very Important	Ranking
Emergency Warnings/Communications	97%	1
Community Rules, safety, new projects, etc.	92%	2
Notice of upcoming SIPOA meetings	80%	3
Board and committee minutes	77%	4
Lake House fitness/wellness class info	65%	5

Additional questions and responses on communication included:

- 47% of respondents said that they used Zoom to access SIPOA meetings.
- *Currents* - Readership continues to expand. 92% receive *Currents* via email. 53% indicated that they also read *Currents* on the sipoa.org website. 94% responded that they would recommend *Currents* to a friend.
- 76% of respondents subscribe to Tidelines.
- 74% of the respondents agree that the electronic message boards at the gatehouse have enhanced communication with owners and guests.
- 67% use the sipoa.org website to obtain SIPOA-related information.

Environmental

The 2022 Survey asked, “What level of importance do you place on the following,” and had 1,016 responses:

Table 8: Environmental Issues

Environmental Topic	% Very Important/Important Responses	Ranking
Controlling invasive plant species	88%	1
Minimizing impacts of development on wildlife habitat	86%	2
Protection of bird population	84%	3
Turtle population/patrol	83%	4
Deer population and management	80%	5
Adopt-a-highway program	46%	6

The majority of Property Owners would like to see more focus on minimizing impacts of the development on wildlife and controlling invasive plants.

Planning

Respondents were asked to rank 5 important issues as identified by the Long Range Planning Committee. The issues were to be ranked by owners from 1 – 5 with 1 being the most important. The 5 issues were:

- Enhance traffic safety throughout Seabrook Island (pedestrian, bicycle, vehicle)
- 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.
- Manage native wildlife species by striving for appropriate predator/prey ratios using such approaches as habitat modification and improvements.

As shown in Table 9, **Flooding** was the most pressing issue with 50% of respondents ranking it first among the listed issues. Second was **Facilities/Improvements/Upgrades**.

Table 9: Ranking of Most Important Issues 2022, 2020 and 2018

Issue	2022 Rank	2020 Rank	2018 Rank
Flooding	1 (50%)	1 (70%)	1
Facilities Improvements/Upgrades	2 (20%)	4 (18%)	NA
Enhance Traffic Safety	3 (19%)	NA	NA
Communications Infrastructure	4 (9%)	3 (23%)	4
Wildlife Management	5 (8%)	NA	NA
Living Costs/Property Values	N/A	2 (24%)	3

Safety, Gate Access & Enforcement

87% of respondents only interact with access and enforcement officers at the gatehouse. 16% of respondents have interacted with access and enforcement officers on SIPOA roads and 10% at their home. 11% of respondents had no interaction with officers.

Table 10: Gate Access & Enforcement Staff 2022, 2020 and 2018

Issue	2022 Agree	2022 Neutral
Staff is Courteous	81%	16%
Staff is Responsive	69%	25%
Staff is Effective	62%	25%

Additional responses in the 2022 survey included:

- 53% of respondents expressed satisfaction with the level of enforcement of SIPOA Rules & Regulations regarding vehicle access, operation, and parking.
- 65% of respondents agreed that the new traffic islands at gate entrance enhance safety.
- 94% of respondents agreed that bicycle and pedestrian safety is critical to life on Seabrook Island

Demographics

A majority of respondents, 57%, were male. As seen in Table 11, a majority of respondents are between ages 60 to 69, but data shows a slight increase in 50-59 and 70-80+ age groups, and a decrease in the 60-69 age group from 2018-2022.

Table 11: Age Category of Respondents

Age Category	2022 Percentage of respondents	2020 Percentage of respondents	2018 Percentage of respondents
Under 40	1%	1%	1%
40-49	6%	5%	3%
50-59	18%	16%	19%
60-69	36%	44%	44%
70-79	33%	29%	28%
80 +	6%	5%	5%

Table 12: Number of Respondents by Years on Seabrook Island

Years on Seabrook Island	Percent of 2022 respondents	Percent of 2020 respondents
1-5	40%	34%
6-10	27%	15%
11-15	12%	17%
16-20	7%	17%
21-25	8%	10%
26-30	3%	4%
31-35	3%	1%
Over 36	0%	1%

A majority of respondents owned single family residences, and some respondents owned multiple properties, as seen in Table 13.

Table 13: Respondents' Number of Properties By Type

Property Type	1	2	3	4	5	Total
Single Family Home	643	14	2	2		661
Regime/Association	389	18			1	408
Unimproved Lot	69	3	2		0	75
Home Under Construction	22	2			1	25

Respondents were asked if they had rented on Seabrook Island before making the decision to purchase property 41% responded yes, and 59% responded no.

Table 14: Number of Months Spent on Seabrook Island for Part-Time Residents

Number of Months	2022 % Part-Time Residents	2020 % Part-Time Residents
0	3%	1%
1	16%	9%
2	14%	17%
3	9%	19%
4	7%	11%
5	8%	9%
6	2%	14%
7	4%	3%
8	2%	4%
9	2%	1%
10	2%	1%
11	2%	1%
12	23%	10%

Approximately 20% of respondents rented their Seabrook Island property during the past year, with 3% stating they would rent in the future. Over two-thirds (71%) utilized a rental agency; Coastal Getaways, Seabrook Exclusives, and Vacasa were the most frequently mentioned rental agencies.

Employment

The 2022 survey asked Property Owners with Seabrook Island as their primary residence if they are still employed, and if so, where they are working. 31% of 537 respondents indicated they are employed – 69% full-time and 31% part-time.

- 44% (73) work remotely from home.
- 21% (36) work outside the home.
- 35% (59) work both remotely and outside the home.

Children Living on Seabrook Island

The 2022 survey asked full time residents if they have children living in their households and if so, do their children attend school locally.

33 respondents with children residing on Seabrook Island provided information on schools their children are attending.

Table 15: Schools Attended by Children living on Seabrook Island

Schools Attended	
Charleston Public Schools?	8
Private school	8
Home school	6
Prefer not to answer	11

All respondents – both full-time and part-time residents - were asked if children reside with them. 86% indicated there are no children in the household.

143 resident/non-resident respondents indicated that children live in the household with the respondent. Age ranges are in Table 16.

Table 16: Ages of Respondents' Children in Household

Age	# of Children in Age Range
0-4	59
5-9	48
10-14	68
15+	145

Ebikes, LSVs and EVs Ownership

The survey included three questions related to ownership of ebikes, low-speed vehicles and electric vehicles. 19% of the 1,057 respondents indicated that they own an LSV, and 98% of those LSVs are electric powered.

Respondents were asked if they owned an electric vehicle. Of the 1,043 responses, 91% did not own an electric vehicle. 28% indicated that they planned to convert to an electric vehicle in the next five years. 4% of 1,049 respondents owned Class 1 pedal-assist ebikes.

Solar Energy

2% of 1,057 respondents answered yes in response to the question “Do you have a solar energy installation on any of your properties?”

Volunteerism

Respondents were asked their level of agreement with the following statement: “Property Owner volunteers are critical to SIPOA’s direction/oversight.” 84% of 1,042 respondents agreed. Responses to additional questions about volunteerism are shown in Tables 17 and 18

Table 17: Volunteer Activity

Survey Questions	# of Responses	% Yes	% No
Have you submitted a volunteer form for committees/Board in the past?	1,044	20%	80%
Have you served on SIPOA committees or Board in the past	211	62%	38%
Would you be willing to volunteer in the future?	1,046	29%	24%

Table 18: Volunteer Opportunities

Agree

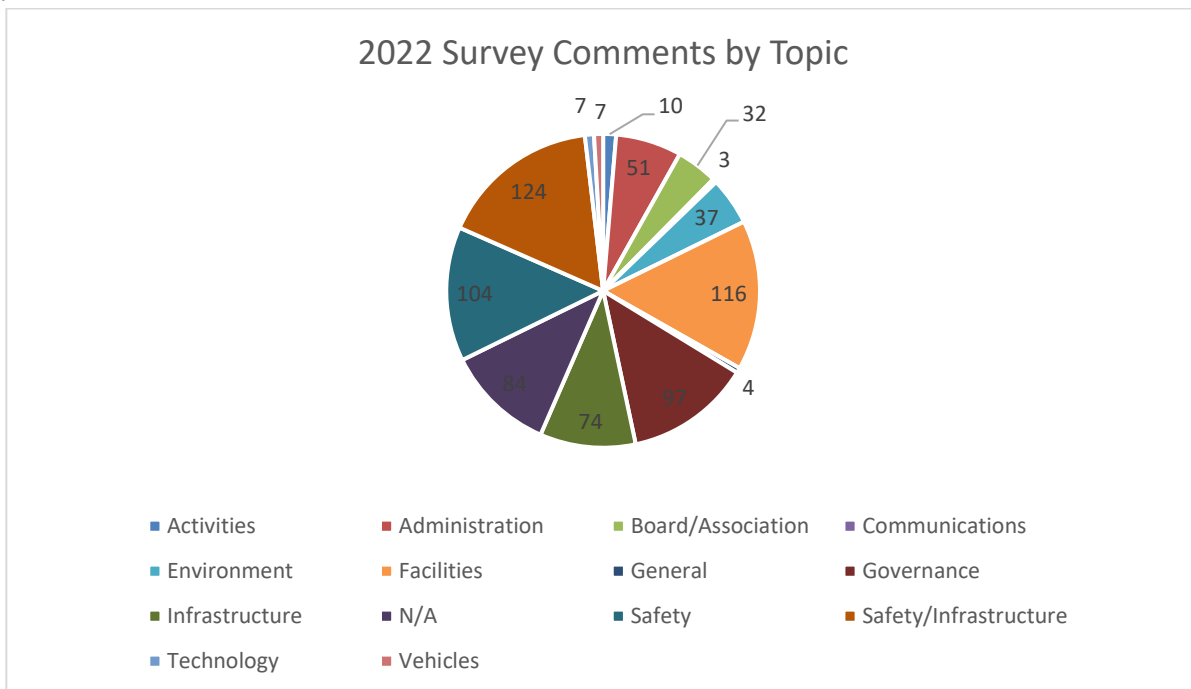
Opportunities to volunteer for SIPOA committees/special projects are communicated clearly.	53%
I know where to go to get information about SIPOA volunteer committees.	51%
I am willing to lend my expertise, talents and time to committees/special projects to support the work of SIPOA.	45%
SIPOA volunteers are recognized for their work.	35%

Only One Improvement - Responses

The 2022 Survey included a single open-ended question to provide Property Owners the chance to provide important feedback. Question 9 asked “If you could make only one improvement on Seabrook Island that would have a significant and positive impact on our "quality of life", what would that be? The dataset of the 700+ responses will be used by the Board and SIPOA committees as input to the 2023 Strategic Plan. This section provides a summary of the dataset.

We have grouped the responses into the relevant SIPOA areas. Please note that we received 84 responses, tagged as “N/A”, that were not related or relevant to SIPOA’s purview - and are the responsibility of other organizations including the Town, the Club and other organizations. The following table summarizes the responses.

Chart 1: Summary of 2022 responses by topic – Note - many respondents included several topics in one comment.



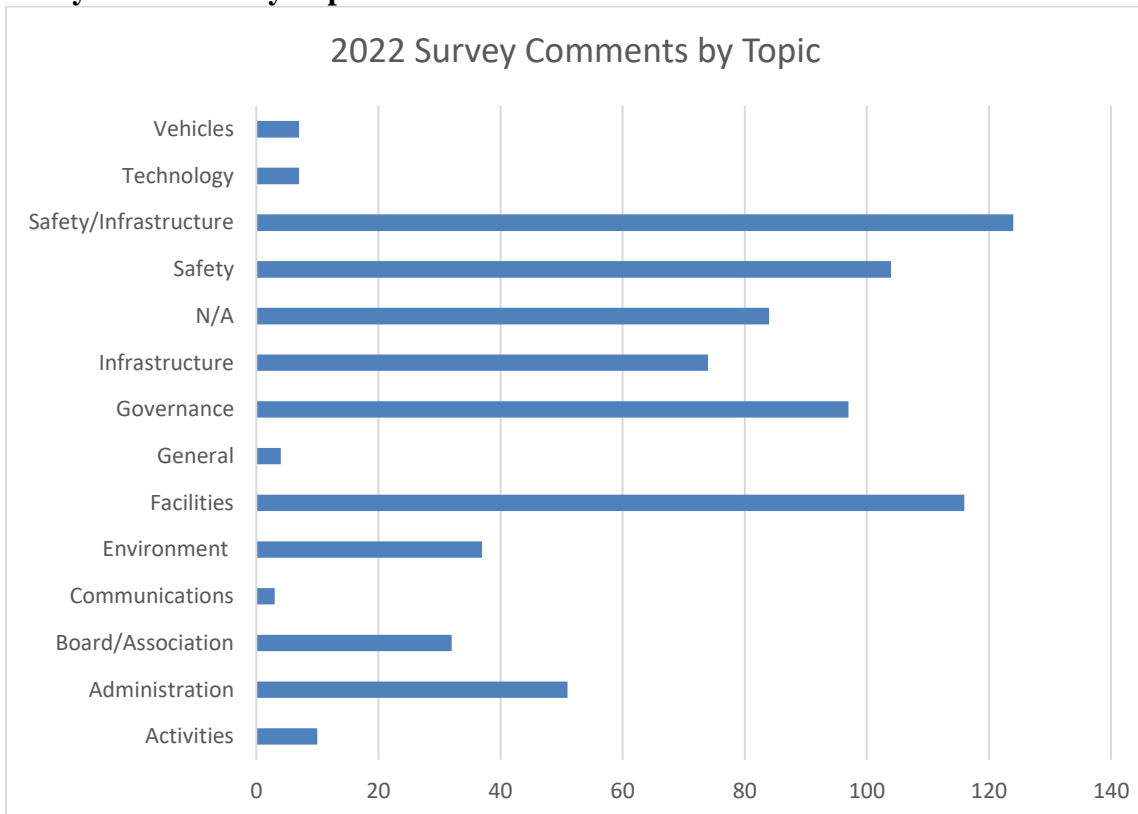
Note on Topic Categories:

Infrastructure includes: Roads, stormwater drainage/flooding, signage, lighting

Safety includes: Rules enforcement, island access, traffic, parking, speed, stop signs

Safety/Infrastructure includes: Bike paths/lanes, sidewalks, crosswalks

Table 19: Survey Comments by Topic



The number 1 improvement comment topic in 2022 survey was **Safety/Infrastructure specifically relating to bike paths/sidewalks/crosswalks** (124 responses).

Past engineering studies determined the possibility of adding a separate path parallel to the entire 6 miles of Seabrook Island loop inside the gate is not feasible. SIPOA will however, continue to evaluate alternative options to provide the safest possible routes for non-vehicles.

Table 20: The topic with the second most comments (116) were related to SIPOA facilities including:

Facilities	Total Responses
Lake House & Oyster Catcher Community Center	60
Beach/beach parking/boardwalks	30
Other	26

Table 21: The topic with the third most responses (104) was related to Safety, including the following areas:

Safety	Total Responses
Bikes, pedestrians, ebikes,	15
Rules enforcement	69
Island access	13
Personnel/interaction	2
Speedbumps	1
Stop signs	1
Traffic	3

The Safety and Security Committee conducted in-depth studies in 2021 and 2022 and this survey data will be used

to further evaluate the recommendations from the study reports and add specific scope to the Committee 2023 Strategic Plan.

Table 22: The topic with the fourth most responses was Governance, with a total of 97 comments relating to restrictions on property rentals pro/con, access to SIPOA facilities, Island One, and SIPOA committees.

Governance Total Responses	97
Property Rental Restrictions Pro/Con (details below)	92
Island One - Repeal	3
Committees/Other	2

Table 22.1: Details of Comments Concerning Property Rental Restrictions Pro/Con

Total Comments from Table 22	92
Cap or Limit Short Term Rentals	64
Eliminate Short Term Rentals	7
Allow all Rentals	5
Restrict/Eliminate Renter Access to SIPOA facilities	16

Table 23: SIPOA Administration received 51 comments that included the following topics:

Administration Total Responses	51
ARC Process and Standards	12
Enforcement: ARC, Rental Policy, Rules & Regs	16
Owner services, owner/guest interaction, civility, operations	11
Communications	4
Other	8

Table 24: There were 37 comments about the Environment, including the following topics:

Environment Total Responses	37
Common Areas	4
Development	3
Noise from landscape equipment	2
Greenspace Preservation	18
Wildlife	10

Thanks

Finally, as Chair of the SIPOA Long Range Planning Committee and member of the Data Collection 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, SIPOA Communications Administrator, and Heather Paton, SIPOA Executive Director, 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,
Tom Johnson, Chair Long Range Planning Committee