



TITLE:

2023 KICA Member Survey: Results

DIRECTOR OF COMMUNICATIONS:

Leah Burris

JULY 10, 2023 | BOARD OF DIRECTORS

2023 KICA MEMBER SURVEY

Survey Participation



Excellent Member Participation

SURVEY OPEN

May 10-May 24, 2023

**3,348 Members
Participated**

OR

36% of Members

(9.2k total members. KICA has email addresses for 8.1k members.)

83 QUESTIONS

7,589 MEMBER COMMENTS

from 21 open comment sections

(25% more individual comments than 2021)





Member Demographics



All member types were adequately represented, which is valuable for data segmentation.

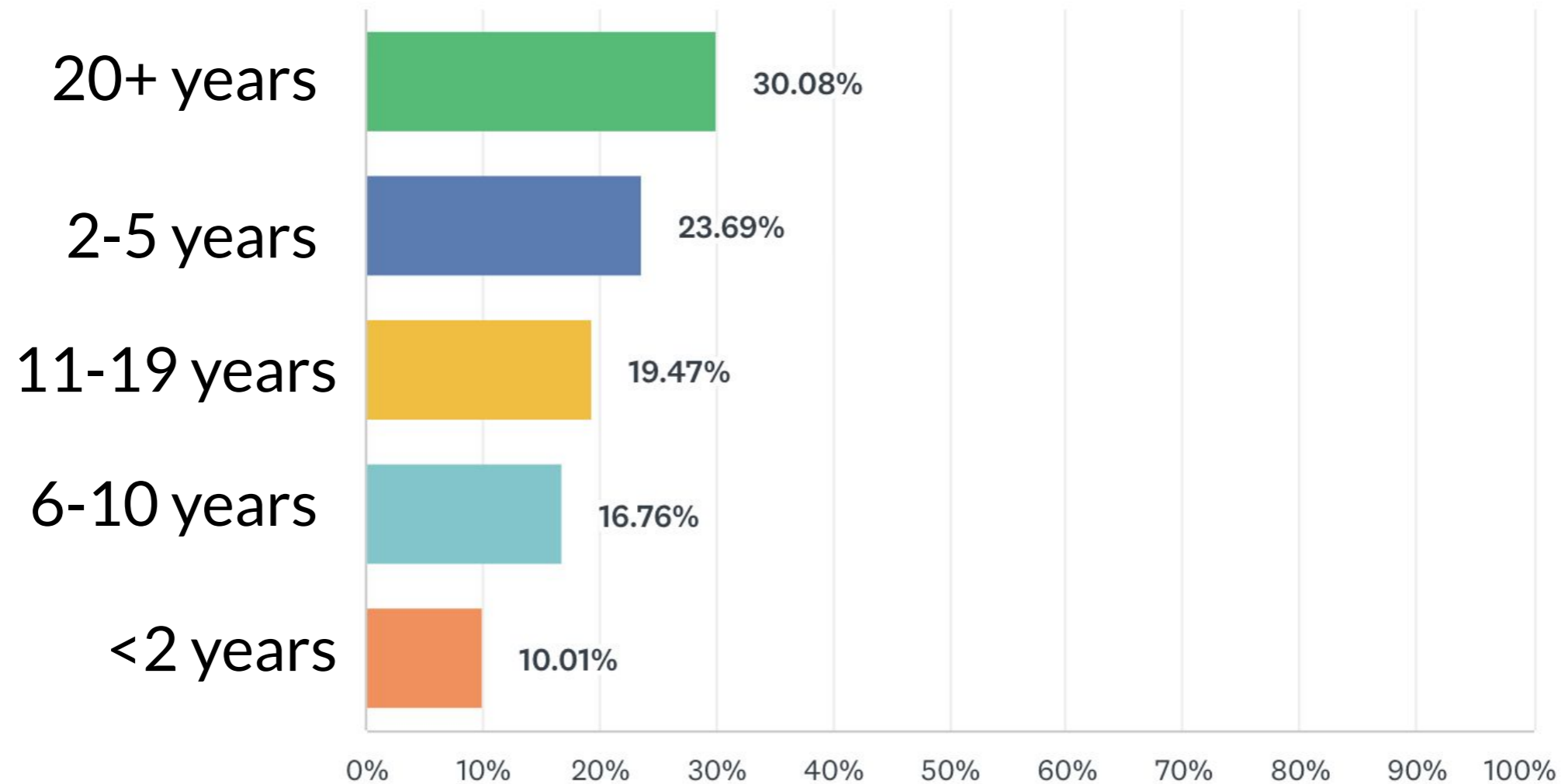
- New owners through 20+ year owners
- On-island a few weeks to full-time
- Rental property owners
- Club/non-club members



Length of Ownership

How long have you owned property on Kiawah Island? Please select one:

Answered: 3,348 Skipped: 0

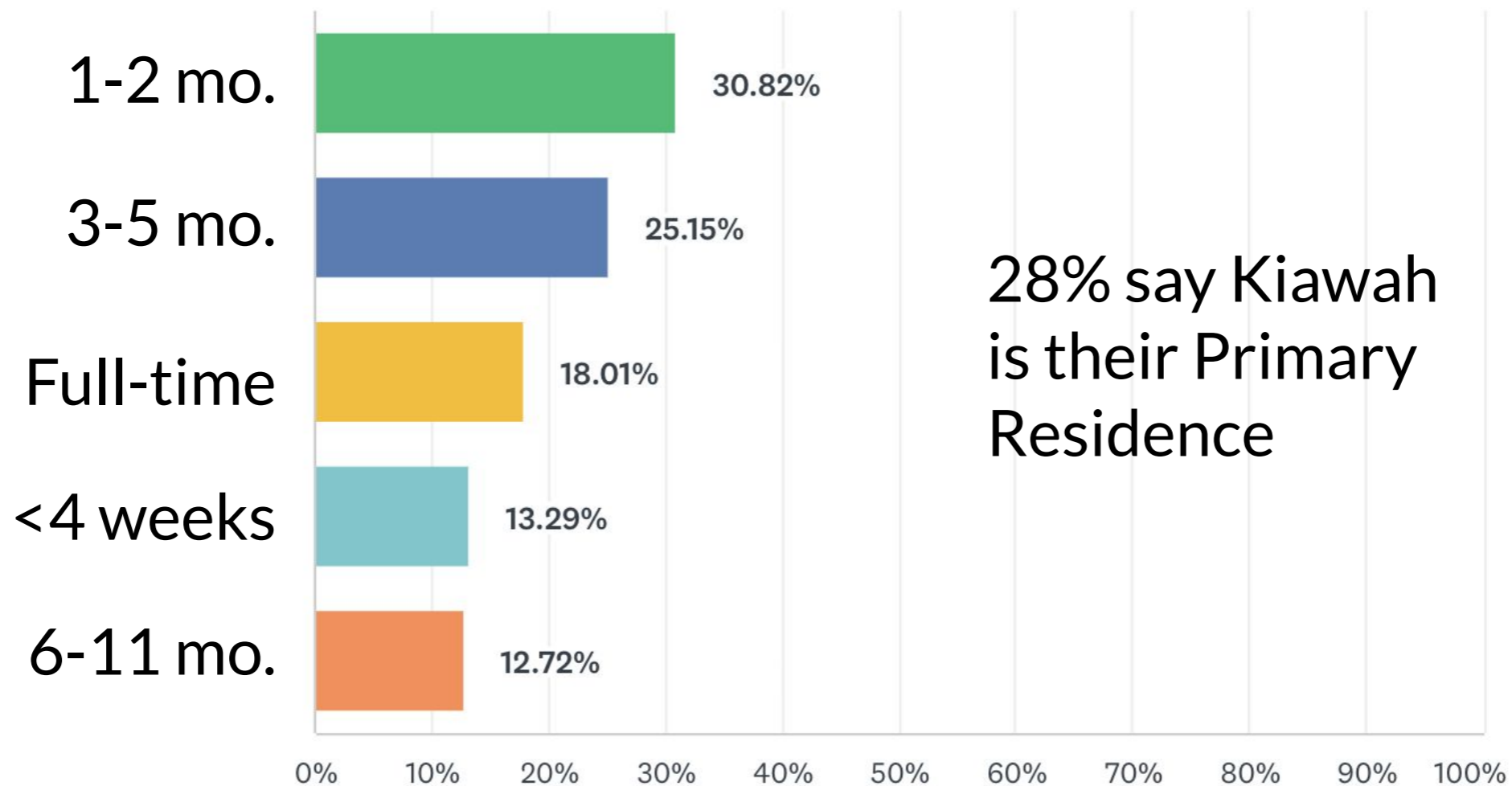




Time Spent on Kiawah Annually

Approximately how much time, in total, do you typically spend on Kiawah each year?

Answered: 3,348 Skipped: 0

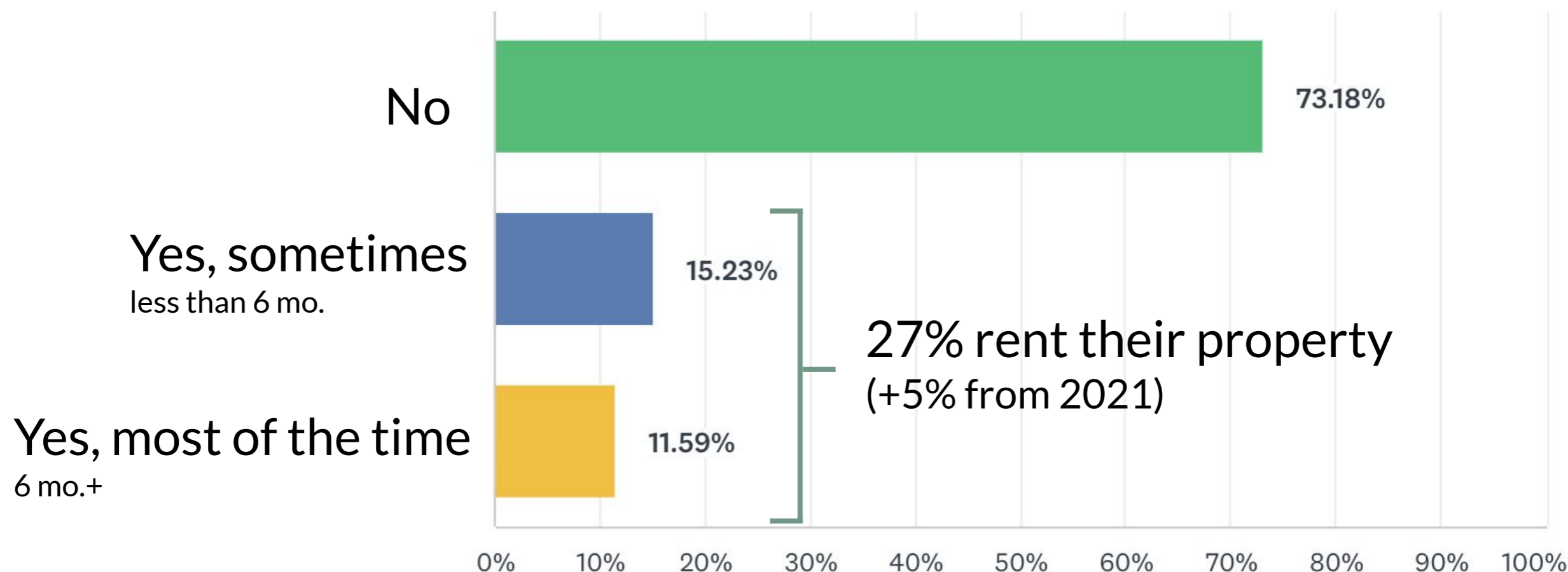




Vacation Rentals

Do you rent your property?

Answered: 3,348 Skipped: 0

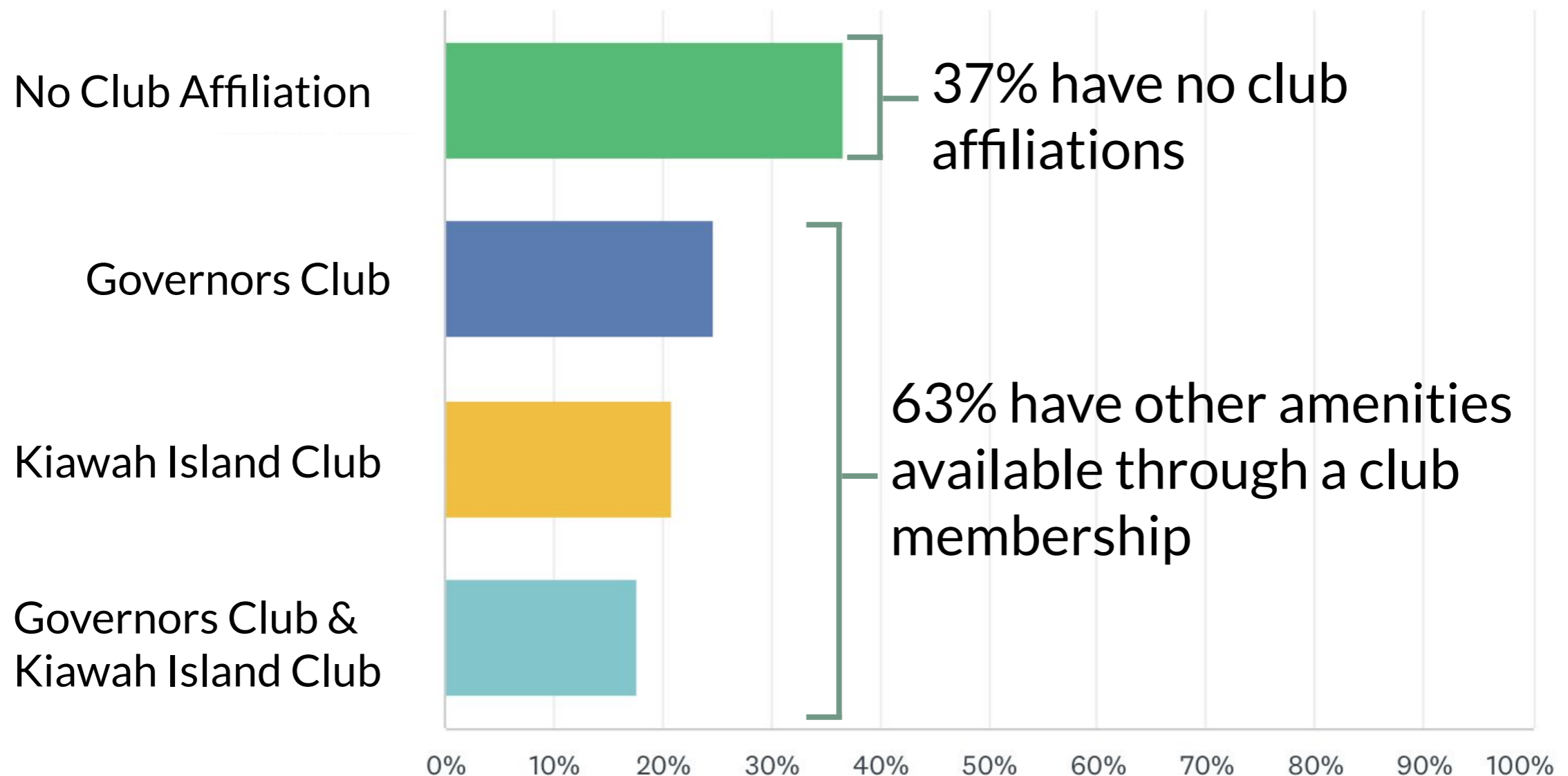




Club Affiliations

Are you a member of the Governor's Club or the Kiawah Island Club?

Answered: 3,348 Skipped: 0

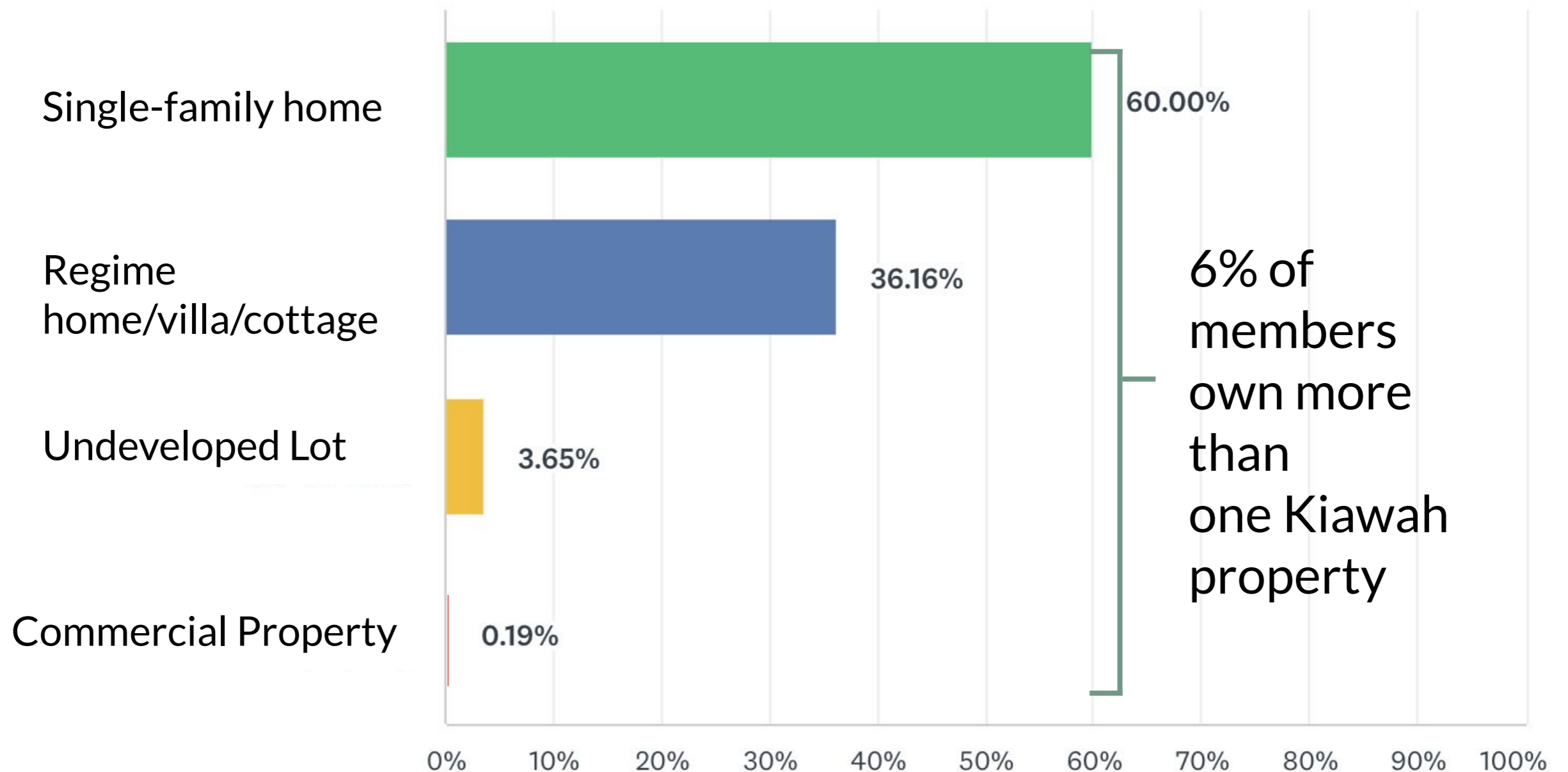




Kiawah Property Types

What type of property do you own?

Answered: 3,150 Skipped: 198

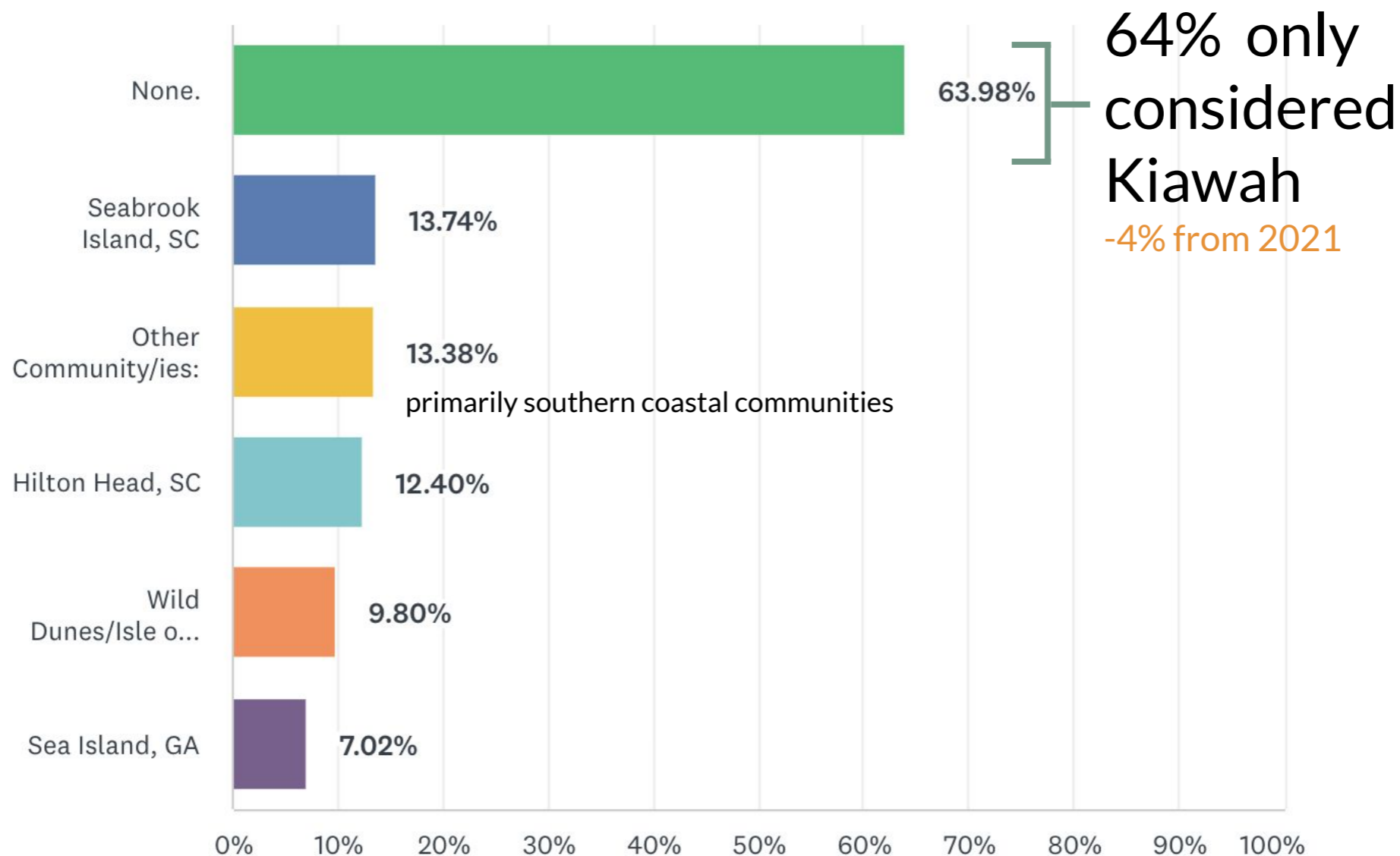




Other Communities

When you purchased your Kiawah property, what other communities did you consider?

Answered: 3,348 Skipped: 0



2023 KICA MEMBER SURVEY

Sandcastle Amenities and Services





Sandcastle Use

The Sandcastle serves about 70% of the membership.

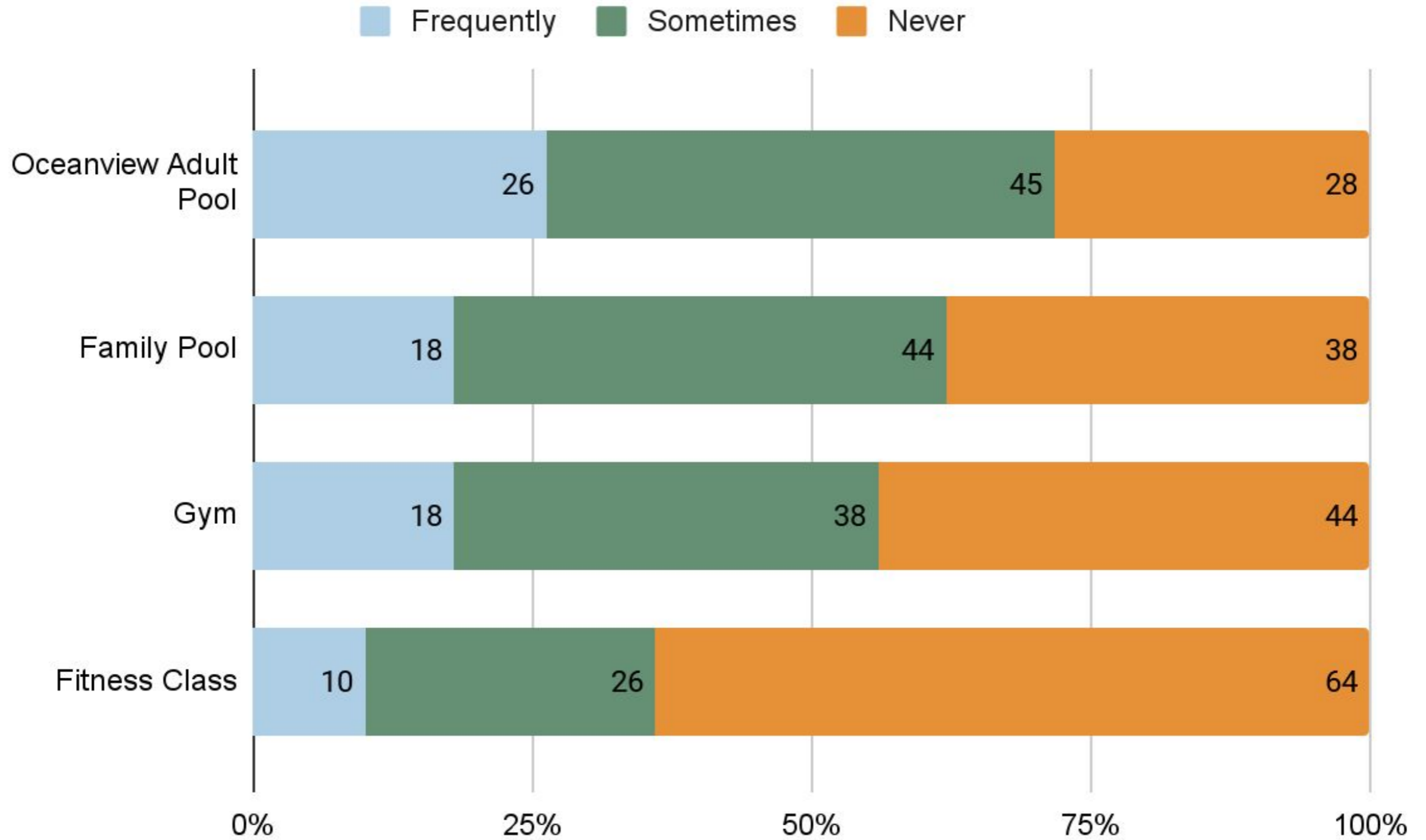
A little less than 30% of members don't use the Sandcastle. An estimated 70% of members have the availability of other amenities through other club memberships or their regime.

The pools are used more widely than the fitness facilities.





Sandcastle Use





Sandcastle Satisfaction

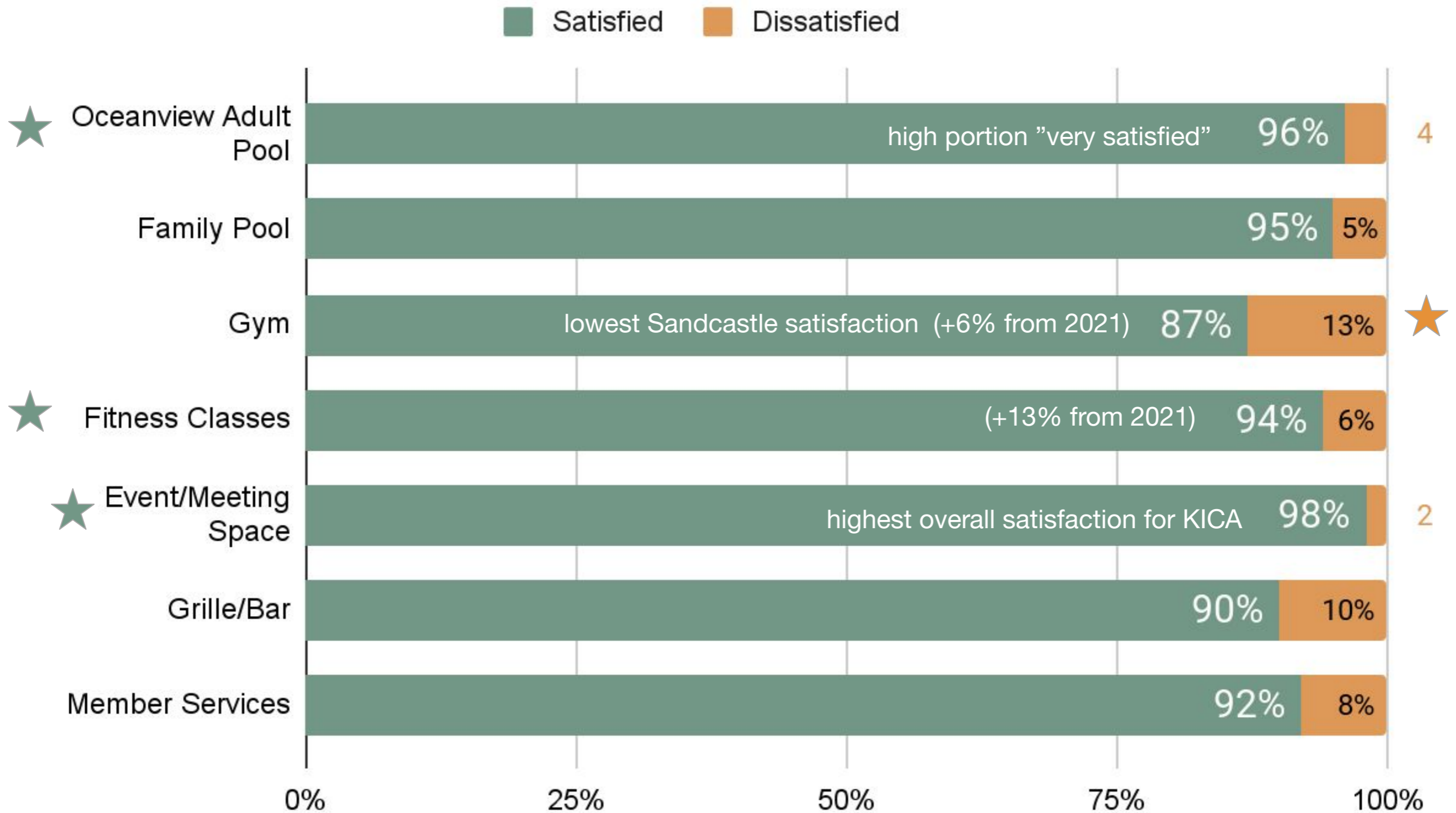


Satisfaction with Sandcastle amenities is strong (90-98%), with the exception of the gym (87%).

Satisfaction has increased in four of the five major amenities since 2021.



Sandcastle Satisfaction

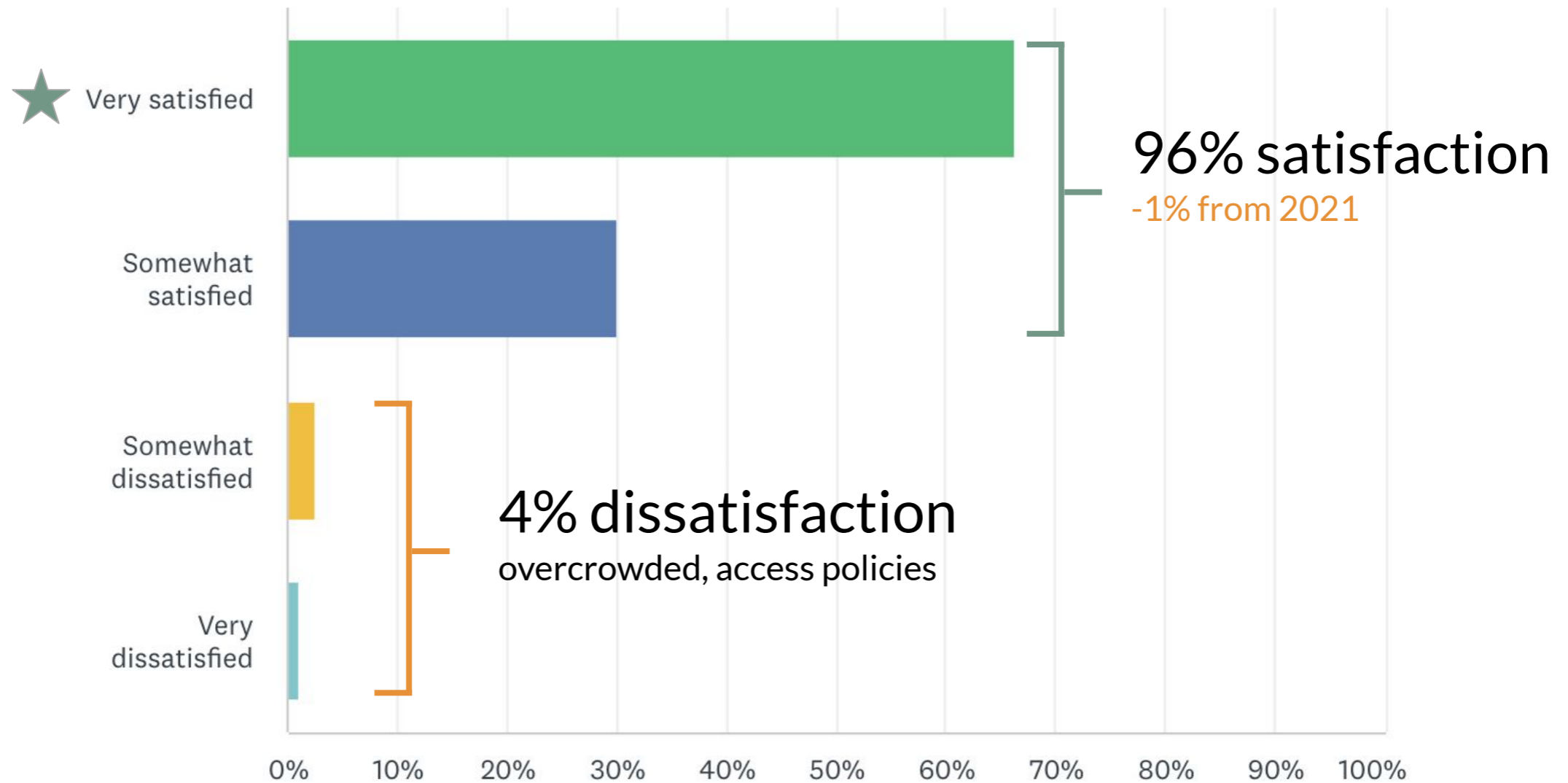




Oceanview Adult Pool

How satisfied are you with the quality and condition of The Sandcastle's Oceanview Adult Pool?

Answered: 2,385 Skipped: 963

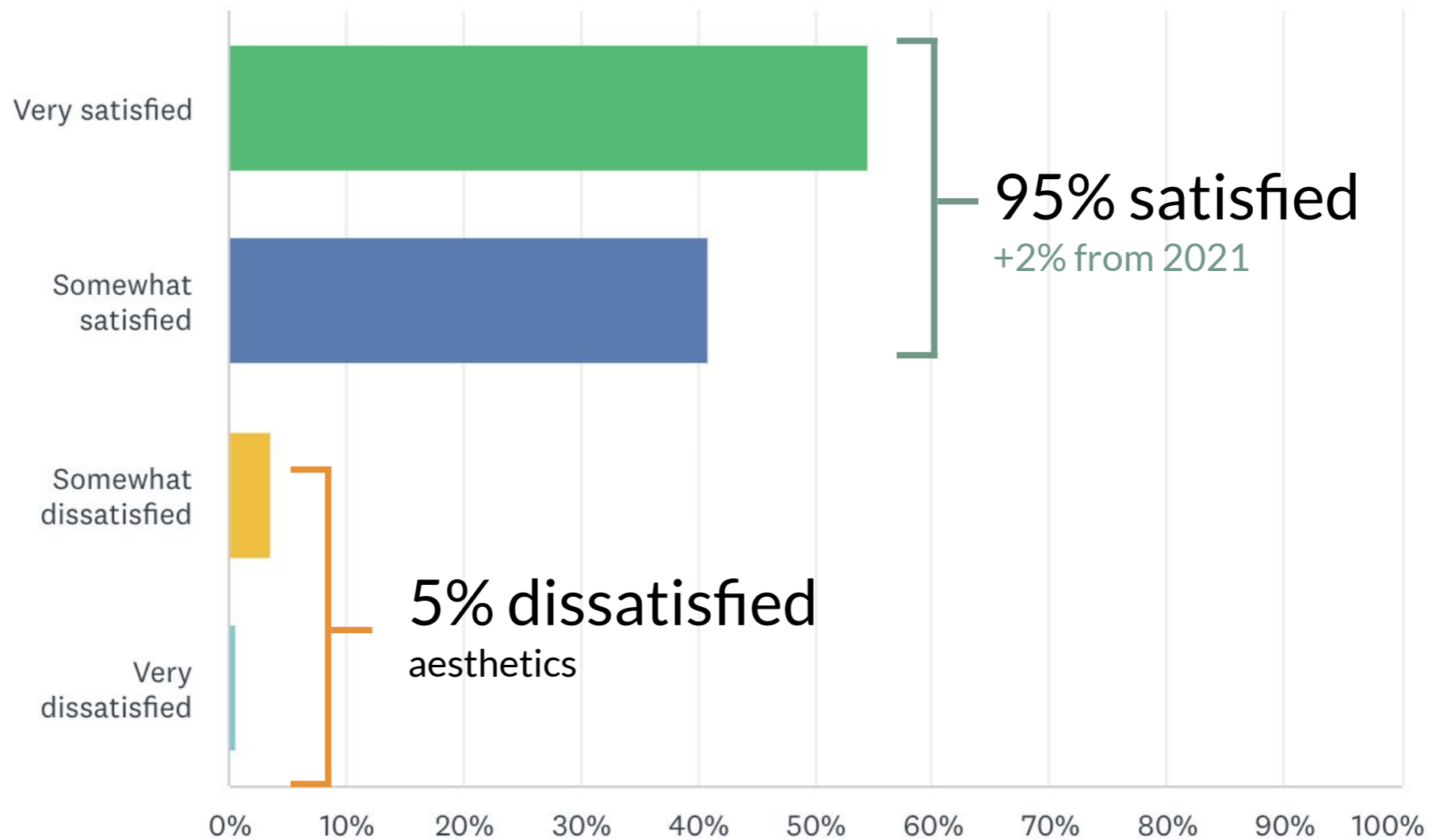




Family Pool

How satisfied are you with the quality and condition of The Sandcastle's Family Pool?

Answered: 2,050 Skipped: 1,298



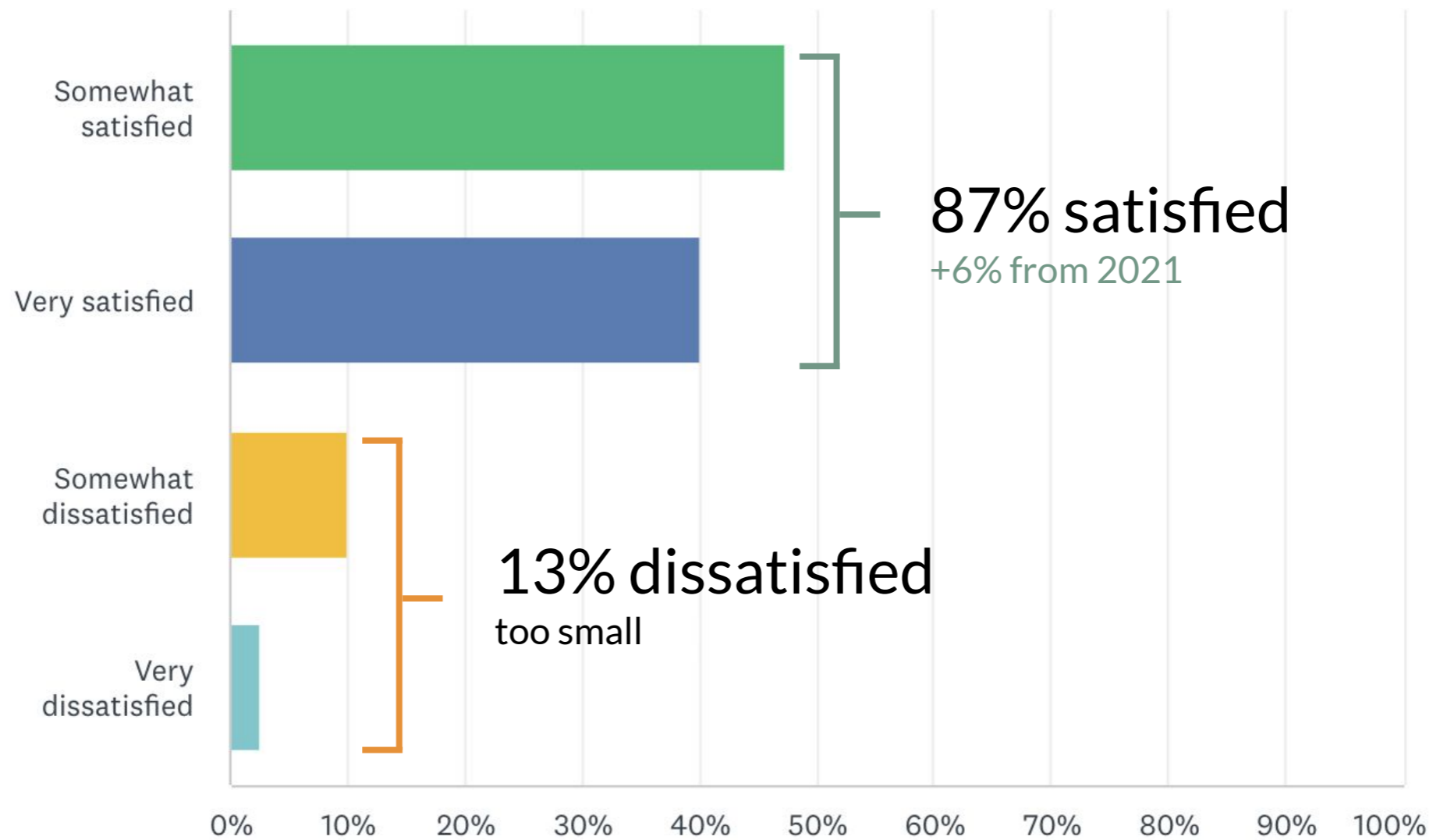
SANDCASTLE SATISFACTION



Gym

How satisfied are you with the quality and condition of The Sandcastle's gym?

Answered: 1,874 Skipped: 1,474



Gym



The majority of members dissatisfied with the gym (67%) commented that the space is too small.

The largest segment of dissatisfied members are on-island for 6-11 mo. annually and those who have a Governor's Club membership.

Overcrowding was only mentioned in 13% of dissatisfied comments.



HOW KICA CAN IMPROVE

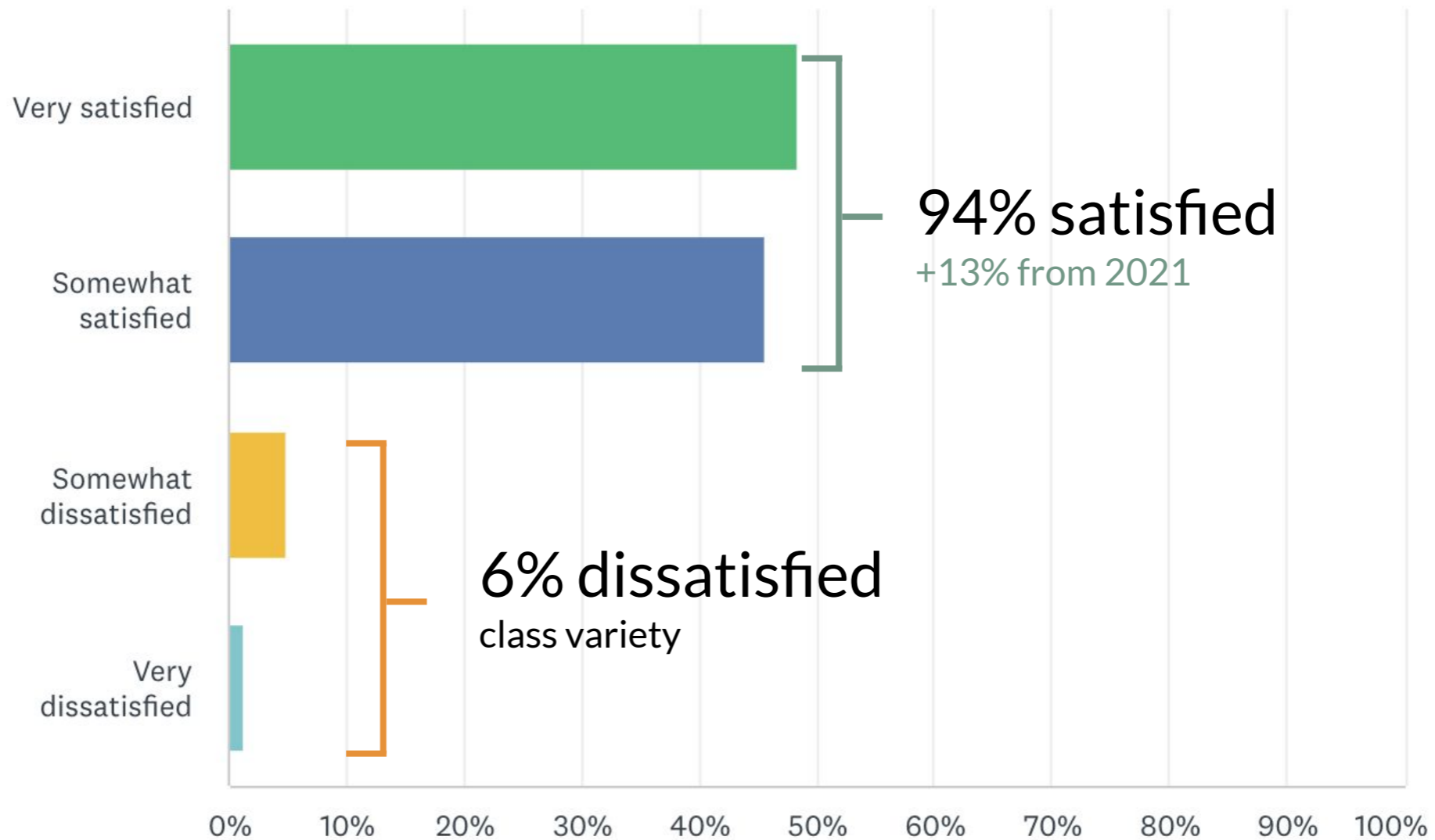
Potential long term planning for a larger or additional facility.



Fitness Classes

How satisfied are you with the quality of The Sandcastle's fitness class offerings?

Answered: 1,177 Skipped: 2,171

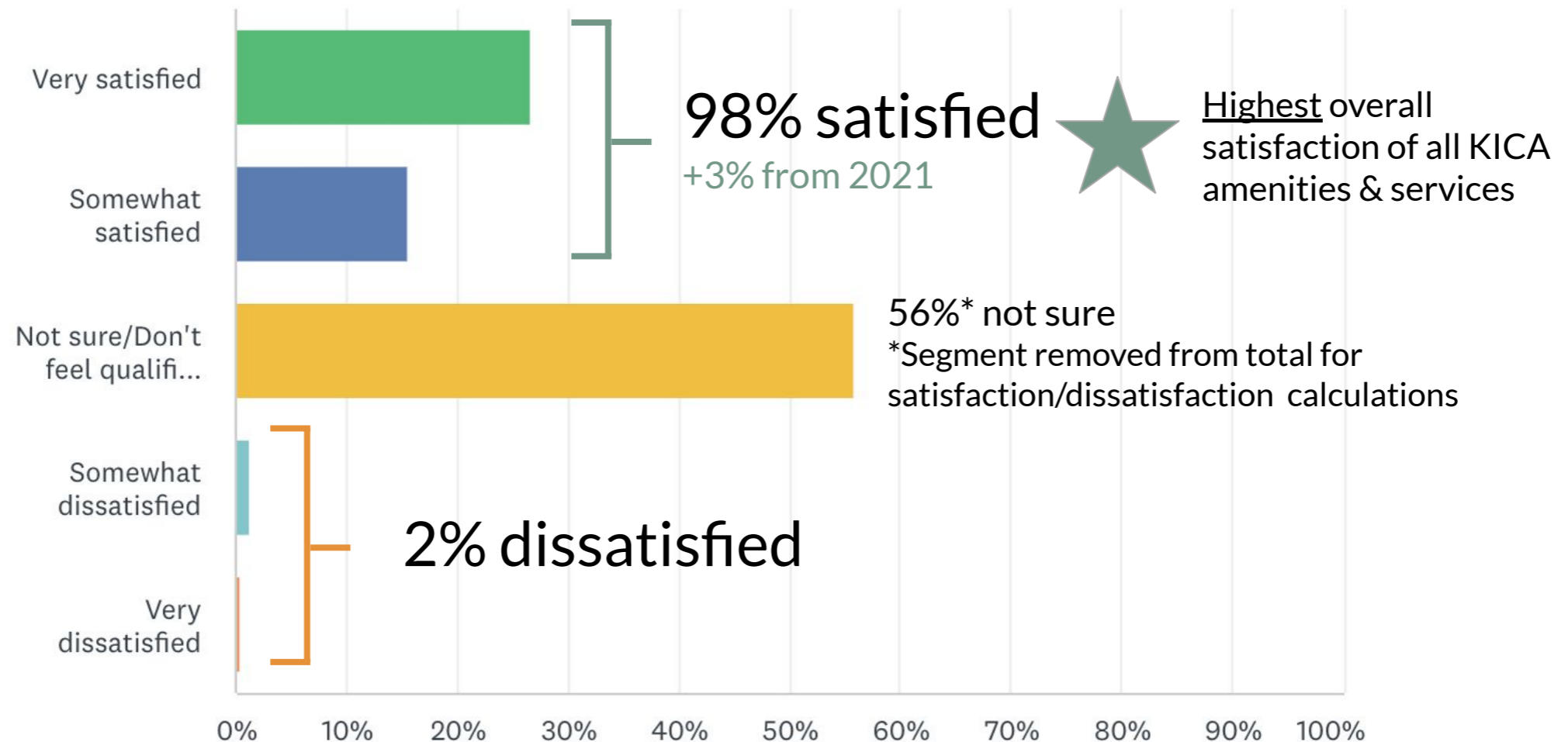




Event/Meeting Space

How satisfied are you with the quality and condition of The Sandcastle's event and meeting space?

Answered: 3,275 Skipped: 73

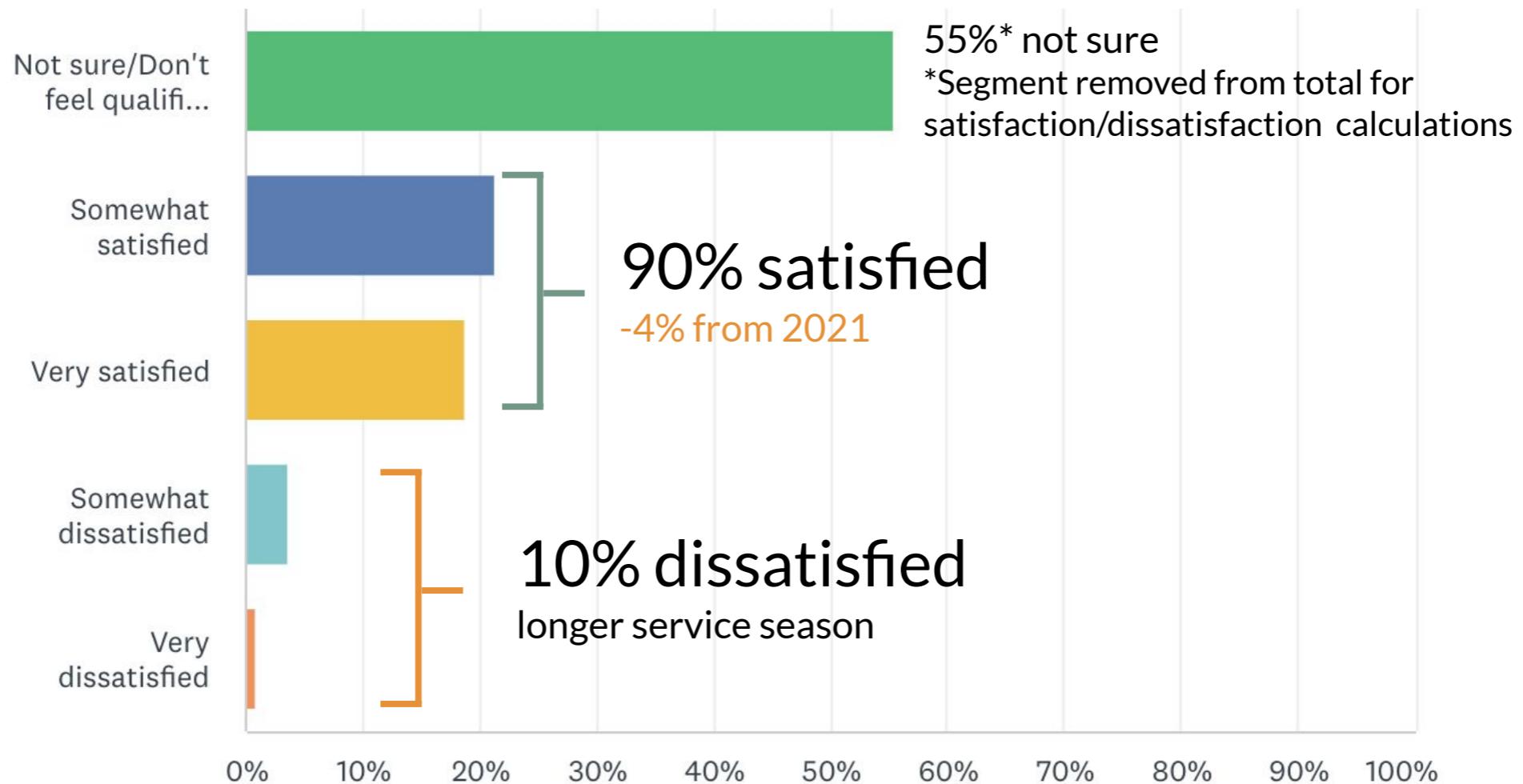




Summer Season Grille/Bar

How satisfied are you with the quality of The Sandcastle's summer-season Castle Grille and Sandbar?

Answered: 3,275 Skipped: 73

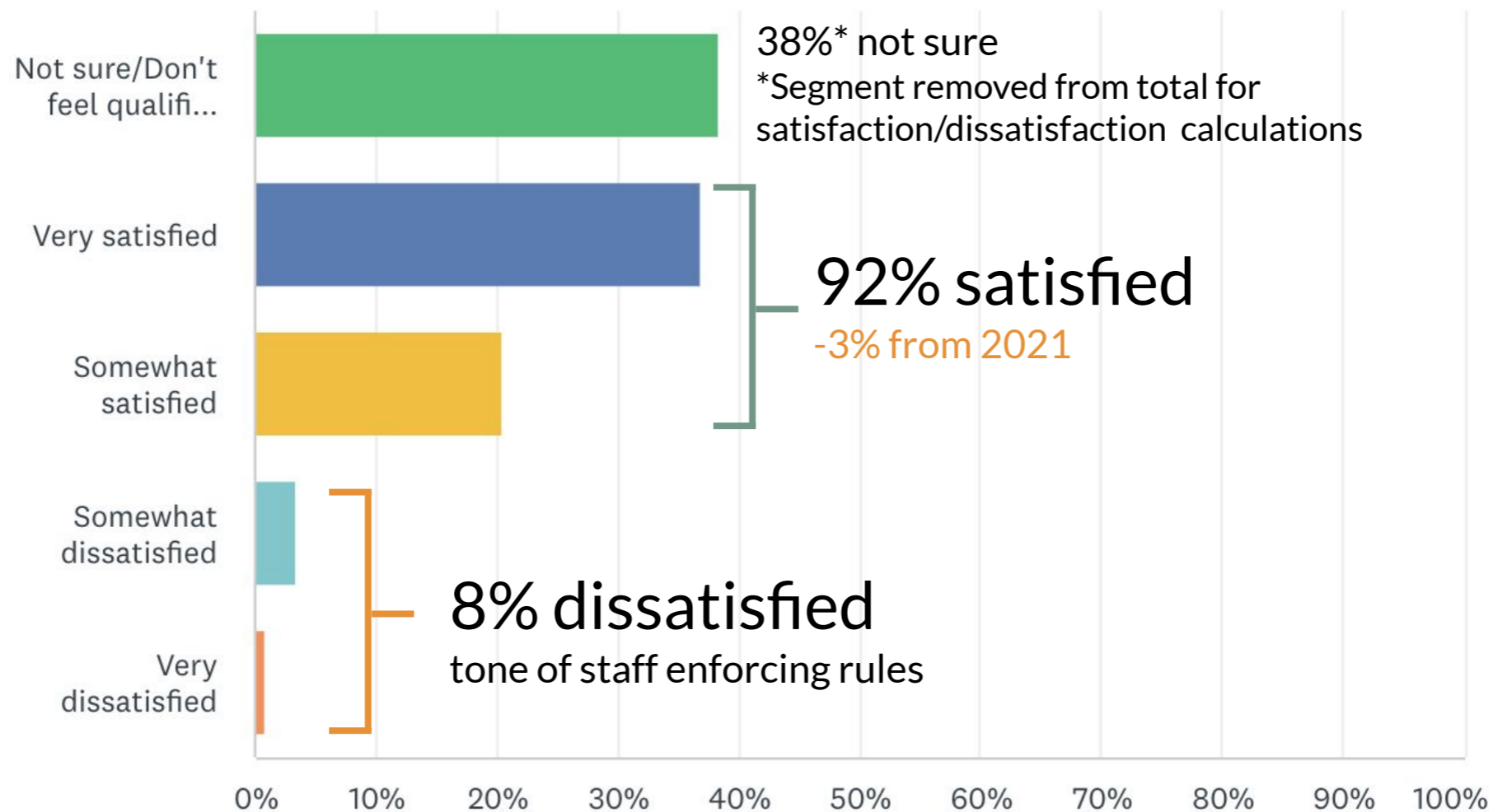




Member Services

How satisfied are you with the quality of member services support at The Sandcastle?

Answered: 3,275 Skipped: 73



2023 KICA MEMBER SURVEY

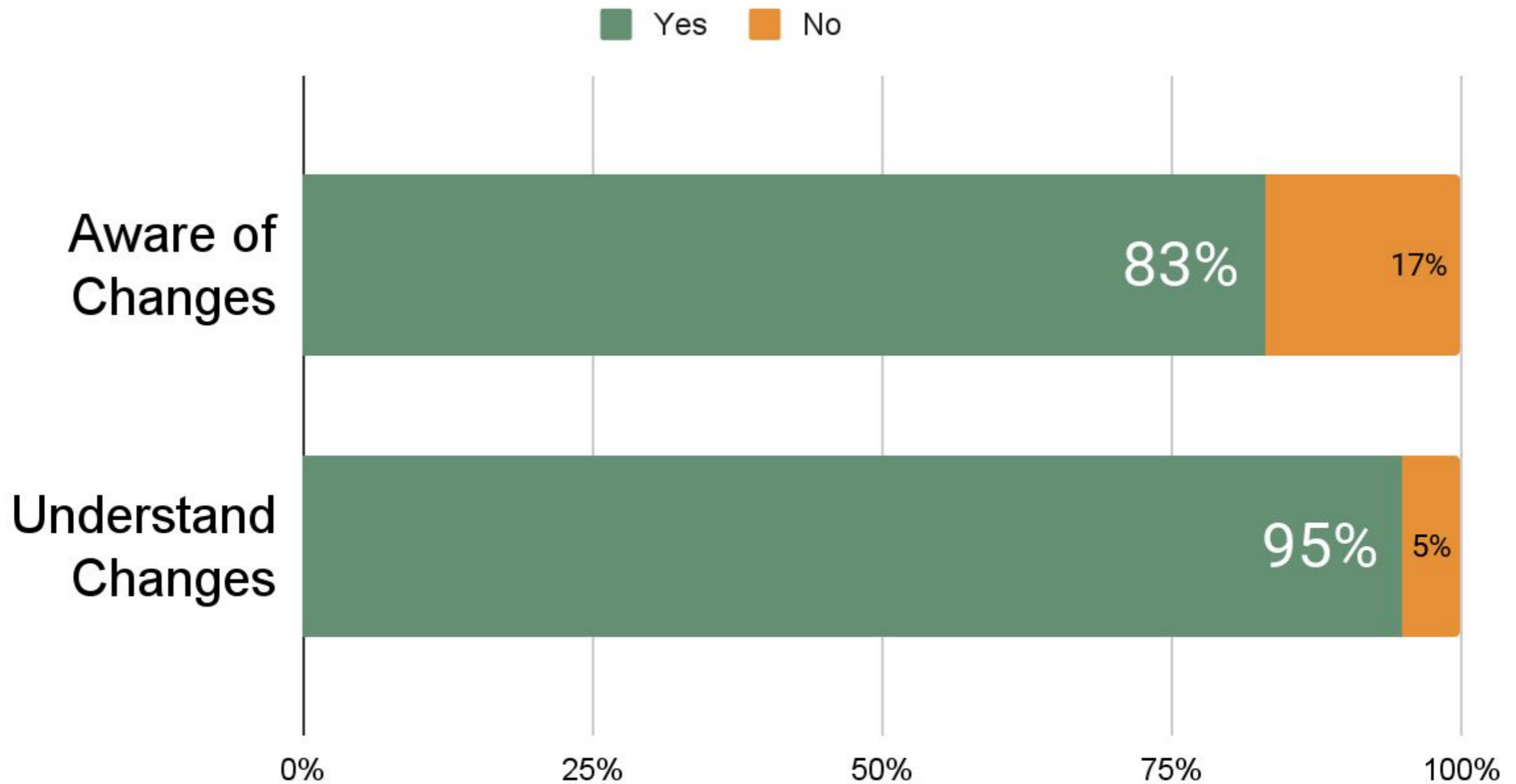
New Sandcastle Access Policies





Sandcastle Access Policy Changes

Implemented April 2023

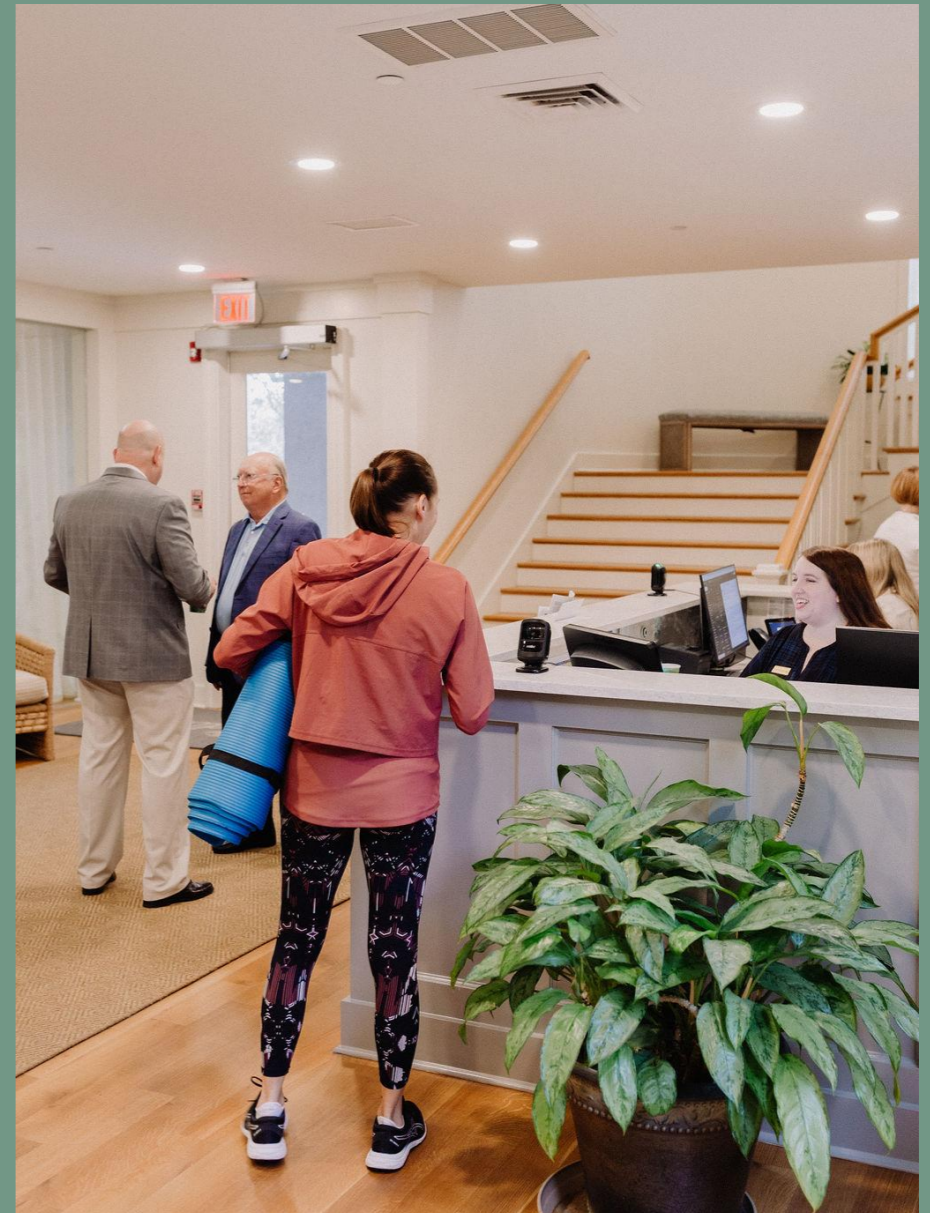




Sandcastle Access Policy Changes

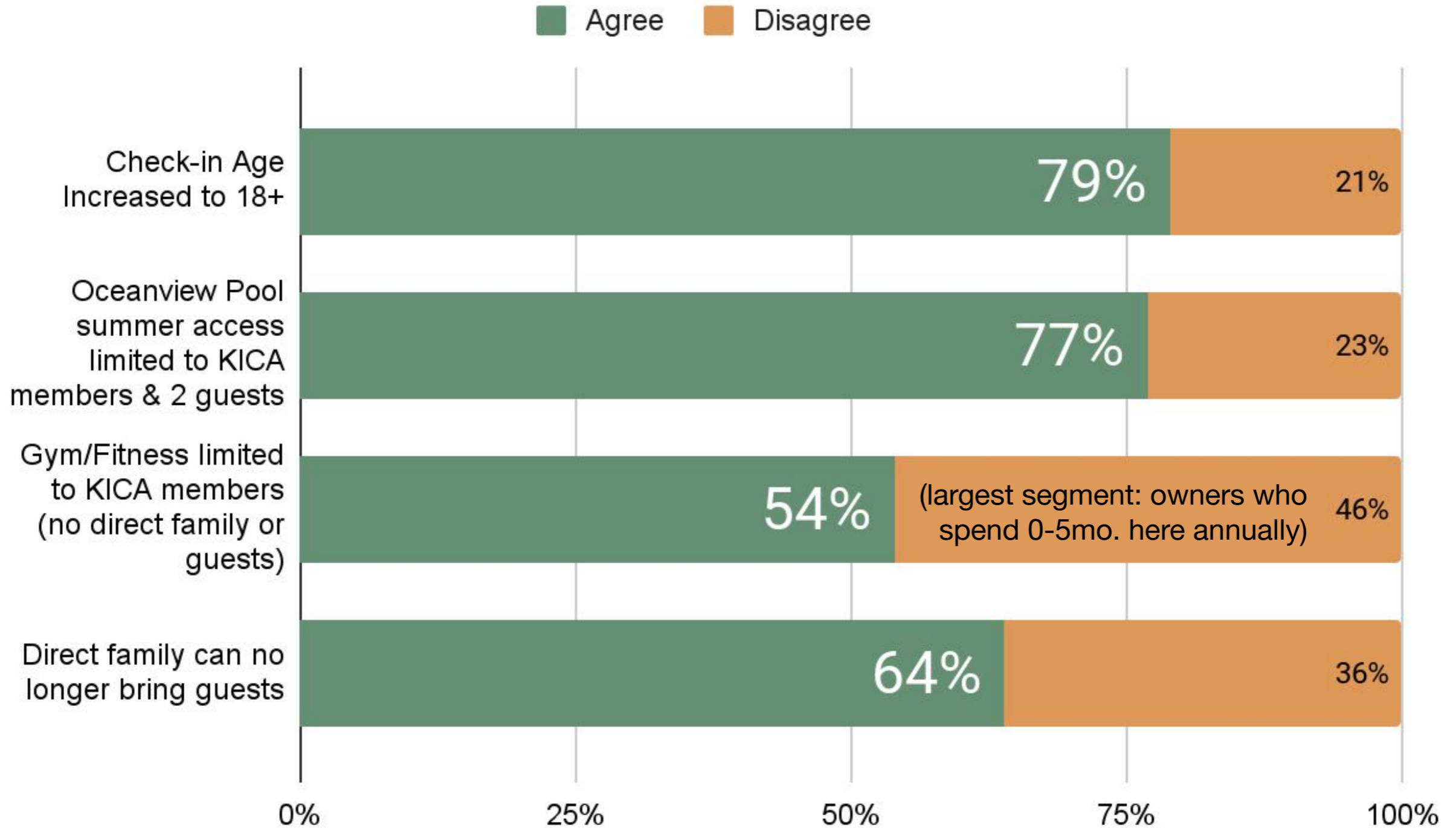
There is general agreement with the new Sandcastle access policies.

The greatest disagreement is with the restriction of access to the gym/fitness to members only, when direct family could formerly use the facilities.





Sandcastle Access Policy Changes



2023 KICA MEMBER SURVEY

Boardwalk, Leisure Trail and Boating Amenities





Trails, Boardwalks and Boating Facility Use

Boardwalks are KICA's most used, and most frequently used amenity.

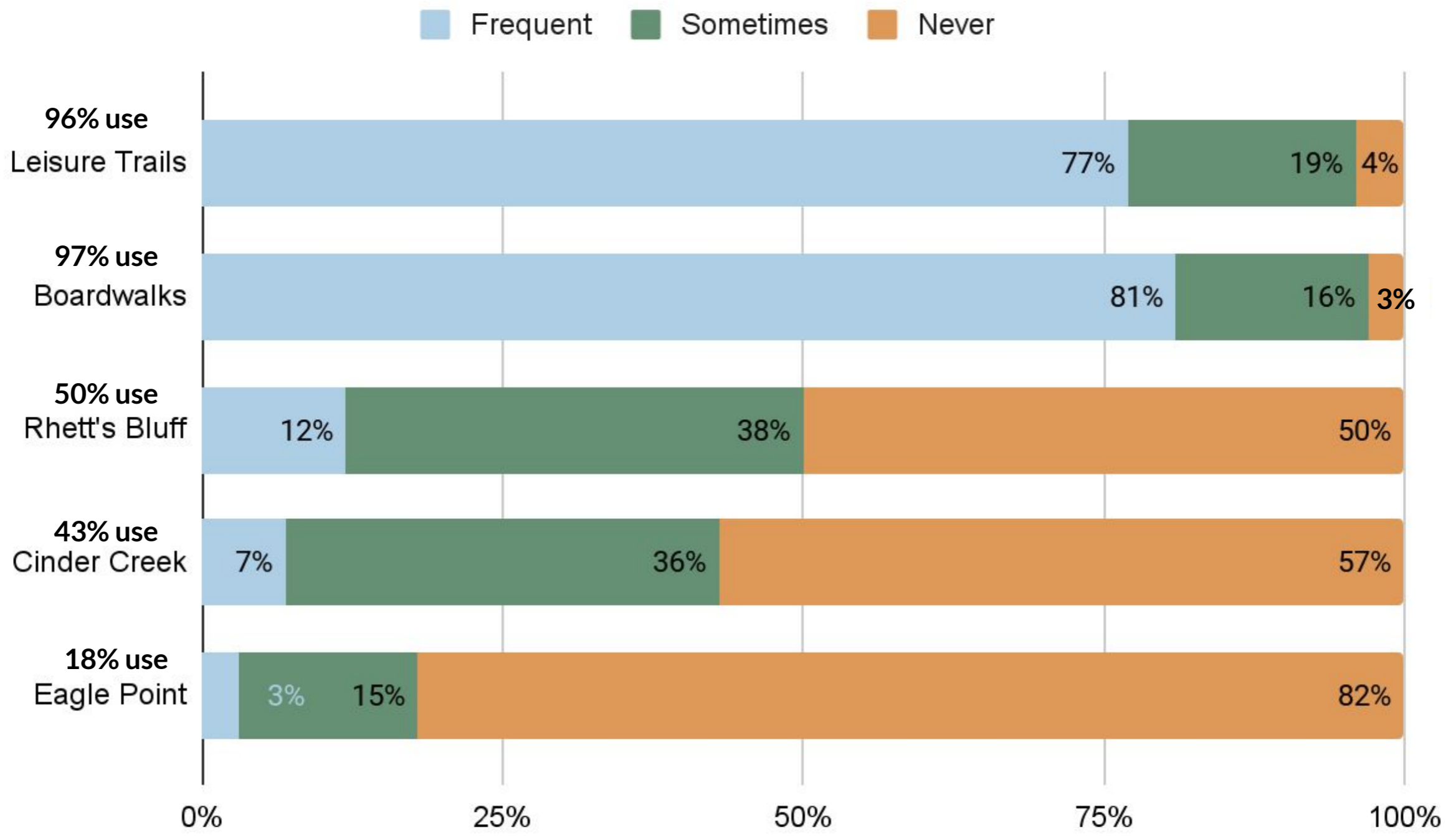
Leisure trails are a close second.

Only half of members use boating facilities, and they are used infrequently.



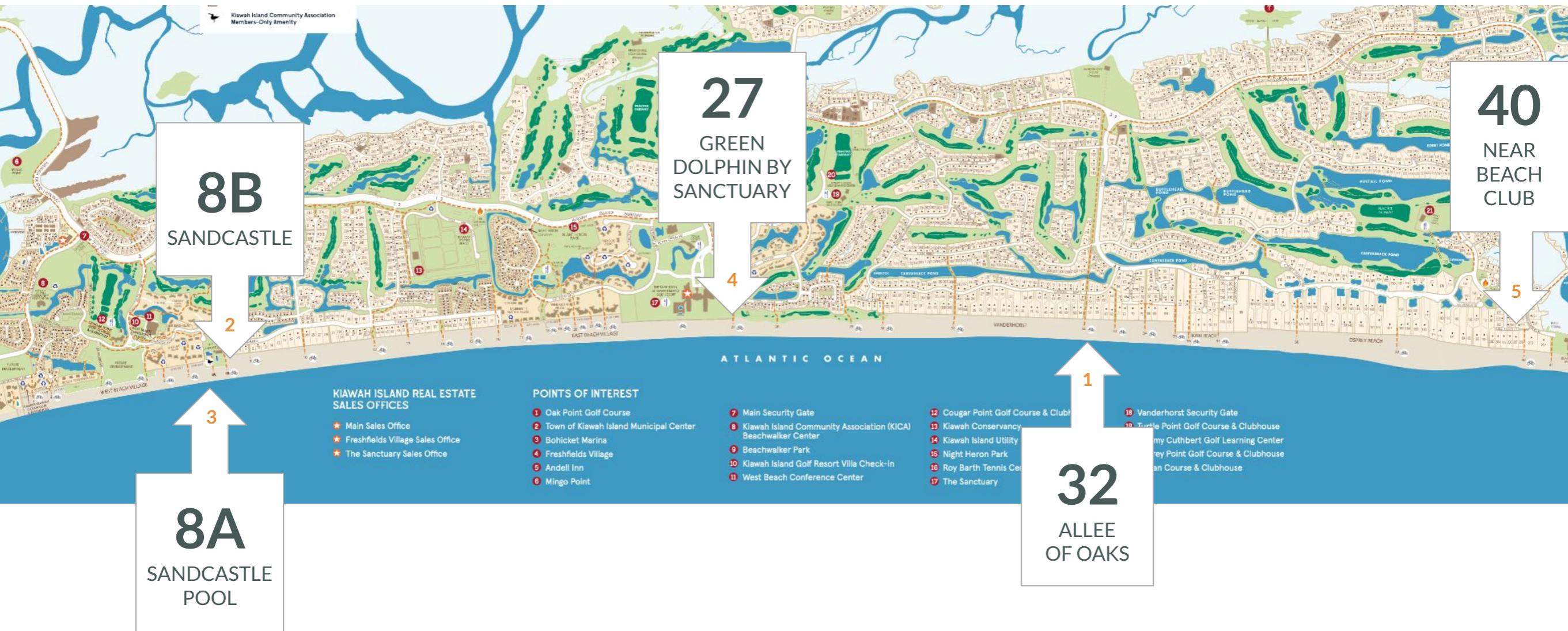


Trails, Boardwalks and Boating Facility Use





Most Used Boardwalks





Trails, Boardwalks and Boating Facility Satisfaction



Satisfaction with trails, boardwalks, and boating facilities is strong (92-94%).

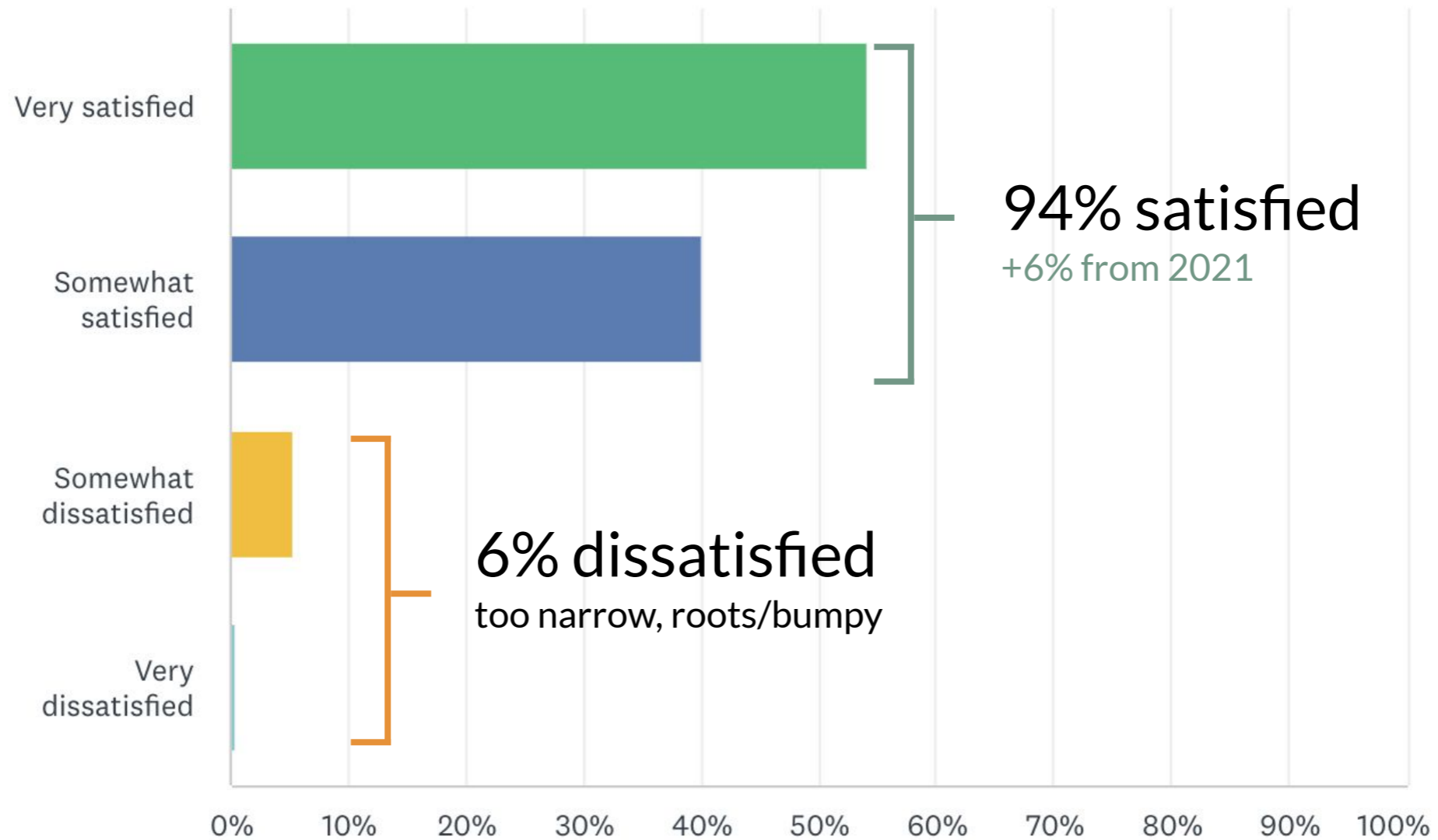
We've seen some decrease in satisfaction in boating facilities from 2021, but they're still high.



Leisure Trail Satisfaction

How satisfied are you with the quality and condition of the leisure trails?

Answered: 3,067 Skipped: 281

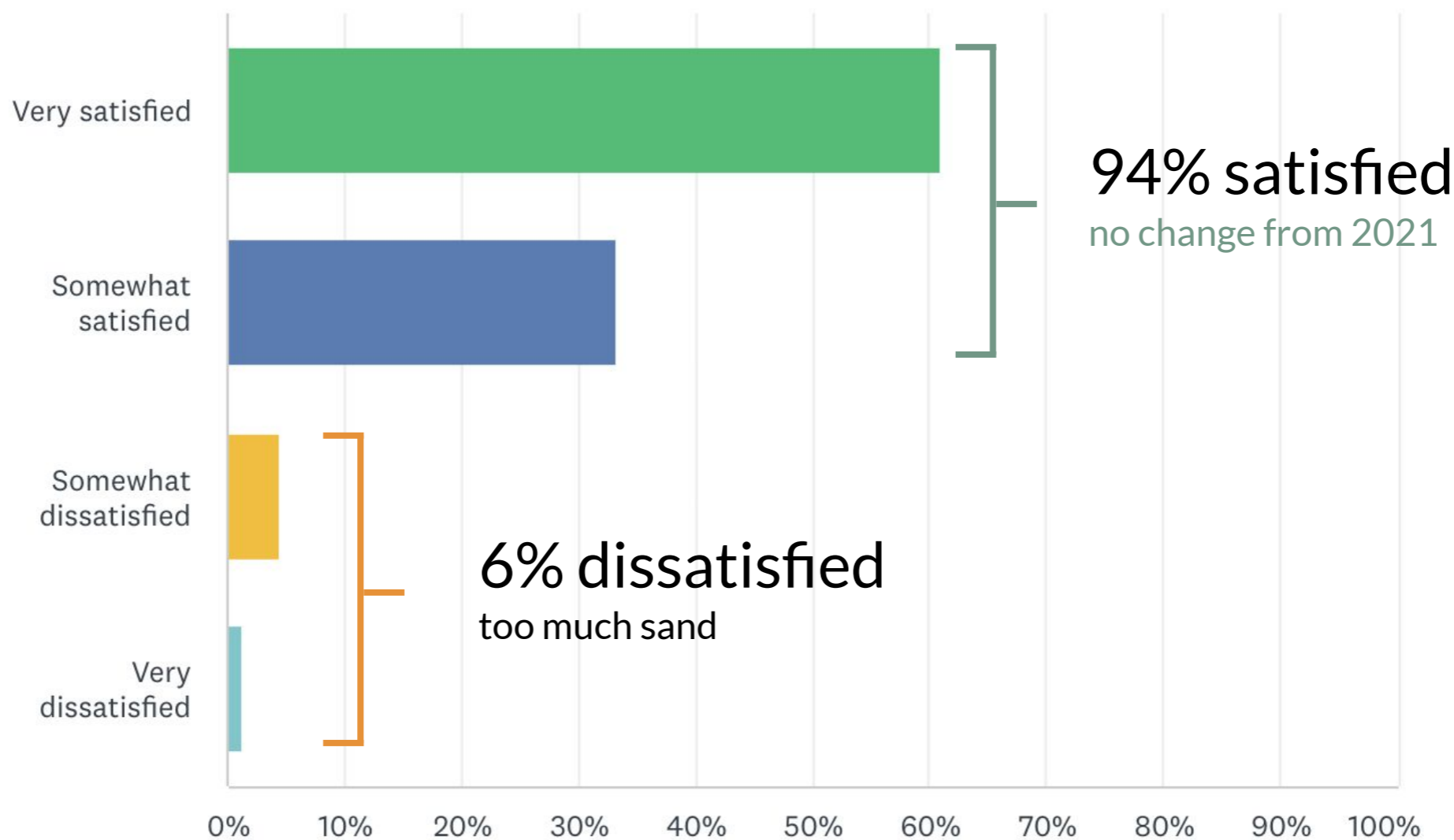




Boardwalk Satisfaction

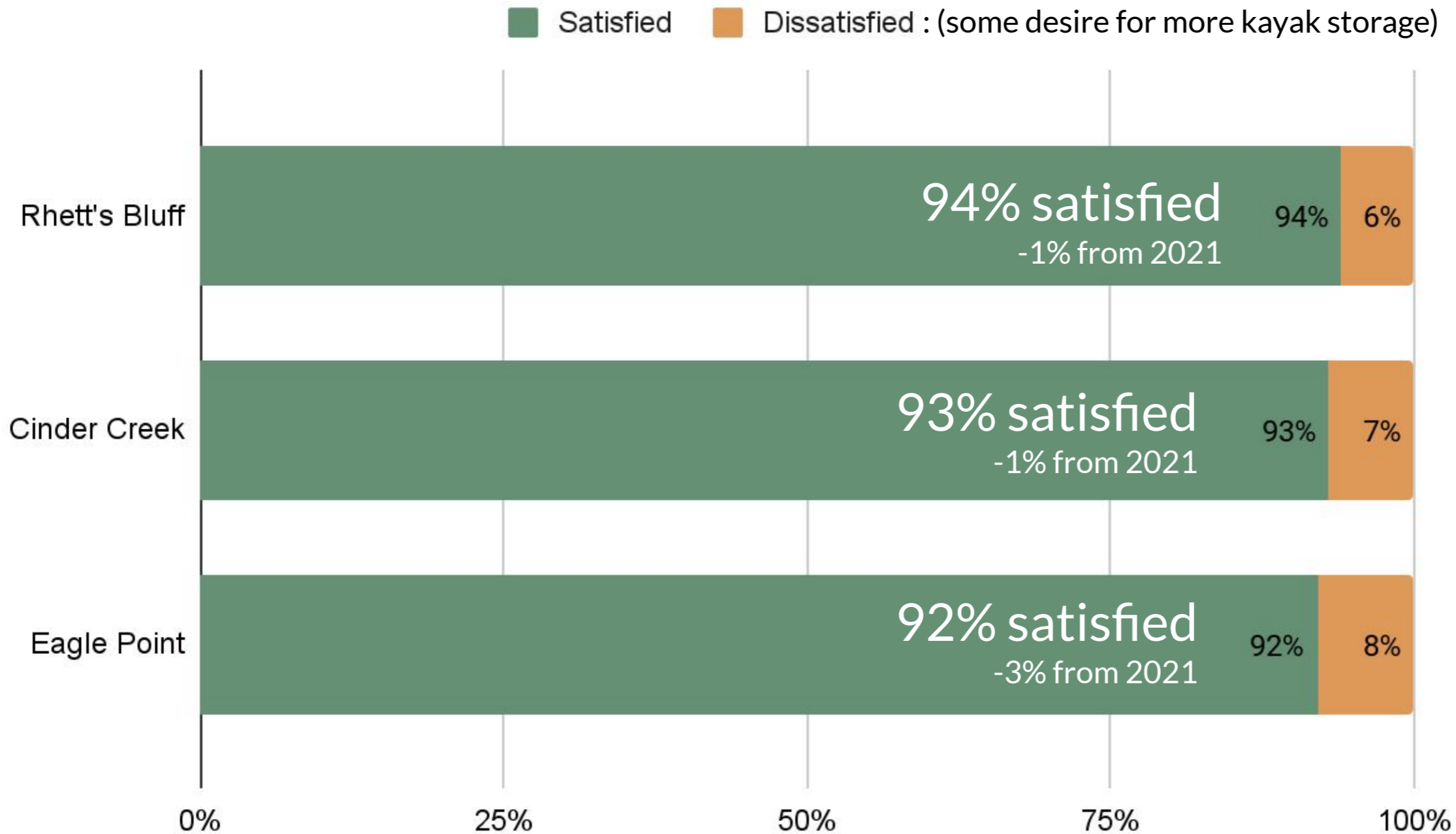
How satisfied are you with the quality and condition of the beach access boardwalks?

Answered: 3,056 Skipped: 292





Boating Facilities Satisfaction



2023 MEMBER SURVEY

Infrastructure & Common Property Maintenance





Infrastructure and Common Property Maintenance Satisfaction

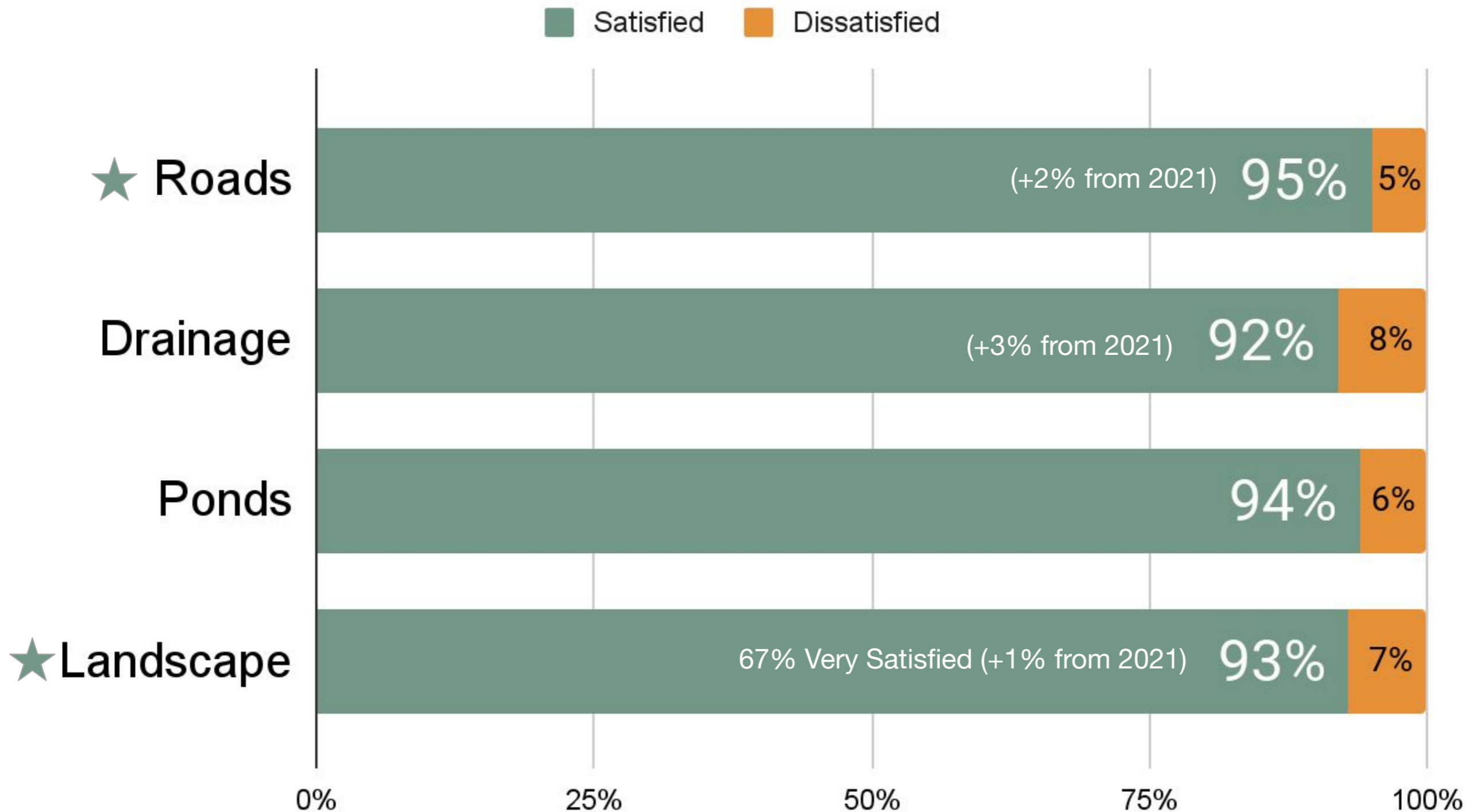


Satisfaction with infrastructure and common property maintenance is strong (92-95%).

These areas have increased in satisfaction or stayed the same from 2021 results.



Infrastructure and Common Property Maintenance Satisfaction

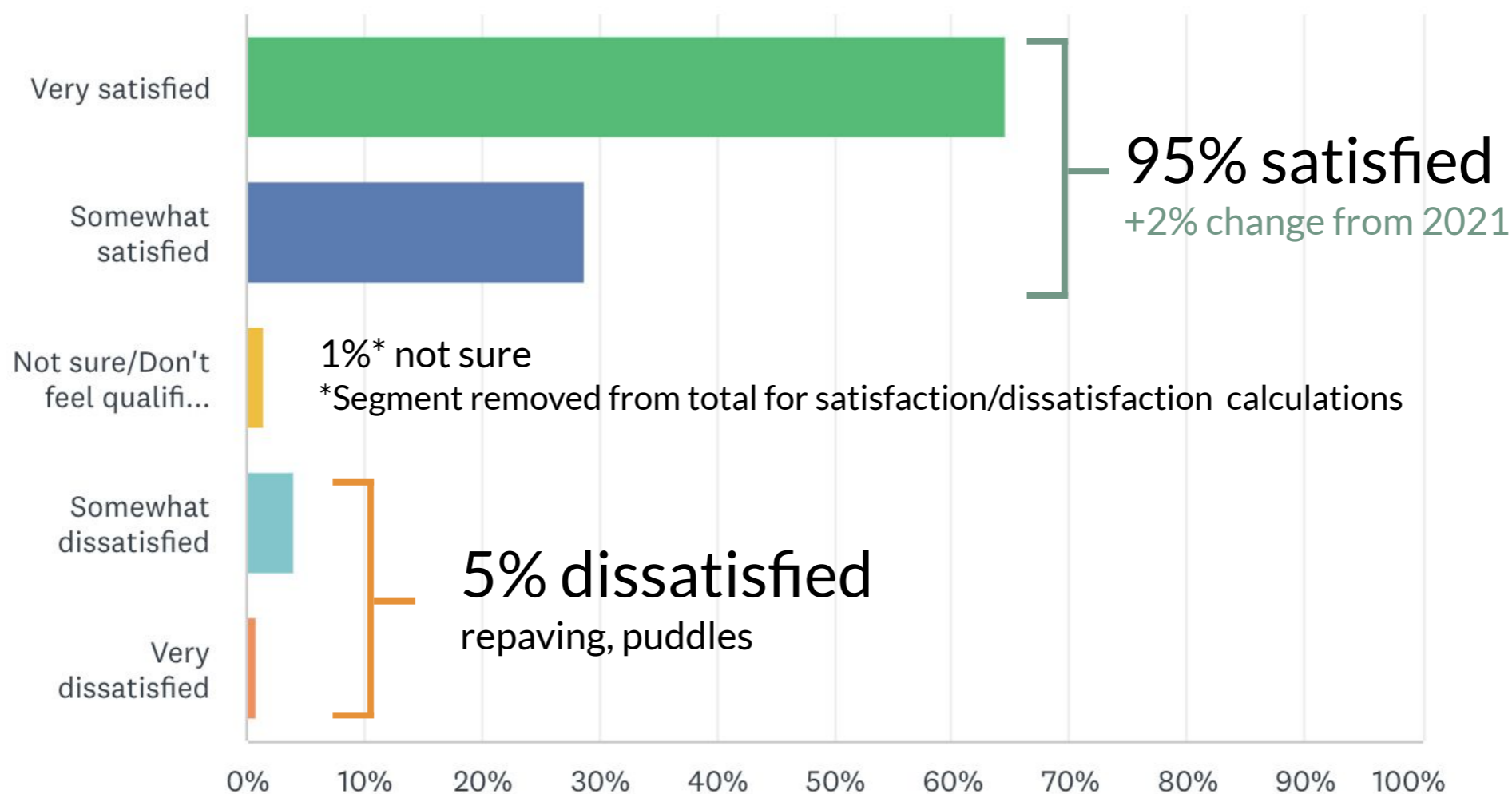




Roads Satisfaction

How satisfied are you with the quality and condition of island roads? (KICA does not maintain roads outside of the main gate, regime roads or parking lots.)

Answered: 3,130 Skipped: 218

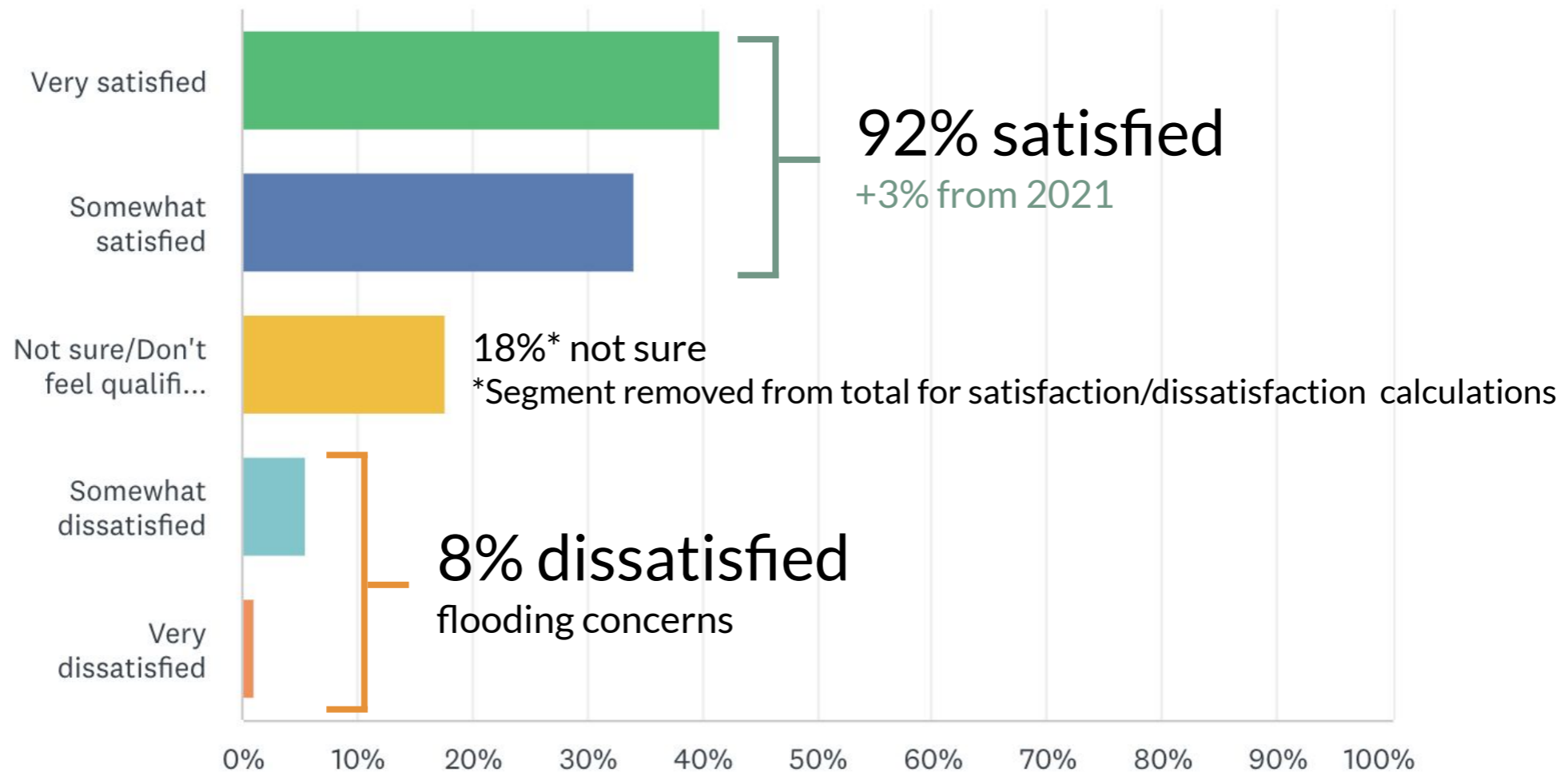




Drainage Satisfaction

How satisfied are you with the quality of drainage maintenance, including the recent drainage optimization projects to mitigate common flooding issues?

Answered: 3,122 Skipped: 226

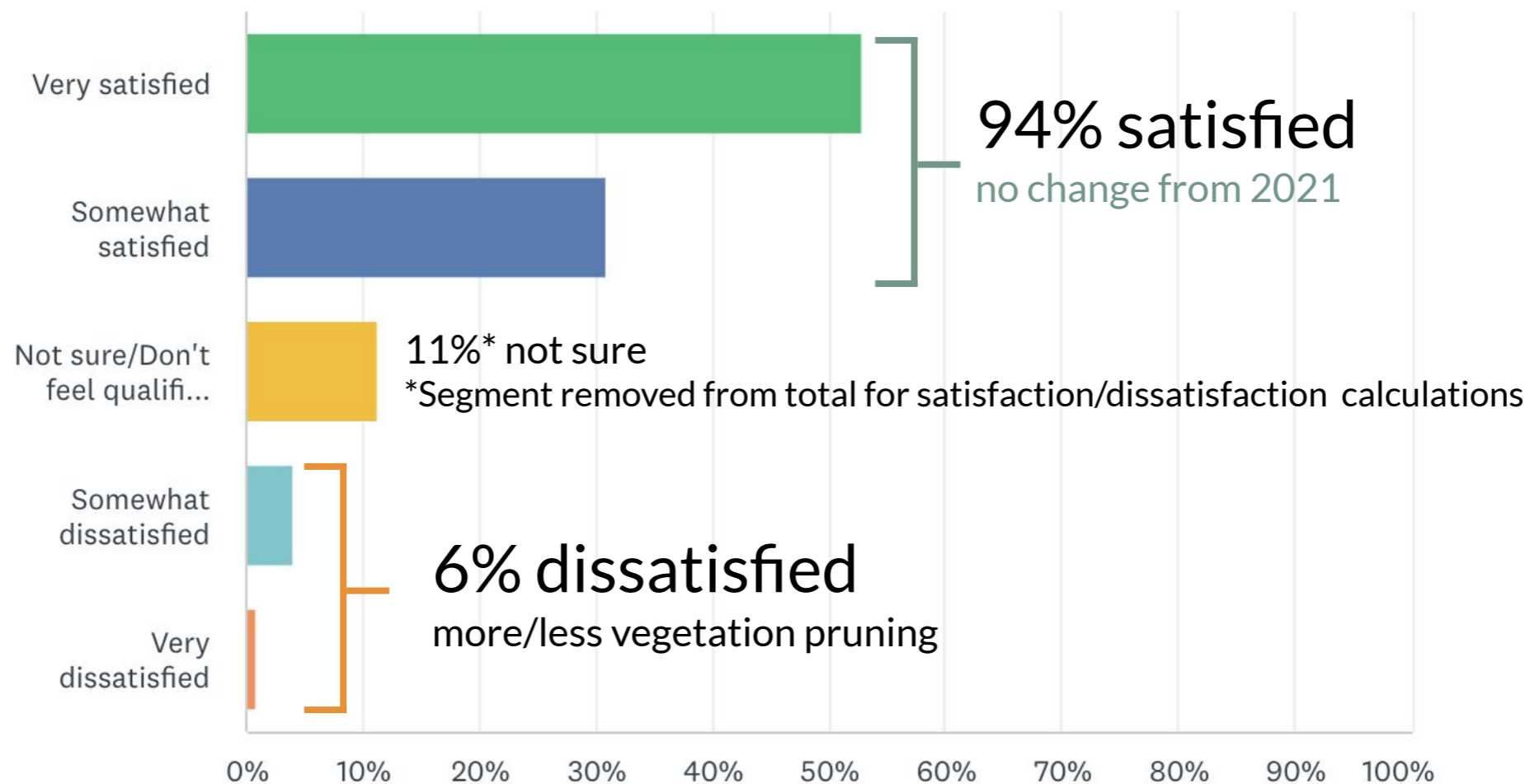




Pond Satisfaction

How satisfied are you with the condition of our island's ponds? (Our ponds are interconnected and serve as the master drainage system for the island. They also provide important wildlife habitat.)

Answered: 3,122 Skipped: 226

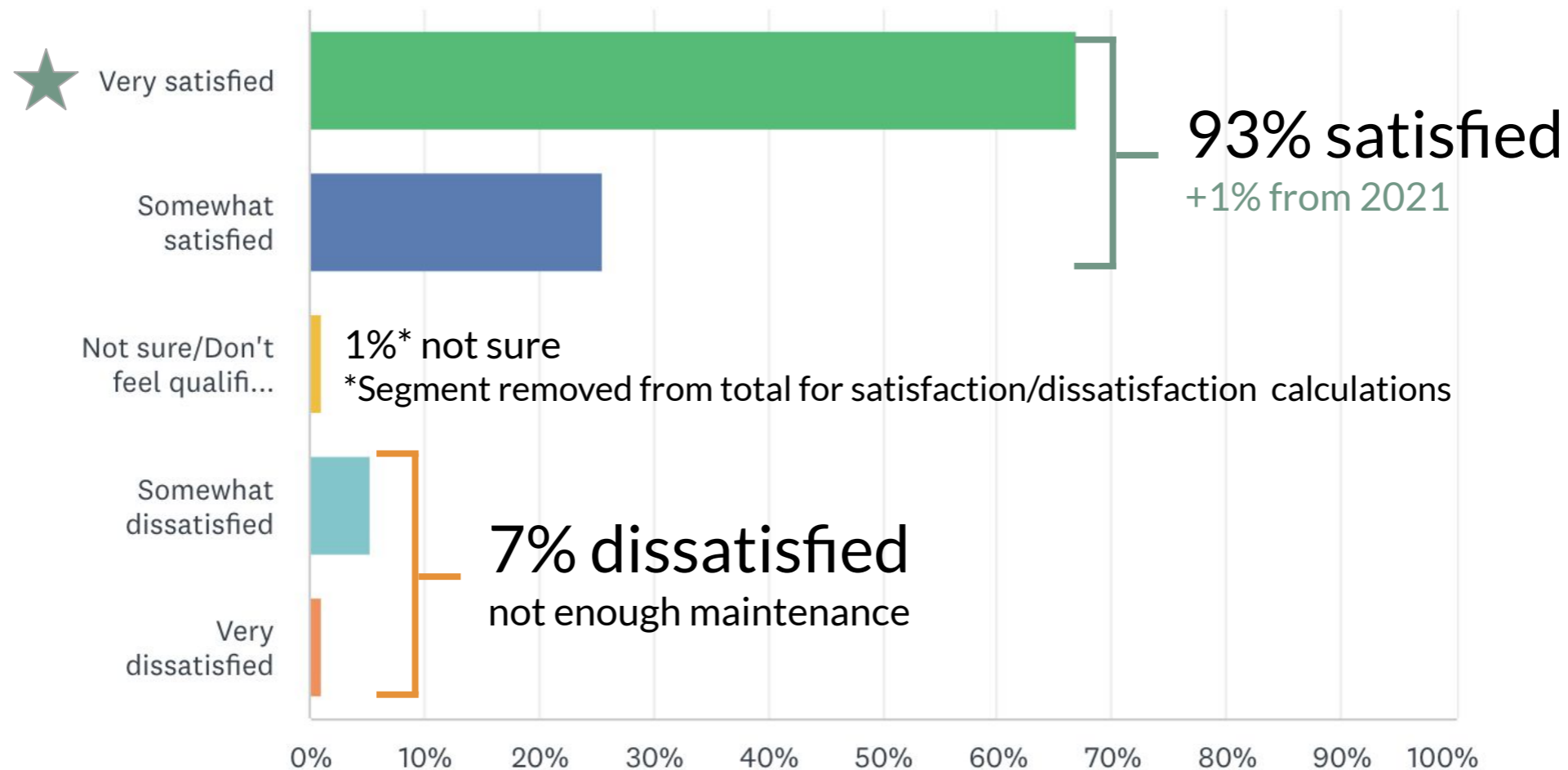




Landscape Satisfaction

How satisfied are you with the quality of common property landscaping along roadways and leisure trails? (KICA does not maintain golf courses; regime, resort or club properties; or land outside of the main gate.)

Answered: 3,121 Skipped: 227



2023 MEMBER SURVEY

Rules Enforcement and Safety





Rules Enforcement Satisfaction



The lowest category of member satisfaction is with the enforcement of island rules (75-78%).

This is about the same as 2021 survey results.

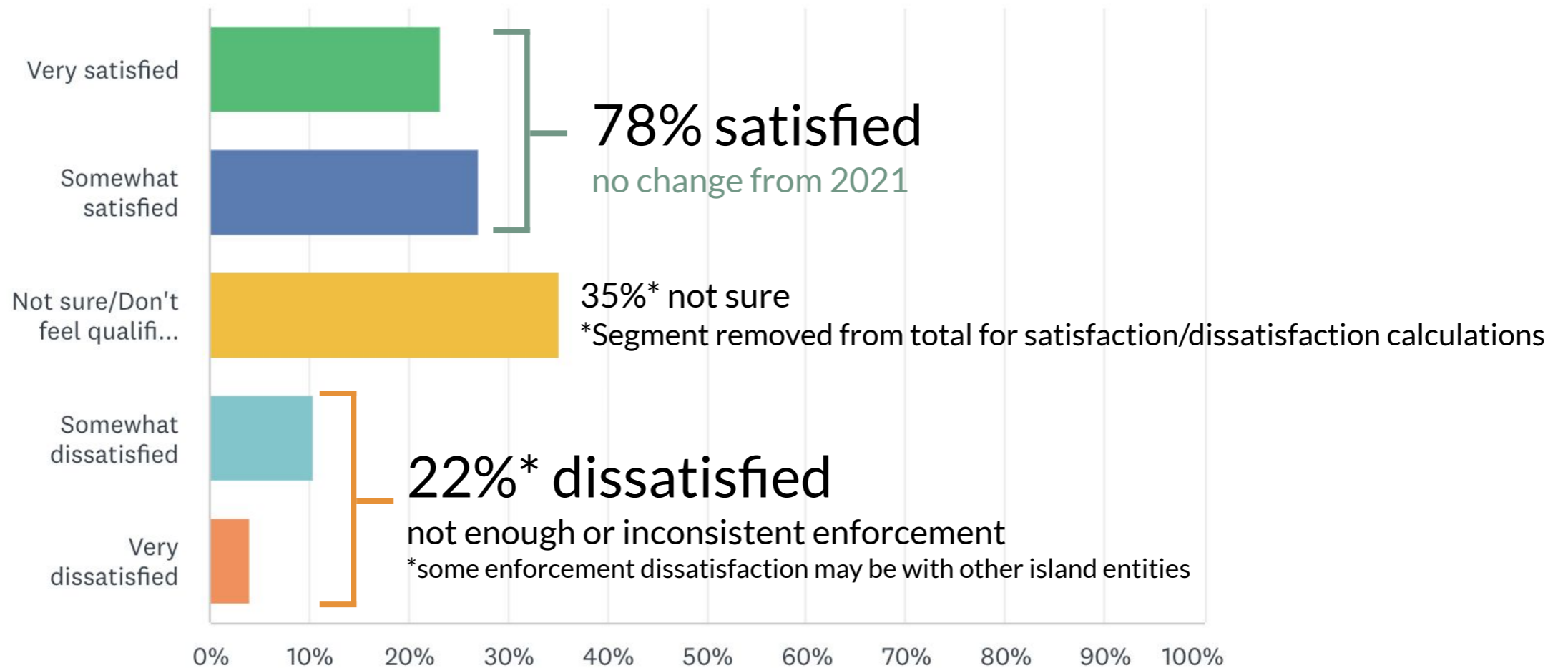
A portion of enforcement dissatisfaction is not actually with KICA's enforcement, it's with access policies or other entities' enforcement responsibilities.



Covenant Violation Enforcement Satisfaction

How satisfied are you with the enforcement of members' property/home maintenance violations (ex. unkempt lawn/landscape, mold/mildew on home, etc.)?

Answered: 3,115 Skipped: 233





Covenant Violation Enforcement Dissatisfaction

Dissatisfied members most commonly cited not enough enforcement of property covenant violations and lack of consistency of enforcement.

MEMBER SEGMENTS

Members most dissatisfied with covenant compliance are full-time owners.

HOW KICA CAN IMPROVE:

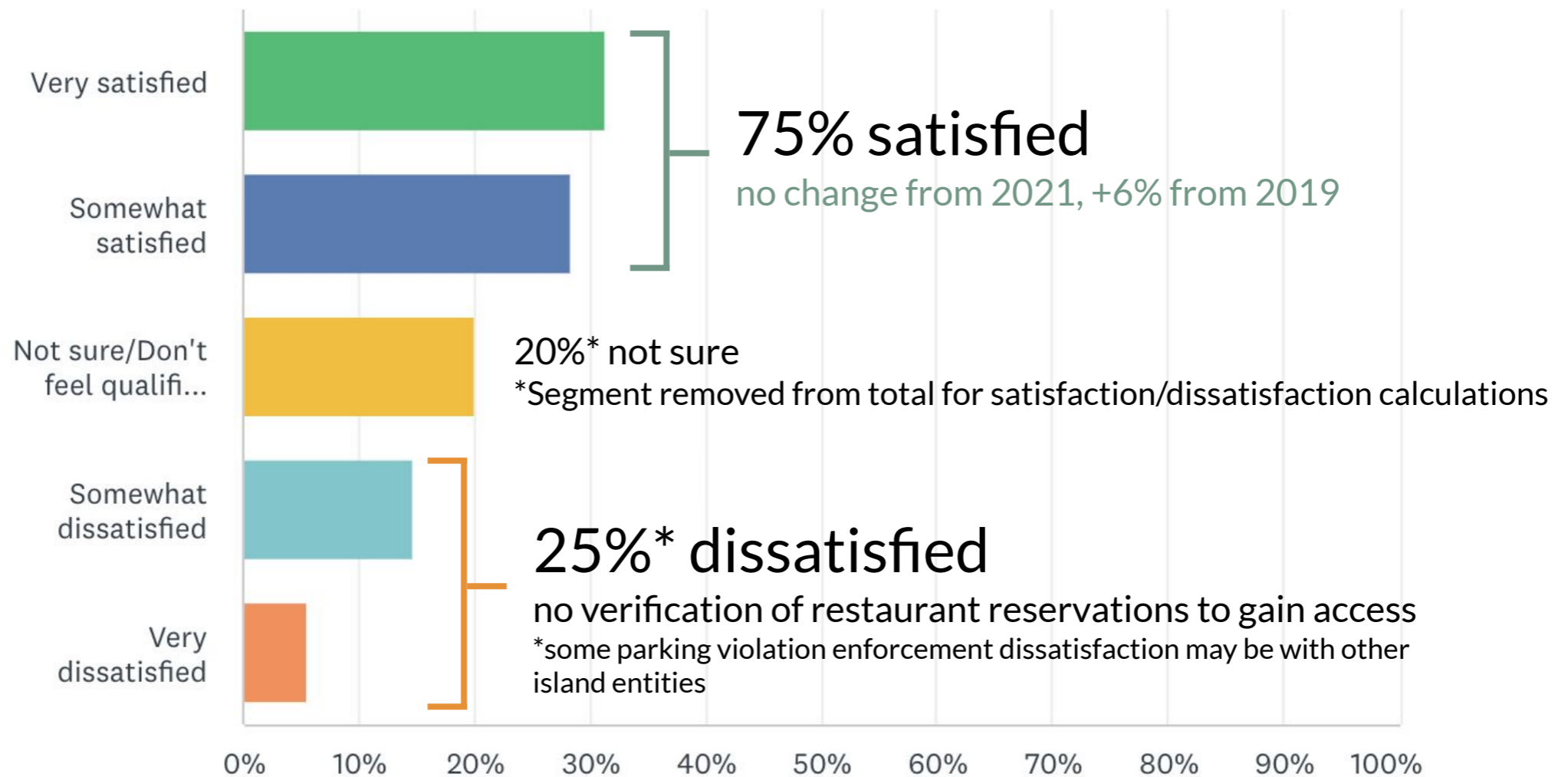
- Improve education of rules
- Improve ease of reporting issues and education on how to report



Gate Access and Parking Violation Enforcement Satisfaction

How satisfied are you with the enforcement of gate access and parking violations?

Answered: 3,115 Skipped: 233





Gate Access Violation Enforcement Dissatisfaction

Dissatisfied members most commonly cited frustration with guest access being granted without proof of resort dining/golf reservation.

MEMBER SEGMENTS

There's more dissatisfaction with owners who spend 6+ months on Kiawah and slightly more with owners who have owned for 6-19 years.

HOW KICA CAN IMPROVE:

- Continue to Review Opportunities to Improve the Resort-Guest Verification Processes
- Educate members on what reservations are verified for access: ex. hotel, golf, renter



Parking Violation Enforcement Dissatisfaction

Dissatisfied members most commonly cited illegal street parking to access beach boardwalks, and guest and contractor parking at homes.

MEMBER SEGMENTS

There's more dissatisfaction with owners who spend 6+ months on Kiawah and slightly more with owners who have owned for 6-19 years.

HOW KICA CAN IMPROVE:

- KICA recently added another full-time patrol staff, responsible for parking enforcement and other rules/regs.
- Education on illegal/legal parking
- Improve ease of reporting issues and education on how to report



More Enforcement Comments

Members frequently mention they want better enforcement of:

- **short-term rental violations** (TOKI)
- **bikes on roads** (KICA)
 - new patrol officer on bicycle - July 1
- **speeding** (KICA/TOKI)
 - KICA traffic calming initiative

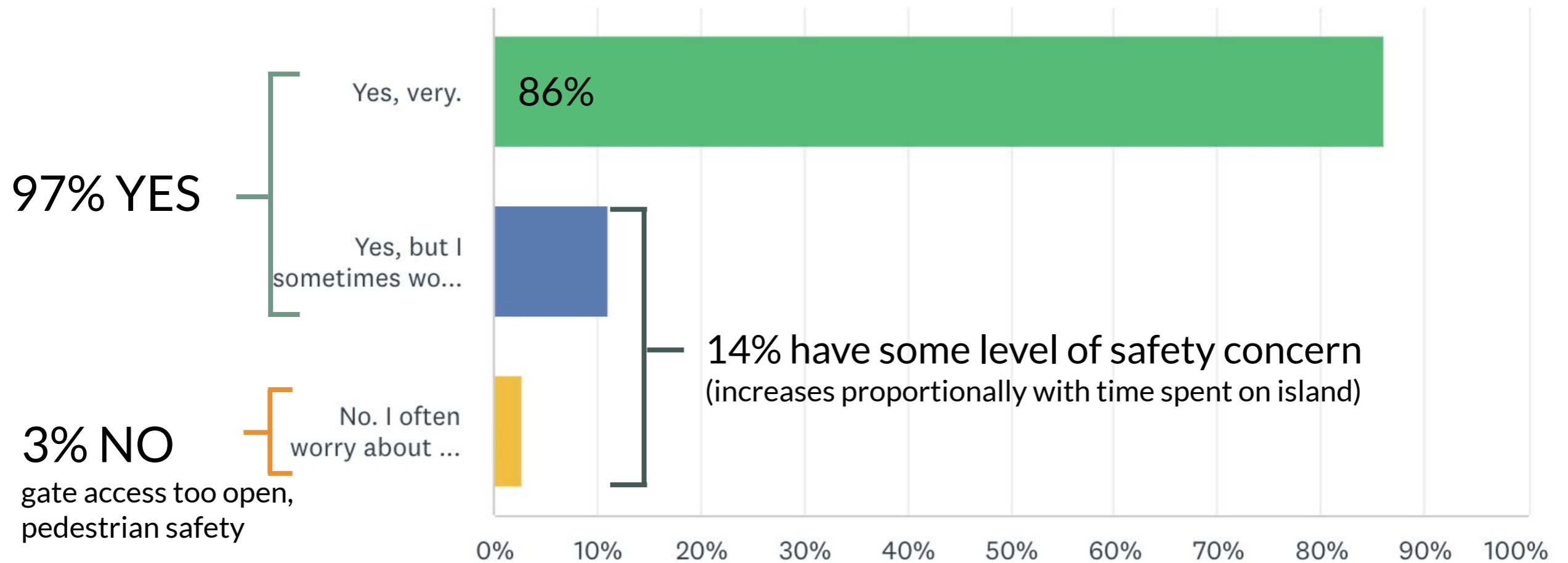
About 35% of general enforcement comments did not relate to KICA responsibilities.



Kiawah Safety

Do you feel Kiawah Island is a safe place?

Answered: 3,114 Skipped: 234



2023 MEMBER SURVEY

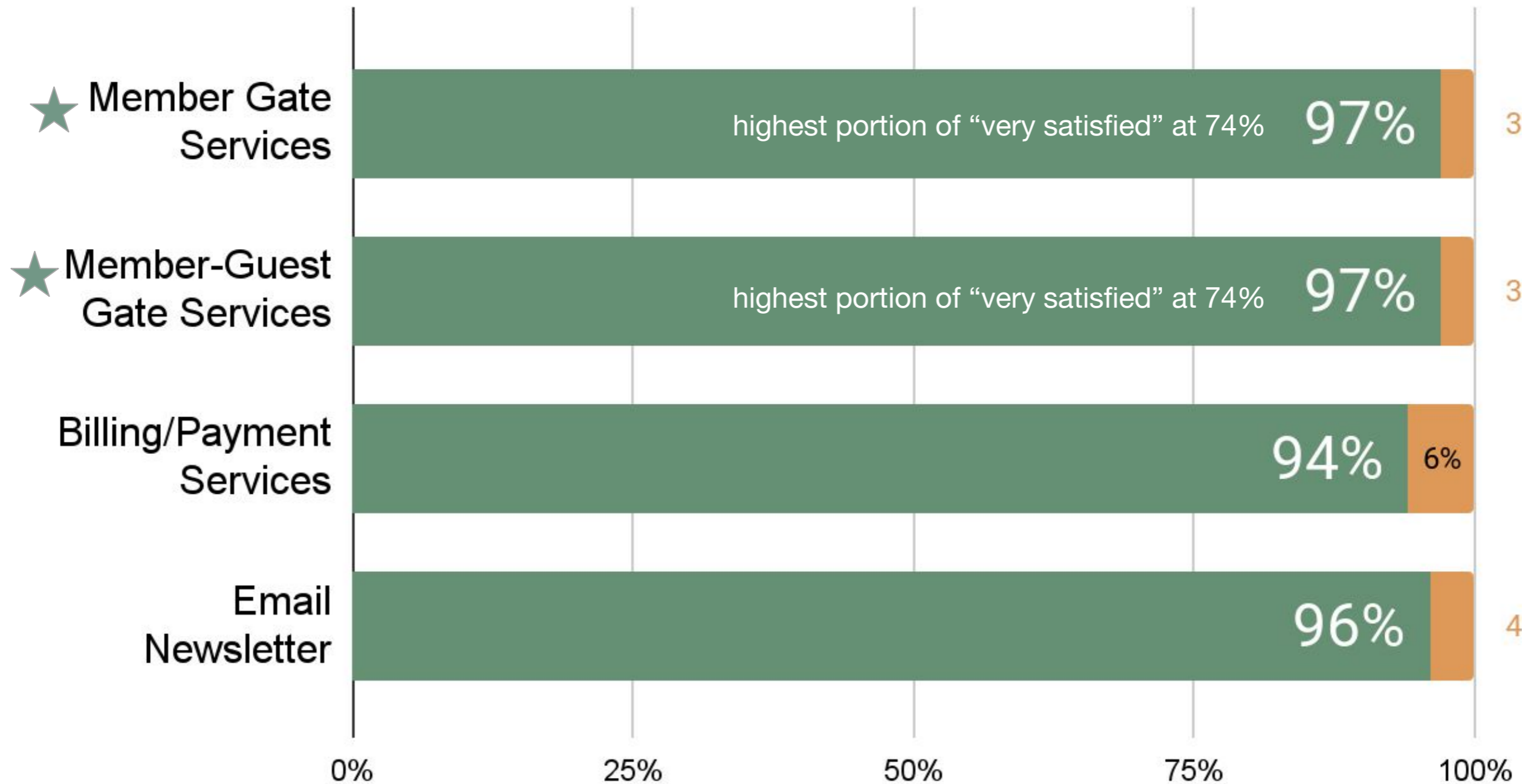
Member Services and Preferences





Other Member Services Satisfaction

Satisfaction Dissatisfaction

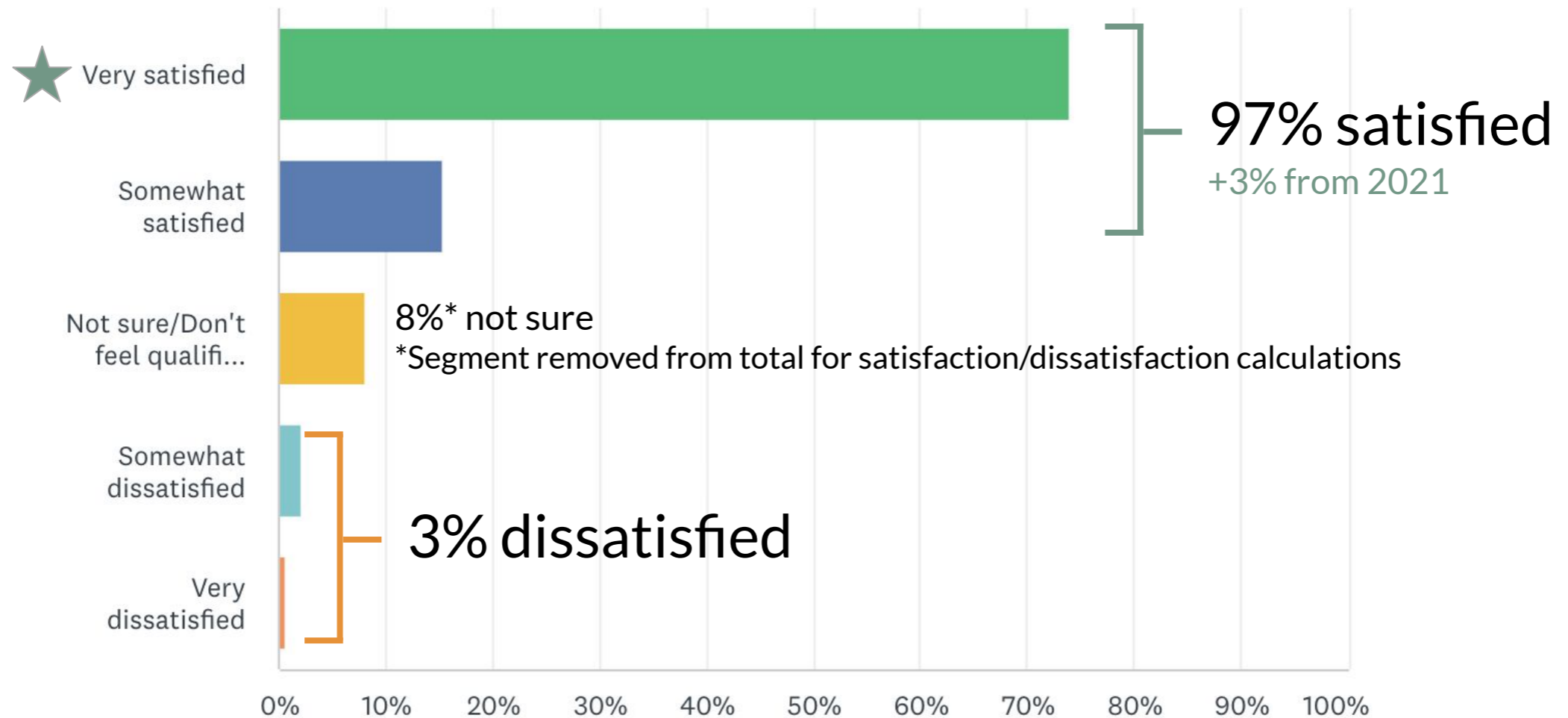




Member Gate Access Services Satisfaction

How satisfied are you with the quality of service when requesting a member-vehicle gate access decal?

Answered: 3,107 Skipped: 241

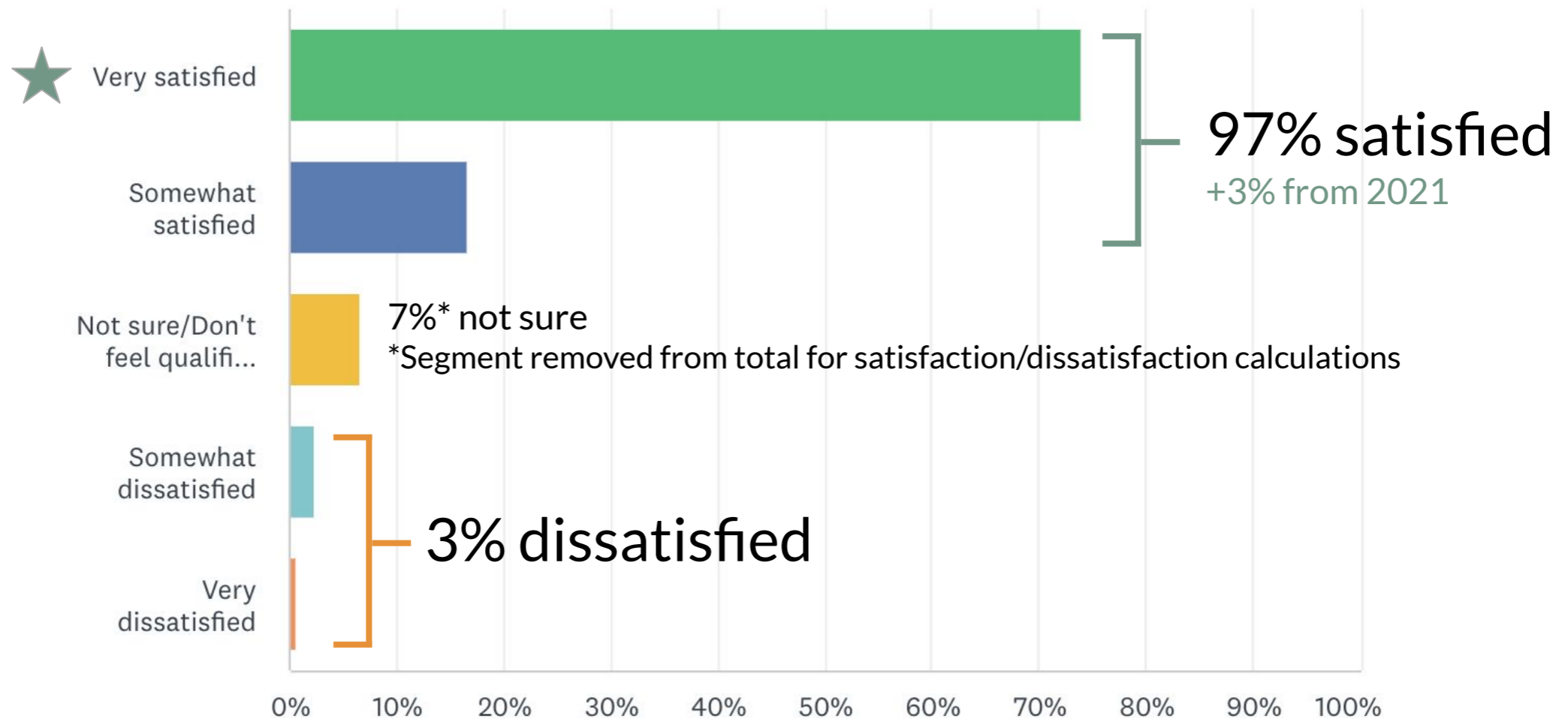




Member-Guest Gate Access Services Satisfaction

How satisfied are you with phone, email or online services to request gate passes for your family/guests.

Answered: 3,107 Skipped: 241

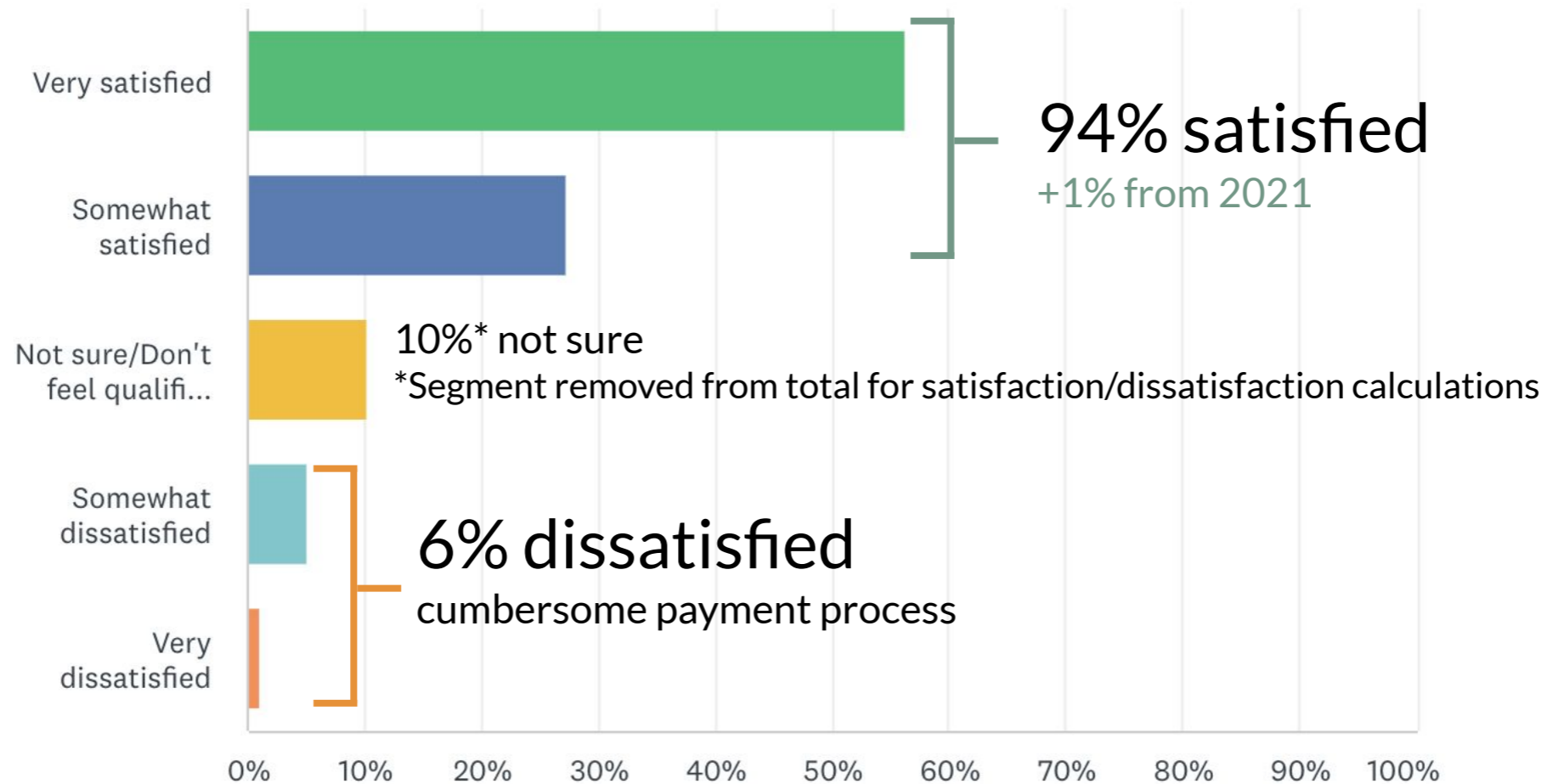




Online Payment Portal Satisfaction

How satisfied are you with billing communications and the ease of payments through your online member account?

Answered: 3,107 Skipped: 241

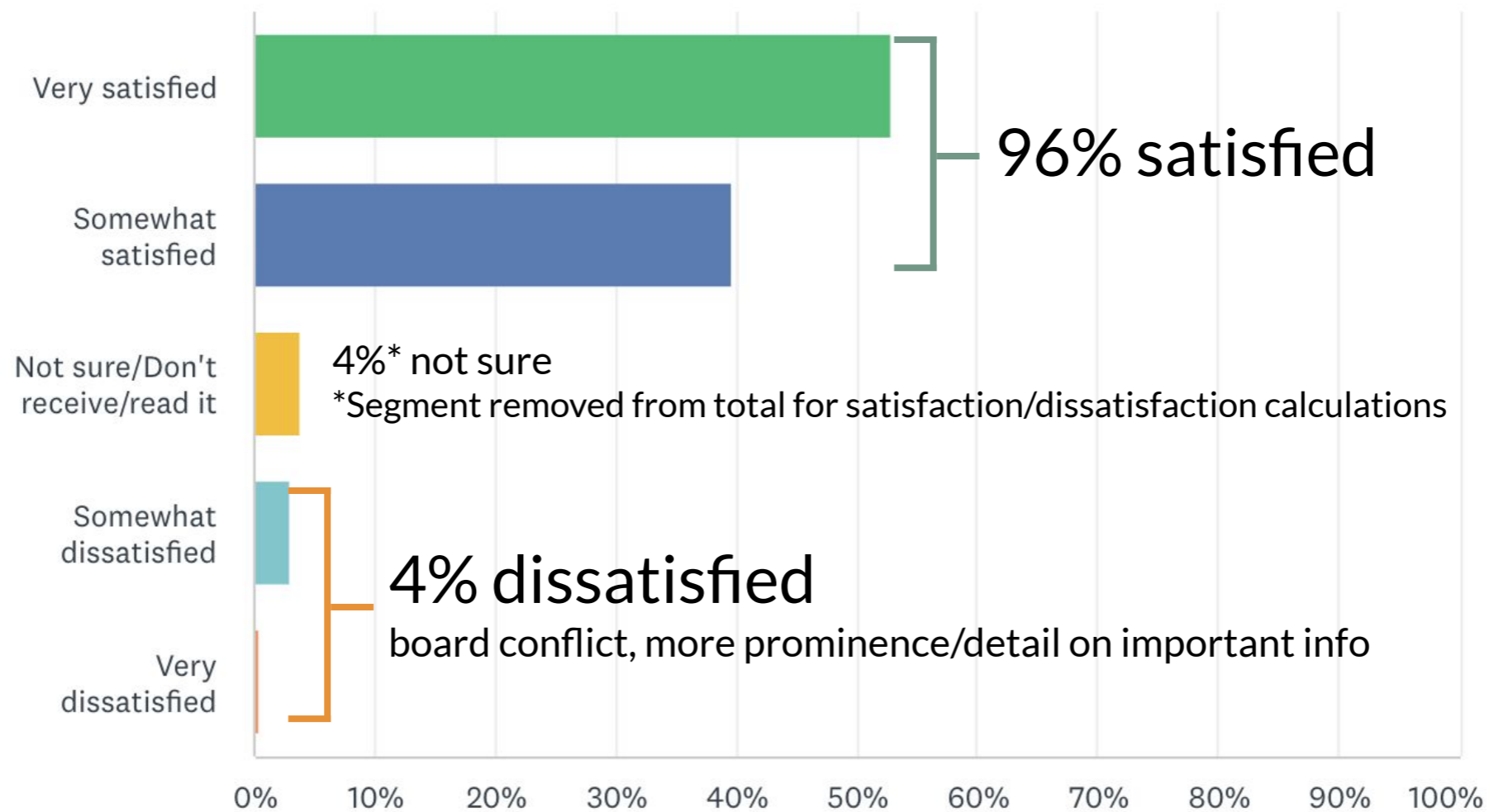




Weekly Email Newsletter Satisfaction

How satisfied are you with the quality of information provided in KICA's weekly email newsletter?

Answered: 3,096 Skipped: 252

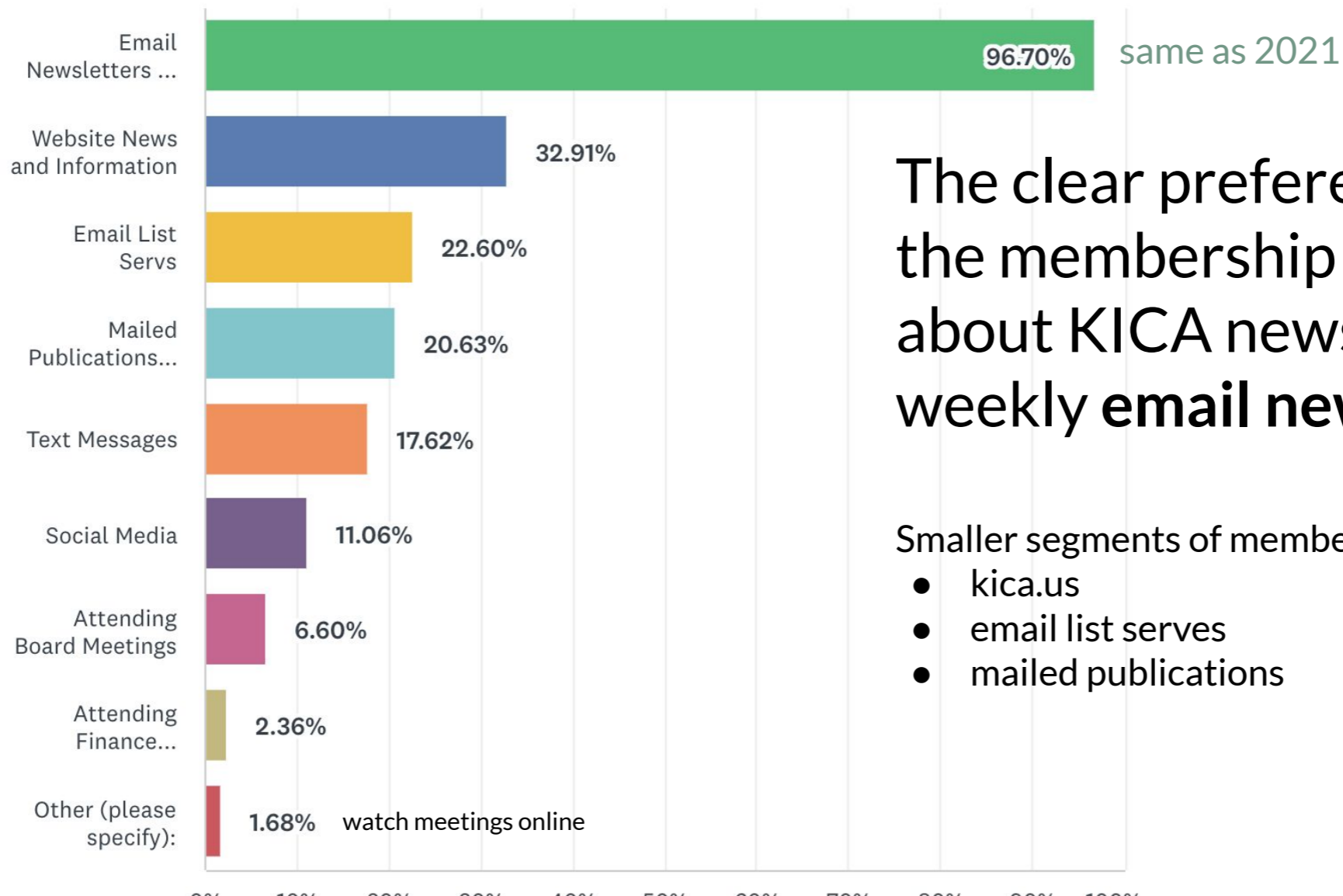




Channels for Receiving KICA News

How do you prefer to stay informed about KICA news and initiatives? Select all that apply.

Answered: 3,093 Skipped: 255



The clear preference of the membership is to learn about KICA news through weekly **email newsletters**.

Smaller segments of members also prefer:

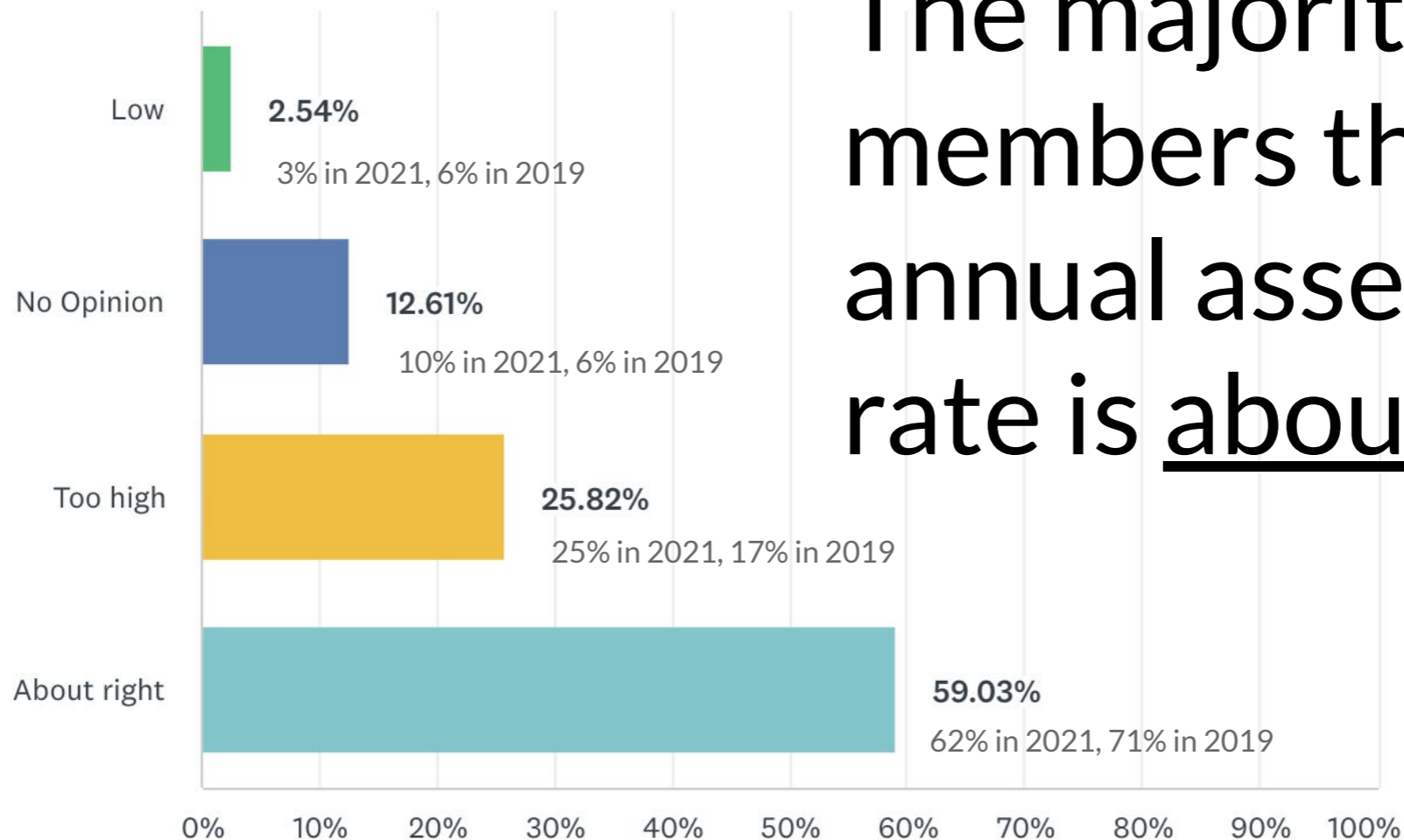
- kica.us
- email list serves
- mailed publications



Annual Assessment: Value

Based on KICA's scope of community operations and services (land and infrastructure maintenance; Sandcastle and gate operations; rules enforcement), KICA's approximate annual assessment amount of \$2,754 for a developed property/home seems:

Answered: 3,029 Skipped: 319



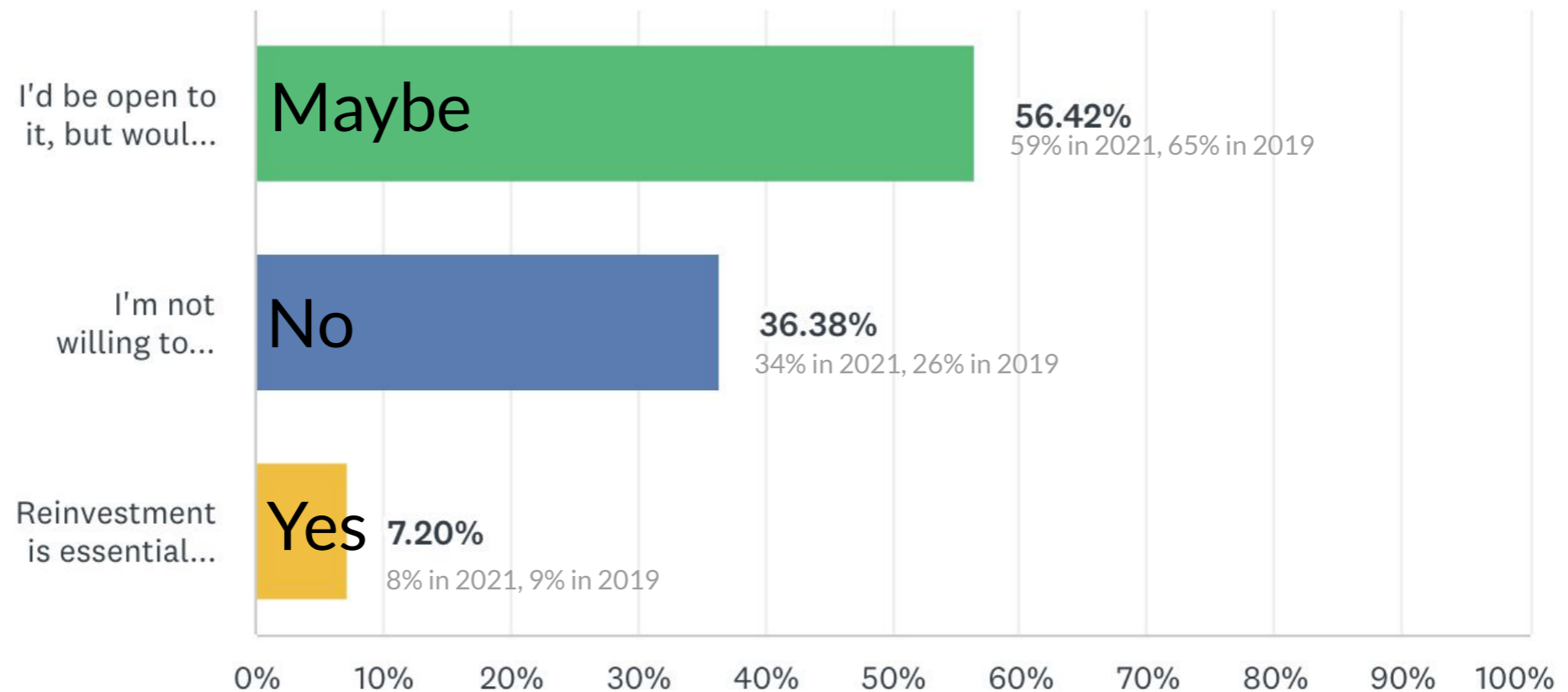
The majority of members think the annual assessment rate is about right.



Annual Assessment: Willingness to Spend More

How willing are you to spend more to ensure that Kiawah's brand and reputation as a premier community is maintained?

Answered: 3,029 Skipped: 319





Annual Assessment: Trend

There is a slight trend toward financial tightening in comparison to 2021 and 2019 survey results.

MEMBER SEGMENTS

The largest segments of members who think the assessment is too high are non-club members, spend less than 4 weeks annually on Kiawah, or rent their property.

2023 MEMBER SURVEY

Governance

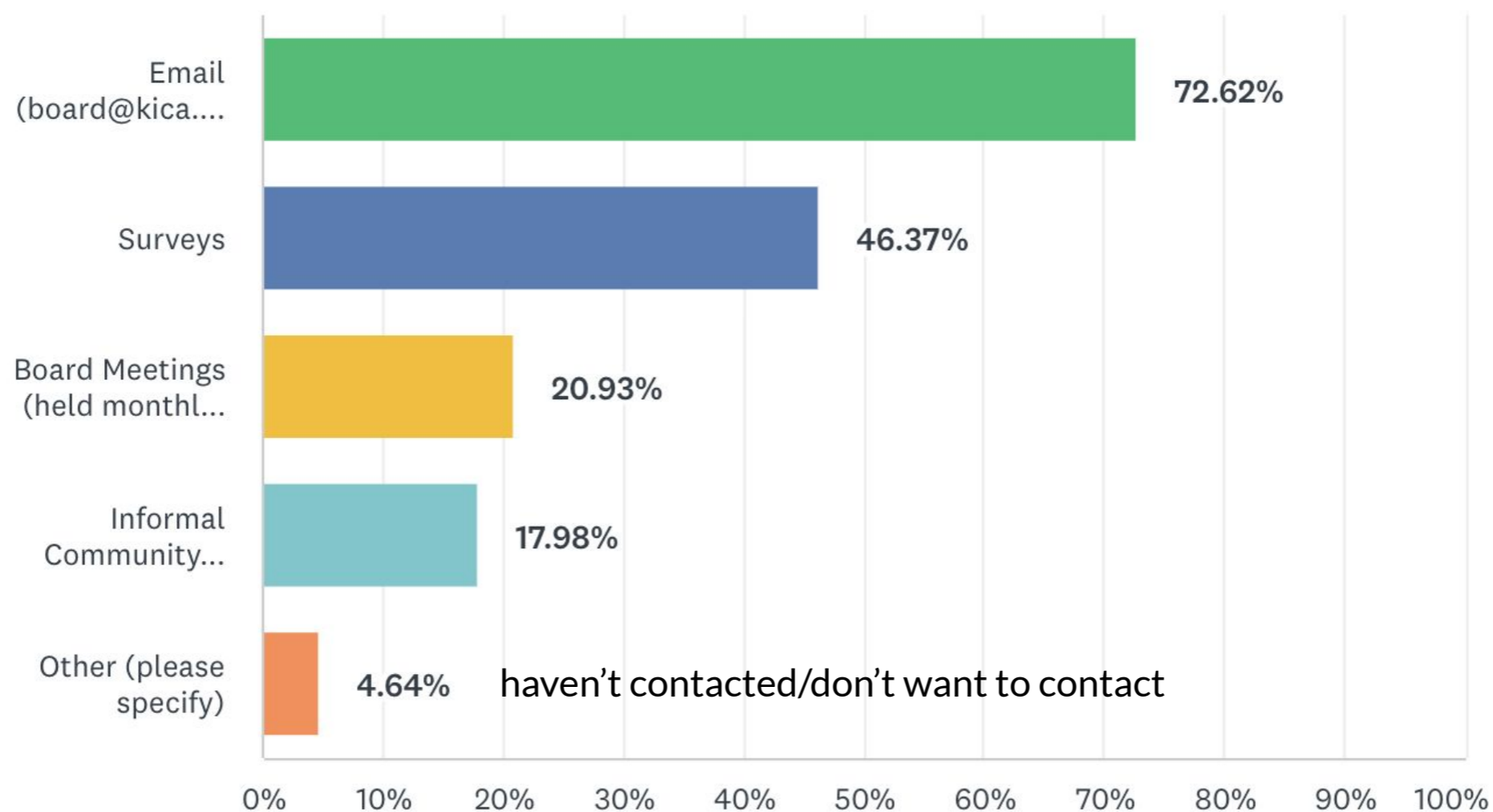




Board Representative Contact Preferences

How do you prefer to communicate with your KICA board representatives?
Select all that apply.

Answered: 3,082 Skipped: 266



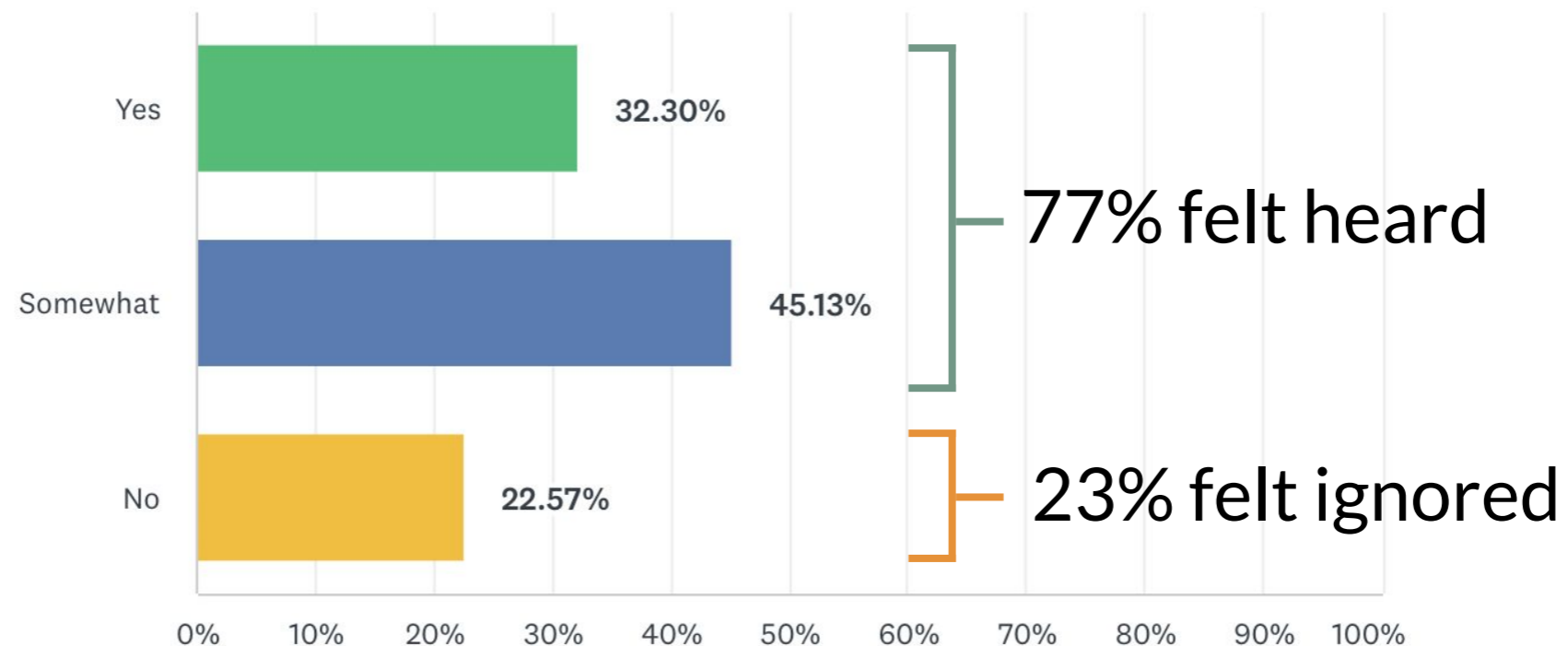


Board Representative Interactions

15% of members said they have contacted a board representative in the last year.

Do you feel your comments were heard and considered by the board?

Answered: 452 Skipped: 2,896

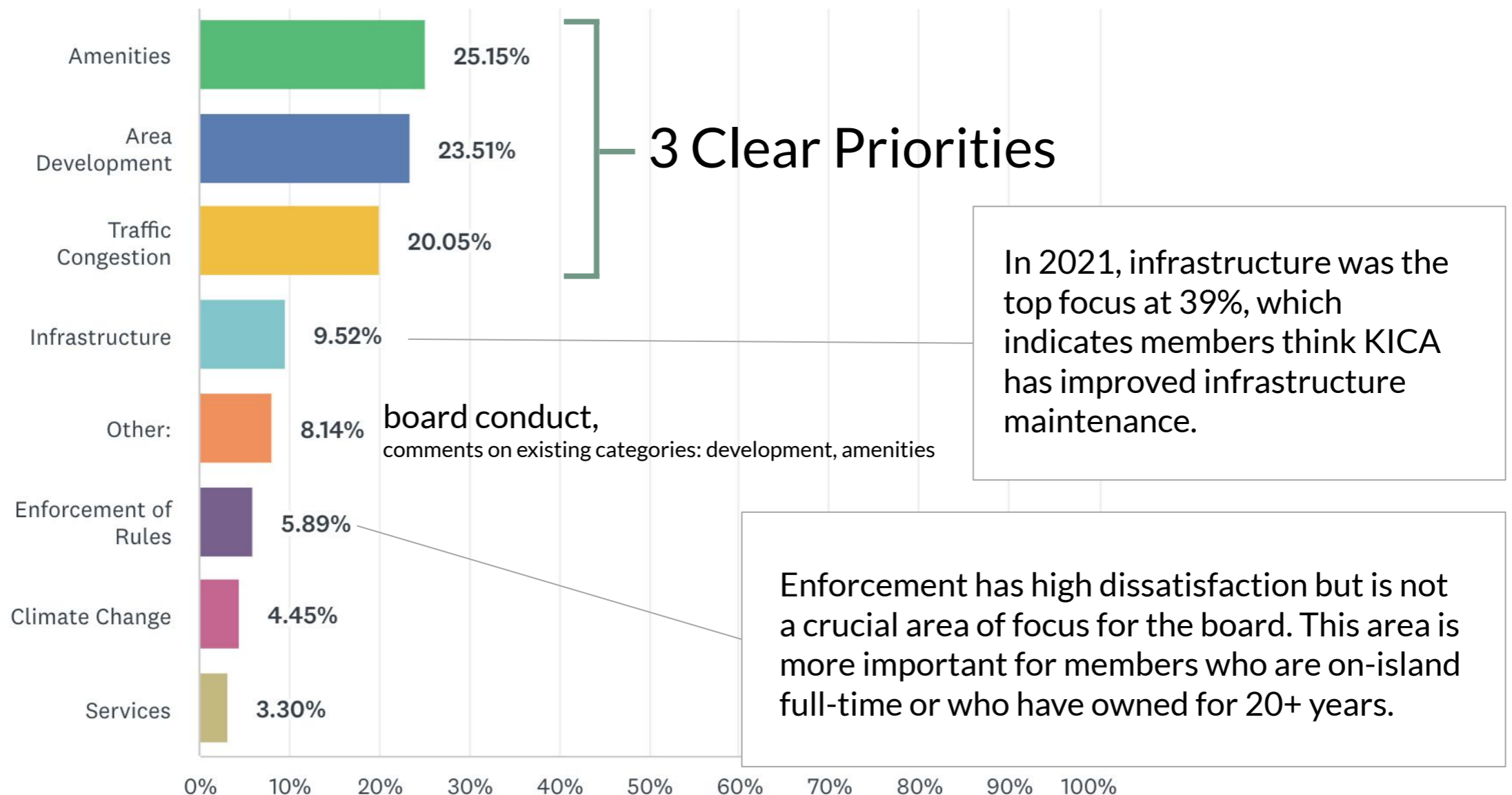




Most Crucial Area of Focus for the Board of Directors

Which of the following do you believe is currently the most crucial area of focus for the board in order to maintain the Kiawah brand?

Answered: 3,058 Skipped: 290





#1 Most Crucial Area of Focus for the Board of Directors: Amenities

There is some desire for reinvestment in existing amenities, like the leisure trails and The Sandcastle.

Some interest in new amenities (and concern with appealing to next generation).

MEMBER SEGMENTS

Amenities are a higher priority for members who spend less than 6 months per year on Kiawah and new members.

NEXT STEPS

More information is needed to understand member preferences for amenities. KICA could potentially conduct a mini survey to dive deeper.



#2 Most Crucial Area of Focus for the Board of Directors: Development

Members are concerned with local development negatively impacting Kiawah's livability and the environment.

MEMBER SEGMENTS

Development is of slightly higher priority for members who have owned for 2-10 years. There's no obvious trend when considering time spent on the island.

BOARD HAS EXPRESSED COMMITMENT

KICA does not have direct authority over development, but the board is committed to advocating for members' interests as local development plans progress through Town Planning Commission and Architectural Review Board approvals.



#3 Most Crucial Area of Focus for the Board of Directors: Traffic Congestion

Members are equally concerned with traffic congestion inbound at the main gate and at major Johns Island intersections.

MEMBER SEGMENTS

Traffic congestion is of a higher priority for members who spend more than 6 months annually on Kiawah and increases in priority with length of ownership.

BOARD HAS EXPRESSED COMMITMENT

The board is committed to addressing gate congestion issues, in collaboration with the town. (The town is responsible for all roads outside of the main gate, including the Beachwalker Drive intersection).

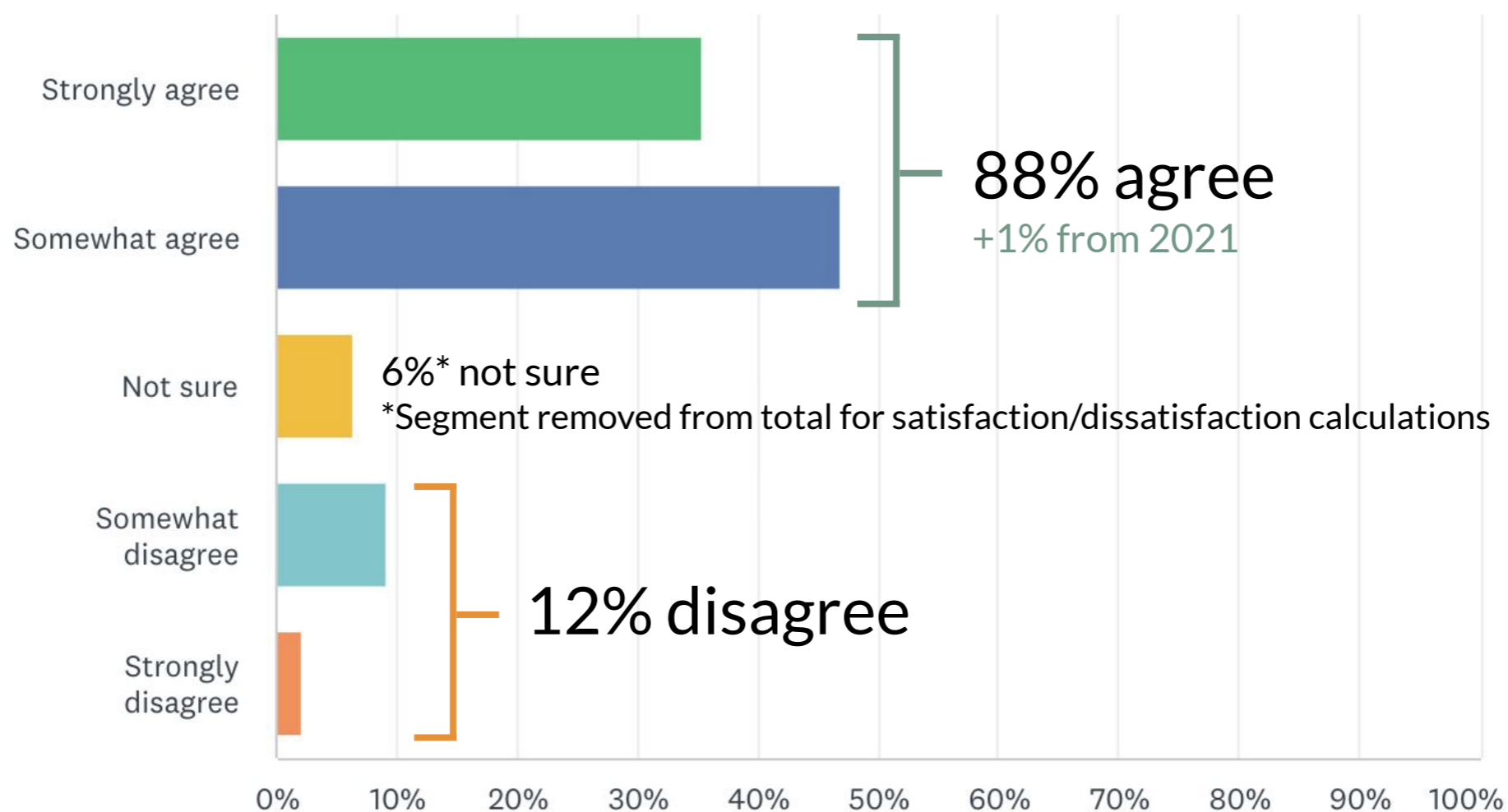
The board is committed to involvement in Johns Island traffic discussions and advocating for Kiawah members' interests.



KICA Upholding the Kiawah Brand

Share your view on the following statement: KICA's services, amenities and infrastructure live up to the five-star quality central to the "Kiawah brand."

Answered: 3,058 Skipped: 290



2023 MEMBER SURVEY

Architectural Review Board Feedback





Architectural Review Board (ARB) Feedback

The ARB is not controlled by the Kiawah Island Community Association (KICA). It is overseen by the master developer, Kiawah Partners.

As island development concludes, the functions of the ARB may be transferred to KICA or the Town of Kiawah Island (TOKI). A KICA/TOKI task force is currently examining the possible next steps for an ARB transition and will provide the community with recommendations by the end of 2023.

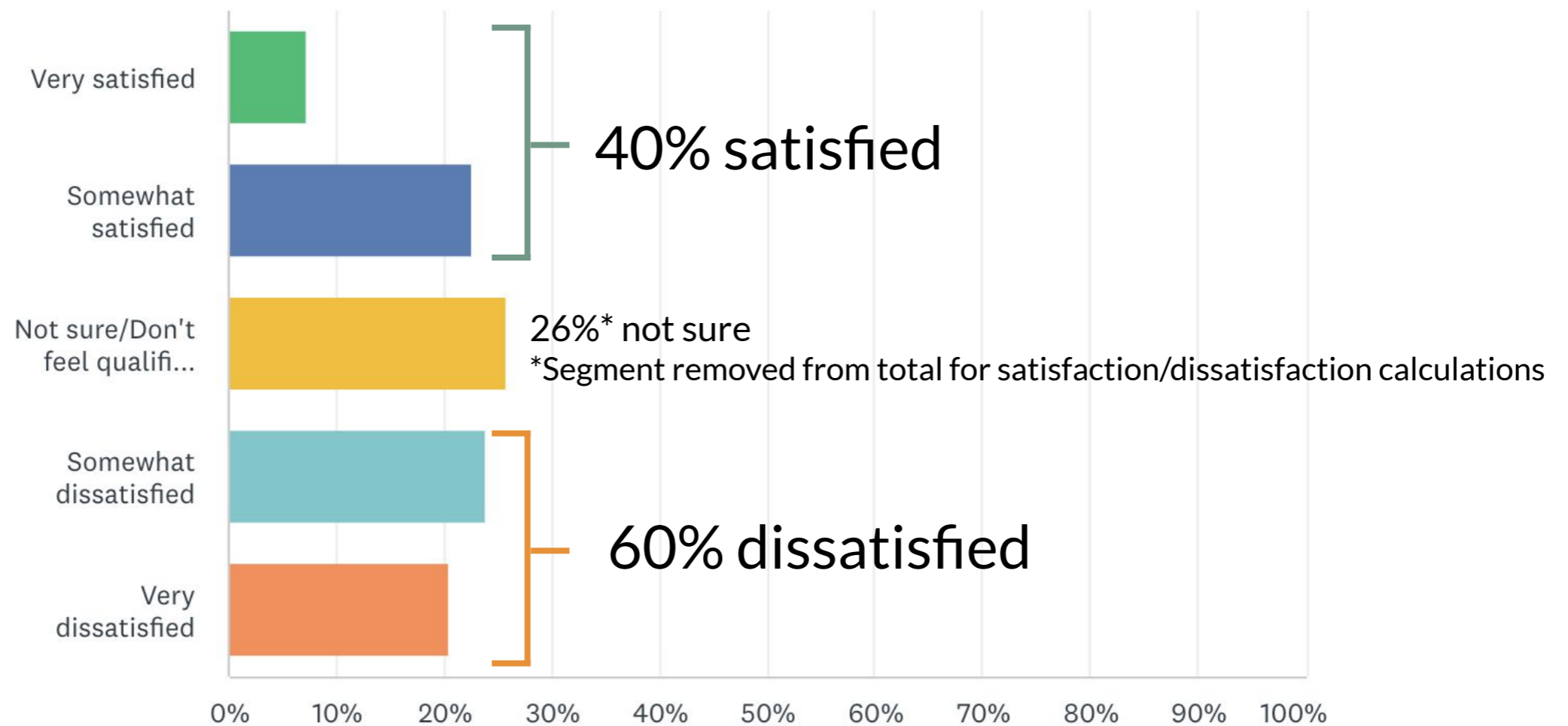
(ARB surveys are usually conducted by household. This KICA survey allowed multiple members of each household to provide feedback.)



Architectural Review Board (ARB) Satisfaction

How satisfied are you with the Kiawah Island Architectural Review Board?

Answered: 3,033 Skipped: 315

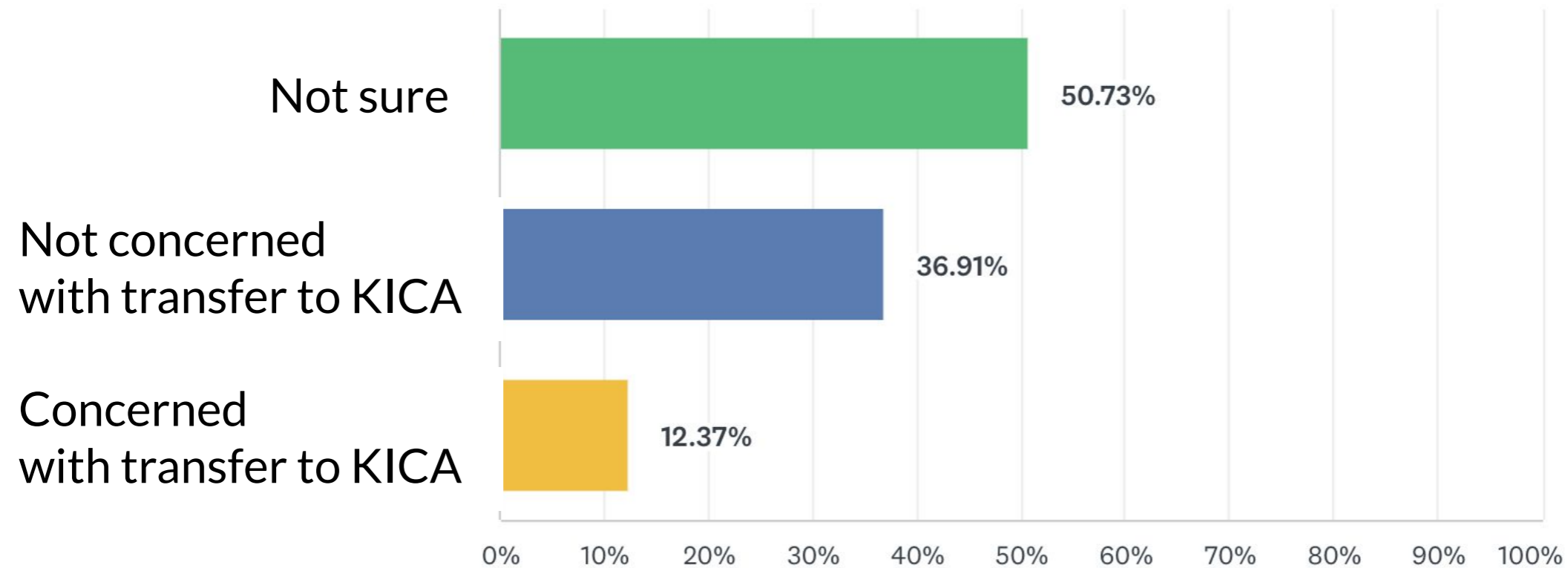




Transfer of Architectural Review Board (ARB)

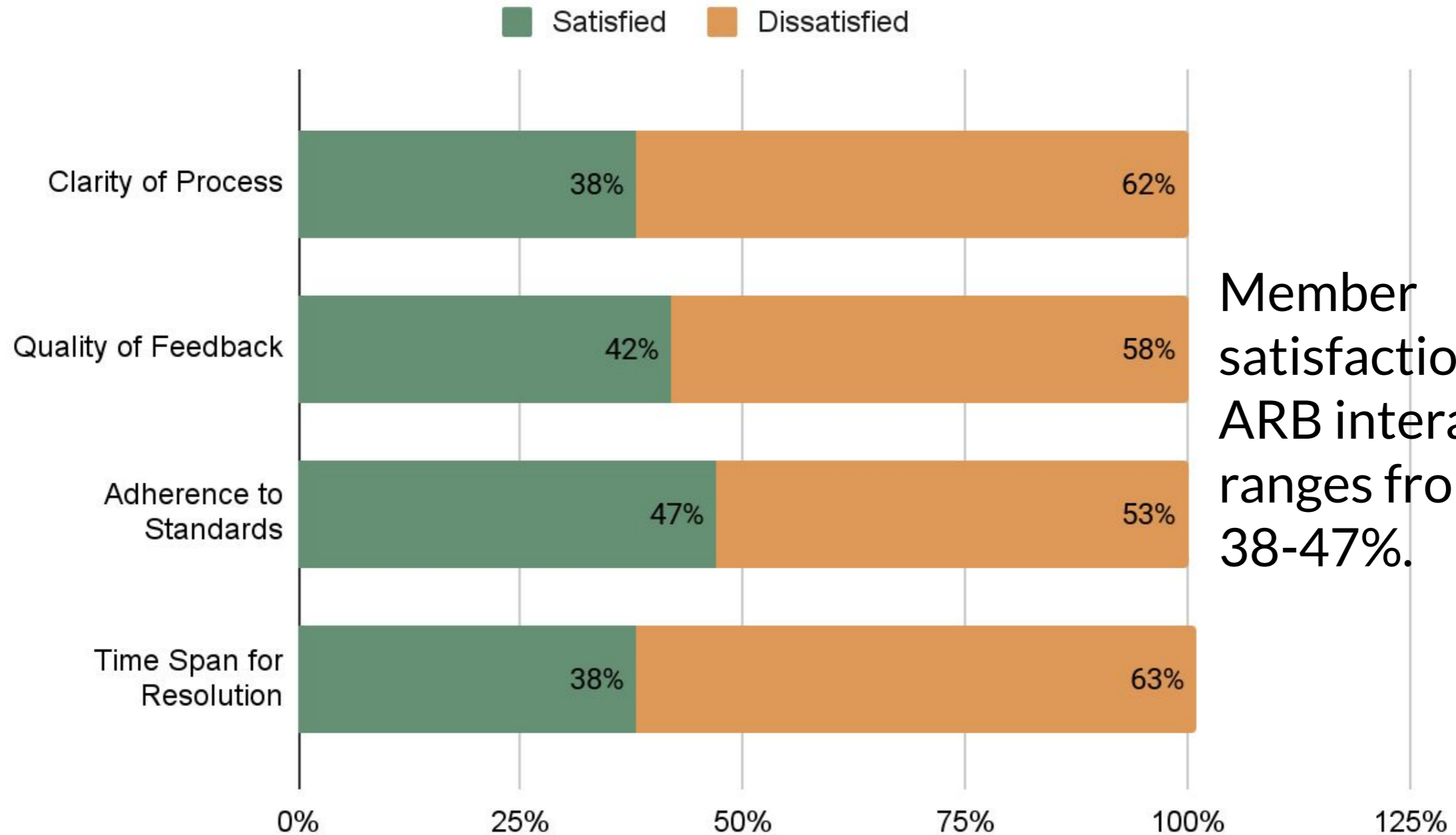
Would you have any concerns if the functions of the ARB were transferred to KICA?

Answered: 3,032 Skipped: 316





Architectural Review Board (ARB) Recent Interaction Satisfaction



2023 MEMBER SURVEY

Summary of Results





Satisfaction Trends

KICA's average satisfaction rate is 92%.

Satisfaction with KICA amenities and services has improved or stayed the same in most areas since the 2021 member survey.



Highest Overall Satisfaction Categories

- 1. Sandcastle Event/Meeting Space: 98%**
- 2. Gate Access Services for Members and Member-Guests: 97%**
- 3. Oceanview Adult Pool: 96%**
- 4. Weekly Email Newsletter: 96%**



Highest “Very Satisfied”

- 1. Gate Access Services for Members and Member-Guests: 74%**
- 2. Landscaping: 67%**
- 3. Oceanview Adult Pool: 66%**



Areas That Need Improvement

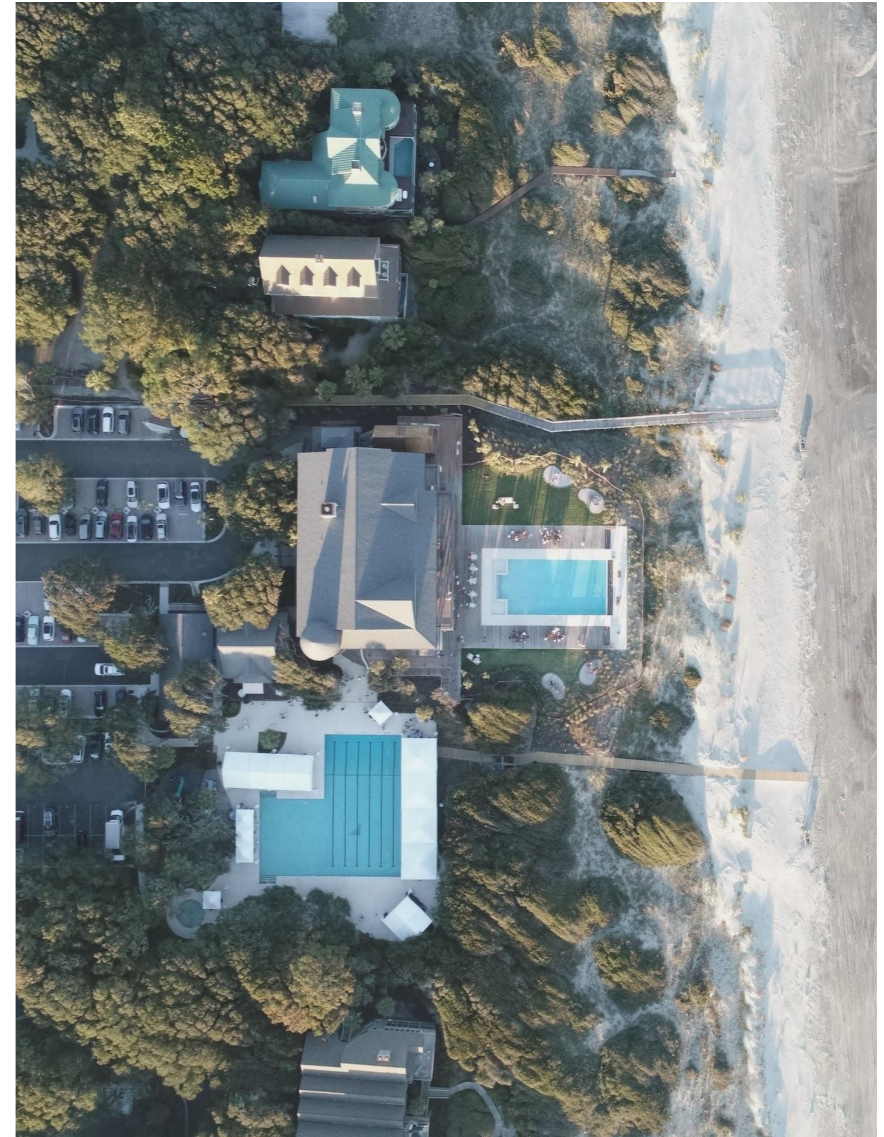


1. **Enforcement - Gate Access and Parking Violations:** 25% dissatisfied
2. **Board Communication:** 23% of members who contacted the board felt ignored
3. **Enforcement - Covenant Violations:** 22% dissatisfied
4. **Sandcastle Gym:** 13% dissatisfied



Areas of Focus for the Board

- 1. Amenities**
- 2. Area Development**
- 3. Traffic Congestion**



2023 MEMBER SURVEY

Thank you,
members!

