



# **CITY OF ISLE OF PALMS STRATGIC PLAN:** *2020 COMMUNITY SURVEY*

*FINAL*  
2/16/2021

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## Executive Summary

- Results in this report summarize responses from 663 individuals from the City of Isle of Palms – approximately 15% of the City’s population.
- The respondent sample closely mirrors demographics reported in American Community Survey 2019 5-Year Estimates, with slightly lower representation from younger age groups and households with an annual income under \$100,000.
- The top three strategic issues reported in this survey are:
  1. *Managing pressure from population growth in surrounding metropolitan areas,*
  2. *Need for improved infrastructure (i.e. drainage, sewer, power),*
  3. *Financial stability.*
- Isle of Palms stakeholders are most satisfied with quality of fire, police, and waste collection services. Three areas in which improvement is most desired are: maintenance of streets & sidewalks, traffic flow within City limits, and management of stormwater runoff.
- The top three reasons residents choose to live in Isle of Palms are:
  1. *Scenic beauty,*
  2. *Recreational opportunities,*
  3. *Safe community.*

## About the Survey

### *Survey Methodology*

The community survey was targeted at reaching four major stakeholder groups determined during a meeting with the City Council: full-time residents, part-time residents, rental property owners, and brick & mortar business owners. This form asked a total of fifteen questions broken into the following sections: residential, strategic, and demographics. The final section focusing on demographics was included to ensure that this analysis includes a representative sample of the Isle of Palms Community.

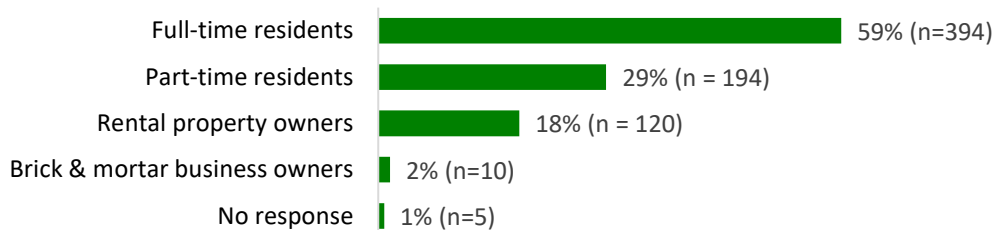
Strategic questioning included two matrices inviting respondents to rate a list of items on a Likert scale. The first matrix measured stakeholder satisfaction with twelve city services. The second matrix asked respondents to assign a level of importance to a list of eight strategic issues that had been identified during meetings with Isle of Palms’ departmental leaders and City Council, facilitated by the Riley Center’s strategic planning team. These questions were followed by two opportunities for stakeholders to provide open-ended feedback on any additional issues that were not listed in the second matrix and what they thought should be IOP’s top priority over the next two to three years.

### *Survey Distribution*

This questionnaire was sent to a total 1,313 stakeholders. Emails containing personal survey links were sent out to an initial respondent list on December 8, 2020. The City of Isle of Palms continued to collect additional email addresses through a sign-up form made available on their website and advertised on social media. Subsequent distributions of the questionnaire occurred approximately every one-to-three days leading up to the close of the survey on December 22, 2020. A total 695 partial and completed surveys were collected, resulting in a 53% response rate. An initial qualifier question filtered out 32 respondents that did not fall into the targeted stakeholder groups, leaving 663 primary responses analyzed in this report. This number leaves us with a 15% response rate from the entire Isle of Palm Population (4,360 reported by American Community Survey 2019 5-Year Estimates).

Percent of responses belonging to each stakeholder type is provided in Figure 1. The distribution shown in this graph is representative of the Isle of Palms community, with the largest number of stakeholders being full-time residents. While brick and mortar business owners may look like an underrepresented group, the response rate for this category is satisfactory. Of the seventeen brick & mortar businesses that were contacted, ten owners submitted a survey response, resulting in a 59% response rate.

**Figure 1. Stakeholder Type (Multiple Response)**



## Respondent Profile

This survey included a series of demographic questions to ensure that results are representative of the current Isle of Palms population. Table 1 provides a comparison of the results from these survey questions with numbers from American Community Survey 2019 5-Year Estimates. This table shows that the respondent sample used in this report is a close match to existing demographics in the community. Demographics that received notably lower representation than seen in the census data are younger respondents (under the age of 35) and households with an annual income below \$100,000. Additional illustrations of this demographic data are provided in Figures 2-7. The only graph that has not been compared to census data is Figure 4, which looks at employment status. This data was not included in the table due to differences in categories used between this survey and those used by the American Community Survey. However, it should be noted that the nearly half (47%) of respondents are retired.

Table 1. Survey Sample vs Census Data

	Category	Survey Sample	IOP 2019 Census Data
GENDER	Male	51%	51%
	Female	44%	44%
RACE	White	90%	94%
	Asian	0.3%	2%
	African American	0.3%	0.2%
	Other	0.5%	4%
ETHNICITY	Of Hispanic, Latinx, or Spanish origin	1%	2%
	Non-ethnic	91%	98%
AGE	18 to 24 (20 to 24 in Census column)	0.2%	3.5%
	25 to 34	1%	7.9%
	35 to 44	8%	7.4%
	45 to 54	15%	11.8%
	55 to 64	31%	21.0%
	65 to 74	31%	22.0%
	75 +	11%	7.9%
ANNUAL HOUSEHOLD INCOME	\$200,000 +	41%	31%
	\$100,000 to \$199,999	24%	31%
	\$50,000-\$99,999	8%	20%
	< \$50,000	0.8%	17%

Table 1. This table provides a comparison of responses to demographic questions used in this survey with data from American Community Survey 2019 5-Year Estimates. Note that the survey sample column allowed for respondents to also choose "prefer not to respond" which may impact this comparison.

Figure 2. Gender

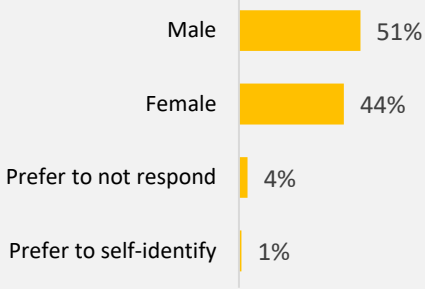


Figure 3. Race

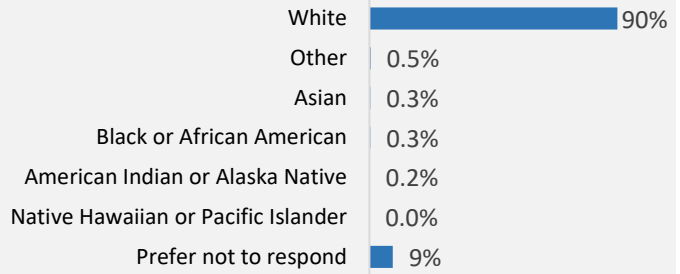


Figure 4. Employment Status

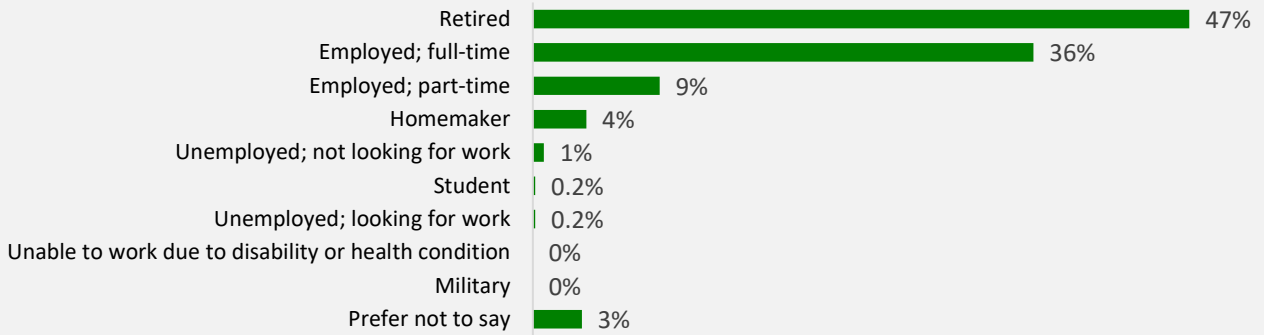


Figure 5. Age Range

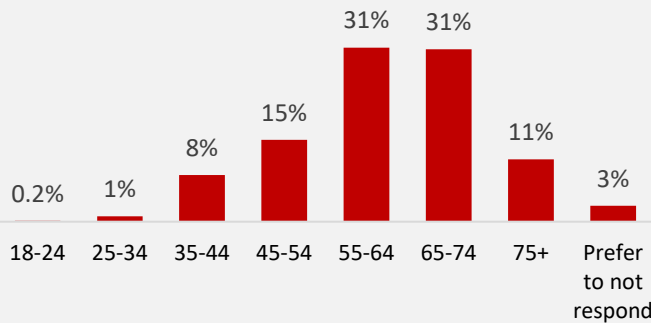


Figure 6. Ethnicity

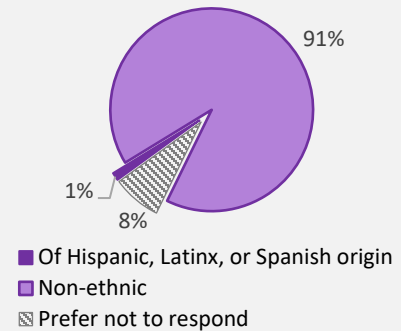
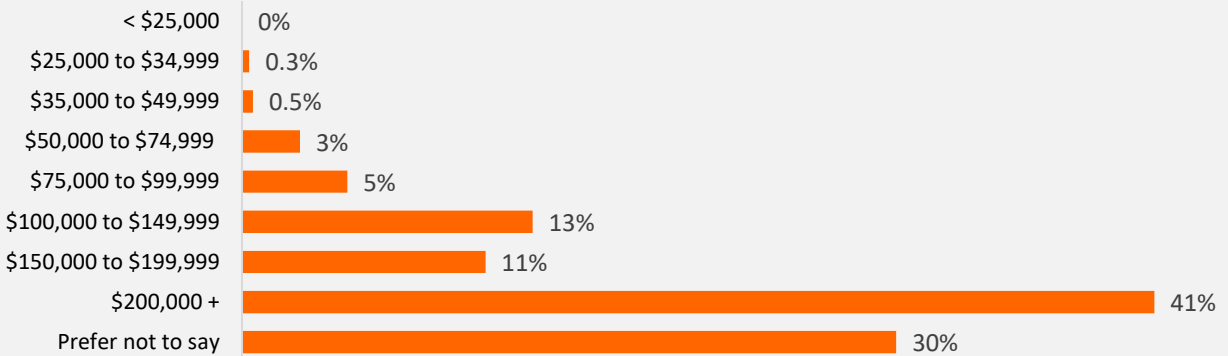


Figure 7. Annual Household Income

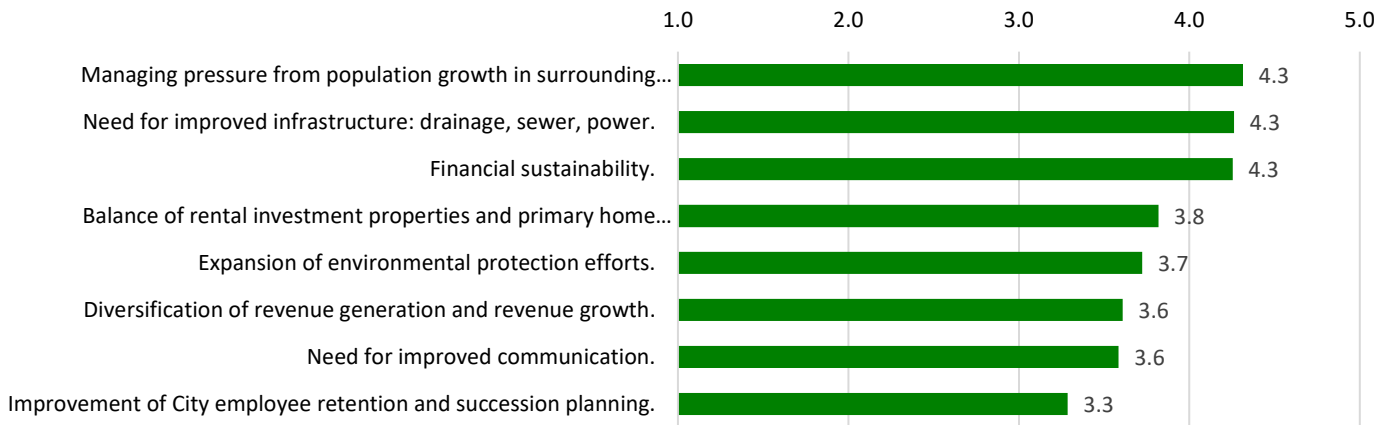


## Strategic Questioning

### *Strategic Issue Importance*

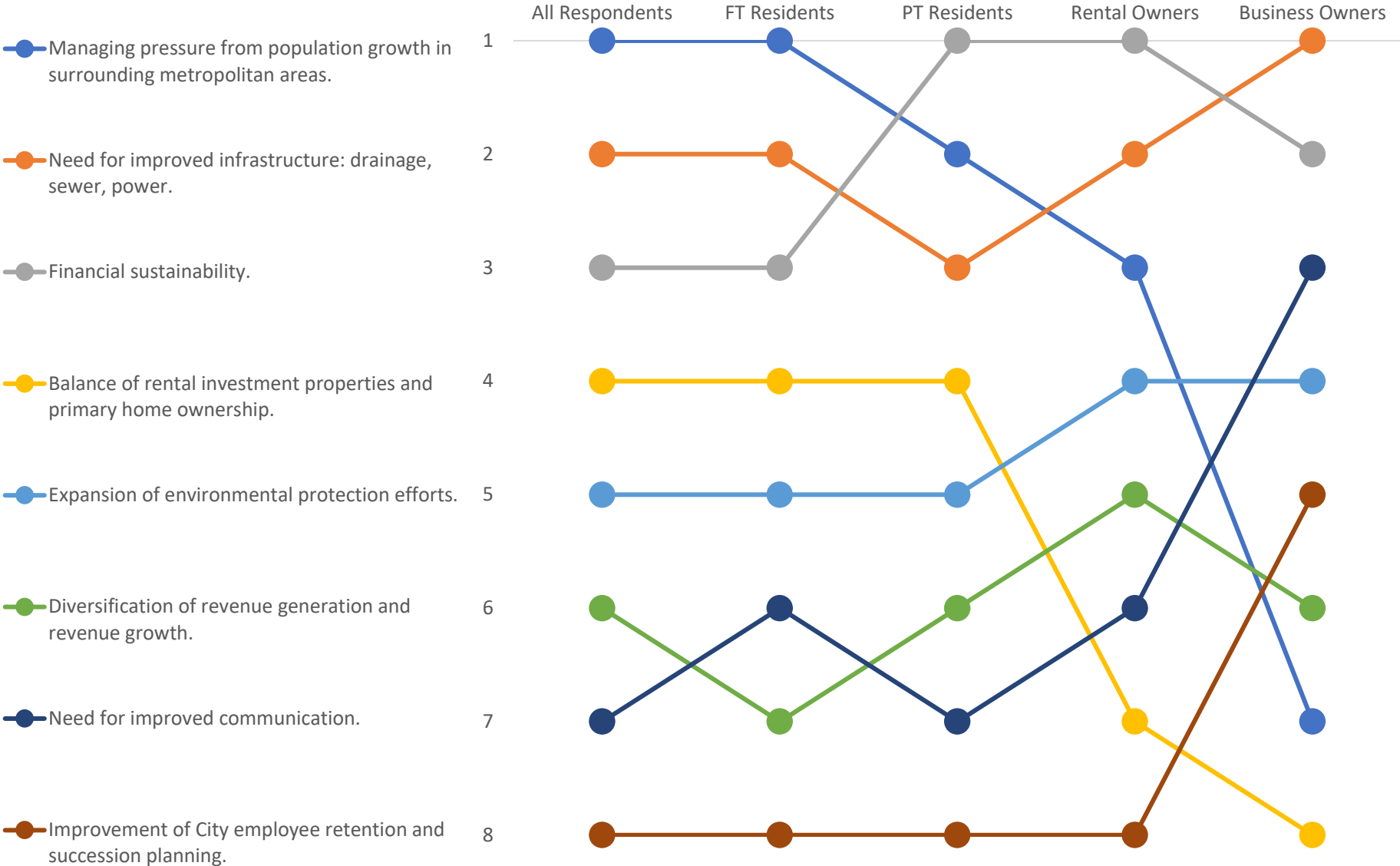
A key step in the strategic planning process is to prioritize the strategic issues being faced by the community. During a series of meetings with City department leaders and Council members, a list of eight issues were identified. In order to assist the planning team in prioritizing these issues, this survey asked respondents to assign each with a level of importance on the following scale: not important at all (1), low importance (2), neutral (3), important (4), extremely important (5). The average level of satisfaction from all stakeholders is shown in Figure 8. This not only illustrates the ranking of these strategic issues, but also shows the margin between each ranking. This allows the observation to be made that the same level of importance has been placed on the top three strategic issues.

**Figure 8. Strategic Issue Level of Importance**



A detailed comparison of strategic issue rankings between full-time residents, part-time residents, rental owners, and business owners is shown in Figure 9. Issue prioritization is fairly similar among full- and part-time residents, which make up the majority of the respondent group. As expected, views become more mismatched when looking at rental owners and business owners. The two strategic issues placed in the top three ranking positions by all stakeholder groups are “need for improved infrastructure” and “financial sustainability”. The low ranking of City employee retention and succession planning may be due to a limited understanding of the internal operations of the City.

Figure 9. Ranked Strategic Issues by Stakeholder Group





### Service Satisfaction

In order to measure stakeholder satisfaction with services offered by the City of Isle of Palms, this survey asked respondents to rate twelve items on the following five-point scale<sup>1</sup>: very dissatisfied (1), dissatisfied (2), neutral (3), satisfied (4), and very satisfied (5). Average satisfaction levels are illustrated Figure 10, comparing results from all respondents with those from just full-time residents.

Overall, stakeholders have a high level of satisfaction with services offered to them by the City. Rating half of the items listed in the satisfied to very satisfied range. These include fire services, police services, waste collection services, customer services provided by City employees, parks & recreational services, and upkeep of public spaces. Another five services fall into the neutral to satisfied range, including: response to COVID-19, effectiveness of City communication with the public, enforcement of City codes & ordinances, maintenance of streets & sidewalks, and traffic flow within City limits. The only service that received an average rating below the mid-point of neutral is the management of stormwater runoff, a common issue in coastal communities.

Figure 11 provides this data by the percent of respondents choosing satisfied or very satisfied for each service, comparing all stakeholders with full-time residents. This graph shows that more than half of stakeholders are satisfied with ten of the twelve items listed. The two services with the lowest satisfaction rates (less than 50%), are traffic flow within City limits and management of stormwater runoff.

**Table 2. All Stakeholders vs. FT Residents Avg. Satisfaction**

SERVICE	$\Delta^2$
Quality of waste collection services.	0.11
Quality of customer service provided by City employees.	0.08
Quality of police services.	0.06
Quality of fire services.	0.06
Response to COVID-19 outbreak.	0.03
Quality of parks and recreational services.	0.00
Traffic flow within City limits.	-0.08
Upkeep of public spaces, including beaches.	-0.09
Enforcement of City codes and ordinances.	-0.09
Effectiveness of City communication with public.	-0.09
Management of storm water runoff.	-0.16
Maintenance of streets and sidewalks.	-0.21

The purpose of comparing all respondents with full-time residents is to look at the satisfaction levels from individuals that may have more experience with City services on a day-to-day basis. Table 2 ranks the differences between the average satisfaction rating for these two groups. This calculation shows that full-time residents are much less satisfied with management of stormwater runoff and maintenance of street & sidewalks than the entire respondent group.

<sup>1</sup> An option labeled “unsure” was also available for each listed service, however it is not included in this analysis.

<sup>2</sup> This column provides average full-time resident satisfaction minus average satisfaction for all stakeholders.

Figure 10. Average Satisfaction with City Services

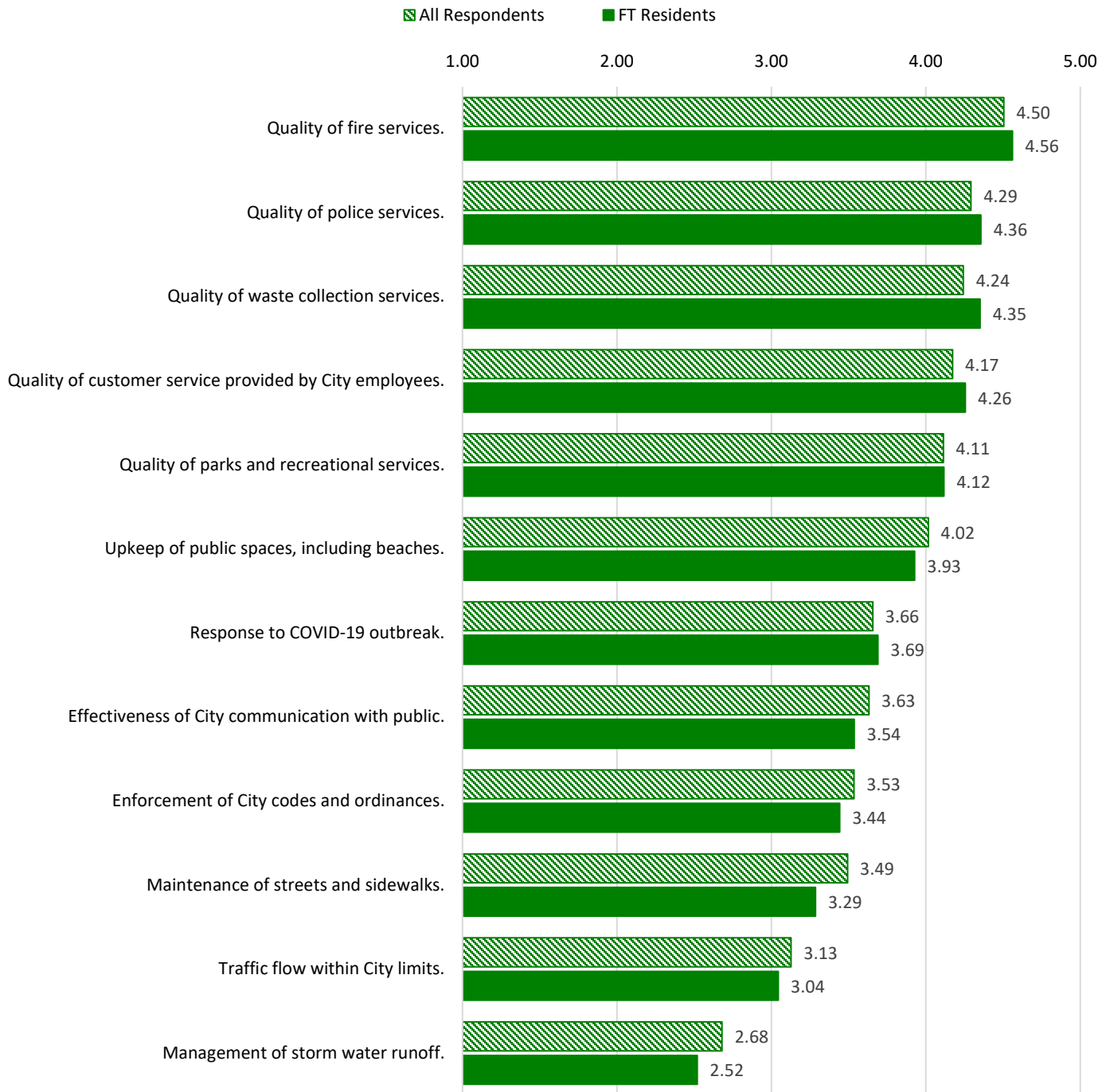


Figure 10. This graph shows the average satisfaction level with city services for all respondents and full-time residents. Satisfaction is shown on the following scale: very dissatisfied (1), dissatisfied (2), neutral (3), satisfied (4), very satisfied (5).

Figure 11. City Service Satisfaction - Percent Satisfied/Very Satisfied

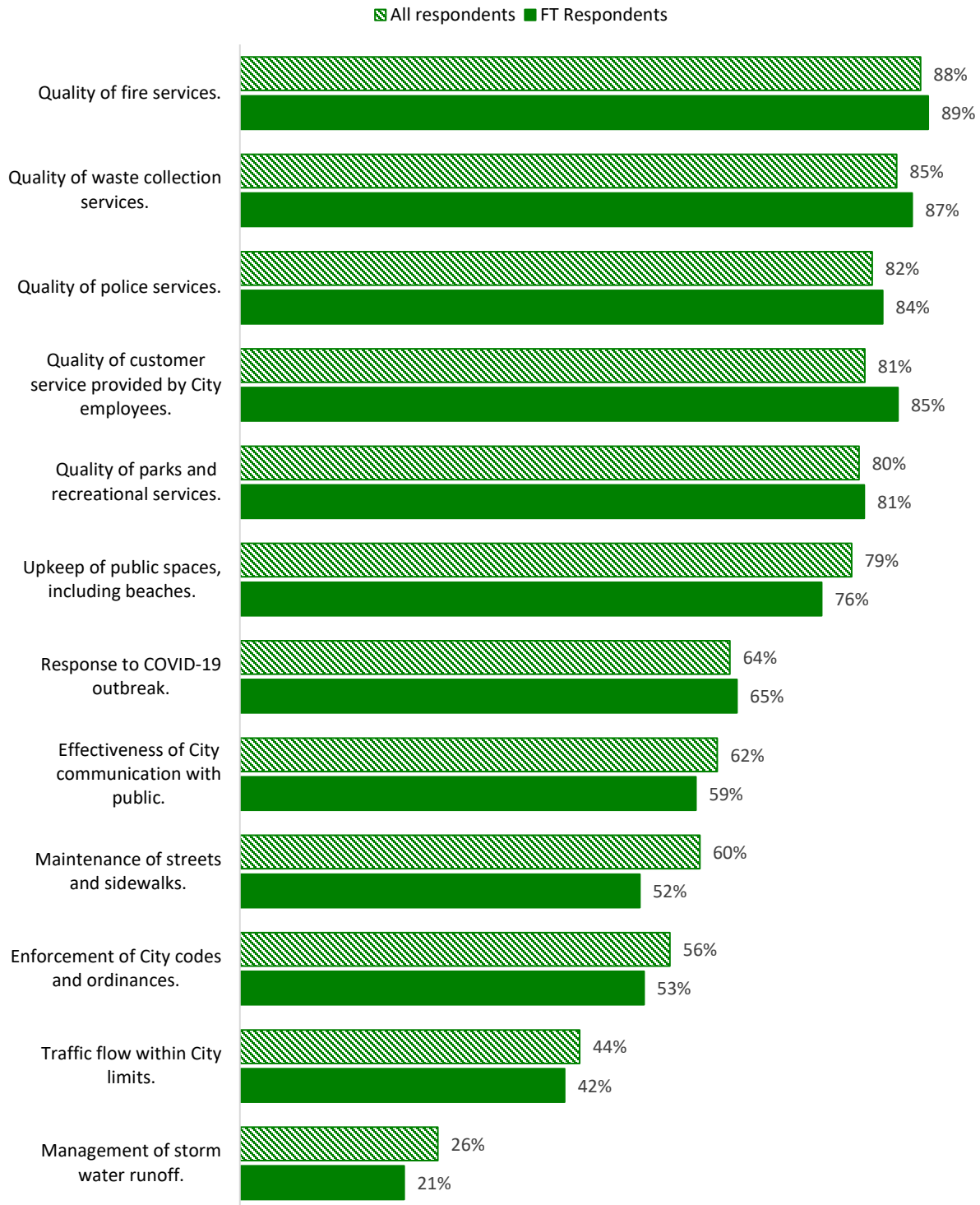
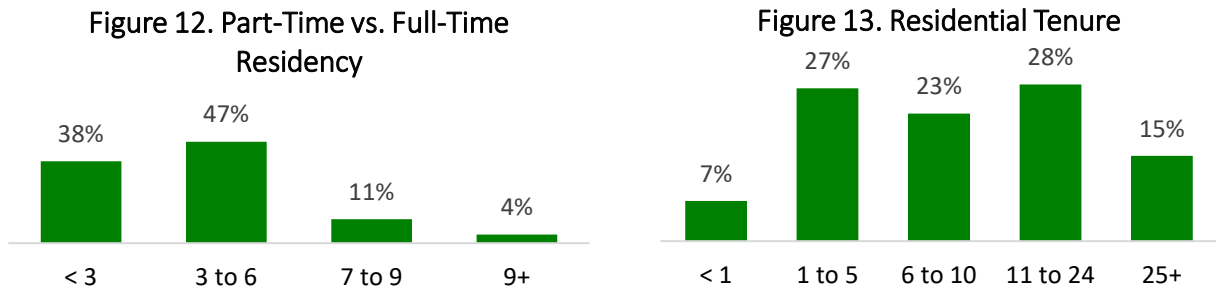


Figure 11. This graph shows the percentage of respondents that rated each city service as satisfactory or very satisfactory.

*Residential*

This survey also asked additional questions to learn more about the Isle of Palms residential community. There is a fairly even distribution of residential tenure seen among full- and part-time resident respondents (Figure 12). For part-time residents, about half (47%) spend three to six months living in Isle of Palms annually (Figure 13). Residents are also asked to choose the top three reasons they chose to live on Isle of Palms (Figure 14). The most common reasons chosen are scenic beauty (81%), recreational opportunities (63%), and safe community (63%). Respondents were also given an opportunity to write-in other top reasons they choose to be an Isle of Palms resident; a summary of these open-ended responses is provided in Table 3.



**Figure 14. Top Reasons to Live In IOP**

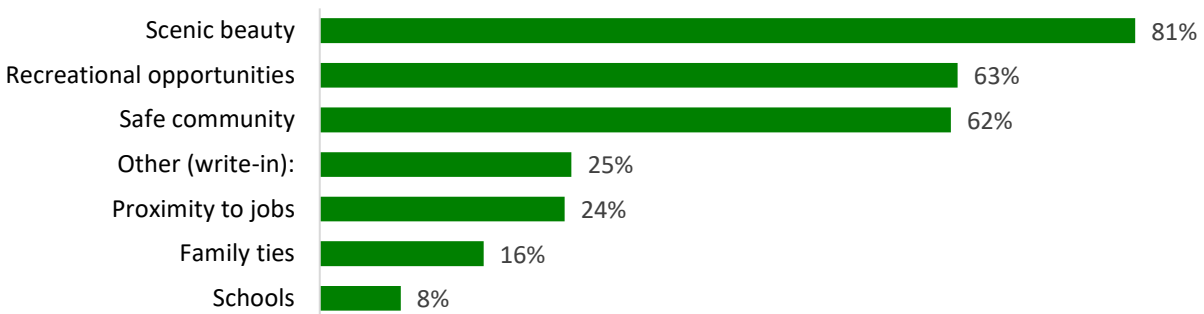


Table 3. Other Reasons to Live in IOP (Write-In)		
CATEGORY	COUNT	PERC
BEACH/WATER/WEATHER	53	38%
PROX TO CHS/LOCATION	28	20%
REMOTENESS/SMALL COMMUNITY	19	14%
RECREATION	11	8%
VACATION	5	4%
LONGEVITY/HOME	5	4%
TOURISM/PROPERTY VALUES	5	4%
FAMILY/FRIENDS	4	3%
OTHER	4	3%
RETIREMENT	3	2%
PROX TO MEDICAL CARE	3	2%

## Open-Ended Responses

### *Additional Strategic Issues*

In addition to the strategic issue importance series of questioning, respondents were also given the opportunity to communicate any additional issues that should be considered in the strategic plan. This portion of the survey received 266 responses. Major themes observed are listed below with the percentage of responses in which they were included:

- Traffic congestion and parking regulation (47%),
- Balance of resident needs versus visitor needs (20%),
- Local business support, specifically related to the issue with Tidal Wave Sports (12%),
- Completion of plan for the Marina (12%),
- City Council integrity and transparency (10%),
- Livability of the Island, pedestrian friendliness, upkeep of public areas, etc. (8%),
- Managing the impacts of climate change on the island (5%).

### *Short-Term Priorities*

Respondents were also asked to indicate what they think should be prioritized by the Isle of Palms government over the next two to three years. Major themes seen within these 541 responses are listed below with the percentage of responses in which they were included:

- Traffic and parking (44%),
- Improved infrastructure (36%),
- Balancing needs of visitors and residents (20%),
- Growth management (13%),
- Management/restriction of rental properties (8%),
- Environmental protection and response to climate change (6%).

## Appendix: Survey Instrument

### Welcome to the City of Isle of Palms' Strategic Community Survey!

The goal of this research effort is to collect feedback on the current state of the community to inform the 2021 Strategic Plan Update. All responses to this survey will remain anonymous and be used only for strategic planning purposes. Your input is greatly appreciated and will play a vital role in the mapping of IOP's future!

**Q1)** Are you 18 years of age or older?

Yes

No

**Q2)** Please select all responses that apply to your relationship with Isle of Palms:

I am a full-time resident of IOP.

I am a part-time resident of IOP.

I own rental property in IOP.

I own a brick & mortar business in IOP.

None of the above statements apply to me<sup>3</sup>.

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<sup>3</sup> Respondents choosing this option are taken to the end of the survey since they do not fall into one of the targeted stakeholder groups.

**RESIDENTIAL QUESTIONS** *(for those indicating they are either full-time or part-time residents in the previous question).*

**Q3)** How long have you been a resident of Isle of Palms?

- Less than one year
- 1-5 years
- 6-10 years
- 11-24 years
- 25+ years
- I do not live in Isle of Palms

**Q4)** What portion of the year do you reside in Isle of Palms?

- More than 9 months of the year
- 7-9 months of the year
- 3-6 months of the year
- Less than 3 months of the year



**Q5) What are the top three reasons you chose to live in Isle of Palms? (select only three).**

- Safe community
- Recreational opportunities
- Family ties
- Schools
- Proximity to jobs in the Charleston Metro Area
- Scenic beauty
- Other (write-in): \_\_\_\_\_

**STRATEGIC PLANNING QUESTIONS**

**Q6)** Please communicate your level of satisfaction with each of the following items:

	Very dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Unsure
Quality of police services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of fire services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of parks and recreational services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maintenance of streets and sidewalks.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Upkeep of public spaces, including beaches.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enforcement of City codes and ordinances.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of customer service provided by City employees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Effectiveness of City communication with public.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Traffic flow within City limits.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Management of storm water runoff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of waste collection services.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Response to COVID-19 outbreak.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Q7) Strategic Issues:** *A strategic issue is an existing challenge that may have a major impact on the course or direction of the community.*

Part of the strategic planning process is identifying and prioritizing the issues currently being faced by the community. Please indicate how important you believe the following strategic issues are to the Isle of Palms on a scale of one to five (5 being extremely important and 1 being not important at all):

	1 - Not important at all	2 - Low importance	3 - Neutral	4 - Important	5 - Extremely important
Need for improved infrastructure: drainage, sewer, power.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Expansion of environmental protection efforts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Need for improved communication.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Balance of rental investment properties and primary home ownership.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Managing pressure from population growth in surrounding metropolitan areas.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Diversification of revenue generation and revenue growth.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improvement of City employee retention and succession planning.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial sustainability.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Q8)** Are there any strategic issues facing the Isle of Palms that weren't listed above? If yes, please describe them below.

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**Q9)** What do you think should be the City of Isle of Palms' top priority over the next 2-3 years?

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**DEMOGRAPHICS**

**Q10)** Please select your gender:

- Male
- Female
- Non-binary
- Prefer to self-identify: \_\_\_\_\_
- Prefer not to respond

**Q11)** Please select your age range:

- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75+
- Prefer not to respond

**Q12)** Do you descend from Hispanic, Latinx, or Spanish origin?

- Yes
- No
- Prefer not to respond

**Q13)** Please select your race:

- White
- Black or African American
- American Indian or Alaska Native
- Asian
- Native Hawaiian or Pacific Islander
- Other: \_\_\_\_\_
- Prefer not to respond

**Q14)** Please indicate your employment status below:

- Employed; full-time
- Employed; part-time
- Unemployed; looking for work
- Unemployed; not looking for work
- Homemaker
- Student
- Military
- Retired
- Unable to work due to disability or health condition.
- Prefer not to say.

**Q15)** Please select your annual household income range:

- Less than \$25,000
- \$25,000 - \$34,999
- \$35,000 - \$49,999
- \$50,000 - \$74,999
- \$75,000 - \$99,999
- \$100,000 - \$149,999
- \$150,000 - \$199,999
- \$200,000 or more
- Prefer not to say.