Webb Management Services

※ Webb Management Services, Inc. is a management consulting practice for the development and operation of cultural facilities. We work for governments, schools, developers, and arts organizations on facility feasibility, business planning, and strategic planning. Our practice was founded in 1997, and we recently started our 381st assignment.

※ Duncan Webb authored *Running Theaters* in 2005, a best practices guide to the operation of multi-user performing arts facilities in North America. He contributed to *Building for the Arts* and *Performing Arts Center Management*. And he has been a regular contributor to the *Clyde Fitch Report* since 2014.

※ Staff all have a combination of business training and professional experience in the performing arts sector.

※ Recent work in the region includes studies in Charlotte (NC), Greenville (NC), Monroe (NC), Augusta (GA), Pinehurst (NC), and Virginia Beach (VA).
The Town of Hilton Head Island, located off the coast of South Carolina, is a popular tourist destination largely known for its beaches and golf courses. Year-round, however, there is an engaged resident population active in the arts, culture, heritage, recreation, and civic life.

With a recent decline in the popularity of golf, the Town has sought to examine and enhance the role and impact of arts, culture, and heritage on the island and consider how they enrich residents’ and guests’ lives, support economic development, and attract new residents.

In 2014, an Arts and Cultural Assessment and Strategic Plan was completed, followed by a 2016 Arts and Cultural Strategic Planning Committee Final Report. This work suggested that additional research be conducted on the Island’s arts, cultural, and heritage venues and the challenges they present to the community’s many arts groups.

In addition, Hilton Head’s Arts Center of Coastal Carolina has recently presented the Town with a Sale and Leaseback proposal. The Town already provides the Arts Center with a significant contribution through the island’s Accommodation Tax (ATAX). However, deferred maintenance, a need for new equipment, and damage from Hurricane Matthew have together increased the need for support.

In an effort to help the Town better understand the venues at hand and its role in supporting them, Webb Management Services has been hired, along with sub-consultants Theatre Consultants Collaborative and The North Group, to conduct a study that will assess the opportunity to develop or improve cultural facilities from a market perspective and then, if appropriate, advance physical, financial, and operational plans for those recommendations.
Past Studies

- Over the last 10 years, a number of studies assessing the state and future of the arts, culture, and heritage on Hilton Head Island have been conducted. They include:

  - **Arts + Cultural Council Task Force Report** (*June 2006*): This report considered the possibility of developing a regional Arts and Cultural Council inclusive of Hilton Head Island and, on the mainland, the area south of the Broad River. Initial activities to be undertaken by the council included creating a monthly calendar of events that could be shared online and in print, the coordination of arts/cultural youth education programs, and the compilation of a comprehensive list of groups and individuals involved in arts and cultural activities.

  - **Community Vision of Hilton Head Performing Arts Facility Feasibility Study Phase 1 Report: Needs Assessment** (*November 2007*): Community Vision of Hilton Head (CVHH) hired Arts Consulting Group, Inc. (ACG) to conduct a study on the feasibility of developing new performing arts facilities on the island. The study found that there was no rationale for building a new, large facility on the island. Instead, it was recommended that a permanent amphitheater with covered seating for 2,400 be developed at one of three locations: Honey Horn Plantation, Jenkins Island, or Shelter Cove Park. In addition, ACG suggested building a performing arts center in collaboration with the University of South Carolina Beaufort’s Bluffton campus. This facility, it was recommended, should include a concert theatre (capacity 1,500 to 2,000) and a multi-purpose/drama theatre (capacity 200 to 250).

  - **Community Foundation Survey of Arts Organizations** (*2012*): The Community Foundation of the Lowcountry conducted a Survey of Arts Organizations in 2012. The survey asked organizations about their operations (year founded, number of paid staff, and operating budget), the facilities they use, and the biggest challenges to their operations. Seven organizations completed the survey.
Past Studies

🌟 The Town of Hilton Head Island Report on a Comprehensive Performing + Cultural Arts Assessment + Strategic Plan (April 2014): In 2014, the Town of Hilton Head Island retained The Cultural Planning Group to assess the island’s nonprofit arts and cultural community and provide recommendations on the Town’s role in their future growth and sustainability. The study resulted in three goals for the Island as well as a series of strategies to achieve them. The goals were:

🌟 “To strengthen the existing cultural, historical, and humanities resources in the community to best serve the residents, workers, and visitors to Hilton Head Island;

🌟 To ensure that local cultural organizations and artists have sustainable funding support for their programs and activities; and,

🌟 To provide an appropriate mix of high-quality, well-equipped arts facilities and venues.”

In addition, the report provided a series of recommendations for the Arts Center of Coastal Carolina, including that the Town invest $3 million into the building’s physical structure, consider an additional allocation of $500,000 for contingencies and the development of a physical plant fund, and that a comprehensive strategic planning process be undertaken by the Center.

🌟 Hilton Head Island Arts Facilities Preliminary Working Plan (December 2014): In 2014, the Town of Hilton Head Island asked the Arts Center of Coastal Carolina to develop a report outlining its long-term expectations for the arts on the island, particularly in regards to programming, facilities, community and corporate support and financing, and the role of the Town. The Arts Center’s research began with an overview of the Island’s facilities, emphasizing their limited amenities, capacities, and availability. They then outlined three facility options and a series of multi-phased approaches to realize their development. The recommended facilities included a 15,000 square foot general arts facility with two theaters and education space, a 1,200-seat concert hall, and a 475-seat performing arts theater.
Past Studies

❄ Arts + Cultural Strategic Planning Committee Final Report (January 2016): Hilton Head’s Arts + Cultural Strategic Planning Committee was established by the Town Council in effort to help the Town implement its Arts and Cultural Mission Statement. In particular, the Committee was charged with “determin[ing] the role, if any, of Town Government and other entities in supporting the Island’s arts and cultural organizations.” The resulting study identified multiple areas of improvement, particularly in regard to ATAX distribution (the report notes that many small nonprofits are often barred from applying because they lack the skilled resources necessary to accomplish the reporting that the grant requires) and the quality of the island’s venues, which are perceived to be limiting organizational growth. In addition, three primary recommendations were made:

❄ “The Town should support Hilton Head Island as an Arts + Cultural Destination by elevating it in Town communications;

❄ The Town should support and fund the Hilton Head Island Culture + Arts Network; and,

❄ The Town should address the venue issues impacting a significant number of arts, culture, and history organizations.”

continued on next slide…
In completing this report, the Planning Committee was not specifically tasked with assessing the island's venue issues; however, when asked about their challenges, multiple arts organizations and schools mentioned them. Specific concerns included:

- “Finding space that was an appropriate size for their event;
- Finding space that had the type of needed physical characteristics (e.g., acoustics, lighting, type of seating, location of seating, climate control, etc.);
- Finding space that is convenient for customers or attendees (e.g., parking, location, etc.);
- Funding the costs for the available space; and,
- Scheduling problems for events or rehearsal.”

Regarding the role that the Town should play in supporting the arts, the Planning Committee outlined the following:

- “Funding the Hilton Head Island Culture + Arts Network;
- Funding or other assistance to help facilitate the planning and implementation of one or more art enclaves;
- Marketing funds in addition to ATAX to promote the arts, culture, and history sector; and,
- Facilitating venue issues.”
Beaufort County

In recent years, Beaufort County has seen tremendous change and growth. While our work will review specific market trends in a later section, we would like to highlight a few recent developments and proposed projects:

- **Bluffton Cultural District Designation**: Old Town Bluffton became South Carolina’s sixth state-designated cultural district in 2016. The area includes 120 cultural attractions and is home to nearly three dozen annual festivals and events.

- **Hilton Head National Golf Club**: The owners of Hilton Head National Golf Club recently asked Beaufort County for a change in zoning that would allow for the construction of 700,000 square feet of retail space, 400 apartments, 500 single-family homes, an assisted-living facility, a 125,000 square foot convention center, and a 1,500-seat performing arts center. There is considerable opposition to the project, particularly in regards to issues like overcrowding, traffic, and waterway pollution.

- **National Monument to the Reconstruction Era**: Prior to leaving office, President Obama announced the creation of a national monument to the Reconstruction Era in Beaufort County. The County is home to a deluge of important sites, including Hilton Head Island’s Mitchelville, the Penn Center, and the home of Robert Smalls.

- **Hilton Head Christian Academy Move**: Hilton Head Christian Academy recently announced that they plan to break ground for a new campus in Bluffton in January 2018. With the move, the Academy hopes to grow enrollment to 600 or 700 students, enhance its use of technology in project-based learning, and have a designated space for its growing arts program.

- **The Gullah Farmers Cooperative Association**: The Gullah Farmers Cooperative Association is in discussion with Beaufort County to retrofit a former health services building into a facility for local farmers to bring their produce for collecting, washing, packaging, and distribution. There are currently 17 partner farmers with expectations for up to 50.

It’s important, then, that Hilton Head residents and officials begin to view what is happening in Bluffton and in Beaufort County as critical and inherent to the island’s long-term success.
For more than two decades, plans to develop a port in Jasper County have been discussed. With the ports in Savannah and Charleston expected to be operating at capacity within the next few years, these plans have begun to move forward.

As planned, the container port will span 1,500 acres, handle seven million twenty-foot equivalent units, and take its rank as the biggest port on the East Coast.

A joint venture between the South Carolina and Georgia port authorities, the project is expected to cost $4.7 billion and be operational by 2025.

Currently, Jasper County is one of the poorest counties in South Carolina. The port project could potentially add 7,500 jobs, increase annual personal income by up to $210 million, and have an overall investment impact of $875 million.
Assessment methodology

- The first phase of the work, which this report covers, is our assessment of needs, which considers the case for new or improved facilities in terms of audience demand, user demand, the existing supply of facilities, and how such a project supports the broader goals of the community and the region.

- To complete the assessment, we have:
  - Interviewed a cross-section of cultural, political, and community leaders, as well as artists and cultural organizations active in the region;
  - Toured local and regional cultural facilities;
  - Studied the size and characteristics of the market area (including full-time & part-time residents, plus short-term visitors);
  - Developed and evaluated detailed inventories of existing facilities; and
  - Held public forums.
Study informants

We conducted 115 confidential in-person, group and telephone interviews with the following individuals. We are grateful for their participation.

- Jack Alderman, Greater Island Council
- Roni Allbritton, Shelter Cove Towne Centre
- David Ames, Town Councilman
- Karen Attaway, Venue Committee
- Melissa Azallion, McNair Law Firm
- Frank Babel, Hilton Head Island Biking Advisory Committee
- Beth Baldwin, Beth Baldwin Weddings
- Tom Barnwell, Native Islander
- Kathleen Bateson, Arts Center of Coastal Carolina
- Jean Beck, Real Estate Association
- David Bennett, Mayor of Hilton Head Island
- Steve Birdwell, Sea Pines Resort
- Rabbi Brad Bloom, Congregation Bet Yam
- Kayla Boyter, Hilton Head Island-Bluffton Chamber of Commerce
- Mary Briggs, Hilton Head Symphony Orchestra
- Dru Brown, Home + Villa Vacation Co.
- Margot Brown, Hilton Head Prep
- Alli Cadmus, Technical College of the Lowcountry
- Emory Campbell, Native Islander/Gullah Tours
- Gilbert G. Campbell, Venue Committee
- John Carlyle, Hilton Head School of Dance
- Dan Castro, Venue Committee
- Karen Cerrati, Resident
- Fred Chitty, Camera Club of Hilton Head Island
- Kelly Cody, Wexford Planned Unit Development
- Louise M. Cohen, Gullah Museum of Hilton Head Island
- Lili Coleman, Venue Committee
- Judith Costello, Jcostello Gallery
- Raymond Cox, Volunteers in Medicine
- John Cranford, Cranford Hollow
- Cindy Creamer, Venue Committee
Study informants (continued)

* Cynthia Cullen, Hilton Head Island Community Church
* Terry Davis, Palmetto Dunes Resort
* Jill Dawson, Attorney
* Kent Eddy, Atlantic States Management
* Lee Edwards, Former Town Councilman
* James Ellis, Jones Brothers Tree
* Eric Esquivel, La Isla Magazine
* Lindsay Finger, Long Cove Planned Unit Development
* Lori Finger, Hilton Head Dance Theatre
* Doug Fletcher, First Presbyterian Church
* Steve Forbes, Beaufort County Council Member
* Herbert Ford, Native Islander
* Juliann Foster, Venue Committee
* Rex Garniewicz, Coastal Discovery Museum
* Florry Gibbes, Venue Committee
* Marty Gleason, Resident
* Marc Grant, Town Councilman
* Walt Graver, Community Vision
* Janice Gray, Art League of Hilton Head Island
* Pennie Grimes, Hilton Head Island Land Trust
* Bill Harkins, Town Councilman
* Chris Haro, Keller Williams
* Natalie Heft, Arts + Cultural Council of Hilton Head Island
* Jane Joseph, Venue Committee
* Diane Kastler, Tide Pointe
* Molly Kennedy, Celebration Events
* Jamie Kinnear, Sun City Hilton Head
* Adrianne Kirsch-Lively, Camellia Art
* Peter Kristian, Hilton Head Plantation Planned Unit Development
* Judy Lampe, Sun City
* Drew Laughin, Former Mayor + Town Councilman
* Bob Lee, Venue Committee
* Tom Lennox, Town Councilman
* Martin Lesch, Junior Jazz Foundation
* Kim Likins, Town Councilwoman
Study informants (continued)

- Diego Machecha, Hargray Communications
- Maureen Mack, Hilton Head Shorenotes
- Jan Maganini, Seabrook
- Michael Marks, Community Foundation of the Lowcountry
- Bret Martin, Sea Pines Planned Unit Development
- Patti Maurer, Island School Council for the Arts
- John McCann, Town Councilman
- Chris McCorkendale, Hargray Communications
- Martin McFie, The Charleston Opera
- Alicia McGowan, MSA Hospice
- William J. Miles, Hilton Head Island-Bluffton Chamber of Commerce
- Dan Monroe, Island Real Estate Guide
- Glenn Neff, Hilton Head Choral Society
- Linda Neff, Hilton Head Choral Society
- Phyllis Neville, Main Street Youth Theatre
- Daryl Orage, The Village
- Larry Perigo, The Headliners
- Steve Riley, Town Manager
- Caroline Rinehart, Sandbox Museum
- Stu Rodman, Beaufort County Council Member
- Greg Russell, Venue Committee
- Helen Ryan, Former Principal, Hilton Head Island High School
- John Salazar, University of South Carolina Beaufort
- Linda Saylor, Silver Garden
- Kate Schaeffer, Coastal Conservation League
- Theo Schofield, Omni Hotel
- Mira Scott, Picture This Gallery
- Shirley "Peaches" Peterson, Mitchelville Preservation Project
- Linda Piekut, Heritage Library
Study informants (continued)

* Andrew Shumacher, Palmetto Dunes Planned Unit Development
* Cinda Seamon, Main Street Youth Theatre
* Nancy Sulek, Volunteers in Medicine
* Frank Soule, Island Recreation Center
* Denise Spencer, Community Foundation
* Lisa Sulka, Town of Bluffton
* Gwen Taylor, Bluffton Self Help
* Suzanne Thompson, Venue Committee
* Eric Turpin, Native Island Business + Community Affairs Association
* Jane Upshaw, Former Chancellor, University of South Carolina Beaufort
* Sally Warren, Shipyard Planned Unit Development
* Sandy West, Lighthouse Consulting
* Blake White, Lean Ensemble Theater
* Jay Wiendl, Sonesta Hotel
* George Williams, Former Town Councilman
* Lee Wilwerding, World Affairs Council
Forces + trends
The NEA's Survey of Public Participation in the Arts has long been considered the best dataset on arts attendance.

**Percentage of U.S. Adults Who Participated in the Arts at Least Once During a 12-Month Period, by General Category of Participation (2012)**

- Arts Consumption through Electronic Media: 71%
- Moviegoing: 59%
- Voluntary Reading: 58%
- Art-Making or Art-Sharing (I): 50%
- Visual or Performing Arts Attendance: 49%
- Art-Making or Art-Sharing (II): 48%
- Arts Learning through Classes or Lessons: 7%
Arts participation

* The 2012 survey confirmed that fewer adults are attending virtually all types of performing arts activity, a trend that has been apparent through several survey cycles.

### Percent of U.S. Adults Who Attended at Least One of Various Types of Arts Performance or Visited an Art Museum or Gallery: 1982-2012

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>39.0%</td>
<td>41.0%</td>
<td>39.4%</td>
<td>34.6%</td>
<td>33.3%</td>
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</tr>
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</table>


<table>
<thead>
<tr>
<th>Type</th>
<th>2002</th>
<th>2008</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classical Music</td>
<td>11.6%</td>
<td>9.3%</td>
<td>8.8%</td>
</tr>
<tr>
<td>Jazz</td>
<td>10.8%</td>
<td>7.8%</td>
<td>8.1%</td>
</tr>
<tr>
<td>Dance Other than Ballet</td>
<td>6.3%</td>
<td>5.2%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Latin, Spanish, or Salsa Music</td>
<td>NA</td>
<td>4.9%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Ballet</td>
<td>3.9%</td>
<td>2.9%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Opera</td>
<td>3.2%</td>
<td>2.1%</td>
<td>2.1%</td>
</tr>
</tbody>
</table>

NA = This question was not asked before 2008.

Note: None of the changes between 2008 and 2012 are statistically significant.
Young adult participation

* And that participation in the arts by younger adults has been trending downwards for over 20 years across all disciplines.
In December 2015, Americans for the Arts and Ipsos Public Affairs surveyed more than 3,000 Americans over the age of 18 on arts participation, support for arts education and government arts funding, and the personal benefits and well-being that come from arts participation.

Key findings (released July 2016):

- Two thirds of Americans attended an arts event in the past year.
- An even higher proportion of people experienced arts at a non-arts venue.
- People of color are more likely to attend than White people.

Note that this effort suggests that national levels of participation may be higher than suggested by the SPPA.
The AFTA and Ipsos Public Opinion Poll also shows:

- Educational attainment and household income are key predictors of arts participation.
- Half of Americans are active art makers.
- Americans believe that cultural facilities are key to quality of life, local business, and the economy.
- Americans believe the arts are part of a well-rounded K-12 education.
- Millennials are the most active arts generation, as attendees, collectors, donors, and practitioners.
Public sector funding

* Another challenge is the pressure on different levels of government to reduce direct arts funding.
Private sector philanthropy

※ There is also more competition for private sector support coming from emerging areas like environmental sustainability and healthcare.
Baumol’s cost disease

* The economic challenge of arts organizations is that there are no productivity gains over time in the way that the “product” is created. Thus, as costs inevitably increase, arts organizations must fundraise more money every year just to stay even.

Figure 2.1. Symphony Expenses and Producer Prices, 1987–2005
Active arts participation

* The good news is that active participation in the arts is growing, with more people looking for ways (and places) to express their personal creativity.
Arts education

* Arts education is also growing, mostly due to the development of outreach and education programs by nonprofit arts organizations.

**Figure 72.** Distribution of Funds Budgeted for the Arts (in Millions of Dollars)

<table>
<thead>
<tr>
<th>Year</th>
<th>Personnel</th>
<th>Services/Other</th>
<th>Supplies/Equipment</th>
<th>Total FY</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014-15</td>
<td>335</td>
<td></td>
<td></td>
<td>9</td>
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<tr>
<td>2013-14</td>
<td>320</td>
<td></td>
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<td>2</td>
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<tr>
<td>2012-13</td>
<td>308</td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>2011-12</td>
<td>311</td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>2010-11</td>
<td>301</td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>$368</strong></td>
</tr>
</tbody>
</table>

From the NYC Department of Education 2014-2015 Arts in the Schools Report
In addition, the sector is finally able to articulate a strong value proposition to justify public and private sector support. This generally involves making the connection between the arts and other key community goals such as:

- Economic development;
- Creative place-making;
- Downtown revitalization;
- Cultural tourism;
- Quality of life;
- Business and workforce development and retention;
- Community development;
- Arts in education; and,
- Healing – physical, mental, spiritual, and communities.
Facilities responding to changes

✱ Cultural facilities are responding to these challenges and opportunities, as follows:
  ✱ By embracing a broader definition of cultural activity that reflects the diversity, heritage, and means of creative expression of all people;
  ✱ By shifting from the old image of a theater as a place that lights up occasionally for the select few to a new image of a place that is always open, always active, and much more inclusive, aspiring to be the community living room;
  ✱ Through more collaborative efforts to promote the development of cultural districts;
  ✱ By focusing on active programs rather than passive participation;
  ✱ By focusing more on community engagement and development;
  ✱ By placing greater focus on the social experience of attending an event;
  ✱ By finding ways to maintain a low cost of access for nonprofit arts groups;
  ✱ Through the addition of secondary, temporary, and outdoor spaces; and,
  ✱ By providing audiences with some measure of control over their experience.
Market analysis
Market analysis

Overview

This analysis will define the market and examine the market for the arts on Hilton Head Island, paying close attention to key indicators for arts participation and attendance such as educational attainment and household income.

Methodology

To define the market for cultural facilities in the region, we mapped ticket buyer data for the Lean Ensemble Theatre, Hilton Head Choral Society, Hilton Head Symphony Orchestra, and the Arts Center of Coastal Carolina. This allowed us to define the market as:

- Hilton Head Island,
- Beaufort County, and
- The 25-mile radius surrounding the Hilton Head Island Town Hall.

We then collected demographic data from Nielsen Segmentation + Market Solutions, a market research resource that expands and extrapolates Census data using a variety of inputs. Lastly, we examined local and regional tourism data in order to assess its current size and potential to attract visitors for cultural programs and events.
The chart below provides a breakdown of ticket buyers for Hilton Head Choral Society, Hilton Head Symphony Orchestra, Lean Ensemble Theatre, and the Arts Center of Coastal Carolina. Maps of 2015-2016 ticket buyers are on the following pages.

### Hilton Head Island Ticket Buyer Data

#### 2015-2016 Data

<table>
<thead>
<tr>
<th></th>
<th>Number of Tickets Sold</th>
<th>Percentage of Total Ticket Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>HHI</td>
<td>County</td>
</tr>
<tr>
<td><strong>Hilton Head Choral Society</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2015-2016 Single Ticket</td>
<td>360</td>
<td>536</td>
</tr>
<tr>
<td>2015-2016 Subscription</td>
<td>100</td>
<td>126</td>
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<tr>
<td><strong>Hilton Head Symphony Orchestra</strong></td>
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<tr>
<td>2015-2016 Single Ticket</td>
<td>701</td>
<td>1,125</td>
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<tr>
<td>2015-2016 Subscription</td>
<td>398</td>
<td>575</td>
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<tr>
<td><strong>Arts Center of Coastal Carolina</strong></td>
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</tr>
<tr>
<td>FY16 Theater Single Ticket</td>
<td>2,364</td>
<td>4,089</td>
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<tr>
<td>FY16 Theater Subscription</td>
<td>776</td>
<td>1,349</td>
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<tr>
<td>FY16 Presenting Tickets</td>
<td>659</td>
<td>1,066</td>
</tr>
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#### All Data

<table>
<thead>
<tr>
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<th>Number of Tickets Sold</th>
<th>Percentage of Total Ticket Buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>HHI</td>
<td>County</td>
</tr>
<tr>
<td><strong>Hilton Head Choral Society</strong></td>
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<tr>
<td>2012-2017 Single Ticket</td>
<td>860</td>
<td>1,330</td>
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<tr>
<td>2012-2017 Subscription</td>
<td>489</td>
<td>610</td>
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<tr>
<td><strong>Hilton Head Symphony Orchestra</strong></td>
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<tr>
<td>2012-2017 Single Ticket</td>
<td>3,081</td>
<td>4,793</td>
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<tr>
<td>2012-2017 Subscription</td>
<td>1,843</td>
<td>2,646</td>
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<tr>
<td><strong>Lean Ensemble 2015-2017 All Patrons</strong></td>
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<tr>
<td>FY14-FY16 Theater Single Ticket</td>
<td>6,327</td>
<td>10,828</td>
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<tr>
<td>FY14-FY16 Theater Subscription</td>
<td>2,433</td>
<td>4,201</td>
</tr>
<tr>
<td>FY14-FY16 Presenting Tickets</td>
<td>1,913</td>
<td>3,160</td>
</tr>
</tbody>
</table>
Lean Ensemble ticket buyers

* Lean Ensemble Theatre is a producing company new to Hilton Head Island.
* Combined ticket data from 2015, 2016, and 2017 indicates that,
  * 64.60 percent of their single-ticket buyers (STBs) have Hilton Head Island addresses;
  * 83.58 percent travel from within Beaufort County; and,
  * 90.38 percent travel from within a 25-mile radius of the island.
Hilton Head Choral Society subscribers

The Hilton Head Choral Society is a 100-voice ensemble founded on the island in 1975.

- 73.53 percent of its subscribers have Hilton Head Island addresses;
- 92.65 percent travel from within Beaufort County; and,
- 92.65 percent travel from within a 25-mile radius of the island.
Hilton Head Choral Society single-ticket buyers

* Single-ticket buyers (STBs) are represented across the United States. Nevertheless, 53.41 percent have Hilton Head Island addresses, 79.53 percent travel from within Beaufort County and 81.45 percent travel from within a 25-mile radius of the island.
The Hilton Head Symphony Orchestra was founded in 1982.

- 61.33 percent of its subscribers have Hilton Head Island addresses;
- 88.60 percent travel from within Beaufort County; and,
- 89.06 percent travel from within a 25-mile radius of the island.
Like with the Choral, STBs are represented across the United States. However, 41.16 percent have Hilton Head Island addresses, 66.06 percent travel from within Beaufort County; and 66.88 percent travel from within a 25-mile radius of the island.
Arts Center of Coastal Carolina subscribers

* The Arts Center has the most ticket buyers.
* 54.72 percent of its subscribers have Hilton Head Island addresses;
* 95.130 percent travel from within Beaufort County; and,
* 96.61 percent travel from within a 25-mile radius of the island.
Arts Center of Coastal Carolina single-ticket buyers

* Of STBs, 36.39 percent have Hilton Head Island addresses, 62.95 percent travel from within Beaufort County and 64.13 percent travel from within a 25-mile radius of the island.
Finally, we mapped ticket buyers to the Arts Center’s presenting series. Of that group, 55.99 percent have Hilton Head Island addresses, 90.57 percent travel from within Beaufort County and 92.86 percent travel from within a 25-mile radius of the island.
Selected market segments

- This exercise of looking at the distribution of various audiences has led us to select three geographic areas to analyze:
  - Hilton Head Island,
  - Beaufort County, and
  - The 25-mile radius around The Town of Hilton Head Island (1 Town Center Ct).
In all market segments, the population is growing.

The fastest growth is within Beaufort County. Between 2000 and 2010, the population grew by 34 percent. Between 2010 and 2022, it is projected to grow an additional 23 percent, reaching a total population of 201,620. And, according to U.S. Census Data, the 2030 population is projected at 215,270.

The 25-mile radius has also experienced considerable growth: between 2000 and 2010, the population grew by 14 percent and is projected to grow an additional 17 percent between 2010 and 2022.

Growth on Hilton Head has been more conservative. Between 2000 and 2010, the population grew by 10 percent, from 33,898 to 37,099. Between 2010 and 2022, it is projected to grow by 9 percent, reaching an estimated 43,587 by 2022.
Population density: 2000

This map and the next show population density in Beaufort County by block group for the years 2000 and 2010.
Population density: 2010

- Between 2000 and 2010, population density increased throughout most of the Beaufort County.

- The area of greatest interest to this work, however, is the area along Route 278, where population density changed dramatically.
Median age: 2000

The following maps look at change in median age in Beaufort County between the same ten-year span.
This series of maps is most striking because it shows that, while most of Beaufort County has gotten older (including Hilton Head Island), Bluffton has gotten much younger.
There are notable differences in the distribution of age amongst all three market segments.

On Hilton Head Island, 35 percent of the population is ‘Age 65+'. An additional 15 percent is between the ages of ‘55 to 64.’ This is a considerably larger senior population than in Beaufort County, the 25-mile radius, or, notably, the nation, where only 15 percent of the population is ‘Age 65+'.

Regionally, the population is much younger. In Beaufort County, 20 percent of the population is ‘17 and under’ and an additional 9 percent is between the ages of 18 and 24. In the 25-mile radius, 21 percent of the population is ‘17 and under’ and 10 percent is between the ages of 18 and 24.
Market characteristics

- The population on Hilton Head Island is affluent: 18 percent has a household income of ‘$150,000 or more’ and an additional 15 percent has a household income of ‘$100,000 to $149,999’.

- Notably, 21 percent of Hilton Head Island’s population has a household income of ‘$25,000 to $49,999’.

- Regionally, 25 percent of both the Beaufort County and 25-mile radius populations has a household income of ‘$25,000 to $49,999’.

- In addition, 23 percent of the 25-mile radius also has a household income of ‘Less than $24,999’.
Market characteristics

- Educational attainment across all three market segments varies.
- It is highest on Hilton Head Island, where 29 percent of the population has a Bachelor’s Degree and an additional 19 percent has a ‘Graduate or Prof. Degree.’
- In each market segment, between 20 and 23 percent of the population has ‘Some College, No Degree’.
- And, in Beaufort County and the 25-mile radius, roughly a quarter of the population is a ‘High School Graduate (or GED).’
Market characteristics

- Although there is a White-majority population in each market segment, Hilton Head Island and its surrounding region are diverse.
- On Hilton Head Island, 13 percent of the population is 'Hispanic or Latino' and 7 percent is 'Black or African American.'
- In the 25-mile radius, 30 percent of the population is 'Black or African American' and an additional 8 percent is 'Hispanic or Latino.'
In all market segments, English is the language spoken at home.

There are, however, pockets of Spanish speakers. On Hilton Head, 11 percent of the population speaks Spanish at home, as does 9 percent of the Beaufort County population, and 7 percent of the 25-mile radius population.
Part-time residents

According to 2010 Census Bureau data, Hilton Head Island has 33,306 total housing units. Of those, 16,535 (49.6%) are occupied housing units, and an additional 9,767 (29%) are for seasonal, recreational, or occasional use.

The most recent second homeowner/part-time resident data comes from the Hilton Head Island Second Home Owner Study Report (Prepared by John Salazar, Ph.D., University of South Carolina-Beaufort, 2011), which is based on a survey of second home owners on Hilton Head Island. While there are plans to update this study in 2017, the 2011 survey found that:

- Ninety percent of second homes have sole owners;
- Sea Pines is the location of most second homes;
- Sixty-two percent of second homes are not publicly rented;
- The majority of second home owners drive to Hilton Head; and,
- Fifty-eight percent of second home owners purchased their home in order to return to Hilton Head for vacation.

Respondents to the survey were largely male, between the ages of 61 and 70, married, and had an average income of $200,000 to $249,000. It is estimated that owners that do not rent their second homes take five vacations a year and stay seven days a week on each vacation. Thirty-nine percent of survey respondents indicated that arts and culture were an important attribute of Hilton Head Island, and 43 percent said they felt neutral about history/heritage.
The Gullah community

- The Gullah Geechee are the “descendants of captive Africans brought to the Americas from the west coast of Africa who inhabit the Sea Islands of North Carolina, South Carolina, Georgia, and Florida prior to and since the Civil War.” (Gullah Heritage Trail Tours website)

- The total population of Gullah Geechee people is estimated at 200,000. On Hilton Head Island, Gullah make up 8 percent of the population. (Hilton Head Monthly: Hilton Head—The heart of Gullah/Geechee Corridor, 27 Jan. 2016)

- The Gullah have a rich culture and history that includes storytelling, cuisine, music, folk beliefs, crafts, farming, and fishing.

- In 2004, the National Trust for Historic Preservation placed the Gullah Geechee Coast on a list of most threatened places. In 2006, Congress created the Gullah Geechee Cultural Heritage Corridor and Commission (shown at right). (Hilton Head Monthly: Hilton Head—The heart of Gullah/Geechee Corridor, 27 Jan. 2016)

- Today, the Gullah face a number of challenges, including increased commercial development and its environmental impacts and land erosion. (Hilton Head Monthly: Hilton Head—The heart of Gullah/Geechee Corridor, 27 Jan. 2016)

Additional Sources: National Geographic: Being Gullah or Geechee, Once Looked Down On, Now a Treasured Heritage (16 Oct. 2014); Los Angeles Times: The Gullah people have survived on the Carolina sea islands for centuries. Now development is taking a toll (4 Nov. 2016)
Tourists and tourism

- Hilton Head is well-known as a tourist destination. Annually, 2.5 million visitors travel to the island to visit the beach, golf, and soak up the sun.

- According to Regional Transactions Concepts’ Economic + Fiscal Impact Analysis: Estimated Impact of Hilton Head Island Tourism in 2015 on Beaufort County, South Carolina (March 31, 2016), a study looking at the economic and fiscal impacts of tourist spending on Hilton Head Island according to five types of lodging arrangements, 329 visitors spent an average of $34.71 per person on performance/visual arts in 2015 and 248 visitors spent an average of $23.56 per person on festivals, as shown in the chart at right.

- Important to note are the similarities in spending between the number of beach visitors and museum/historical tour visitors: 507 visitors spent an average of $14.89 per person at the beach, while 503 visitors spent an average of $18.85 per person on museum/historical tours.

- In total, the study estimates that visitor spending on Hilton Head generates 12,740 jobs in Beaufort County and $26.9 million in revenue.

Table 2 – Survey Results: Total Tourist Expenditures, All Visitor Segments

<table>
<thead>
<tr>
<th>Question</th>
<th>N</th>
<th>Avg. Spend per Person</th>
<th>Total Spend ($1000s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation (around the Hilton Head Island area) - Estimated dollar amount spent</td>
<td>1,424</td>
<td>$61.12</td>
<td>$87,032.3</td>
</tr>
<tr>
<td>Lodging - Estimated dollar amount spent</td>
<td>1,477</td>
<td>$268.17</td>
<td>$396,081.7</td>
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<tr>
<td>Food-dining out - Estimated dollar amount spent</td>
<td>1,870</td>
<td>$83.12</td>
<td>$155,443.4</td>
</tr>
<tr>
<td>Food-groceries - Estimated dollar amount spent</td>
<td>1,625</td>
<td>$53.84</td>
<td>$87,497.7</td>
</tr>
<tr>
<td>Beaches - Estimated dollar amount spent</td>
<td>507</td>
<td>$14.89</td>
<td>$7,549.4</td>
</tr>
<tr>
<td>Shopping - Estimated dollar amount spent</td>
<td>1,663</td>
<td>$59.44</td>
<td>$89,849.9</td>
</tr>
<tr>
<td>Spas - Estimated dollar amount spent</td>
<td>248</td>
<td>$39.29</td>
<td>$9,743.2</td>
</tr>
<tr>
<td>Golf - Estimated dollar amount spent</td>
<td>579</td>
<td>$65.64</td>
<td>$38,006.6</td>
</tr>
<tr>
<td>Biking - Estimated dollar amount spent</td>
<td>612</td>
<td>$18.50</td>
<td>$11,322.0</td>
</tr>
<tr>
<td>Parks - Estimated dollar amount spent</td>
<td>307</td>
<td>$16.43</td>
<td>$5,656.8</td>
</tr>
<tr>
<td>Performance/visual arts - Estimated dollar amount spent</td>
<td>329</td>
<td>$34.71</td>
<td>$11,421.1</td>
</tr>
<tr>
<td>Festivals - Estimated dollar amount spent</td>
<td>248</td>
<td>$23.56</td>
<td>$5,844.0</td>
</tr>
<tr>
<td>Museum/historical tours - Estimated dollar amount spent</td>
<td>503</td>
<td>$18.85</td>
<td>$9,479.1</td>
</tr>
<tr>
<td>Boating/sailing - Estimated dollar amount spent</td>
<td>310</td>
<td>$32.24</td>
<td>$10,024.2</td>
</tr>
<tr>
<td>Nature based activities - Estimated dollar amount spent</td>
<td>332</td>
<td>$18.02</td>
<td>$5,984.0</td>
</tr>
<tr>
<td>Dolphin tours - Estimated dollar amount spent</td>
<td>309</td>
<td>$28.50</td>
<td>$8,807.8</td>
</tr>
<tr>
<td>Tennis - Estimated dollar amount spent</td>
<td>137</td>
<td>$24.89</td>
<td>$3,409.9</td>
</tr>
<tr>
<td>Fishing - Estimated dollar amount spent</td>
<td>183</td>
<td>$37.96</td>
<td>$6,946.6</td>
</tr>
<tr>
<td>Sporting events - Estimated dollar amount spent</td>
<td>118</td>
<td>$32.63</td>
<td>$3,849.9</td>
</tr>
<tr>
<td>Other cultural activities - Estimated dollar amount spent</td>
<td>264</td>
<td>$30.55</td>
<td>$8,064.0</td>
</tr>
<tr>
<td>Other sport activities - Estimated dollar amount spent</td>
<td>145</td>
<td>$30.13</td>
<td>$4,388.1</td>
</tr>
<tr>
<td>Other outdoor activities - Estimated dollar amount spent</td>
<td>351</td>
<td>$26.52</td>
<td>$9,309.6</td>
</tr>
<tr>
<td>Other expenses - Estimated dollar amount spent</td>
<td>816</td>
<td>$52.69</td>
<td>$42,992.8</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td>$1,027,684.1</td>
</tr>
</tbody>
</table>

Tourists and tourism

The *2016 Hilton Head Island Bluffton Chamber of Commerce Progress Report* states the following about tourism to the island in 2015:

- It brought 2.65 million visitors;
- Hilton Head Island was the #2 Island in North America and Canada (according to Travel + Leisure’s World’s Best Awards);
- Tourism brought $1.1 billion in local economic impact;
- Hilton Head was the #1 most popular island for summer vacation (according to Yahoo.com); and,
- Hilton Head was one of the most Instagrammed places the United States (according to Time Magazine).

*DataTech’s November 2016 National Golf Rounds Played Report* indicates that the number of rounds of golf played on Hilton Head Island decreased by -7.6 percent in November and by -8.6 percent for the year-to-date.
Tourists and tourism: timeshares

The Regional Transactions Concepts’ Economic + Fiscal Impact Analysis: Estimated Impact of Hilton Head Island Tourism in 2015 on Beaufort County, South Carolina (March 31, 2016) estimates that, in 2015, there were 463,208 timeshare visitors to Beaufort County.

Data from the American Resort Development Association indicates that, over the years, timeshare owners have changed. They are:

- More diverse;
- Young and family-oriented;
- Well-educated, employed, and money conscious;
- Like to research and experience before they buy; and
- Have disposable income.
Tourists and tourism: affluent leisure travelers

In addition, *The 2014 Hilton Head Island Tourism Summit: $150,000 or Higher Household Incomes*, a white paper created by the University of South Carolina-Beaufort’s Lowcountry and Resort Islands Tourism Institute (LRITI), looks specifically at the characteristics and habits of Hilton Head Island’s affluent leisure travelers, which make up 28 percent of all island visitors. The data was collected via survey, which received 5,556 total responses, and found that:

- Eighty-eight percent of visitors are married;
- Fifty percent are Boomers (born 1946-64), 31 percent are Gen Xers (born 1965-78), 3 percent are Matures (born before 1946), and 16 percent are Millennials (born 1980-97);
- Fifty-three percent of visitors are female and 46 percent are male;
- The majority of visitors are white (85 percent) and average two to 4 domestic travel trips per year;
- Visitors are well-educated (82 percent have Bachelor degrees or higher);
- Fifty-seven percent of visitors are traveling with kids between the ages of 0 and 18;
- Their average stay lasts 6.7 days;
- Eighty-five percent of visitors indicated that their primary reason for travel to Hilton Head was recreation/vacation; and,
- While on Hilton Head, top expenses (excluding lodging, dining, and groceries) are shopping, golf, biking, museum/historical tours, and performance/visual arts.
Tourists and tourism: heritage tourism

Finally, LRITI’s report, *The Value of Beaufort County’s Heritage Tourism Segment (2016)* assesses the value of heritage tourism in Beaufort County. Data was collected via survey and found that:

- Heritage travelers tend to be older, married, do not have any children living at home, and are slightly more educated and more affluent than Beaufort’s general visitor population.

- Seventy-two percent of respondents indicated that history was an important attribute when deciding to visit Beaufort; 39 percent indicated that the arts were an important attribute.

- When asked to indicate whether or not they had visited or intended to visit various tourist attractions, 76 percent of visitors indicated that they had or intended to visit beaches, 74 percent indicated that they had or intended to visit restaurants, and 54 percent indicated that they had or intended to visit historical landmarks. Twenty-three percent indicated that they had or intended to visit museums/performing arts/cultural activities.

- Heritage tourism has the potential to bridge age groups for Hilton Head Island and that there is latent demand for heritage tourism by visitors and non-visitors.
The chart below contains attendee data pulled from surveys created by LRITI for a variety of Hilton Head Island festivals. The Bluffton Arts + Seafood Festival has been included for comparison.

### Hilton Head Island Festival Attendee Survey Results (2016)

<table>
<thead>
<tr>
<th>Visitor Characteristics...</th>
<th>Motoring Festival + Concours d'Elegance</th>
<th>Oyster Festival</th>
<th>Burgers + Brew Festival</th>
<th>Wine + Food Festival</th>
<th>WingFest</th>
<th>Seafood Festival</th>
<th>Hilton Head Snow Day</th>
<th>2016 Bluffton Arts + Seafood Festival</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Festival Time of Year:</strong></td>
<td>Fall</td>
<td>Fall</td>
<td>Fall</td>
<td>Spring</td>
<td>Spring</td>
<td>Hinesville, GA; Sumter, SC; Rochester, NY; Atlanta, GA; Barnstable, MA; Greenville, SC; Boston, MA; Washington, D.C.; Augusta, GA</td>
<td>Atlanta, GA; Augusta, GA; Rochester, NY; Atlanta, GA; Barnstable, MA; Greenville, SC; Boston, MA; Washington, D.C.; Augusta, GA</td>
<td>Columbia, SC; Walterboro, SC; Atlanta, GA; Athens, GA</td>
</tr>
<tr>
<td><strong>Strong Markets:</strong></td>
<td>Atlanta, GA; Charleston, SC; Charlotte, NC; Columbia, SC; Greenville, SC</td>
<td>Atlanta, GA; Augusta, GA; Charleston, SC</td>
<td>Hinesville/Fort Stewart, GA; Atlanta, GA; Cincinnati, OH</td>
<td>Atlanta, GA; Greenville, SC; Columbia, SC; Jacksonville, FL; Augusta, GA</td>
<td>Augusta, GA</td>
<td>Augusta, GA</td>
<td>Augusta, GA</td>
<td>Augusta, GA</td>
</tr>
<tr>
<td><strong>Gender:</strong></td>
<td>Female: 41%; Male: 59%</td>
<td>Female: 61%; Male: 39%</td>
<td>Female: 56%; Male: 44%</td>
<td>Female: 64%; Male: 36%</td>
<td>Female: 62%; Male: 38%</td>
<td>Female: 64%; Male: 36%</td>
<td>Female: 71%; Male: 29%</td>
<td>Female: 69.1%; Male: 31%</td>
</tr>
<tr>
<td><strong>Age:</strong></td>
<td>Age 65 to 69: 18%; Age 70+: 18%</td>
<td>Age 55 to 59: 16%; Age 60 to 64: 14%; Age 65 to 69: 13%</td>
<td>Age 55 to 59: 12%; Age 60 to 64: 12%; Age 25 to 29: 12%; Age 30-34: 11%</td>
<td>Age 60 to 64: 21%; Age 55 to 59: 12%; Age 65 to 69: 11%; Age 60 to 64: 11%</td>
<td>Age 65 to 69: 17%</td>
<td>Age 60 to 64: 18%</td>
<td>Age 60 to 64: 18%</td>
<td>Age 65 to 69: 18%; Age 70+: 18%</td>
</tr>
<tr>
<td><strong>Marital Status:</strong></td>
<td>Married: 78%</td>
<td>Married: 67%</td>
<td>Married: 73%</td>
<td>Married: 77%</td>
<td>Married: 66%</td>
<td>Married: 67%</td>
<td>Married: 67%</td>
<td>Married: 69%</td>
</tr>
<tr>
<td><strong>Children Under 18 Living at Home:</strong></td>
<td>No: 77%</td>
<td>No: 74%</td>
<td>No: 73%</td>
<td>No: 78%</td>
<td>No: 83%</td>
<td>No: 70%</td>
<td>No: 70%</td>
<td>No: 78%</td>
</tr>
<tr>
<td><strong>Education:</strong></td>
<td>Bachelors Degree: 32%; Graduate Degree: 29%</td>
<td>Bachelors Degree: 34%; Graduate Degree: 32%</td>
<td>Bachelors Degree: 35%; Graduate Degree: 27%</td>
<td>Bachelors Degree: 41%; Graduate Degree: 36%</td>
<td>Bachelors Degree: 29%; Graduate Degree: 27%; Some College: 20%</td>
<td>Bachelors Degree: 29%; Graduate Degree: 28%; Some College: 17%</td>
<td>Bachelors Degree: 30%; Graduate Degree: 31%</td>
<td>Bachelors Degree: 31%; Graduate Degree: 31%</td>
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<tr>
<td><strong>Annual Household Income:</strong></td>
<td>$100K-$149,999: 19%; N/A: 18%; $150K-$199,999: 15%</td>
<td>$100K-$149,999: 20%; N/A: 17%; $50K-$75K: 17%</td>
<td>$100K-$149,999: 20%; N/A: 17%; $50K-$75K: 17%</td>
<td>$200K Plus: 23%; $100K-$149,999: 21%</td>
<td>$100K-$149,999: 22%; N/A: 17%; $50K-$75K: 19%</td>
<td>$100K-$149,999: 21%; N/A: 17%; $50K-$75K: 19%</td>
<td>$100K-$149,999: 21%</td>
<td>$50K-$74,999: 19%; $75K-$99,999: 16%; $100K-$149,999: 15%</td>
</tr>
<tr>
<td><strong>Primary Address:</strong></td>
<td>HHI/Bluffton/Beaufort/Savannah Area: 50%; Other US Location: 38%</td>
<td>HHI/Bluffton/Beaufort/Savannah Area: 48%; Other US Location: 43%</td>
<td>HHI/Bluffton/Beaufort/Savannah Area: 63%; Other US Location: 33%</td>
<td>Other US Location: 51%; HHI/Bluffton/Beaufort/Savannah Area: 50%; Other US Location: 39%</td>
<td>HHI/Bluffton/Beaufort/Savannah Area: 50%; Other US Location: 39%</td>
<td>HHI/Bluffton/Beaufort/Savannah Area: 50%; Other US Location: 39%</td>
<td>HHI/Bluffton/Beaufort/Savannah Area: 79%</td>
<td>HHI/Bluffton/Beaufort/Savannah Area: 71%</td>
</tr>
<tr>
<td><strong>Trips Taken to HHI:</strong></td>
<td>Five or More: 59%; Five or More: 53%; One: 26%</td>
<td>Five or More: 66%</td>
<td>Five or More: 63%</td>
<td>Five or More: 50%; One: 22%</td>
<td>Five or More: 54%</td>
<td>Five or More: 74%</td>
<td>Five or More: 63%; I'm a Day Visitor: 74%;</td>
<td>Five or More: 74%</td>
</tr>
<tr>
<td><strong>Length of Stay:</strong></td>
<td>3 Days: 26%</td>
<td>3 Days: 26%; 9 or more: 22%</td>
<td>9 Days or More: 22%; I'm a Day Visitor: 21%</td>
<td>9 Days or More: 22%; 3 Days: 21%; 2 Days: 19%</td>
<td>9 Days or More: 36%; I'm a Day Visitor: 25%</td>
<td>9 Days or More: 36%; I'm a Day Visitor: 20%</td>
<td>Stay: 74%;</td>
<td>Stay: 24%</td>
</tr>
<tr>
<td><strong>Primary Reason for Visit:</strong></td>
<td>Motoring Festival + Concours d'Elegance: 72%</td>
<td>Pleasure Vacation: 58%</td>
<td>Pleasure Vacation: 42%</td>
<td>Wine + Food Festival: 43%</td>
<td>Pleasure Vacation: 53%</td>
<td>Pleasure Vacation: 25%</td>
<td>Hilton Head Island Snow Day: 39%; Pleasure Vacation: 24%</td>
<td>Bluffton Arts + Seafood Festival: 60%</td>
</tr>
</tbody>
</table>

*Data pulled from Lowcountry + Resort Islands Tourism Institute at USCB
Hilton Head festival visitors

- The chart indicates that, for most Hilton Head Island festivals, the majority of survey respondents traveled from within the Hilton Head Island/Bluffton/Beaufort/Savannah area. The exception is the Wine + Food Festival: 51 percent of survey respondents indicated that they attended from some ‘Other US Location’.

- WingFest and the Seafood Festival pulled from the farthest distance, with survey respondents traveling from New York, Massachusetts, Virginia, and Washington, D.C.

- Survey respondents were largely female, with the exception of the Motoring Festival + Concours d’Elegance: 59 percent of attendees were male and 41 percent were female.

- The majority of survey respondents were over the age of 50, although the Burgers + Brew Festival attracted a younger demographic (29 percent were between the ages of 25 and 34). Hilton Head Snow Day also attracted a younger demographic (20 percent were between the ages of 40 and 44 and 18 percent were between the ages of 30 and 34), but had a regional draw: 79 percent of survey respondents attended from the Hilton Head Island/Bluffton/Beaufort/Savannah area.

- Festival attendees were well-educated and affluent and the majority had taken five or more trips to Hilton Head Island.

- Most festival attendees were visiting the island for Pleasure Vacation, although 72 percent of Motoring Festival + Concours d’Elegance survey respondents, 43 percent of Wine + Taste survey respondents, and 39 percent of Snow Day survey respondents were visiting specifically for those events.
Market conclusions

* The market for the arts is growing and diverse. The Hilton Head Island population is well-educated and affluent, suggesting propensity to support traditional performing arts.

* Many in Beaufort County and the 25-mile radius have lower levels of educational attainment and less affluence, indicating opportunities for hands-on and participatory programs. And, there is a large and growing ‘Hispanic or Latino’ population.

* Local and regional population growth has resulted in increased younger population density, particularly along Route 278.

* Twenty-nine percent of Hilton Head’s housing stock is owned by 2nd homeowners, who are well educated and affluent.

* Hilton Head’s Gullah community is rich in culture and history. The island’s inclusion in the Gullah Geechee corridor provides a unique opportunity to connect Hilton Head Island to the larger Lowcountry region.

* Tourism is a growing, and changing on Hilton Head Island, with visitors expressing less interest in playing golf and more interest in exploring the island’s history and heritage. Visitors to Hilton Head Island tend to be well educated and affluent, often traveling with children. There are 400,000 timeshare visitors to Beaufort County. This group is diverse, affluent, well-educated, and family-oriented.

* According to festival attendee survey results, Hilton Head Island’s various festivals have a large regional draw, attracting visitors from the greater Hilton Head/Bluffton/Beaufort/Savannah region. They are older, are affluent and well-educated, and have visited Hilton Head Island multiple times in the past.
User demand
User demand

Overview

Over the course of this needs assessment, we gathered information on demand for space from various types of organizations, including local and regional arts and cultural groups.

Methodology

We worked with the Town and the Venue Committee to identify a number of community groups, educators, and other organizations that might have demand for space. We interviewed and surveyed these groups to understand their facility needs in terms of size, functionality, and potential levels of use.
Local demand for space

- Hilton Head is home to a number of small arts groups and community organizations, many of which have demand for cultural space or increased cultural programming. These groups include:

- **The Art League of Hilton Head Island**: The Art League leases gallery space in the Art Center in addition to having academy space for hands-on programming on Cordillo Parkway. Hands-on programs are offered twice a day every day in the winter months, and gallery exhibitions at the Art Center are changed every four weeks. While this arrangement works fine for the Art League, the organization would love a space that could house both its exhibitions and programming.

- **Native Island Business + Community Affairs Association’s Gullah Celebration**: The Gullah Celebration is a month-long festival featuring a range of cultural events. Annually, it attracts 15,000 to 20,000 people. Currently, Celebration programming is spread across multiple venues and spaces on the island. NIBCAA would like to have a permanent space however and cited a redeveloped Mitchelville as an ideal option.

- **The Hilton Head Island Land Trust**: The Hilton Head Island Land Trust preserves and protects the island's critical natural resources. The Trust would like to create an outdoor classroom and garden with a nature trail in partnership with the library. In addition, the organization is currently working with local nonprofits and Historic Black Churches to have Beach City Road designated an Historic Corridor.

- **Main Street Youth Theatre**: Main Street Youth Theatre currently leases the Main Street Theatre, which is owned by Hilton Head Prep. While this works well, the Youth Theatre would love to have access to a scaled-down version of the Seahawk Cultural Center. Something with a sufficient backstage, space to build sets, sizable dressing rooms, classroom or meeting spaces, and so on. Access to such a space would allow the organization to bring back yearly summer camps.
Local demand for space

- The Hilton Head Symphony Orchestra: The Hilton Head Symphony Orchestra performs at First Presbyterian Church. Performances are regularly sold out and the facility’s limited availability is a challenge. The Symphony is exploring the possibility of using more non-traditional venues and flex spaces in effort to reach the Millennial demographic, but a large hall would still be needed. Their ideal space would have good food and beverage options (including alcohol sales), have some flexibility, and include an orchestra pit for operas or other stagings.

- Hilton Head International Piano Competition: The Hilton Head International Competition is one of the leading piano competitions in the United States. Traditionally, the Competition ran on a two-year cycle, with competitors between the ages of 13 and 18 performing one year and those between the ages 18 and 30 performing the next. A third year was recently added so that previous Competition winners could return to Hilton Head Island to perform. With additional facilities, the Competition could potentially return to its two-year cycle, incorporating returning musicians into competition programming.

- Lean Ensemble Theatre: Lean Ensemble is the newest group on the island, producing contemporary straight plays. The organization fills a very specific gap within the community and is much loved for it. Currently, Lean Ensemble uses the Main Street Theatre, although it does have its limitations (a leaking roof, inefficient HVAC, and so on). The group’s ideal facility is a large black box with flexible seating, a separate building for a shop, and rehearsal space.

- Young Artist Performances, Inc.: Young Artist Performances offers performance opportunities to advanced high school and conservatory musicians. The organization presents three public performances in addition to a series of others in community spaces (retirement communities, churches, etc.). The organization’s ideal space would have a small stage and backstage, a grand piano, great acoustics, and space for a post-concert reception.

- Hilton Head Symphony Orchestra—Youth Concerto Competition: During the Youth Concerto Competition, 10 finalists from the southeast perform one movement of a concerto with piano accompaniment. The winner receives a cash prize and performs with the Hilton Head Symphony Orchestra the following season. The ideal space for this event would have a capacity of 350 with great acoustics and additional practice spaces.
Local demand for space

- **The Hilton Head Island Carolina Shag Club**: The Hilton Head Island Carolina Shag Club is a social dancing club with more than 300 members. The group offers weekly lessons and social dance events, but struggles to find venues with wood dance floors.

- **The World Affairs Council**: The World Affairs Council has demand for a large facility to accommodate its Friday Speaker Series. The ideal facility would have orchestra seating, sound and AV capabilities, internet, hearing assistance devices, and a lobby or gathering space for socializing and book signings. In addition, it would be nice to have a space to host a luncheon with the speaker. Such a space would include a catering kitchen, round tables, and a speaker system.

- **The Hilton Head Island Biking Advisory Committee**: The Hilton Head Island Biking Advisory Committee expressed interest in the idea of developing a public art bike tour or tour of Hilton Head’s numerous pocket parks.

- **Hilton Head Island Camera Club** has demand for exhibition space.

- Anecdotal research indicates that there is demand for meeting and event space on the part of local businesses, as well as demand for visual arts studios and maker-space facilities.
Local arts demand

### User Demand: Performance Facilities

<table>
<thead>
<tr>
<th></th>
<th>Performances</th>
<th>Rehearsals /Tech</th>
<th>Other</th>
<th>Total</th>
<th>Low Capacity</th>
<th>Ideal Capacity</th>
<th>High Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hilton Head Symphony</td>
<td>20</td>
<td>60</td>
<td>-</td>
<td>80</td>
<td>-</td>
<td>1,500</td>
<td>-</td>
</tr>
<tr>
<td>Hilton Head Choral Society</td>
<td>8</td>
<td>8</td>
<td>-</td>
<td>16</td>
<td>1,000</td>
<td>1,100</td>
<td>1,200</td>
</tr>
<tr>
<td>World Affairs Council of Hilton Head</td>
<td>-</td>
<td>-</td>
<td>16</td>
<td>16</td>
<td>1,000</td>
<td>1,000+</td>
<td>-</td>
</tr>
<tr>
<td>Hilton Head Dance Theater</td>
<td>18</td>
<td>14</td>
<td>-</td>
<td>32</td>
<td>450</td>
<td>725</td>
<td>1,000</td>
</tr>
<tr>
<td>American Guild of Organists</td>
<td>1</td>
<td>1</td>
<td>-</td>
<td>2</td>
<td>-</td>
<td>600</td>
<td>-</td>
</tr>
<tr>
<td>Hilton Head International Piano Competition</td>
<td>6</td>
<td>-</td>
<td>-</td>
<td>6</td>
<td>-</td>
<td>350</td>
<td>-</td>
</tr>
<tr>
<td>Hilton Head Symphony Orchestra: Youth Concerto Competition</td>
<td>1</td>
<td>1</td>
<td>-</td>
<td>2</td>
<td>-</td>
<td>350</td>
<td>-</td>
</tr>
<tr>
<td>Main Street Youth Theatre</td>
<td>30</td>
<td>72</td>
<td>-</td>
<td>102</td>
<td>300</td>
<td>325</td>
<td>350</td>
</tr>
<tr>
<td>Lean Ensemble Theatre</td>
<td>20</td>
<td>80</td>
<td>-</td>
<td>100</td>
<td>125</td>
<td>160</td>
<td>200</td>
</tr>
<tr>
<td>Heritage Library: Speaker Series</td>
<td>-</td>
<td>-</td>
<td>5</td>
<td>5</td>
<td>-</td>
<td>150</td>
<td>-</td>
</tr>
<tr>
<td>Young Artist Performances Inc.</td>
<td>3</td>
<td>-</td>
<td>-</td>
<td>3</td>
<td>-</td>
<td>100</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Days of Use</strong></td>
<td><strong>107</strong></td>
<td><strong>236</strong></td>
<td><strong>21</strong></td>
<td><strong>364</strong></td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

- Tallying up demand for performance space, we find that 11 groups have 107 days of demand for performances, 236 days of demand for rehearsals/tech, and 21 days of demand for ‘other’ activities (mostly speaking series).
- In total, this amounts to 364 days of demand for a performance space.
Local arts demand

<table>
<thead>
<tr>
<th>User Demand Summary: Performance Facilities (11 Users)</th>
<th>Performances</th>
<th>Rehearsals /Tech</th>
<th>Other</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 to 350 seats (6 users)</td>
<td>60</td>
<td>153</td>
<td>5</td>
<td>218</td>
</tr>
<tr>
<td>600 to 725 seats (2 users)</td>
<td>19</td>
<td>15</td>
<td>0</td>
<td>34</td>
</tr>
<tr>
<td>1,000 to 1,500 seats (3 users)</td>
<td>28</td>
<td>68</td>
<td>16</td>
<td>112</td>
</tr>
<tr>
<td><strong>Total Days of Use:</strong></td>
<td><strong>107</strong></td>
<td><strong>236</strong></td>
<td><strong>21</strong></td>
<td><strong>364</strong></td>
</tr>
</tbody>
</table>

- To create this chart, we have used the data from the previous slide to group potential users according to their desired capacity needs.

- This indicates that there are six users (Hilton Head International Piano Competition, Hilton Head Symphony Orchestra’s Youth Concerto Competition, Main Street Youth Theatre, Lean Ensemble Theatre, the Heritage Library’s Speaker Series, and Young Artist Performances) in need of a facility with 100 to 350 seats 218 days of the year.

- Three groups (Hilton Head Symphony, Hilton Head Choral Society, and World Affairs Council of Hilton Head) have 112 days of demand for a facility with 1,000 to 1,500 seats.

- And, only two groups, the American Guild of Organists and Hilton Head Dance Theater need a space with 600 to 750 seats 34 days of the year.
Local arts demand

We also looked at demand for classroom and rehearsal facilities. In total, five groups have an estimated 328 days of demand for such space. However, given that Hilton Head Island has more than 200 nonprofits on the island, it is likely that this number is actually much higher, as these spaces are often also used as meeting or small event spaces.

On the following slide, we have listed Hilton Head's culturally-oriented nonprofits along with their area of focus, the audience they serve, the programming types offered, and the facility (or facilities) that are used.

Some groups have spaces of their own, but many others are using churches, retirement community facilities, or the local Starbucks. A few groups are even using meeting rooms in public works facilities like the Palmetto Electric Company, the water company building, and a fire station.

### User Demand: Classroom/Rehearsal Facilities

<table>
<thead>
<tr>
<th></th>
<th>Classroom Use</th>
<th>Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hilton Head Choral Society*</td>
<td>40</td>
<td>100</td>
</tr>
<tr>
<td>Heritage Library</td>
<td>10</td>
<td>30</td>
</tr>
<tr>
<td>World Affairs Council</td>
<td>192</td>
<td>30</td>
</tr>
<tr>
<td>Main Street Youth Theatre: Summer Camp*</td>
<td>14</td>
<td>-</td>
</tr>
<tr>
<td>Hilton Head Island Carolina Shag Club*</td>
<td>72</td>
<td>-</td>
</tr>
</tbody>
</table>

Total Days of Use: 328

*Indicates that some estimations were made*
# Local arts demand

## Hilton Head Island: Culturally Oriented Nonprofit Organizations (32 Listed)

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Focus Area</th>
<th>Population Served</th>
<th>Public Programming</th>
<th>Facility/Facilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Art League of Hilton Head</td>
<td>Visual arts</td>
<td>General</td>
<td>Exhibition, Education</td>
<td>Academy, Arts Center of Coastal Carolina</td>
</tr>
<tr>
<td>Arts Center of Coastal Carolina</td>
<td>Performing arts</td>
<td>General</td>
<td>Presenting, Producing, Rental, Education</td>
<td>Arts Center of Coastal Carolina</td>
</tr>
<tr>
<td>Arts + Cultural Council of Hilton Head</td>
<td>General arts + culture</td>
<td>General</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Barbershop Harmony Society: Hilton Head Island Barbershoppers</td>
<td>Music</td>
<td>General</td>
<td>Producing</td>
<td>Cypress Clubhouse in Hilton Head Plantation</td>
</tr>
<tr>
<td>Coastal Discovery Museum</td>
<td>Heritage, Nature</td>
<td>General</td>
<td>Exhibition, Rental, Education</td>
<td>Coastal Discovery Museum</td>
</tr>
<tr>
<td>Embroiderers Guild of America: Low Country Chapter</td>
<td>Visual Arts</td>
<td>Adults</td>
<td>Exhibition, Education</td>
<td>Community Room of Palmetto Electric Company</td>
</tr>
<tr>
<td>Gullah Museum of Hilton Head Island</td>
<td>Heritage, culturally specific</td>
<td>General</td>
<td>Exhibition, Education</td>
<td>Gullah Museum</td>
</tr>
<tr>
<td>Heritage Library Foundation</td>
<td>Heritage</td>
<td>General</td>
<td>Exhibition, Education</td>
<td>Heritage Library</td>
</tr>
<tr>
<td>Hilton Head Choral Society, Inc.</td>
<td>Music</td>
<td>General</td>
<td>Producing</td>
<td>Cypress Clubhouse in Hilton Head Plantation</td>
</tr>
<tr>
<td>Hilton Head Dance Theatre</td>
<td>Dance</td>
<td>General</td>
<td>Producing, Education</td>
<td>Hilton Head Dance School</td>
</tr>
<tr>
<td>Hilton Head Island Carolina Shag Club</td>
<td>Dance</td>
<td>Adults</td>
<td>Education</td>
<td>Dophin Head Golf Club, Starbucks, Poseidon Rooftop Bar</td>
</tr>
<tr>
<td>Hilton Head Jammers</td>
<td>Music</td>
<td>General</td>
<td>Producing</td>
<td>N/A</td>
</tr>
<tr>
<td>Hilton Head Symphony Orchestra</td>
<td>Music</td>
<td>General</td>
<td>Producing, Education</td>
<td>First Presbyterian Church, Retirement Facility</td>
</tr>
<tr>
<td>Island School Council of the Arts</td>
<td>General arts + culture</td>
<td>Youth/Children</td>
<td>N/A</td>
<td>Arts Center of Coastal Carolina, Westin Hilton Head Island, Village at Wexford, Others</td>
</tr>
<tr>
<td>Island Writers Network</td>
<td>Literary arts</td>
<td>Adults</td>
<td>Education</td>
<td>Heritage Library</td>
</tr>
<tr>
<td>Junior Jazz Foundation</td>
<td>Music</td>
<td>Youth/Children</td>
<td>Presenting, Education</td>
<td>Sonesta Resort</td>
</tr>
<tr>
<td>Low Country Civil War Roundtable</td>
<td>Heritage</td>
<td>Adults</td>
<td>Education</td>
<td>Bluffton High School Auditorium</td>
</tr>
<tr>
<td>Main Street Youth Theatre</td>
<td>Theatre</td>
<td>Youth/Children</td>
<td>Producing, Education</td>
<td>Main Street Youth Theatre, Fire Station</td>
</tr>
<tr>
<td>Mitchville Preservation Project</td>
<td>Heritage, culturally specific</td>
<td>General</td>
<td>Education</td>
<td>N/A</td>
</tr>
<tr>
<td>National Society Daughters of the American Revolution: Cpt. William Hilton Chapter</td>
<td>Heritage</td>
<td>Adults</td>
<td>Education</td>
<td>N/A</td>
</tr>
<tr>
<td>National Society Sons + Daughters of the Pilgrims</td>
<td>Heritage</td>
<td>Adults</td>
<td>Education</td>
<td>N/A</td>
</tr>
<tr>
<td>Omnipeace Foundation</td>
<td>Music</td>
<td>N/A</td>
<td>Producing</td>
<td>N/A</td>
</tr>
<tr>
<td>Palmetto Quilt Guild</td>
<td>Visual arts</td>
<td>Adults</td>
<td>Education</td>
<td>Hilton Head Beach + Tennis Resort, Water Company</td>
</tr>
<tr>
<td>Sandbox: A Hilton Head Area Children’s Museum</td>
<td>General education</td>
<td>Youth/Children</td>
<td>Exhibition, Education</td>
<td>Sandbox</td>
</tr>
<tr>
<td>Sea Pines Forest Preserve Foundation</td>
<td>Nature</td>
<td>General</td>
<td>Education</td>
<td>N/A</td>
</tr>
<tr>
<td>Seahawk Theatre Guild</td>
<td>Theatre</td>
<td>Youth/Children</td>
<td>Producing</td>
<td>Hilton Head High School</td>
</tr>
<tr>
<td>Society Sons of the American Revolution - Dr. George Mosse Chapter</td>
<td>Heritage</td>
<td>Adults</td>
<td>Education</td>
<td>Tide Pointe</td>
</tr>
<tr>
<td>Sweet Adelines, International - Hilton Head Shore Notes</td>
<td>Music</td>
<td>General</td>
<td>Producing, Education</td>
<td>Island Lutheran Church</td>
</tr>
<tr>
<td>The Mary Green Singers + Chorale</td>
<td>Music</td>
<td>General</td>
<td>Producing</td>
<td>Holy Family Church, All-Saints Episcopal Church, St. Gregory the Great Catholic Church</td>
</tr>
<tr>
<td>The National Society Colonial Dames XVII Century: Hilton Head Island Chapter</td>
<td>Heritage</td>
<td>Adults</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>The Performing Arts Consortium, Inc.</td>
<td>Music</td>
<td>Youth/Children</td>
<td>Producing</td>
<td>N/A</td>
</tr>
<tr>
<td>Young Artist Performances, Inc.</td>
<td>Music</td>
<td>Youth/Children</td>
<td>Producing</td>
<td>Private Homes, Retirement Communities, Churches</td>
</tr>
</tbody>
</table>

**Webb Management Services Inc.**
Educational sector demand

- Hilton Head Prep School owns and operates Main Street Theatre, using it for school productions and renting it to community groups like Lean Ensemble Theatre and Main Street Youth Theatre. While Hilton Head Prep does not necessarily have demand for using a new performance space, the school does have interest in taking students to more shows at the Arts Center, participating in outreach opportunities (i.e. in-school workshops, having share their experiences working in the arts, and so on), and providing students with more opportunities to engage in the history/heritage of the island.

- University of South Carolina-Beaufort recently opened their Hilton Head Gateway Campus in Bluffton. The school is in need of additional facilities and would be interested in using space to expand its performing arts programs or grow its hospitality programming.
Touring commercial entertainment demand

* Our research indicates that there is potential for a new facility to attract some touring entertainment.

* Greg Russell, for example, produced 75 outdoor shows on the island between 2000 and 2010 to much success. His biggest challenge was that there was not an appropriate venue for such events on the island. For every concert he produced, he was required to build a stage, rent equipment, and so on, making presenting a concert an expensive undertaking.

* Conversations with presenters in Greenville and Pawleys Island were also positive. The North Carolina Presenters Consortium, for example, which includes members from South Carolina, creates a space for presenters to block-book acts across venues that are similar in size and programming style. This makes it more likely for artists or groups coming from Florida or California to perform in a given market.
Program demand

- There are limited opportunities for Hilton Head residents and visitors to take cultural arts classes.
- There are some opportunities for visual artists, with for-profit ventures like the IDEA Studio and The Arts Cafe, in addition to the Art League. But, there are limited classes and programs in the performing arts.
- The Hilton Head Island Recreation Association, the nonprofit dedicated to improving quality of life on the island, is primarily dedicated to wellness and recreation.
- We see an opportunity for additional programs that are accessible to all members of the community at a variety of price points, durations (workshops versus three-week offerings versus six-week offerings and so on), skill levels, and locations.
Summary of user demand

- There is demand for new arts and cultural facilities on the part of local arts groups and organizations. This demand totals 364 days in a performance space and 328 days in a classroom or rehearsal space.

- The challenge is that this demand for multiple types and sizes of space. While groups like the Symphony, the International Piano Competition, the Choral Society, and the World Affairs Council have need for a large capacity facility with excellent acoustics, groups like Main Street Youth Theatre and Lean Ensemble Theatre have need for a small, flexible space that can be arranged in a number of configurations.

- There is also demand for studio, exhibition, classroom, rehearsal, and meeting space as well as arts and cultural programs.

- Research indicates that there is opportunity for presenting commercial entertainment as well as partnerships to minimize the burden of doing so.
Existing facilities
Overview

In order to assess the competitive situation for new cultural or civic facilities, we developed five inventories:

- **Performance Facilities Inventory**: Local (defined as Hilton Head Island) and regional (within a 25-mile radius of Hilton Head Island) facilities used on a regular basis (4 or more times per year) for live performances.

- **Outdoor Facilities Inventory**: Outdoor performance facilities on Hilton Head Island.

- **Museums + Heritage Sites**: Museum and heritage sites on Hilton Head Island.

- **Community Festivals Inventory**: Hilton Head Island’s community festivals.

- **Arts/Culture/Heritage Program Spaces**: Facilities on the island that are used for cultural programming.

- **Local Meeting + Event Facilities**: Meeting and event spaces on Hilton Head Island.

We consider these facilities in terms of their amenities, features, programming, and availability in order to identify gaps.
Performance facilities

Methodology:

* The inventory considers the physical features and types of activities hosted in 33 local and regional indoor facilities (13 locally and 20 regionally) with capacities between 100 and 2,524 seats.

* In addition, the condition and functionality of each facility has been rated using eight variables. They are:
  * Facility condition,
  * Staff and support,
  * Theatrical functionality,
  * Acoustics,
  * Customer amenities,
  * User amenities,
  * Atmosphere/character, and
  * Suitability for users.

* Variables are rated on a scale of 1 to 4, with the higher score being better. The ‘building condition’ and ‘staff and support’ categories carry the most weight.
# Performance facilities

## Hilton Head Island Performance Facilities Inventory

### Indoor facilities on Hilton Head Island

<table>
<thead>
<tr>
<th>Type</th>
<th>Facility</th>
<th>Capacity</th>
<th>Event Types Supported</th>
<th>Facility Condition</th>
<th>Staff and Support</th>
<th>Theatrical Functionality</th>
<th>Acoustics</th>
<th>Customer Amenities</th>
<th>Atmosphere/Character</th>
<th>Suitability for Users</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Religious</td>
<td>First Presbyterian Church</td>
<td>1,000</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>1.0</td>
</tr>
<tr>
<td>Religious</td>
<td>Holy Family Catholic Church*</td>
<td>1,000</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1.0</td>
</tr>
<tr>
<td>School/Uni.</td>
<td>Hilton Head Island High School: Seahawk Cultural Center</td>
<td>653</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>2.4</td>
</tr>
<tr>
<td>School/Uni.</td>
<td>St. Francis Catholic School*</td>
<td>500</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>1.7</td>
</tr>
<tr>
<td>Performance</td>
<td>Arts Center of Coastal Carolina: Elizabeth Wallace Theater</td>
<td>349</td>
<td>10</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3.2</td>
</tr>
<tr>
<td>Other</td>
<td>The Rooftop Bar at Poseidon</td>
<td>300</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>1.9</td>
</tr>
<tr>
<td>Religious</td>
<td>St. Francis by the Sea Catholic Church</td>
<td>300</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>2.0</td>
</tr>
<tr>
<td>School/Uni.</td>
<td>Hilton Head Preparatory School: Main Street Theatre</td>
<td>230</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>2.1</td>
</tr>
<tr>
<td>Performance</td>
<td>Arts Center of Coastal Carolina: Rachel + John Jakes Studio Theater</td>
<td>175</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>2.8</td>
</tr>
<tr>
<td>School/Uni.</td>
<td>Hilton Head Island High School: Black Box</td>
<td>100</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>2.0</td>
</tr>
<tr>
<td>Other</td>
<td>The Jazz Corner</td>
<td>80</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>2.2</td>
</tr>
<tr>
<td>Other</td>
<td>The Boardroom*</td>
<td>50</td>
<td>1</td>
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</table>
Performance facilities

Hilton Head Island Performance Facilities Inventory

Indoor facilities within 25 mi. of Hilton Head Island

<table>
<thead>
<tr>
<th>Facility Name</th>
<th>Type</th>
<th>Capacity</th>
<th>Presenting Activity</th>
<th>Producing Activity</th>
<th>Rental Activity</th>
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<tbody>
<tr>
<td>Savannah Civic Center: Johnny Mercer Theater</td>
<td>Performance</td>
<td>2,524</td>
<td>Theatre, Dance</td>
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<tr>
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<td>Performance</td>
<td>1,200</td>
<td>Theatre, Dance</td>
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<tr>
<td>Savannah College of Art + Design: Trustees Theater</td>
<td>School/Uni.</td>
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<td>Theatre, Dance</td>
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<tr>
<td>May River High School Auditorium*</td>
<td>School/Uni.</td>
<td>800</td>
<td>Theatre, Dance</td>
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<tr>
<td>Battery Creek High School Auditorium*</td>
<td>School/Uni.</td>
<td>719</td>
<td>Theatre, Dance</td>
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<tr>
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<td>School/Uni.</td>
<td>650</td>
<td>Theatre, Dance</td>
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<tr>
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<td>School/Uni.</td>
<td>607</td>
<td>Theatre, Dance</td>
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<tr>
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<td>Performance</td>
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<td>Theatre, Dance</td>
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<td>Theatre, Dance</td>
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<tr>
<td>Savannah State University: JFK Auditorium (under construction)</td>
<td>School/Uni.</td>
<td>250</td>
<td>Theatre, Dance</td>
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<td>Tybee Post Theater</td>
<td>Performance</td>
<td>206</td>
<td>Theatre, Dance</td>
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<tr>
<td>Savannah Children’s Theatre*</td>
<td>Performance</td>
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<td>Theatre, Dance</td>
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<tr>
<td>Savannah State University: Elmore Theater</td>
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<td>Theatre, Dance</td>
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<tr>
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<td>Performance</td>
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<td>Theatre, Dance</td>
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<tr>
<td>Muse Arts Warehouse</td>
<td>Performance</td>
<td>100</td>
<td>Theatre, Dance</td>
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<tr>
<td>Savannah Cultural Affairs: Black Box</td>
<td>Performance</td>
<td>100</td>
<td>Theatre, Dance</td>
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</table>

*Some capacities and/or characteristics estimated.
## Performance facilities

### Hilton Head Island Performance Facilities Inventory

**Indoor facilities on Hilton Head Island**

<table>
<thead>
<tr>
<th>Type</th>
<th>Facility</th>
<th>Capacity</th>
<th>Presenting Activity</th>
<th>Producing Activity</th>
<th>Rental Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance</td>
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<td>Performance</td>
<td>Historic Savannah Theatre*</td>
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### Performance Facilities Table

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<th>Facility Condition</th>
<th>Staff and Support</th>
<th>Theatrical Functionality</th>
<th>Acoustics</th>
<th>Customer Amenities</th>
<th>Atmosphere/Character</th>
<th>Suitability for Users</th>
<th>Rating</th>
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### Figure

The figure illustrates the performance facilities on Hilton Head Island, categorized by type, with ratings for different aspects such as capacity, presenting activity, producing activity, and rental activity. Each facility is depicted with a specific color intensity for each category, indicating its capability and popularity.
# Performance facilities

## Hilton Head Island Performance Facilities Inventory

*Indoor facilities within 25 mi. of Hilton Head Island*

<table>
<thead>
<tr>
<th>Type</th>
<th>Facility Name</th>
<th>Capacity</th>
<th>Event Types Supported</th>
<th>Event Condition</th>
<th>Staff and Support</th>
<th>Theatrical Functionality</th>
<th>Acoustics</th>
<th>Customer Amenities</th>
<th>Space/Environment/Atmosphere/Character</th>
<th>Suitability for Users</th>
<th>Facility Rating</th>
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<tbody>
<tr>
<td>Performance</td>
<td>Savannah Civic Center: Johnny Mercer Theater</td>
<td>2,524</td>
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<td>4</td>
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<tr>
<td>Performance</td>
<td>Lucas Theatre for the Arts</td>
<td>1,200</td>
<td>4</td>
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</tr>
<tr>
<td>School/Uni.</td>
<td>Savannah College of Art + Design: Trustees Theater</td>
<td>1,105</td>
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<td>School/Uni.</td>
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</tr>
</tbody>
</table>

*Some capacities and/or characteristics estimated.*

## Availability

- **Not Available**
- **Low**
- **Medium**
- **High**

- **Flexible Seating**
- **Food Service/Concessions**
- **Alcohol Allowed**
- **Dedicated Parking**
- **Lighting Equipment**
- **Sound Equipment**
- **Film/Projection Equipment**
- **Ticketing Services**

- **20%**
- **40%**
- **60%**
- **80%**
- **100%**
- **25%**
- **50%**
- **75%**
- **90%**
- **95%**

- **27%**
- **52%**
- **18%**
- **3%**

<table>
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<th>Flexible Seating</th>
<th>Kitchen Facilities</th>
<th>Rehearsal/Program Space</th>
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<th>Dedicated Parking</th>
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<th>Lighting Equipment</th>
<th>Sound Equipment</th>
<th>Film/Projection Equipment</th>
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<td>Savannah College of Art + Design: Trustees Theater</td>
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<td>May River High School Auditorium*</td>
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<tr>
<td>Battery Creek High School Auditorium*</td>
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<tr>
<td>Beaufort High School Performing Arts Center*</td>
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<td>Savannah College of Art + Design: Arnold Hall Theater</td>
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<td>Bluffton High School Auditorium</td>
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<td>Sun City Hilton Head: Magnolia Hall*</td>
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<tr>
<td>USC Library Center for the Arts</td>
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<td>Trustees Garden: Charles H. Morris Center</td>
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<tr>
<td>Savannah State University: JFK Auditorium (under construction)</td>
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<td>Tybee Post Theater</td>
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<td>Savannah Children's Theatre*</td>
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<td>Savannah State University: Elmore Theater</td>
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<td>Savannah College of Art + Design: Mondanaro Theater</td>
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<tr>
<td>Bluffton Town Hall: Ulmer Auditorium*</td>
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<tr>
<td>Muse Arts Warehouse</td>
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<tr>
<td>Savannah Cultural Affairs: Black Box</td>
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</tbody>
</table>
Performance facilities

HHI Regional Perf. Facilities

PERFORMANCE
RELIGIOUS
SCHOOL/UNI.
OTHER
25-MILE RADIUS

Performance facilities across the region, with specific locations marked on the map within a 25-mile radius.
Performance facilities

**Presenting + Producing Activity**

* Music is the most commonly presented activity in both local and regional performance facilities.
* Locally and regionally, there is limited presenting of theatre, dance, or family and culturally specific programming.
* More than half of the facilities inventoried, both locally and regionally, are used to produce performing arts.
* On Hilton Head Island, the Arts Center is the primary presenter of traditional performing arts (theatre, dance, etc.).
Performance facilities

Features + Amenities

* Six facilities on Hilton Head Island have flexible seating. Of these, four are ‘other’ facilities (primarily bars or restaurants).

* Locally and regionally, a number of facilities have kitchens and/or rehearsal/program space. Few facilities have an orchestra pit or fly space.

* For the most part, facilities are well equipped with lighting, sound, and film/projection equipment.

* Locally, more facilities allow alcohol, have food service/concessions, and have ticketing services than regional facilities.
The matrix at right plots each inventoried facility according to its capacity (the x-axis) and quality (the y-axis) in order to give us a sense of where there might be gaps in Hilton Head’s current inventory of performance spaces.

The size of the circle indicates the number of different types of activities a facility supports: the larger the circle, the more activity types are supported.

Based on the matrix, we can see that most facilities have capacities of 1,000 seats or fewer.

The majority of facilities have mid-range quality ratings and most support only a few activity types.

No local facilities have a capacity larger than 1,000 seats. Further, the three regional facilities with 1,000+ capacities are all in Savannah.
Performance facilities

* Here, we zoom in on the previous matrix to focus on facilities with 1,000 seats or fewer.

* This indicates that local facilities tend to be lower in quality than regional facilities.

* Locally and regionally, the Arts Center’s Wallace Theater has the best quality rating.
This matrix organizes facilities according to type.

Of the 33 facilities inventoried, 14 (including the Seahawk Cultural Center and Main Street Theatre) belong to a high school or university. Typically such spaces have limited availability and concessions.

Three facilities are religious and three are ‘other’ (specifically, Hilton Head Island bars/restaurants that are used for music or comedy).

Twelve of the inventoried facilities are performance spaces. Of those, only two are on Hilton Head Island and both are located in the Arts Center.
Performance facilities

* Lastly, we consider the availability of each facility.

* Availability is determined through conversations with facility managers and users or through online research and is based on the ease with which a facility is booked on prime days of the week (Thursday, Friday, and Saturday).

* Seventeen of the inventoried facilities have limited availability, six have medium availability, and nine have no availability. Only one facility, the black box at Savannah Cultural Affairs, has high availability.
All of this research indicates that there are gaps for high-quality performance spaces in the market, particularly within the 1,000 seats or fewer and 1,300 to 2,400-seat capacity ranges.

The matrix also shows that the main theater at the Arts Center could serve an important set of users needing a smaller space, if available.
The Arts Center of Coastal Carolina opened in 1996 to be the home of a community theatre company and serve a range of other community needs. The facility features a 349-seat theater, a small black box, a gallery, and meeting rooms.

Programming is now dominated by self-produced theatre (five plays or musicals a season), as the managing organization has developed into a professional producing theatre company. Between March 1996 and August 2016, the Arts Center has produced 113 shows and presented 261 performing acts, accounting for 3,769 total performances. Total attendance in this time has reached 1,331,252.

The Arts Center receives a large portion of the ATAX ($396,000 in 2016), indeed the largest of any other organization on the island.

While the facility has an excellent set of spaces and is in fine condition, it is in need of new technical equipment. A study completed by Theatre Consultants Collaborative in 2015 estimates that replacing and updating the Arts Center’s current lighting system might cost up to $1.1 million.

To help manage these costs, as well as the cost of damage from Hurricane Matthew, the Arts Center recently presented the Town with a sale and leaseback proposal. The proposal suggests that the Town purchase the Arts Center land and building for $6 million and enter into a lease agreement that allows the Arts Center to lease back the building for $1 per year. The Town has yet to decide whether or not to move forward with this arrangement.
The following slides look at the Art Center's utilization for the years 2016 and 2017. In short, how often each of its various spaces are used over the course of the year and what they are used for.

This first slide looks specifically at the utilization of the Theater:

In 2016, the theater had 303 total days of use. Of these, 251 were related to Arts Center productions (performance, rehearsal, load-in/out). Twenty-seven days were used for a presenting activity (performance, rehearsal, load-in/load-out, or tech), and 25 days of use were by outside users as renters (13 for performances, three for rehearsals, and nine for load-in/load-out).

For 2017, the theater is scheduled to have 301 total days of use. Producing activity takes up 270 days of use. Presenting activity represents 16 days of use and outside rentals represent 15 days of use.
Here, we look at the utilization of the Black Box.

- In 2016, the Black Box had 137 total days of use, with producing activity on 126 days, presenting on 8 days and 3 days of rentals.

- In 2017, the Black Box is scheduled to have 133 total days of use, with producing activity on 118 days, presenting on 12 days and 3 days of rentals.

- Unlike the main theater, there should be some capacity to increase utilization of this space.
The Art Center’s other spaces—the Heritage Room, Community Room, and Art Studio—are not nearly as busy as the theaters and are activated mostly through internal programs.
Other key spaces

- The 1,000-seat sanctuary at First Presbyterian Church has been the workhorse for several of the larger groups on the island, including the Symphony and World Affairs Council. The Church has been very accommodating, but there are severe functional limitations with the space, acoustical challenges, and also limited amenities for audiences. In addition, the growth of the Church’s own programs is limiting the availability of the space, a trend that might well continue.

- The Seahawk Cultural Center at Hilton Head High School has a reasonable 653-seat auditorium that is used by some outside groups, including Hilton Head Dance Theater. Again, there are significant physical limitations with the space, as well as limited availability and the difficulty of securing dates well in advance.

- Main Street Theatre is a vital resource for Hilton Head Island’s small performing arts groups. It is, however, in constant demand and is in need of capital improvements.
Outdoor facilities

Methodology

※ There are eight outdoor performance spaces that are used for arts and culture events four or more times per year.
※ These facilities range in capacity from 30 to 2,000.
※ Each inventoried space has been rated based on the following attributes:
   ※ Facility condition,
   ※ Staff and support,
   ※ Theatrical functionality,
   ※ Acoustics,
   ※ Customer amenities,
   ※ User Amenities,
   ※ Atmosphere/Character, and
   ※ Suitability for users.
※ Like the previous inventory, the ‘facility condition’ and ‘staff and support’ categories carry the most weight.
Outdoor facilities

Hilton Head Island Outdoor Facilities Inventory
Local outdoor facilities that accommodate cultural performances

<table>
<thead>
<tr>
<th>Facility</th>
<th>Capacity</th>
<th>Fixed Seats</th>
<th>Event Types Supported</th>
<th>Facility Condition</th>
<th>Staff and Support</th>
<th>Theatrical Functionality</th>
<th>Acoustics</th>
<th>Customer Amenities</th>
<th>User Amenities</th>
<th>Atmosphere/Character</th>
<th>Suitability for Users</th>
<th>Facility Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shelter Cove Community Park Pavilion</td>
<td>2,000</td>
<td>0</td>
<td>3</td>
<td>4</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>2</td>
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<td>2.1</td>
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<tr>
<td>Coastal Discovery Museum; Mary Ann Peeples Pavilion</td>
<td>250</td>
<td>0</td>
<td>3</td>
<td>2</td>
<td>3</td>
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<td>3</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2.4</td>
</tr>
<tr>
<td>Sea Pines Resort; Liberty Oak Pavilion</td>
<td>200</td>
<td>200</td>
<td>3</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>4</td>
<td>2</td>
<td>4</td>
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<td>1</td>
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<td>2</td>
<td>1</td>
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<td>1.9</td>
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<td>Tiki Hut</td>
<td>150</td>
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<td>3</td>
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<td>1</td>
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<tr>
<td>Coligny Center Stage</td>
<td>120</td>
<td>120</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>4</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>2.2</td>
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<tr>
<td>Aunt Chilada's Easy Street Café</td>
<td>100</td>
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<td>2</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>3</td>
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<td>2</td>
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<td>2.0</td>
</tr>
<tr>
<td>Coastal Discovery Museum; Bird's-Eye View Theater</td>
<td>30</td>
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<td>2</td>
<td>2</td>
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</tbody>
</table>

*Some capacities and/or characteristics estimated.
Hilton Head Island Outdoor Facilities Inventory

*Local outdoor facilities that accommodate cultural performances*

<table>
<thead>
<tr>
<th>Facility</th>
<th>Capacity</th>
<th>Fixed Seats</th>
<th>Event Types Supported</th>
<th>Facility Condition</th>
<th>Staff and Support</th>
<th>Theatrical Functionality</th>
<th>Acoustics</th>
<th>Customer Amenities</th>
<th>User Amenities</th>
<th>Atmosphere/Character</th>
<th>Suitability for Users</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shelter Cove Community Park Pavilion</td>
<td>2,000</td>
<td>0</td>
<td>3</td>
<td>4</td>
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<tr>
<td>Coastal Discovery Museum: Mary Ann Peeples Pavilion</td>
<td>250</td>
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<tr>
<td>Sea Pines Resort: Liberty Oak Pavilion</td>
<td>200</td>
<td>200</td>
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<tr>
<td>Shelter Cove Community Park Veteran's Memorial*</td>
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<tr>
<td>Tiki Hut</td>
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<td>Coligny Center Stage</td>
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<tr>
<td>Coastal Discovery Museum: Bird's-Eye View Theater</td>
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</tbody>
</table>

*Some capacities and/or characteristics estimated.*
Outdoor facilities
Outdoor facilities

Presenting + Producing Activity

* Outdoor programming on Hilton Head Island is music oriented.
* Two venues (25 percent of inventoried outdoor facilities) present family programming.
* Producing activity is centered around festivals and special events.
* Two facilities are used for Academic/Educational programs, both of which are operated by the Coastal Discovery Museum.
Outdoor facilities

Features + Amenities

- Two outdoor facilities have covered seating areas: Shelter Cove Community Park Pavilion and the Coastal Discovery Museum’s Mary Ann Peeples Pavilion.
- Three have kitchen facilities and one has rehearsal/program space.
- All of the inventoried outdoor facilities have dedicated parking. Half (50 percent) allow alcohol and 38 percent have food service/concessions.
- Outdoor facilities are not well equipped: only three (38 percent) have lighting equipment and two (25 percent) have sound equipment.
This matrix indicates the quality of Hilton Head Island’s outdoor performance facilities in relationship to their capacity.

All of the facilities have medium quality ratings and only one has a capacity above 250.

This leaves a large gap for a high-quality, large-capacity outdoor performance venue.
Methodology

- The inventory considers the programming and features of 18 Hilton Head Island museums and heritage sites.
- Each inventoried site has been rated based on the following:
  - Site condition,
  - Staff and support,
  - Visitor amenities,
  - Program space, and
  - Atmosphere/Character.
- Like with previous inventories, the 'site condition' and 'staff and support' categories carry the most weight.
# Museums + heritage sites

## Hilton Head Island Museums + Heritage Sites

<table>
<thead>
<tr>
<th>Facility</th>
<th>Type</th>
<th>Year Est.</th>
<th>Total Area (acres)</th>
<th>Current Programs</th>
<th>Site Condition</th>
<th>Staff and Support</th>
<th>Visitor Amenities</th>
<th>Program Space</th>
<th>Atmosphere/Character</th>
<th>Rating</th>
<th>Size*</th>
<th>Current Programs</th>
<th>Facility Features</th>
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<tbody>
<tr>
<td>The Sandbox Children's Museum</td>
<td>Museum</td>
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<td>&lt;1</td>
<td>3</td>
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<td>3.0</td>
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<tr>
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<td>Harbour Town Lighthouse + Museum*</td>
<td>Museum</td>
<td>1969</td>
<td>&lt;1</td>
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<td>3</td>
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<td>3</td>
<td>2.6</td>
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<tr>
<td>Gullah Museum of Hilton Head (William Simmons House)*</td>
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</table>

*Acresage and/or characteristics are estimated.  
Rough size guideline: S=<10 acres; M=10-50 acres; L=>50 acres
Museums + heritage sites
Museums + heritage sites

*I* Hilton Head Island is home to 13 heritage sites, four museums, and the Hilton Head Heritage Library.

**Heritage Sites**

*I* Out of the 13 heritage sites, seven are clustered along Beach City Road on the northeast end of the island.

*I* With the exception of three historic churches, none of the inventoried sites are programmed. Mitchelville Freedom Park, however, is planned to be programmed with visual arts, lectures and presentations, and other participatory activities.

*I* Most sites date to the Civil War era and are historically significant. Fort Howell, for example, was added to the National Register of Historic Places in 2011 and, in 2013, was selected as a site in the National Park Service’s National Underground Railroad Network to Freedom Program.

**Museums + Library**

*I* Hilton Head Island’s museums and Heritage Library vary in purpose and programming. They provide opportunities for children, culturists, environmentalists, historians, lighthouse enthusiasts, and the like.

*I* Most host free public gatherings, while The Coastal Discovery Museum and The Sandbox Children’s Museum offer participatory visual arts and educational programs.

*I* Harbour Town Lighthouse + Museum is the only facility with a café/restaurant.
The matrix indicates that most museums and heritage sites are of medium quality and that museums offer the greatest variety of activities.

In the inventory, Mitchelville has been recorded according to plans for the future of the park and, as such, is shown here with a medium quality and large number of programs supported.
Museum + heritage sites: Mitchelville

* Founded by Ormsby Mitchel, a Union Army general, in 1862, Mitchelville was the first self-governing community of freed slaves during the Civil War. Located along the northeast end of Hilton Head Island, the town encompassed an area that was roughly two miles long and one mile wide. At its height, in 1865, it had a population of 3,500 freedmen.

* Mitchelville residents built their own homes, created their own government, and established the first compulsory school system in the south. In 1868, however, the Union Army, which had been the primary employer of Mitchelville residents, ended its occupation of the island. In search of jobs, many Mitchelville residents left, and by the 1880s, the community no longer existed as a formal town.

* Today, Mitchelville is a recorded archeological site. Its 33 acres are owned by the Town, although a nonprofit group, Mitchelville Preservation Project (MPP), has formed to “replicate, preserve, and sustain [the site] and educate the public about the sacrifice, resilience, and perseverance of the freedmen of Mitchelville.” The long-term vision is that Mitchelville will become an active history site, with space for revolving exhibits, lectures, forums, tours, and cultural programs.

* Currently, MPP is working with the Coastal Discovery Museum to hire an Executive Director for Mitchelville who will be able to advance the project.

* In addition, the Town is in the process of leasing the Mitchelville site to MPP. As part of this arrangement, MPP would be granted two years of free maintenance, with two years to write a business plan.

* Partnership opportunities for Mitchelville exist with:
  * The Mayor’s Heritage Tourism Task Force;
  * The National Park Service; and,
  * The Gullah Geechee Cultural Heritage Corridor.
Museum + heritage sites: Mitchelville
Museum + heritage sites: coastal discovery museum

The Smithsonian-affiliated Coastal Discovery Museum was founded in 1985. In 2007, it moved into a repurposed plantation (The Discovery House) on the 68-acre Honey Horn property, where it is surrounded by some of the oldest structures on the island; a native butterfly enclosure; bog, heritage, and camellia gardens; and a horse barn.

The Discovery House is 6,000 square feet and is the center of the Museum’s activities. Permanent and temporary exhibition space (there are six to 8 temporary exhibitions a year), a kids zone, a gift store, and meeting/lecture/classroom space can all be found in the building, which is also used to host the Discovery Lecture Series.

The Museum’s mission, “to make a difference in the way people think about and interact with the environment, history, culture, and art through telling the story of the Lowcountry,” is deeply embedded in all of its programming, which includes land and beach tours, kayak tours, dolphin research excursions, and marine science expeditions. In addition, the Museum manages the island’s Sea Turtle Protection Program, offers a Horseshoe Crabs in the Classroom program, and has marsh tacky horses on-site.

Ten years after its move to Honey Horn, the Museum is once again at a point of growth. Last year, staff completed a strategic plan redefining its mission and vision for the future. The plan identifies the following goals:

- To expand digital strategies to reach more people;
- To offer new programs and ways of engaging to the public so that they can participate in meaningful stewardship;
- To implement a Master Plan for Honey Horn, including upgrading its historic structures;
- To plan for a new, 10,000 square foot building to host traveling exhibitions and engage visitors in the many ways they can experience the Lowcountry;
- To grow staff capacity; and,
- To expand the organization’s annual operating budget.

In 2016, attendance at the Museum reached 120,000 people. Of those, 83 percent were tourists, making the Coastal Discovery Museum an important amenity for tourists and residents alike.
The inventory identifies 38 community festivals that take place on Hilton Head Island throughout the year.

For each festival, its primary theme has been noted as well as whether or not it includes food/drink, live music, and/or family activities.
Festival locations

* Festivals take place across the island, although Shelter Cove is the most common festival location.

* Other locations include The Sandbox, Honey Horn, Coligny, and Harbour Town.
Community festivals

* July, November, and March have the most festivals, followed by May, June, August, September, and October.
* April is the slowest month, having only one event, Easter Eggstravaganza.
* Twelve festivals (32 percent) have a holiday or seasonal theme and seven (18 percent) are themed around food/drink.
* There are two art festivals, two music festivals, three heritage festivals, and three boat-oriented festivals.
* There are no festivals focused on marine or island life, nature, or the environment.
* Sixty-eight percent of the inventoried festivals have food/drink available, 68 percent have family activities, and 58 percent have live music.
Meeting + event facilities

Methodology

✲ This inventory includes 82 Hilton Head Island facilities used for meetings and events.

✲ Each inventoried site has been rated based on the following attributes:
  ✲ Facility condition,
  ✲ Staff + support, and
  ✲ Functionality/features.

✲ The inventoried facilities have reception capacities that range from 40 to 2,000 and theater-seating capacities that range from 40 to 1,600.
# Meeting + event facilities

**Hilton Head Island Meeting+Event Facilities**

*Indoor venues in Hilton Head with capacities of 15+*

<table>
<thead>
<tr>
<th>Type</th>
<th>Facility</th>
<th>Facility Condition</th>
<th>Staff+Support</th>
<th>Functionality/Features</th>
<th>Average Rating</th>
<th>Reception</th>
<th>Theater</th>
<th>Banquet</th>
<th>Conference</th>
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<th>Other Event/Meeting Rooms</th>
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<th>Projection Equipment</th>
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### Hilton Head Island Meeting + Event Facilities

*Indoor venues in Hilton Head with capacities of 15+*

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<th>Type</th>
<th>Facility Condition</th>
<th>Facility Support</th>
<th>Functionality/Features</th>
<th>Average Rating</th>
<th>Reception</th>
<th>Theater</th>
<th>Banquet</th>
<th>Conference</th>
<th>Classroom</th>
<th>Historic Venue</th>
<th>Other Event/Meeting Rooms</th>
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<th>Sound Equipment</th>
<th>Projection Equipment</th>
<th>Internet/Wi-fi</th>
<th>On-site Catering</th>
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### Hilton Head Island Meeting + Event Facilities

*Indoor venues in Hilton Head with capacities of 15+*

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### Hilton Head Island Meeting+Event Facilities

*Indoor venues in Hilton Head with capacities of 15+*

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<th>Type</th>
<th>Facility Condition</th>
<th>Staff + Support</th>
<th>Functionality/Features</th>
<th>Average Rating</th>
<th>Reception</th>
<th>Theater</th>
<th>Banquet</th>
<th>Conference</th>
<th>Classroom</th>
<th>Historic Venue</th>
<th>Other Event/Meeting Rooms</th>
<th>Lighting Equipment</th>
<th>Sound Equipment</th>
<th>Projection Equipment</th>
<th>Internet/Wi-fi</th>
<th>On-site Catering</th>
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<td>Shipyard Plantation Beach Club: Meeting Room*</td>
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</tbody>
</table>

*Some capacities and/or features estimated*

### Capacities

- Capacities 0% 89% 67% 72% 72% 82% 92% 18% 8% 5%

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Meeting + event facilities

※ Meeting and event facilities are spread across the island, primarily in hotels and private clubs.

※ Three facilities are event spaces, and 10 are classified as ‘Other’ (the Arts Center, Red Fish, the Beaufort County Library, Old Oyster Factory, and the Island Rec Center Meeting Room).
**Facility Attributes**

- Nearly all (92 percent) facilities have on-site catering available.
- Eighty-nine percent have more than one room available for meetings/events and 82 percent have internet/Wi-fi.
- Most facilities are well equipped with lighting, sound, and projection equipment.
- Only 18 percent of facilities allow outside catering and only 8 percent have a commercial kitchen that is available to rent.
This matrix plots the inventoried meeting and event facilities according to their capacities and ratings. The colors represent the ‘type’ of facility.

The majority of facilities (70 percent) are hotel spaces. These spaces tend to cover a range of capacities and have high quality ratings.

Otherwise, most meeting and event facilities are smaller in capacity with low to medium quality ratings.

This leaves a small gap for a low-capacity meeting and event space with a very high quality rating (as indicated by the red, dashed circle.)
Existing facility conclusions

The Hilton Head Island Performance Facilities Inventory

❖ Local and regional facilities tend to have small capacities and mid-range quality ratings.
❖ A number of the inventoried facilities are school or university facilities and, as such, have limited availability and concessions.
❖ Of the performance facilities inventoried, the Arts Center’s performance spaces are the only ones on Hilton Head Island that are not affiliated with a school.
❖ More than half of the facilities inventoried have limited or no availability.
❖ This research indicates that there are gaps for high-quality performance spaces within the 1,000 seats or fewer and 1,300 to 2,400-seat capacity ranges.

The Hilton Head Island Outdoor Facilities Inventory

❖ Outdoor programming is music oriented.
❖ Only one facility has a capacity larger than 250.
❖ Most facilities are lower in quality and lack covered seating or other amenities.
❖ This indicates a gap for a large-capacity, high-quality outdoor venue with excellent features and amenities.
Existing facility conclusions

Hilton Head Island Museums + Heritage Sites

- There are a number of museums and heritage sites on Hilton Head Island, concentrated on the island’s northeast end along Beach City Road.
- Very few of Hilton Head Island’s historic sites are actively programmed.
- The Island’s museums are generally in good condition, although there are improvements needed.

The Hilton Head Island Community Festivals Inventory

- Hilton Head Island has more than three dozen community festivals throughout the year.
- They take place at a variety of sites across the island, primarily in July, November, and March.
- Most of these sites are informal and require significant temporary investments.

The Hilton Head Island Local Meeting + Event Facilities

- There are numerous meeting and event facilities on Hilton Head Island.
- Most are located in hotels or country clubs, have multiple event spaces, and are well-equipped.
- Very few facilities allow for outside catering or have a commercial kitchen that is available for public access, which is important to culturally-specific communities and organizations.
- This indicates a gap for low-capacity meeting and event space with a high quality rating.
Benefits + impacts
Benefits + impacts

Overview

* Investing in arts and culture can have significant impact on a community, contributing to such things as sense of place, quality of life, and neighborhood and community development.

* Although golf and tourism have been the primary drivers of Hilton Head’s economy, arts and culture have long played an important role in the community and have been well-supported by the Town. In this section, we will look at the Town’s goals for the future of Hilton Head Island and the role that investing in arts and culture can play in advancing them.
Benefits + impacts

Over the course of this study, we met with and interviewed multiple Town leaders. These interviews revealed a variety of goals for the community, including:

- Improve occupancy,
- Think more regionally,
- Continue to attract people to live, work, and retire on Hilton Head,
- Increase property values,
- Get people out from behind the gates of their plantations,
- Develop arts and culture into an economic driver and tourism draw,
- Attract a younger demographic, and
- Fill-in some of the Town’s vacant infrastructure.
The Town of Hilton Head Island Comprehensive Plan: Charting the Island's Future—From Here to 2030 (May 2010): The 2010 Comprehensive Plan is a rewrite of the Town of Hilton Head’s 2004 comprehensive study. The plan specifically addresses land use, community facilities, recreation, population, natural resources, cultural resources, transportation, housing, priority investment, and economic development.

When it comes to cultural resources, the plan states that “[t]he Town seeks to preserve and protect its cultural heritage, recognize changing socioeconomic and cultural patterns, and promote the arts.”

A number of goals, for both historical/cultural resources and the arts, are identified:

**Heritage Goals**

- Identify and preserve important historic and archeological sites on Hilton Head Island;
- Provide access to heritage and religious sites located within gated communities;
- Preserve Native Island culture by assisting Native Islanders with programs that sustain their connection to the land and culture;
- Promote the teaching of the cultural heritage of Hilton Head Island; and,
- Celebrate Hilton Head’s unique character and sense of place through preservation and historic site maintenance, including through the development of a center for Gullah studies.
Benefits + impacts

Arts Goals

✶ Support the arts through ATAX funding;

✶ Create a unifying vision for the arts and cultural community on the island;

✶ Highlight fine arts as an integral part of Hilton Head Island’s cultural resources; and,

✶ Have a Public Art Program that is reflective of the diversity of Hilton Head Island, inclusive of all media and styles, representative of artists of all backgrounds and abilities, are supported through additional sources of funding (a 1% fund, for example), enhance public space and neighborhoods, engage the public, promote visual arts and increase understanding of visual arts, and inventory, maintain, and conserve artworks.

Community Character

✶ Preserve and enhance the natural and physical environments that reflect the character of the island.
Benefits + impacts

* Mayor’s Task Force for the Island’s Future: Vision 2025 (August 2010): Following the Great Recession, a decline in tourism, deterioration in commercial infrastructure, and growing competition from the mainland, in addition to a number of other challenges, began to impact real estate values and resident well being on Hilton Head Island. In response, the Town established a task force to identify strategies to reverse trends and plan for the future. The resulting vision was for a Hilton Head Island that “is recognized as the most extraordinary and desirable resort, residential, retirement and business community on the east coast, due, in large measure, to its commitment to preserve its barrier island as a natural sanctuary for future generations.” A key recommendation was to:

  “Become the preferred hospitality destination for youth and adult learning by developing great historical and cultural sites and by building a center for the performing arts and intellectual and cultural activities.”
Benefits + impacts

Tourism Product Development Concept for the Lowcountry Region: Strategy + Plan Prepared for South Carolina Department of Parks Recreation + Tourism (September 2010): The Tourism Product Development Concept outlines a plan for increasing and spreading the economic benefits of tourism throughout the region. The report identifies six product development programs for the region as well as recommendations for their development. They include:

- **Hilton Head Activity Clusters + Renewal:** This program area focuses on the renewal and reinvigoration of Hilton Head Island as a principal tourism destination. Recommendations include:
  - Increased collaboration between Bluffton and Hilton Head Island on new retail and residential development, and
  - Providing greater support to the development of Mitchelville and Gullah cultural heritage.

- **Penn Center + Gullah Trail:** The aim of the Penn Center and Gullah Trail program is to develop a tourism circuit based on the African American heritage of the Lowcountry. The development of Mitchelville plays a prominent role in this program given that it was the first free and emancipated community in the southern states for escaped slaves. Recommendations include:
  - Developing the Lowcountry Gullah Trail as a pioneer component of the National Gullah Geechee Heritage Corridor;
  - Enabling the African American community to play a key role in the development of the Lowcountry Gullah Trail as a tourism enterprise; and,
  - Incorporating and animating key sites, like Mitchelville so as to incorporate them into the trail.
Benefits + impacts

✱ **Culinary Tourism Development:** Culinary Tourism is identified as a statewide initiative and aims to highlight the food of the Gullah, the Lowcountry, and the larger state. The *Tourism Product Development Concept* report acknowledges that, despite there being a “range of food outlets across the Lowcountry, they are dominated by franchise chain operations.” Recommendations for developing the local culinary scene include:

✱ Developing partnerships between local producers and the hospitality industry;

✱ Contributing resources to new recipe development and research; and,

✱ Partnering with educational and training institutes to encourage the development of skills at all levels in the catering sector.
With the help of Town staff, we held five public meetings earlier in March to seek citizen comments on the study process and sense of need for new or improved cultural facilities. These were lively meetings with a wide range of opinions expressed. Here are some of the opinions we heard multiple times:

- The Town has many other needs that are more important than cultural facilities.
- We may well need new or improved facilities, but we can’t afford to build or sustain them.
- How can we possibly justify adding cultural facilities when the ones we have, most importantly the Arts Center of Coastal Carolina, are struggling financially?
- Hilton Head needs to “re-boot” as a tourist destination, and culture should be part of that effort.
- Full-time residents should not have to pay for facilities serving part-timers and visitors.
- New larger facilities should be off the island, where the growth is occurring.
- We can react to changes as they come, or try to influence the future with these investments.
- Mitchelville is an important project to support.
- Don’t forget the visual arts.
- Coastal Discovery Museum has been very popular with visitors to the island, as well as serving the local population.
- Traffic is already a problem, a new facility will only make the situation worse.
- Do not do anything to Honey Horn.
Conclusions + recommendations
Conclusions

Our research suggests:

- **The market:** There is a strong, but complicated, market for arts, culture, and heritage in and around Hilton Head Island, indicating opportunities for both traditional and non-traditional arts programming. In addition, there is a large tourist population responsive to opportunities to participate in outdoor recreation and heritage.

- **User demand:** There is demand on the part of multiple community groups for performance, rehearsal, classroom, and meeting and event space.

- **Existing facilities:** Facilities on the island are smaller in size with moderate quality. Most, including the Arts Center theaters, have limited availability. There are, however, tremendous museums and historical assets—including Mitchelville and the Coastal Discovery Museum. There is also a lack of affordable facilities for basic cultural programs and groups.

- **Community benefits + impacts:** There are a number of community and regional goals that can be addressed through the development of arts, culture, and heritage on the island, relating to economic development, tourism renewal, heritage and preservation, and regionalism.
Conclusions

* Specific challenges identified over the course of this project include:
  * The combination of donor fatigue and a transient population that tends to commit dollars “back home”;
  * Increasing traffic congestion;
  * The failure of a recent bond that included funds for a new arts center;
  * The cost of hurricane clean up and investments to prepare for future storms;
  * A lack of affordable housing and a limited work force;
  * NIMBY-ism towards new development;
  * The impression (which we believe to be mistaken) that Hilton Head Island’s arts, culture, and heritage sector is not organized or collaborative; and,
  * The argument that people do not come to Hilton Head Island for the arts, so why invest in them?
Recommendations

★ Given these conclusions & challenges, we propose a series of projects, as follows:
★ The development of a community arts center;
★ The development of a large hall in Beaufort County;
★ The development of Mitchelville and other heritage assets;
★ Improvements to the Coastal Discovery Museum;
★ The creation of community gathering and event spaces; and,
★ The development of food and farming attractions and programs on the island.
The most basic facility need is to have a community arts center on and for Hilton Head Island, activated with a combination of rentals, presenting, educational programming, and outreach. Visual artists in particular lack spaces for teaching and related programs.

The Arts Center of Coastal Carolina has the physical attributes to become this space and indeed was designed to serve a set of community-based groups.

It would seem reasonable for the Town to invest in the Arts Center if that organization is prepared and able to re-formulate its business model to become more of a community arts center rather than being dominated by self-produced theatre. Certainly, the request for funding for technical equipment upgrades, which is valid, is easier for the Town to justify if the Arts Center is able to respond to the community’s need for an arts center.

If the Arts Center is not prepared to make that change, we would encourage the Town to consider other options and possibilities for a community arts center, ideally through the adaptive re-use of some other existing structure.
Spruce Peak Performing Arts Center | Stowe, VT

* Spruce Peak Performing Arts Center opened in 2010.

* Included as a part of the development of a second base lodge, the 420-seat facility aimed at improving the quality of life in the alpine community of Stowe.

* The Center is used for presented and rental music, dance, and other live performances; film; non-performance rental events; student matinees; and local school music programs, which receive subsidized access.

* In FY2016, the Center’s calendar had 80 performances, one half of which were live, presented events. Total attendance was over 15,000.

* The facility is owned by the resort and operated by a 501(c)(3) operating organization.

* It has an operating budget of $1 million, three quarters of which is supported by earned income. All fundraising comes from the private sector.
Sunset Cultural Center | Carmel, CA

- Sunset Cultural Center was built as a public school in 1926. In 1963, the City of Carmel purchased the building, renaming it the Sunset Community + Cultural Center.

- In 2001, the facility underwent a $21.4 million renovation, emerging as the Sunset Cultural Center. Funds for the renovation were raised through a mix of public and private contributions: $9 million came from the City and remaining funds came from 1,200 private contributions.

- The Center features a 718-seat theater, multiple meeting rooms, an outdoor plaza, and a terrace.

- 156 total performances in 2016, 22 of which were live presented events.

- While owned by the City, the Center is operated by a nonprofit.

- The facility's operating budget for 2016 was $2.8 million, 52% of which was covered by earned income. Fundraising is split between public and private sector sources.
Jackson Hole Center for the Arts | Jackson, WY

* Jackson Hole Center for the Arts is a 80,000 square foot facility that opened in 2005 and 2007.

* It was conceived to enhance the quality of life for permanent residents, mitigating the increasing cost of living in the area.

* The Arts + Education Pavilion includes dance and visual art studios, classrooms, and administrative space. The Performing Arts Pavilion includes a 500-seat theater, rehearsal space, administrative space, and a music center.

* The facility cost $30 million to build. The site was donated by the public sector and capital costs were raised by the private sector.

* There were years of turmoil at the board level as the Center struggled to find its way. However, it is widely viewed as successful today and has a strong set of 19 resident organizations that use the Center to produce, present, exhibit, and teach.

* The Center’s operating budget is now $2.5M, with $1 million in earned income and the balance raised mostly from the private sector.
A large hall in Beaufort County

- We would recommend the development of a new mid-size multi-purpose hall for music, dance, theater, film, speakers and other events with a capacity range between 1,200 and 1,500 seats.

- There are over 100 days of demand from key groups on the island (Hilton Head Symphony, Hilton Head Choral Society, Hilton Head Dance, and the World Affairs Council of Hilton Head) for such a hall. In addition, the University of South Carolina-Beaufort has interest in expanding its arts programs and could be a potential partner in the development of such a project.

- A mainland location, in proximity to I-95, would provide increased access to touring product traveling between Charleston and Savannah and as well as the growing populations in Bluffton and, potentially, Jasper County. Discussions of such a facility are already taking place in Bluffton, as the community and Beaufort County consider the future of Hilton Head National Golf Club.
The Sandler Center for the Performing Arts opened in November 2007 after six years of planning.

It was developed out of the realization that the region’s demand for the performing arts was growing and that many of its existing facilities were limited in size and functionality. In addition, the City had decided to demolish its 1,000-seat Pavilion Theatre as part of a plan to redevelop the convention center, leaving a large gap in its inventory of performance facilities.

The Sandler Center features a 1,300-seat performance hall, a 2,200 square foot rehearsal hall that doubles as a performance and event space, a VIP room, an event lobby, a gallery, two classrooms, and an outdoor performance plaza.

Programming includes a mix of touring product (including Broadway and headlining music) and performances by 10 resident companies (Virginia Symphony Orchestra, Ballet Virginia International, Virginia Beach Chorale, and Tidewater Winds, to name a few).

The facility is owned by the City of Virginia Beach and managed by Spectra (formerly Global Spectrum).
Wilson Center at Cape Fear Community College | Wilmington, NC

* The Wilson Center at Cape Fear Community College opened in 2015.

* The facility includes a 1,550-seat theater, a studio theater, and 26 instructional spaces.

* Programming includes a mix of presenting (PNC Broadway Series, headliner concerts, touring dance), rentals (The Wilmington Symphony Orchestra, The North Carolina Symphony), and shows produced by Cape Fear Community College.

* As of December 2016, the Wilson Center has had ticket sales of $3.5 million and a total attendance of 84,494.

* The building was publicly funded with a $41 million bond referendum and a $4 million capital campaign.
Mitchelville and other heritage assets

- Mitchelville is widely recognized as Hilton Head Island’s ‘hidden gem’. The park, on its own, has significant local, regional, and national importance. Combined with other regional heritage sites, it could become part of a greater regional trail network within the larger Gullah Geechee Heritage Corridor, also connecting to the National Park Service and their recent work on the Reconstruction Era Monument. These efforts could strengthen the island’s connection with its own history and heritage and impact visitation to the island in significant ways.

- Yet, despite this potential, little progress has been made in recent years. The Town has committed to provide two years of financial support for an Executive Director for Mitchelville and is leasing the park to the Mitchelville Preservation Project for a nominal amount.

- We would endorse the idea that the Town proceed with various investments in Mitchelville. However, we would encourage a more active partnership that ties those investments to a series of Town-mandated goals around program development, organizational development, and partnerships.
Gatekeeper's Museum | Tahoe City, CA

* The Gatekeeper's Museum is a reconstruction of Lake Tahoe's original Gatekeeper's Cabin, home of the Watermaster responsible for the flow of water out of Lake Tahoe.

* The Museum showcases Tahoe history, from the days of the Washoe people through to logging, mining, and tourism.

* Exhibits include Native American baskets, resort memorabilia, historical photographs, clothing, oral histories, maps, archival documents, newspapers, and artifacts.

* The Museum also includes a resource library and a lakeside wedding and event venue.
The Ernest Hemingway Home + Museum | Key West, FL

* The Ernest Hemingway Home and Museum is a privately owned museum dedicated to sharing the space inhabited by the author for 10 years.
* The Museum has a large international draw, receiving groups of visitors from China, Germany, Japan, Poland, Spain, France, Italy, Korea, and Russia.
* The Museum offers 30-minute tours on the life and times of Ernest Hemingway.
* In addition to Hemingway’s home, the museum features gardens, a book store, and a gift shop.
* The Museum is available for weddings and private events.
Coastal Discovery Museum

✱ The Coastal Discovery Museum is an important cultural asset for Hilton Head Island as it speaks to such critical issues as the environment, land, and the culture of the Lowcountry. The Museum runs many programs of interest to full-time and seasonal residents and their families. And, they are an attractive and well-run destination for visitors to the island, effectively becoming a clearing-house for a range of other attractions and amenities.

✱ Within the recently completed strategic plan are goals to add and improve facilities that will allow the Museum to accept touring exhibitions made possible by its Smithsonian affiliation.

✱ We endorse this plan and would encourage the Town to consider how it might support the expansion, as and when the Museum’s needs become more defined.
Sanibel Island’s J.N. “Ding” Darling National Wildlife Refuge is the largest undeveloped mangrove ecosystem in the country.

The Refuge features 6,400 acres of mangrove forest and is home to over 245 species of birds.

Visitors can drive, walk, or bike the Refuge’s 4-mile Wildlife Drive; hike one of its four trails; bird watch; kayak, canoe, or stand-up paddle board; and fish and boat.

There is also a Visitor and Education Center. Free to the public, the Center has interactive exhibits on refuge ecosystems, a hands-on children’s area, and a Nature Gift Store.

Annually, the Refuge welcomes more than 800,000 visitors and is estimated to return $34 million to the local economy.
The Environmental Nature Center, or “The ENC”, was founded in 1972 with a mission to “provide quality education through hands-on experience with nature.”

* It combines 15 California native plant communities, wildlife habitats, and walking trails with a sustainably designed, Leadership in Energy and Environmental Design (LEED) Platinum-certified learning center.

* Programming is varied and includes an adult speaker series, “Little Naturalists” (a program for kids between the ages of three and five and their adults), “Teachers Night Out at the ENC” events, and a number of other family and educational programs.

* In addition, The ENC has a Traveling Naturalist program that allows them to take programming on the road.

* The organization recently purchased an adjacent plot of land with plans to expand its natural habitat, develop a nature play area, and establish a nature-based preschool.
Community gathering and event areas

- There is a recognized need in the community for gathering space. While Coligny and Shelter Cove have been successful, the Town could go further in its attempt to create public gathering space, with more integrated planning that can support the local art and music scene, local retailers, and festivals.

- We are thinking particularly of younger people and families and the different ways that they might choose to participate in the arts and culture.

- Such spaces might include more formal performance and festival locations, less formal park-settings, and more village or urban gathering places.

- This is a longer-term effort for Town and Village planners, thinking about how open space might be protected and used for events, how other areas might be upgraded, and how commercial concentrations might be planned and developed to include a Village square.
Celebration Square | Mississauga, ON

* Celebration Square opened in 2011 following a Project for Public Spaces-led community engagement process.

* The square is operated by the City's Culture Department as an outdoor community center.

* A range of programs activate the square, from farmers markets and Canada Day celebrations to performances and festivals.

* It is located between the Central Library and the Civic Hall and features gardens, a water feature that converts into an ice rink in the winter, a fully equipped mainstage for large performances, and a small amphitheater.

* The square hosts more than 100 free events and attracts more than 500,000 visitors to the downtown each year.

* All events are free and open to the public and facilities are available for rent.
Addison Circle Park | Addison, TX

- Addison Circle Park was completed in 2003.
- It was designed to serve as an outdoor civic center and festival ground for 10,000.
- In creating the park, designers focused on shaping spaces and the land to create good sightlines for outdoor performances, organize ticket-holders, and allow for the placement of tents for events, food, and beverage vendors.
- In total, there are three distinct performance venues, parking for more than 2,100 cars, a covered pavilion with seating for 200, a concession kitchen, fields for recreation, walking trails, and water and electrical hookups located throughout the park.
- The park is used for performances by Shakespeare Festival of Dallas, Taste Addison, Cinema in the Circle, Addison Oktoberfest, a book sale, and charity events.
Finally, we see a tremendous opportunity to rediscover Hilton Head Island’s food and farming heritage; firstly, by re-planting portions of the island and, secondly, through the establishment of a regional farm-to-table program.

From a facility perspective, perhaps the best first step would be to attract a culinary institute to the island. This could serve as a catalyst for a series of food-as-culture initiatives, all of which could have a significant impact on the quality of life for full-time and senior residents and form the basis of new cultural and heritage tourism.

The University of South Carolina at Beaufort is developing a facility on Hilton Head specifically for hospitality management. It will have a kitchen, but is intended more for internal teaching uses.
The Culinary Institute of America is recognized as the premier culinary college in the world.

It began as the New Haven Restaurant Institute in 1946. In the 1970s, in order to accommodate a growing student body, the school relocated to Hyde Park. Today, CIA has campuses in California, Texas, and Singapore.

Academic programs include Bachelor’s degrees in food business management, culinary science, and applied food science; Associate degrees in culinary arts or baking and pastry arts; and Food Enthusiast Programs for those that simply love cooking, baking, and wine.

The CIA, and its five on-campus restaurants, is a destination for many. Public tours are offered Monday through Friday and, in addition, the school is home to Half Moon Theatre, a professional theatre company that uses the CIA’s 800-seat theater for productions.
New Earth Farm | Virginia Beach, VA

* New Earth Farm is a working, sustainable, and educational farm.

* Started in 1995, New Earth offers classes for youth, teens, and adults in farming, gardening, sustainability, farm-to-table cooking, sheep shearing, cheese making, and yoga.

* The farm regularly participates in farmers’ markets and offers an annual spring and summer CSA.

* The Farm’s Food Lab provides classes focused on the various processes used to prepare and preserve foods, including lacto-fermenting and canning.

* Additionally, the farm offers group and school tours and trains students and educators on creating and maintaining school gardens.

* Other programming includes movie screenings, lectures, and hands-on maker events.
A vision for new facilities

✱ This set of recommendations should not be viewed as a menu of possibilities, but rather as a set of community investments that will together deliver significant value to Hilton Head Island and its residents.

✱ Our vision is that these investments will increase property values, enhance quality of life, and build the profile and attraction of Hilton Head as a destination.

✱ These projects also represent an important opportunity for the Town of Hilton Head Island to become a partner in regional planning, locating facilities sensibly and working with other public and private sector partners for the greater good.

✱ We would encourage Town leadership to think of these initiatives collectively, specifically in terms of how capital projects might be funded and various elements sustained over time.

✱ The Town can and should set priorities amongst these ideas and determine what role it should play in advancing specific recommendations, an effort we will support with our continuing physical, financial, and operational planning.
Next steps

※ Continue to fill in information as required.
※ Discussion of the validity of conclusions and recommendations.
※ Selection of items for further study.
※ More public input!