

Kiawah Performing Arts & Cultural Center: Phase 1 Needs Assessment

Delivered to:
The Town of Kiawah Island

Prepared by Webb Mgmt
April 4, 2023



Photo Credit: Visit Charleston

Introduction & Context

Firm Profile

Webb Management Services is a management consulting practice focused on the development, renovation and operation of cultural facilities.

- Feasibility studies, business plans, strategic plans and district plans
- Clients are governments, arts organizations, developers and educators
- 26th year, starting our 500th project



The Study Process

Needs Assessment

Introduction & Context

Forces & Trends

Stakeholder Interviews

Market Analysis

User Demand & Utilization

Existing Facilities & Competitive Analysis

Benefits & Impacts

Partners & Collaborators

Conclusions & Recommendations

Comparable Projects

Methodology



Interviews



Facility Tours



Data Purchase



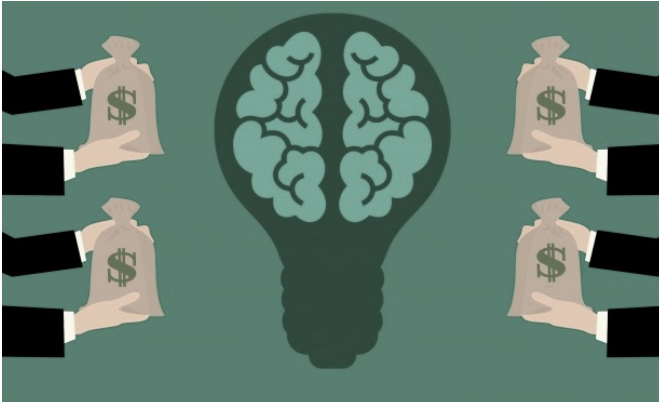
Public Meeting



Research on Other Places

Forces & Trends

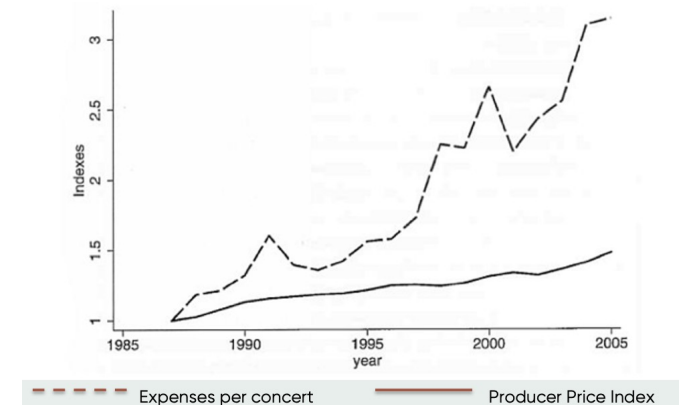
Challenges and opportunities in the sector



Challenge: Private and Public Sector Funding



Challenge: Declining Audiences



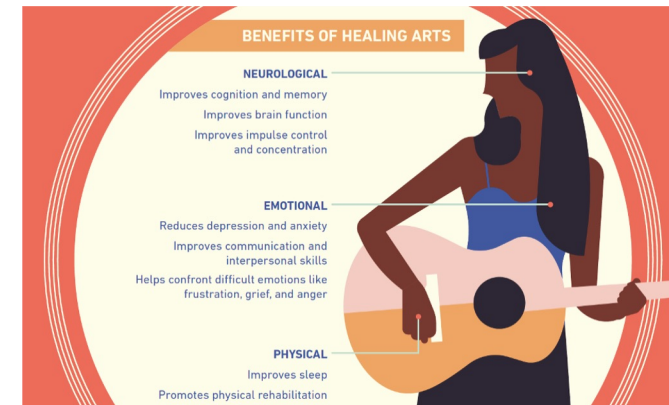
Challenge: Baumol's Cost Disease



Support: Arts Education



Support: Active Arts



Support: The Value of the Arts

What we learned

37 individual interviews, 2 group interviews, and The Public Meeting



Demand: many think there is sufficient demand with optimism for funding



Location: some concerned about location and potential traffic



Facilities: difficult to access; lack adequate performance capabilities and amenities



Quality of Life: new center may support community resilience and elevate Kiawah experience



Sustainability: majority emphasized need for environmental protection



Support: important to gain broad community support and align with long-term vision for Kiawah

Market Analysis

Methodology



Defined the market by mapping ticket buyer point locations using ESRI GIS



Purchased comprehensive demographic data from ESRI platform on market



Analyzed geo-demographic data for consumer habits and market potential



Projected size of potential market attendance using NEA data



Assessed Placer.ai geolocation data to gain insight into visitation patterns



Audience Market Assessment (Esri 2022)

2 County Subdivisions
Site: Johns Island CCD, SC (4501991703) et al.
Geography: County Subdivision

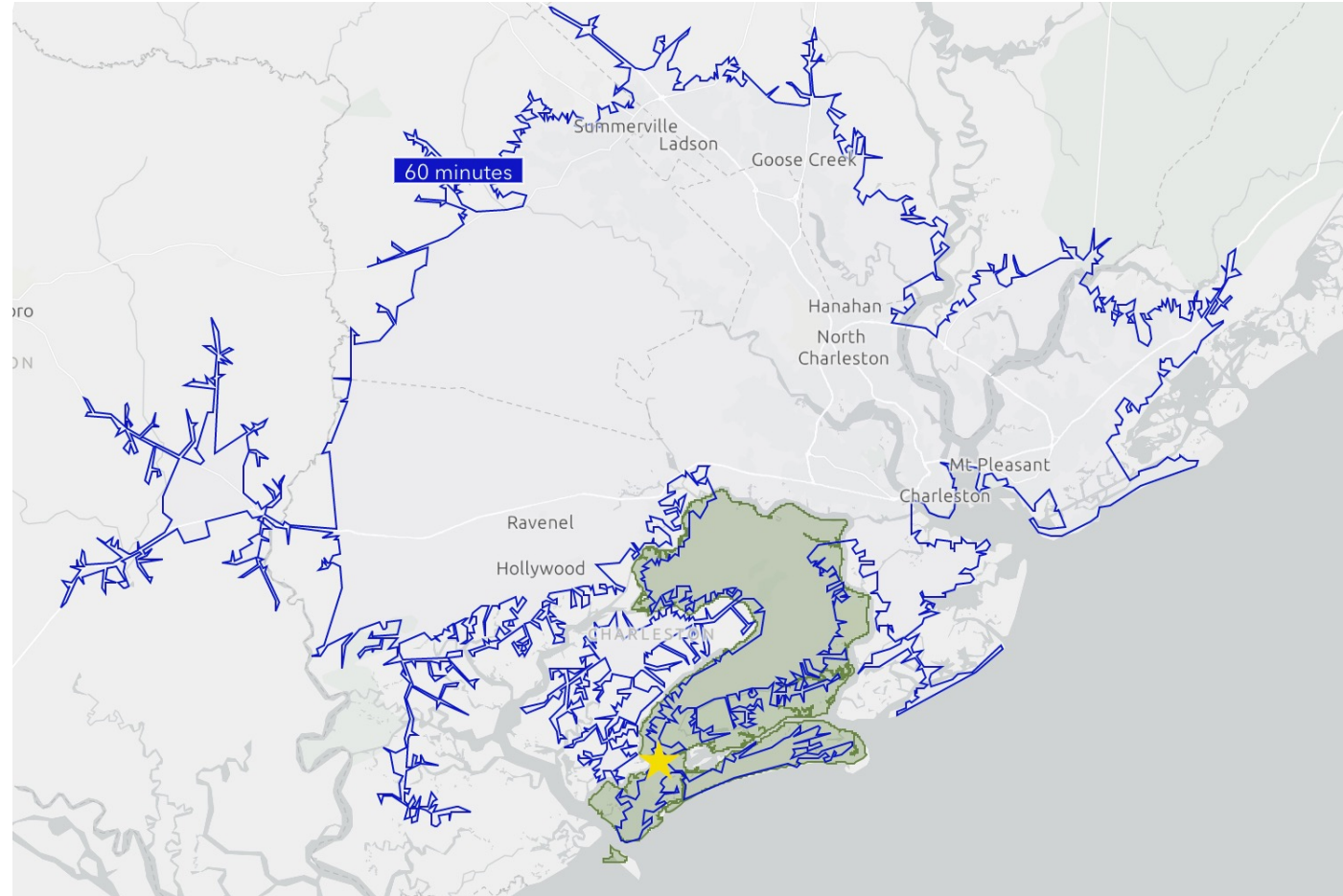
Prepared by Esri

	SC(4501991703...
Population Summary	
2000 Total Population	12,640
2010 Total Population	18,545
2022 Total Population	27,974
2022 Group Quarters	119
2027 Total Population	29,857
2019-2024 Annual Rate	1.31%
2022 Total Daytime Population	27,532
Workers	13,327
Residents	14,205
Household Summary	
2000 Households	4,980
2000 Average Household Size	2.53
2010 Households	7,678
2010 Average Household Size	2.40
2022 Households	12,035
2022 Average Household Size	2.31
2027 Households	12,907
2027 Average Household Size	2.30
2019-2024 Annual Rate	1.41%
2010 Families	5,263
2010 Average Family Size	2.82
2022 Families	7,729
2022 Average Family Size	2.82
2027 Families	8,236
2027 Average Family Size	2.81
2019-2024 Annual Rate	1.28%
Housing Unit Summary	
2010 Housing Units	12,275
Owner Occupied Housing Units	49.4%
Renter Occupied Housing Units	13.1%
Vacant Housing Units	37.5%
2022 Housing Units	17,032
Owner Occupied Housing Units	59.9%
Renter Occupied Housing Units	10.8%
Vacant Housing Units	29.3%
2027 Housing Units	18,439
Owner Occupied Housing Units	58.5%
Renter Occupied Housing Units	11.5%
Vacant Housing Units	30.0%
Median Household Income	
2022	\$103,252
2027	\$111,517
Median Home Value	
2022	\$504,354
2027	\$544,007
Per Capita Income	
2022	\$61,940
2027	\$70,725
Median Age	
2010	45.2
2022	44.7
2027	45.4

Market Analysis

Defining the market

- Analyzed point location of Arts and Cultural Events Council 2022 ticket buyers
- 77% fall within Johns Island and Seabrook-Kiawah Island Census county divisions
- Local market: Census county divisions (green shading)
- Regional market: 60-minute drive time (blue outline)

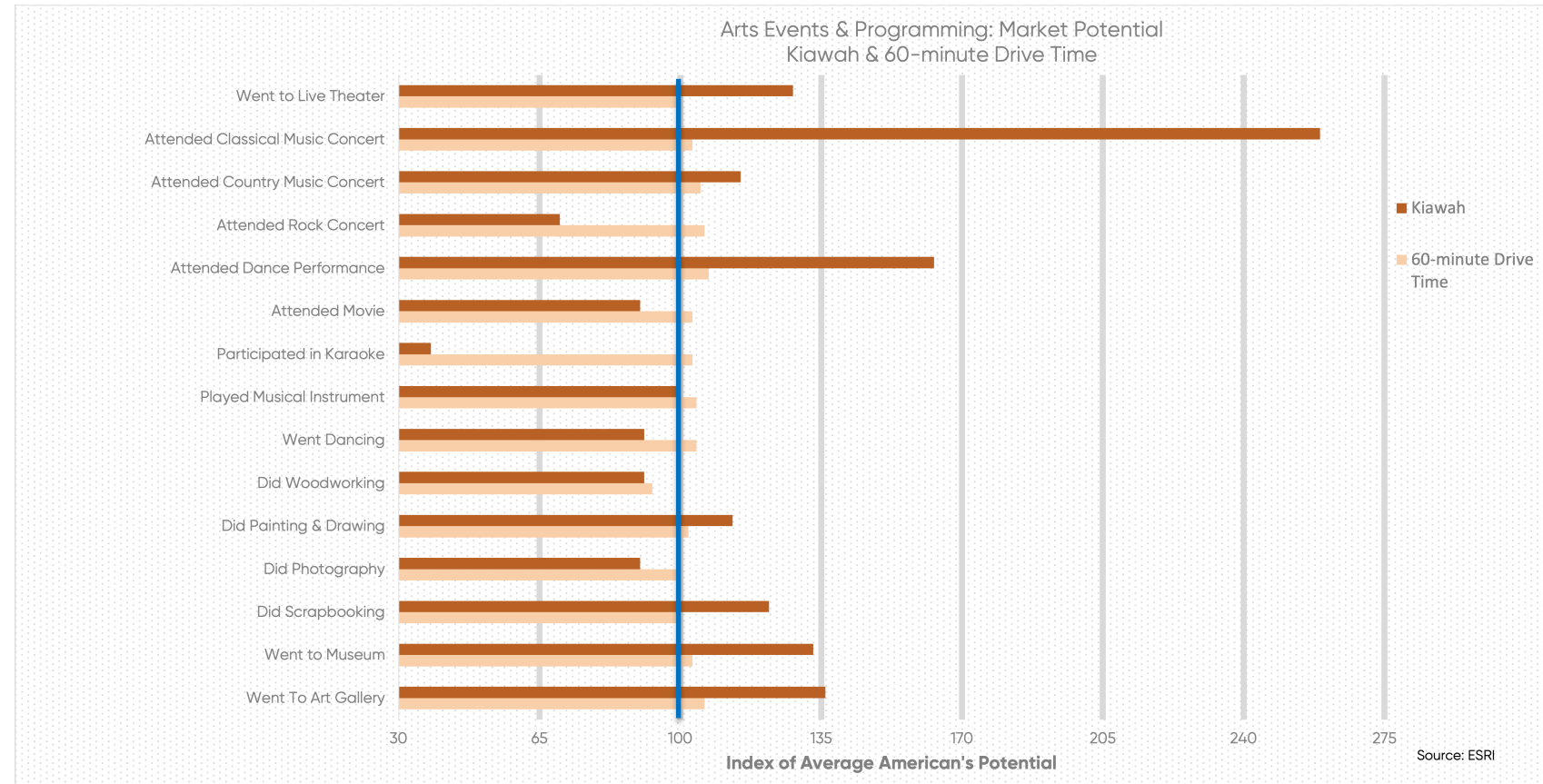


Market Analysis

Strong local market potential

Kiawah residents are:

- 160% more likely than the national average to attend classical music.
- 63% more likely to attend a dance performance.
- 36% more likely to attend an art gallery.
- 33% more likely to go to a museum.
- 28% more likely to attend live theater.



Market Analysis

Regional market projections using NEA data

Kiawah Market Area Demand Estimate (60-minute Drive-time)	Jazz	Classical Music	Opera	Musical Plays	Non-Musical Plays	Ballet	Other Dance	Other Types of Music, Theater, or Dance	Outdoor Performing Arts Festivals	Total
Age 25+	70,648	52,913	12,251	101,714	57,970	12,152	38,583	110,955	180,497	637,684
Age 18-24	17,452	13,830	1,052	23,177	13,804	1,341	10,236	26,737	40,252	147,881
Total Potential Performing Arts Attendance	88,100	66,743	13,303	124,891	71,774	13,493	48,819	137,692	220,749	785,565

- Segmented population by educational attainment, and predicted potential attendance for various arts disciplines
- Used data from the National Endowment of the Arts Survey of Public Participation to project regional market within a 60-minute drive time
- Exercise suggests there is a large potential market for various performing arts disciplines in the regional market area

Market Analysis

Visitation patterns

Trade Area

Jan 1 - Dec 31, 2022



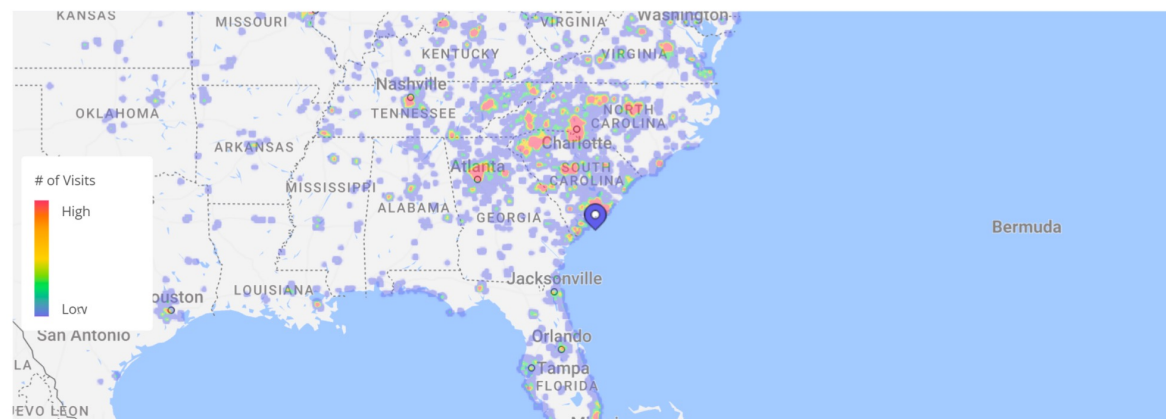
Visitor Journey

Jan 1 - Dec 31, 2022



Trade Area

- Freshfields Village shopping center**
165 Village Green Ln, Kiawah Island, SC 29455



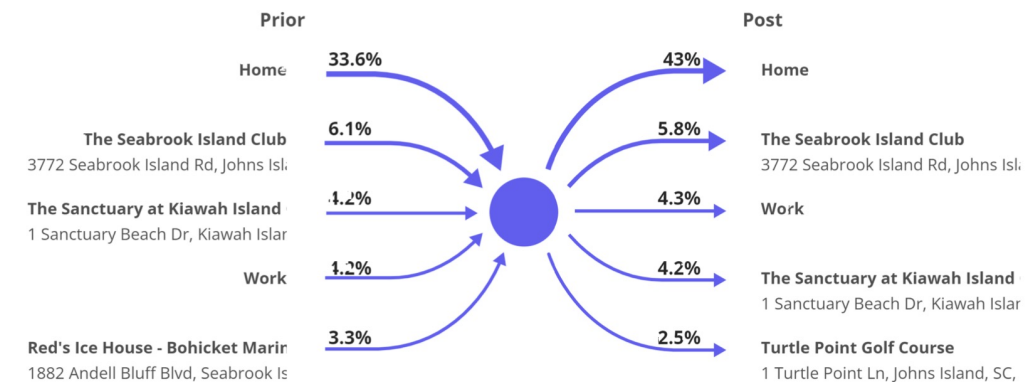
The locations shown are obfuscated for privacy and randomly placed within a census block. They do not represent actual home addresses.

Home Location | Visits | Min. Visits: 1 | Jan 1st, 2022 - Dec 31st, 2022
Data provided by Placer Labs Inc. (www.placer.ai)



Visitor Journey

- Freshfields Village shopping center**
165 Village Green Ln, Kiawah Island, SC 29455



Show by: Location | Jan 1st, 2022 - Dec 31st, 2022
Data provided by Placer Labs Inc. (www.placer.ai)



Comparable Markets

Rationale

We have collected information on indoor and outdoor performing arts facilities from a set of resort communities that have been previously referenced and spoken of in Kiawah as being comparable for a variety of reasons, including:

- Southern location;
- Island/water access;
- The presence of community associations and/or gated community;
- Higher median property values;
- High percentage of housing units for seasonal recreational use;
- Phased development.



Photo Credit: The Watermill Center

Theaters in Resort Communities	Highlands, NC	Hilton Head, NC	Martha's Vineyard, MA	The Hamptons, NY**	Vail & Beaver Creek, CO
Total Population	1,088	38,076	17,000	15,448	11,182
Median Household Income	\$55,938.00	\$87,884.00	\$82,857.00	\$145,069.67	\$89,768.00
Venue	Highlands Performing Art Center	Arts Center of Coastal Carolina	The Yard	Watermill Center	Ford Amphitheater
Capacity	300	349	100	300	2565
Note					Seasonal (1,265 seats)
Venue		Comedy Magic Cabaret	Martha's Vineyard Performing Arts Center	Guild Hall	Donovan Pavillion
Capacity		50	791	360	2200
Note			HS theater	\$29 mill. Capital improvement project	
Venue		Southeastern Summer Theater Institute	Martha's Vineyard Playhouse	Bay Street Theater & Sag Harbor Center for the Arts	Vilar Performing Arts Center Beaver Creek
Capacity		650	150	299	530
Note		Hilton Head HS Theater			
Venue		Lowcountry Celebration Park Ampitheater	Featherstone Center for the Arts	Southampton Cultural Center	Eagle Valley High School
Capacity		3000	200	300	510
Note			Lawn seating		School-Limited Access
Venue				Southampton Arts Center	Battle Mountain High School
Capacity				300	500
Note					School-Limited Access
Venue				Parrish Art Museum	
Capacity				300	
Note				hosts jazz fest	
Total # of Venues	1	3	4	6	5
Largest Capacity Venue	300	3000	791	300	2565
Notes					
Total # Year-Round Venue Seats	300	4049	1241	1859	6305
Total # Year-Round Venue Seats per capita	0.275735294	0.106339952	0.073	0.120339202	0.56385262
Total # Seasonal Venue Seats	0	3650	300	300	2565
Total # Seasonal Venue Seats per capita	0.00	0.10	0.02	0.02	0.23
*approximated capacity					
** combined eastend population					

Comparable Markets

Conclusions

- All of these other communities have dedicated indoor performing arts facilities.
- Most of these communities have a community arts center with a main hall having a capacity in the range of 300 to 400 seats.
- Many of the designated performance spaces have outdoor components that are activated seasonally.



Facility Uses & Users

User Survey

This chart summarizes demand coming from groups surveyed and interviewed. Days of use come from the groups themselves, and is thus likely to be somewhat optimistic.

Nevertheless, we find this information helpful in that it confirms that there is demand for a medium-sized space (300 to 400 seats) representing a range of disciplines – music, dance, theatre and other programs.

KICA is not a potential user of new spaces, but they believe that there is demand for new and better spaces for meetings and events based on the number of requests they turn away.

Potential Users & Annual Use	Discipline	Space Desired	Performances	Event Days	Other Days	Total Use Days
City of Charleston Off of Cult Aff	Various	199-350 cap theater	3	3	0	3
Zandrina Dunning	Music	300-500 cap theater	30	30	0	30
Zandrina Dunning	Music	Rehearsal room			40	40
Charleston Stage	Theatre	100-200 cap theater	2		1	1
Madeleine Kaye	Design	100 cap theater	10	10	0	10
Palmetto City Ballet	Dance	250-600 cap theater	6	3	3	6
Palmetto City Ballet	Dance	Rehearsal room			3	3
Charleston Collegiate	Various	250-500 cap theater	12	10	10	20
Charleston Collegiate	Various	Rehearsal room			6	6
Charleston Symphony	Music	400-750 cap theater	2	2	4	6
Charleston Symphony	Music	Rehearsal room			4	4
Illumine Arts, LLC	Performance	400-600 cap theater	32	28	2	30
Illumine Arts, LLC	Performance	Rehearsal room			14	14
Arts Council (2021-2022 Season)	Various	400-700	32	32	10	42
Kiawah Conservancy	Events	300-500	4	4		4
			133	122	97	219
Total Mid-size Theater Use			121	112	29	141
Total Small Theater Use			12	10	1	11
Total Rehearsal Hall use			0	0	67	67

Facility Uses & Users

Building Collaborative Relationships to Drive Programming

Community arts centers have the potential to form partnerships and collaborative relationships with existing educators, health sector groups and social service agencies to drive programming. On Kiawah, we see specific opportunities to work with:

- Local school districts
- The new senior living facility
- The new medical facility



Photo Credit: Dance for PD®

Existing Facilities

Facility inventories for local and regional current spaces

- Performance spaces
- Meeting & event spaces
- Film, gallery & exhibition space
- Arts program spaces

Performance facilities with a capacity up to 2000
* denotes exceeds capacity

Building	Performance Space	Capacity	Facility Features								Amenities			Availability				Location				
			Flex	Kitch	Rehe	Back	Acc	Sou	Equ	Film	Equ	Stre	Size	Alcohol	Dedicated	Cafe	Ticket	Not Avail	Low	Med	High	City
Charleston Gaillard Center	Martha and John Rivers Performance Hall	1,818																		Charleston	SC	29401
Charleston Music Hall	Charleston Music Hall	965																		Charleston	SC	29403
College of Charleston	Sattile Theatre	785																		Charleston	SC	29401
College of Charleston	Emmett Robinson Theatre	600																		Charleston	SC	29401
College of Charleston	Chapel Theatre	106																		Charleston	SC	29401
Charleston Stage	Dock Street Theater	500																		Charleston	SC	29401
Queen Street Playhouse	Queen Street Playhouse	250																		Charleston	SC	29401
Music Farm	Music Farm	675																		Charleston	SC	29403
The Charleston Place	The Riviera Theater	600																		Charleston	SC	29401
North Charleston Colosium and Performing Arts Center	Performing Arts Center*	2,341																		North Charleston	SC	29418
Woolfe St. Playhouse	The Davis Theater	200																		Charleston	SC	29403
Woolfe St. Playhouse	SideStage	70																		Charleston	SC	29403
Threshold Repertory Theatre (Temporarily Closed)	Main Theater	70																		Charleston	SC	29401
Theatre 99	Theatre 99	500																		Charleston	SC	29401
South of Broadway	South of Broadway	525																		North Charleston	SC	29405
FlowerTown Players	Community Theater Performing Arts	200																		Summerville	SC	29483
34 West Theatre Company	34 West Theater	60																		Charleston	SC	29401
Tua Lingua	Main Space	100																		North Charleston	SC	29405
Pure Theater	Main Theater	100																		Charleston	SC	29403
Charleston County School of the Arts	Rose Maree Myers Theater	400																		North Charleston	SC	29405
Holy City Magic	Main Space	70																		Charleston	SC	29403
French Quarter Inn	Black Fedora Comedy Mystery Theatre	80																		Charleston	SC	29401
Red Velvet Burlesque Show Charleston	Main Space	100																		Charleston	SC	29407
The Charleston Pour House	Main Space	450																		Charleston	SC	29412

Existing Facilities

Performance spaces: rating vs capacity

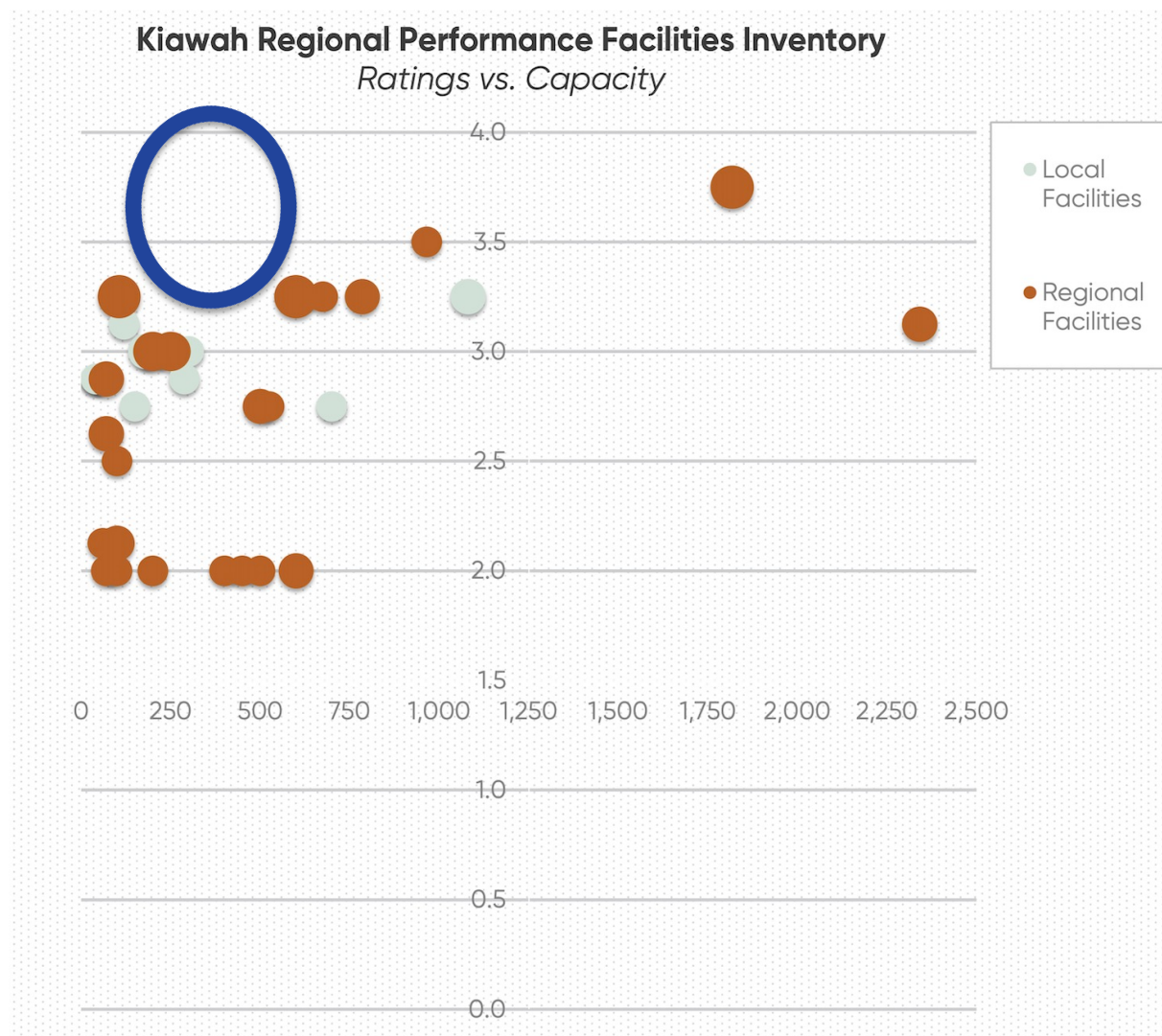
x axis: facility capacities

y-axis: quality rating

Size: number of arts disciplines supported

Blue oval: gap in the market

- 33 performance venues in the region, separated by local and regional market
- Gap in the market for high quality performance spaces for all capacities in the local region
- Gap in high quality facilities seating in the 250-500 range in the regional market



Project Benefits and Impacts

Aligning the project with broader goals



Use arts and culture to promote social health of residents, contributing to community resilience



Preserve natural ecosystem and design with nature



Attract new visitors and residents with arts and entertainment options



Support housing market by offering programming that may attract younger demographic

Conclusions

Opportunity for Kiawah Island Performing Arts & Culture Center



Strong market potential for residents and non-residents



Gaps in performing arts facility inventory



High user demand



Alignment with local and regional goals

Recommendations

Preliminary ideas: Main performance space

- A high quality, performance space with excellent acoustics and technical capabilities
- Flexible seating, with attention to ADA compliance
- Current technologies for live and film events
- 300-400 seats

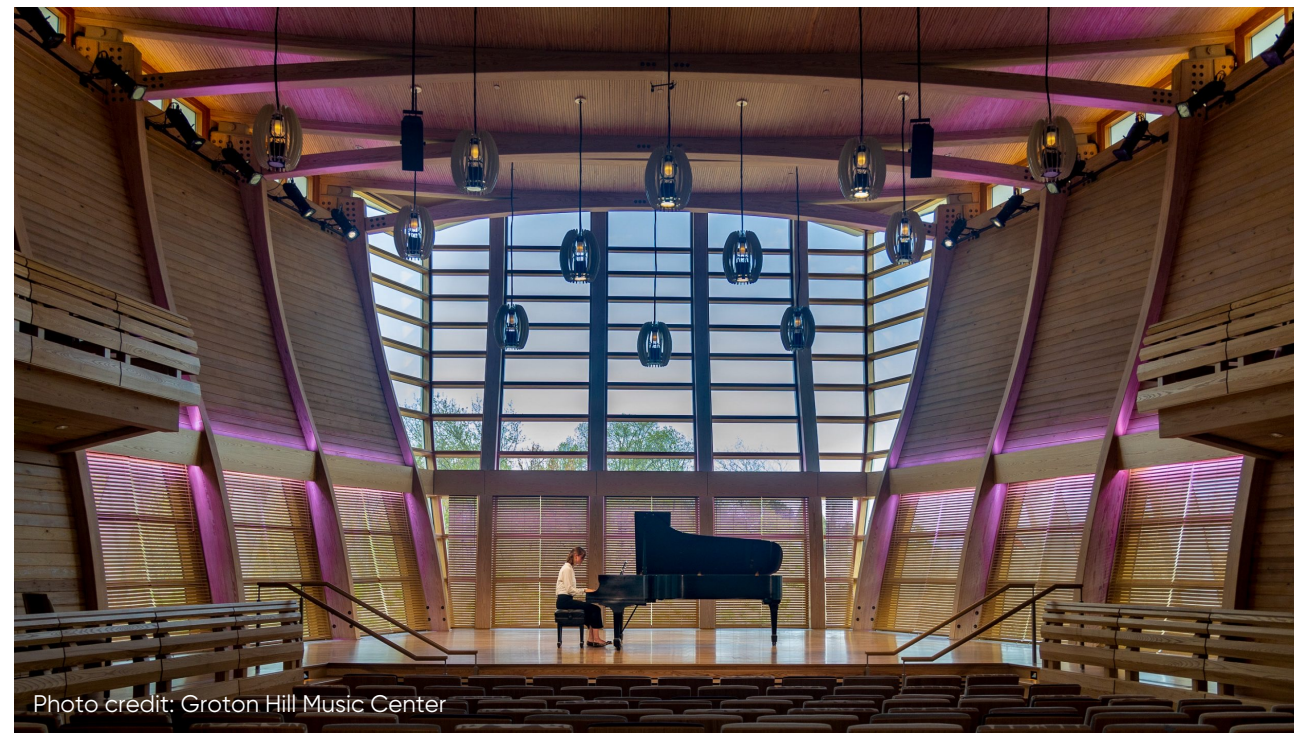


Photo credit: Groton Hill Music Center

Recommendations

Preliminary ideas: Multipurpose space

- Highly flexible form and seating
- For meeting and events, rehearsals, teaching and smaller performances
- 100-150 seats

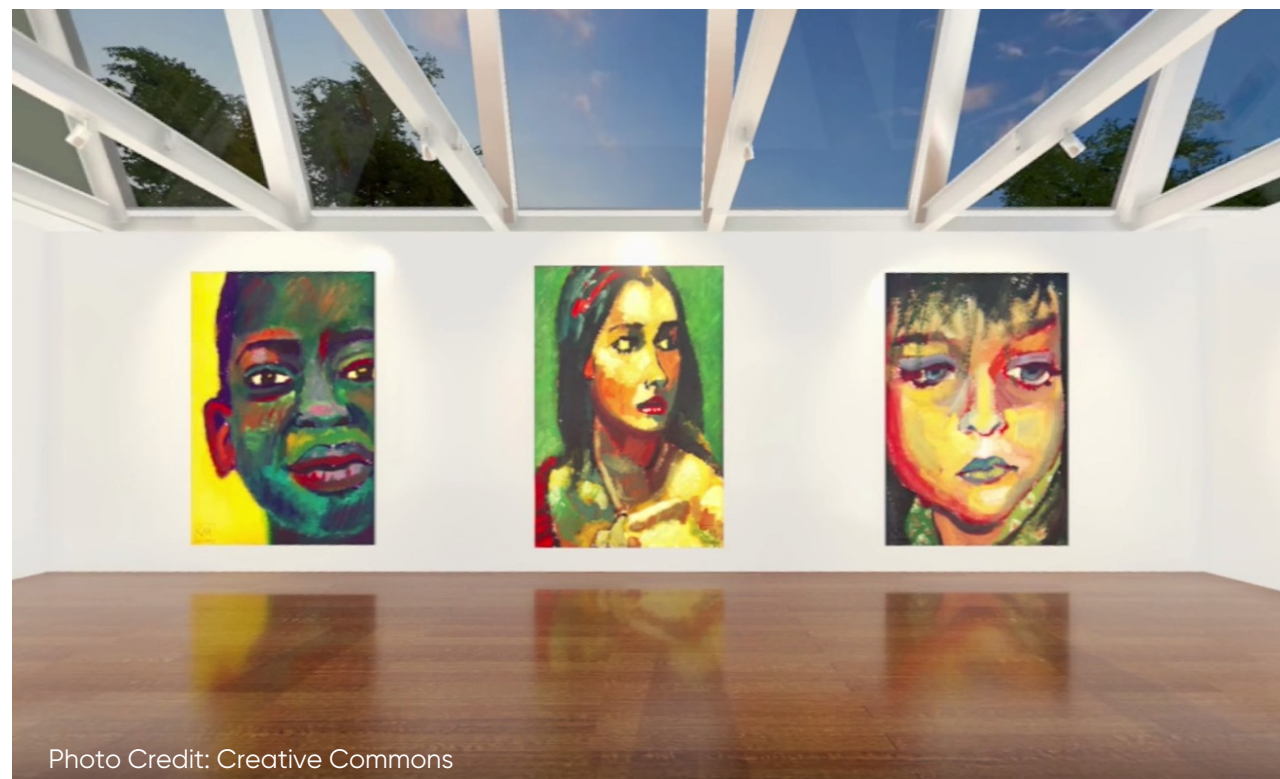


Photo credit: Ertugun Atrium- Jazz at Lincoln Center

Recommendations

Preliminary ideas: Other spaces

- Rehearsal space with dance floor
- Program/classroom space for workshops and arts classes
- Designated exhibition space in lobbies
- Outdoor performance and event space sharing staff and equipment
- Strong food and beverage capabilities
- Full set of backstage accommodations, including green room/dressing rooms for artists
- Spaces can be combined in one facility or be developed separately within a district



Comparable Projects

Highlands Performing Arts Center: Highlands, NC

- Collaboration between the Highlands-Cashiers Chamber Music Festival, Highlands Community Players (resident theater company) and The Town to purchase and renovate a Church as a permanent home. Offers film and exhibition as well as live music and performing acts.
- Recent renovations included an updated 300-seat theater with high ceilings designed and constructed to offer rich acoustics throughout the 15,000sf space. Outside of the theater, guests have access to a full-service bar and comfortable seating where they can relax until curtain.
- Expanding on the property's existing auditorium, the ground-up construction of the PAC incorporated both wood paneling and precast metal. Amplifying the acoustic capabilities of the space, all mechanical systems were installed around the perimeter of the theater, rather than using overhead units. This provided a "bubble" of sorts that allowed the sound in the theater to travel – uninterrupted – richly throughout the room.



Comparable Projects

Highlands Performing Arts Center: Highlands, NC

- The cost of the theater expansion was around \$8–9 million, and was completed in June, 2022.
- Nearly 100 private donors raised \$10 million for the original project, which includes renovating and expanding the existing PAC. The PAC coordinates concerts and fundraising drives to offset the cost of operating the facility and keeps rents low for the nonprofit resident groups. Also received \$1 million in match funding from the The Community Foundation of Greater Birmingham to aid in the redevelopment of the PAC.



Photo credit: Choate Construction

Comparable Projects

Highlands Performing Arts Center: Highlands, NC

- Tucked on the quiet mountain of one of the highest towns east of the Mississippi, the project site came with a host of environmental challenges for the project team and trade partners. In addition to relying on one route in and out of the area that could support the weight of the massive precast walls and other supplies, the project team was operating in a town that sits at an elevation of 4,118 feet within a temperate rainforest. These factors presented both rainy and snowy conditions that required extensive coordination between the stakeholders, trade partners, and project team. However, due to the expertise, experience, and thorough planning of the Choate Construction project team and key stakeholders, the Highlands Performing Arts Center was delivered early and under budget.
- The center was founded on and operates largely based on collaboration with many different arts groups and the community at large. The PAC offers unique programming to seasonal visitors, with a focus on programming for children and year-round residents.

Photo credit: Choate Construction



Comparable Projects

Shalin Liu Performance Center, Rockport, MA

- In 2010, Rockport Music celebrated the opening of the state-of-the-art Shalin Liu Performance Center, designed by Epstein Joslin Architects and acoustician R. Lawrence Kirkegaard. Rockport Music is a summer music festival originally focused on chamber music but now presenting a wide variety of contemporary, jazz and other musical forms.
- The focus of the Center is an air-conditioned concert hall with extraordinary acoustics and comfortable seating for 330. It has professional quality audio-visual equipment for film and live HD broadcasts. There is an oceanfront reception space on the third floor with views of the coastline for educational, social, civic and corporate events (catering kitchen available for use). Wine and beer is served with a selection of food. There is full ADA accessibility.
- The Center's design embraces the cultural and natural legacies of Cape Ann through of wood, stone and water. Walls are clad in stone to reflect the rocky coast of Rockport, and are beneficial to room acoustics. A floor to ceiling window behind stage captures the natural majesty of Rockport Harbor.



Photo credit: Rockport Music

Comparable Projects

Shalin Liu Performance Center, Rockport, MA

The budget for the building was \$20 million, in 2010 dollars. The Hall was constructed within the historic Haskins Building. In 2017 The \$12 million “In Concert with You” campaign was launched, and was divided into three target areas:

- \$5 million for an endowment to support program excellence
- \$3 million for an endowment to support artistic and executive leadership
- \$4 million for the Shalin Liu Performance Center Building Preservation Fund



Photo credit: Rockport Music

Comparable Projects

Shalin Liu Performance Center, Rockport, MA

- The Music Center has become an important cultural resource for the greater Boston community, attracting well-known performers, audiences, and visitors to Cape Ann as an active summer community. Education and community outreach activities serve over 10,000 students and adults throughout Cape Ann and the North Shore annually.
- As a unique regional venue, the Shalin Liu Performance Center offers opportunities to local educational, arts, business and civic groups, including performance, rehearsal and educational programs for local public schools. Community and business groups can rent the facility for meetings and special events as well.
- The physical space succeeded in its purpose as a state-of-the-art chamber music venue, while accentuating the natural beauty and magic of the landscape where it is situated.



Next Steps

Phase Two Scope of Services



Next Steps

Physical Planning Preview

PRELIMINARY GROSS SQUARE FOOTAGE PROJECTION (gsf)

Public spaces = 5600 gsf

300-seat auditorium and stage = 8000 gsf

Performer and production support = 3200 gsf

100-seat studio theatre and support = 4800 gsf

2 classrooms and storage = 2400 gsf

TOTAL = 24,000 gross square feet

Next Steps

Physical Planning Preview

PRELIMINARY PROJECT COST STRATEGY

Level 1 @ \$500 / gsf x 1.3 soft cost multiplier = \$15,600,000 project cost

Level 2 @ \$600 / gsf x 1.3 soft cost multiplier = \$18,720,000 project cost

Level 3 @ \$700 / gsf x 1.3 soft cost multiplier = \$21,840,000 project cost

Level 4 @ \$800 / gsf x 1.3 soft cost multiplier = \$24,960,000 project cost

COMPARABLE PROJECTS

Highlands Performing Arts Center, Highlands, NC (\$18 million, adjusted for inflation)

Cain Center for the Arts, Cornelius, NC (\$25 million capital campaign)

Questions?

