

TOWN COUNCIL

STAFF REPORT Executive Department



MEETING DATE:	July 8, 2025
PROJECT:	Workshop Presentation of the Performing Arts Feasibility Study Report
PROJECT MANAGER:	Chris Forster, MPA, CPFO, CGFM, Assistant Town Manager

BACKGROUND:

The objective of this feasibility study is to assess the viability of establishing a Performing Arts Center (PAC) in Bluffton, South Carolina. Through extensive market research, stakeholder outreach, and facility analysis, this study presents a data-driven foundation to support the planning and potential development of a PAC that is flexible, community-oriented, and financially sustainable. The proposal document submitted to the Town of Bluffton by Johnson Consulting outlines a detailed list of services for the study. Broadly, the objective of the study is to answer the following questions:

- What is the overall assessment of the market?
- What size and type of facility can the market support?
- Who will utilize the venue and what are their needs, desires, and expectations?
- What will be the demand strategy for the venue?

The Town of Bluffton, South Carolina, is considering the development of a new Performing Arts Center (PAC) to serve its rapidly growing population and increasingly vibrant arts and cultural community. This feasibility study, prepared by Johnson Consulting, evaluates the market demand, sustainability, and economic potential of such a facility. The study aims to provide actionable insights and recommendations to guide Bluffton's leadership in determining the appropriate scale, programming, and strategic direction for the PAC.

Bluffton has undergone significant demographic growth, more than doubling its population since 2010. It is also part of a larger regional economy that includes Hilton Head Island and the broader Lowcountry tourism market. Despite strong community interest in the arts and increasing demand for venues, Bluffton currently lacks a dedicated, flexible facility for performances, events, and community programming.

A new PAC can serve as both a cultural anchor and an economic catalyst. A new facility is expected to enhance the quality of life for residents, provide space for local and regional organizations, and contribute to Bluffton's appeal as a destination. Johnson Consulting's process included stakeholder engagement, a regional market assessment, competitive facility audits, industry trends analysis, and a strategic review of similar facilities nationwide.

This effort is part of the Town of Bluffton's broader goals to support community enrichment, enhance the arts ecosystem, and boost tourism and economic activity. The PAC is envisioned to fill current gaps in regional infrastructure by offering a high-quality, multi-use space for performances, meetings, educational programming, and private events.

KEY FINDINGS:

While the focus of this study was a PAC feasibility study, based on comprehensive research and stakeholder outreach, this report concludes that there is both a clear demand and a strong strategic case for developing a flexible, multi-use cultural and civic venue in Bluffton. The proposed venue should have two primary demand verticals: 1) performing arts and entertainment and 2) the flexibility to host conferences, meetings, and social events.

NEXT STEPS:

The next phase of work should include detailed business and financial analysis, site and program analysis, and refined conceptual and space planning. This includes forecasting operational performance, assessing the fiscal and economic impacts of the project, evaluating potential sites, and developing phasing strategies. These efforts should be paired with a comprehensive funding and implementation strategy that supports both capital development and ongoing operations.

As the project advances, ensuring operational and financial sustainability will be paramount. A public-private partnership model is recommended to balance public benefit with professional management expertise. Funding should be pursued through a diverse mix of public, private, nonprofit, philanthropic, and tourism-related sources. Revenue streams should be equally diverse, including ticket sales, space rentals, private events, sponsorships, memberships, and on-site amenities such as a café, studio space, or merchandise area. Securing one or more anchor tenants and pursuing naming rights or capital sponsorships will further enhance long-term viability.

Bluffton is uniquely positioned to develop a high-impact, flexible performing arts and events venue that addresses community needs, fills a critical gap in the regional venue landscape, and generates substantial economic and social benefits. The opportunity aligns with the Town's long-term goals of cultural enrichment, economic diversification, and enhanced quality of life. With strong leadership, coordinated stakeholder engagement, and a shared community vision, this initiative has the potential to serve as a cultural anchor and economic catalyst, providing not only artistic programming but also driving tourism, community engagement, and local spending in Bluffton.

ATTACHMENTS:

1. Feasibility Report

Feasibility Study for a Performing Arts Center

Bluffton, SC

June 2025

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| 1. Introduction

Transmittal Letter

Re: Town of Bluffton Performing Arts Center Feasibility Study

Dear Mr. Forster:

C.H. Johnson Consulting, Inc. (Johnson Consulting) is pleased to submit this report to you regarding the Feasibility Study for Performing Arts Center in Bluffton, SC. Pursuant to our engagement, this report fulfills the scope of work outlined in the project proposal submitted by Johnson Consulting to the Town of Bluffton on November 25th, 2024.

Johnson Consulting has no responsibility to update this report for events, plan modifications, and circumstances occurring after the date of this report. The findings presented herein reflect analyses of primary and secondary sources of information. Johnson Consulting used sources deemed to be reliable but cannot guarantee their accuracy. Moreover, some of the estimates and analyses presented in this study are based on trends and assumptions, which can result in differences between projected results and actual results. Because events and circumstances frequently do not occur as expected, those differences may be material. This report is intended for the Clients' internal use and cannot be used for project underwriting purposes without Johnson Consulting's written consent.

We have enjoyed serving you on this engagement and look forward to providing you with continuing service.

Sincerely,

C.H. Johnson Consulting, Inc.

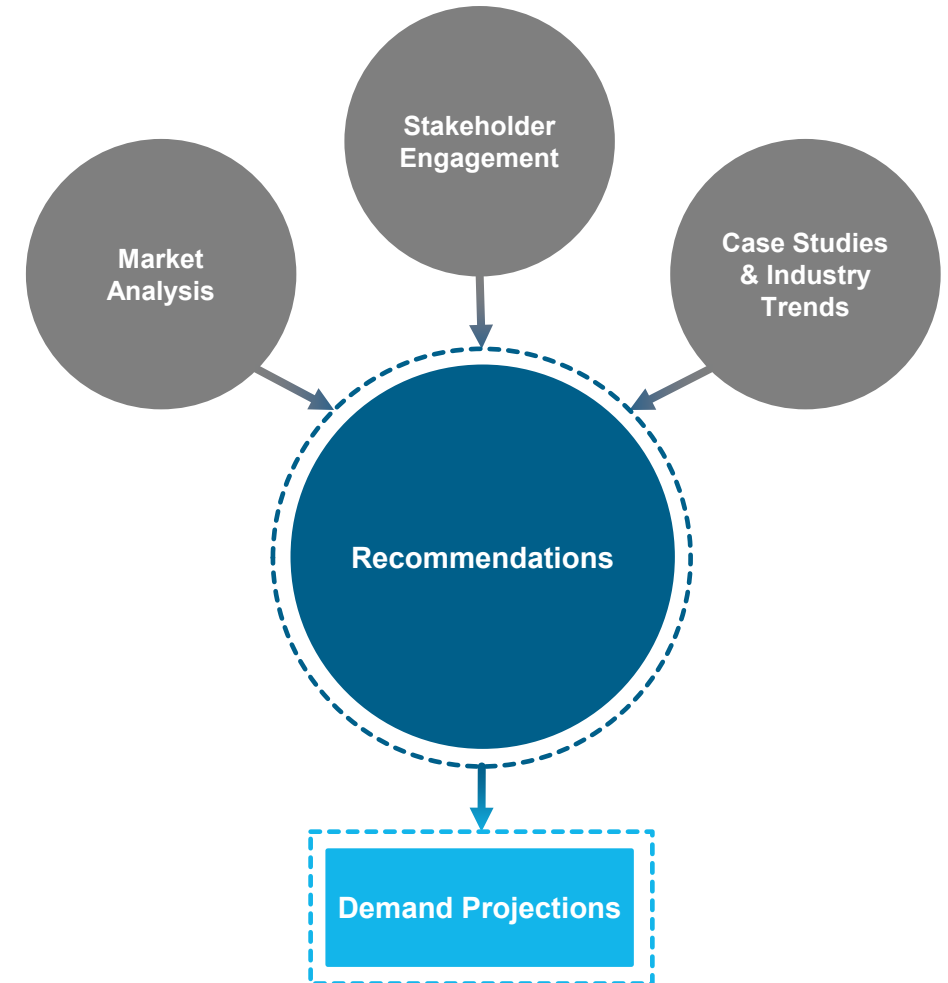
C.H. Johnson Consulting, Inc.

Study Introduction & Methodology

The objective of this feasibility study is to assess the viability of establishing a Performing Arts Center (PAC) in Bluffton, South Carolina. Through extensive market research, stakeholder outreach, and facility analysis, this study presents a data-driven foundation to support the planning and potential development of a PAC that is flexible, community-oriented, and financially sustainable. The proposal document submitted to the Town of Bluffton by Johnson Consulting outlines a detailed list of services for the study. Broadly, the objective of the study is to answer the following questions:

- What is the overall assessment of the market?
- What size and type of facility can the market support?
- Who will utilize the venue and what are their needs, desires, and expectations?
- What will be the demand strategy for the venue?

In order to answer the questions above, the Consulting Team developed and executed a comprehensive methodology for the study, which is illustrated by the figure on the right. The observations, analysis, and conclusions of the study will be presented throughout the remaining sections of this report.



Project Overview

The Town of Bluffton, South Carolina, is considering the development of a new Performing Arts Center (PAC) to serve its rapidly growing population and increasingly vibrant arts and cultural community. This feasibility study, prepared by Johnson Consulting, evaluates the market demand, sustainability, and economic potential of such a facility. The study aims to provide actionable insights and recommendations to guide Bluffton's leadership in determining the appropriate scale, programming, and strategic direction for the PAC.

Bluffton has undergone significant demographic growth, more than doubling its population since 2010. It is also part of a larger regional economy that includes Hilton Head Island and the broader Lowcountry tourism market. Despite strong community interest in the arts and increasing demand for venues, Bluffton currently lacks a dedicated, flexible facility for performances, events, and community programming.

A new PAC can serve as both a cultural anchor and an economic catalyst. A new facility is expected to enhance the quality of life for residents, provide space for local and regional organizations, and contribute to Bluffton's appeal as a destination. Johnson Consulting's process included stakeholder engagement, a regional market assessment, competitive facility audits, industry trends analysis, and a strategic review of similar facilities nationwide.

This effort is part of the Town of Bluffton's broader goals to support community enrichment, enhance the arts ecosystem, and boost tourism and economic activity. The PAC is envisioned to fill current gaps in regional infrastructure by offering a high-quality, multi-use space for performances, meetings, educational programming, and private events.



Photo provided by Visit Bluffton



| 1.1 Executive Summary

Executive Summary

Key Findings

While the focus of this study was a PAC feasibility study, based on comprehensive research and stakeholder outreach, this report concludes that there is both a clear demand and a strong strategic case for developing a flexible, multi-use cultural and civic venue in Bluffton. The proposed venue would have two primary demand verticals: 1) performing arts and entertainment and 2) the flexibility to host conferences, meetings, and social events. This multipurpose capability will ensure that the venue is as highly utilized as possible.

Market Assessment

Bluffton has experienced significant growth over the past decade, with the population increasing by 188 percent since 2010. Currently home to more than 31,000 residents, the town is part of a larger regional economy that includes Hilton Head Island and the Lowcountry tourism corridor. Bluffton's residents are notably affluent and well-educated, with a median household income of nearly \$100,000 and high levels of educational attainment. These characteristics correlate with increased participation in cultural activities and strong local spending on performing arts and entertainment. However, despite this favorable demographic profile, Bluffton lacks a dedicated performing arts venue or event facility capable of hosting mid-sized cultural, civic, and private events. As a result, a substantial portion of Bluffton's event attendance and spending currently flows to neighboring communities, particularly Hilton Head Island and downtown Savannah, creating an ongoing pattern of economic leakage.

Community Engagement and Stakeholder Feedback

The stakeholder engagement process revealed widespread and enthusiastic support for the development of a performing arts facility. Interviews and focus groups involving over 30 organizations, including arts nonprofits, educators, public officials, and local businesses, emphasized the need for a flexible, multi-use venue that can serve youth programs, professional performances, art exhibitions, conferences, fundraisers, and private events. Stakeholders consistently cited the lack of adequate venue infrastructure in Bluffton as a barrier to local cultural development and economic opportunity. There was broad consensus that a new facility should prioritize versatility, accessibility, and community access, allowing for a blend of public performances, educational programming, and rental availability for private and commercial use.

Executive Summary Continued

Competitive and Regional Landscape

A regional audit confirmed that Bluffton's current inventory of performance and event space is limited in both scale and quality. While neighboring Hilton Head Island and Savannah offer a number of venues, these are often geographically inconvenient for Bluffton residents or oriented toward larger-scale productions that do not serve local needs. Several nearby facilities, such as the May River Theatre, offer limited capacity and outdated infrastructure. New developments, such as USCB's proposed convocation center, are focused on athletics or campus-specific functions, leaving a gap for a purpose-built performing arts and events center with cultural and civic programming at its core.

Industry Trends and Case Study Insights

Current industry trends indicate a strong shift toward multi-purpose venue design, with emphasis on flexibility, technology integration, and inclusive, adaptable space. Facilities that can transform from performance mode to banquet or classroom use are proving to be more resilient, especially in smaller or regional markets. National case studies, such as the Cain Center for the Arts in Cornelius, NC, and the Chapman Cultural Center in Spartanburg, SC, reinforce the importance of mixed-use spaces that balance performance programming with community events, educational outreach, and rental income. These examples demonstrate that even in mid-sized towns, well-designed venues can succeed by embracing diversified programming and revenue streams.

Executive Summary Continued

Strategic Recommendations

From both a cultural and economic standpoint, a new Multipurpose Arts and Event Center in Bluffton represents a strategic opportunity. In addition to providing a much-needed platform for the town’s growing arts organizations and community groups, a new facility would help retain local spending and attract regional visitors. Its potential to host meetings, conferences, and private events adds further value by positioning Bluffton as a destination for both cultural enrichment and economic activity. Public investment will likely be required to launch the project, but the long-term outlook for revenue generation via programming, rentals, sponsorships, and philanthropy is promising.

Based on this study’s findings, Johnson Consulting recommends that the Town of Bluffton proceed with planning and design of a flexible, mid-sized Performing Arts and Event Center. The facility should be:

- Multi-use and modular, with convertible seating, meeting rooms, classrooms, studio space, and outdoor areas;
- Community-focused, offering access to local organizations, youth programs, and civic groups;
- Technologically advanced and future-ready, supporting hybrid and digital events and future expansion opportunities;
- Designed for financial sustainability, with diversified programming and revenue models;
- Located with accessibility, visibility, and expansion potential in mind.

These recommendations have resulted in the program shown at right, including a 10,000 SF multipurpose performance hall, supported by flexible meeting space. By strategically aligning with market demand, community aspirations, and best practices from across the country, Bluffton has the opportunity to create a vibrant cultural hub that strengthens its economy, enhances quality of life, and supports its long-term growth as a regional destination.

Town of Bluffton Multipurpose Arts and Events Center Proposed Program of Function Spaces			
Space	Size		Notes
Multipurpose Event / Performance Hall	10,000	SF	Features a 2,400 SF stage Divisible into three smaller spaces
Seated Performance Capacity	600	Seats	
Banquet Event*	800	Attendees	
Tradeshow**	50	Booths**	
Studio Theatre / Meeting Space	3,000	SF	
	175	Seats	

*6' round tables

10'x10' booths

Source: Johnson Consulting

Executive Summary Continued

Demand Projections

Based on the facility program detailed on the previous page, Johnson Consulting has developed a preliminary demand strategy with estimated event and attendance volume for the first 10 years of operations.

As shown, in Year 1, the proposed Multipurpose Arts & Event Center is expected to host 194 total events, including 104 arts and cultural education classes, resulting in total attendance of 29,250, or an average attendance of 152 per event.

In Year 5, the facility is estimated to host 226 events with 54,741 attendees, resulting in an average of 243 attendees per event. In Year 10, the facility can expect to host 234 events, attracting nearly 62,000 attendees, resulting in an average of 264 attendees per event.

Town of Bluffton Multipurpose Arts & Events Center Projected Event Demand

	Year 1	Year 5	Year 10
Ticketed Events	16	22	29
Internal Rentals	12	12	12
Community Partner/ Free Rentals	6	12	13
External Rentals	40	50	50
Free Events/ Performances	16	26	26
Subtotal Events	90	122	130
Arts & Culture Classes	104	104	104
Total	194	226	234

Source: Johnson Consulting

Town of Bluffton Multipurpose Arts and Events Center Projected Total Attendance

	Year 1	Year 5	Year 10
Ticketed Events	6,000	10,122	13,680
Internal Rentals	1,644	1,970	2,093
Community Partner/ Free Rentals	958	2,361	2,676
External Rentals	15,360	26,492	28,601
Free Events/ Performances	3,408	11,716	12,837
Subtotal	27,370	52,661	59,887
Cultural Arts Classes	2,080	2,080	2,080
Total	29,450	54,741	61,967

Source: Johnson Consulting

Town of Bluffton Multipurpose Arts and Events Center Estimated Average Attendance

	Year 1	Year 5	Year 10
Ticketed Events	375	452	475
Internal Rentals	137	164	174
Community Partner/ Free Rentals	171	197	209
External Rentals	384	534	567
Free Events/ Performances	213	458	486
Cultural Arts Classes	20	20	20
Combined Average	152	243	264

Source: Johnson Consulting



2. Market Assessment



| 2.1 Economic & Demographic Trends

Overview

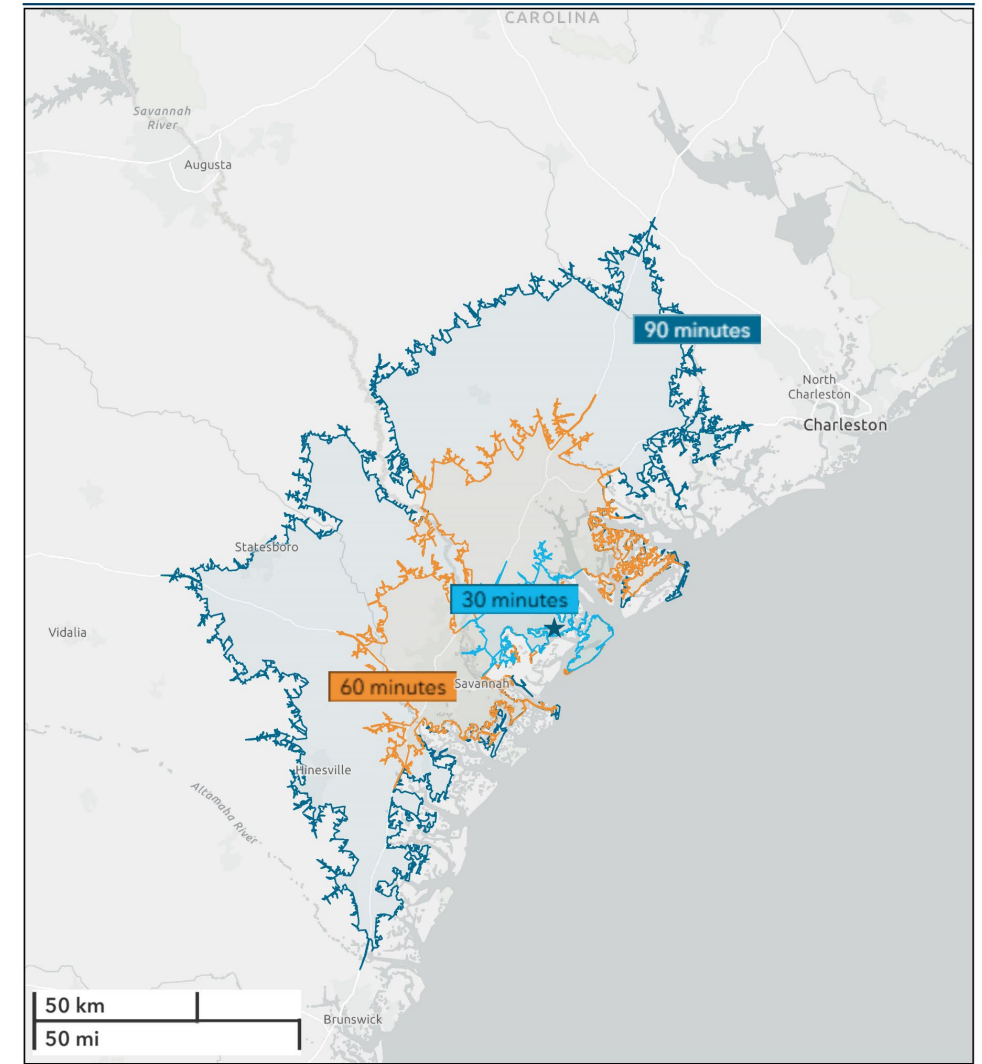
Bluffton is located in southeastern South Carolina on the May River, which flows into the Atlantic Ocean west of Hilton Head Island. Bluffton is located in the Lowcountry region of South Carolina, giving it a unique combination of tidal marshes and scenic riverfront views. From 2010 to 2024, Bluffton's population increased by 188 percent from 12,530 in 2010 to 36,146 in 2024. The town's scenic charm, mild climate and access to outdoor recreation have made it one of the fastest-growing communities in South Carolina. Bluffton is accessible via several airports and freeways:

- **Air:** Bluffton is approximately a 21-minute drive from the Hilton Head Island Airport. The much larger Savannah/Hilton Head International Airport is a 41-minute drive away.
- **Highway:** Bluffton is not immediately connected to any major interstates, but U.S. Route 278 connects Bluffton to I-95 which runs up along the entire East Coast connecting cities like Savannah and Jacksonville.

As shown by the map on the right, the 30-, 60-, and 90-minute drivetime catchments encompass major metro areas such as Savannah and Hilton Head Island.



Bluffton Drive Time Catchments



Population

The resident population of the Town of Bluffton was 36,146 persons in 2024. The 30-, 60-, and 90-minute drive time catchment areas, reflecting the draw of a potential new Performing Arts Center and events and meetings space, had populations ranging from nearly 120,000 to 842,000. Between 2010 and 2024, the population of the Town of Bluffton increased at an average rate of 7.9 percent per annum. These growth rates were far greater than those of South Carolina and the nation. According to Esri, from 2024 to 2029, the population growth of Bluffton is forecasted to see a decrease. The leveling out of Bluffton’s growth rate may indicate the town does not have the necessary infrastructure and amenities to sustain an equally rapid increase in development. The 30-minute drive time catchment around Bluffton has a forecasted average growth rate of 1.5 percent per annum. This indicates the region immediately around Bluffton is growing at a faster rate than the town itself. Furthermore, according to Blueprint Bluffton, the Bluffton Comprehensive Plan, there is forecasted increase in population growth through 2040, as ESRI does not take into account factors such as pipeline residential development.

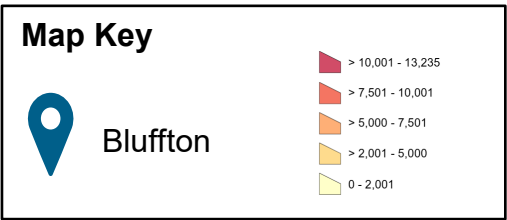
Historic, Current, and Forecasted Population					
	2000	2010	2024	2029	CAGR* 2010-2024
U.S.	281,421,906	308,745,538	338,440,954	344,873,411	0.7%
South Carolina	4,011,989	4,625,344	5,478,831	5,626,237	1.2%
Beaufort County	120,946	162,233	201,775	209,335	1.6%
Town of Bluffton	3,066	12,530	36,146	33,049	7.9%
Bluffton Town Hall (30 minutes)	52,909	89,136	119,610	128,596	2.1%
Bluffton Town Hall (60 minutes)	383,713	474,079	579,861	610,132	1.4%
Bluffton Town Hall (90 minutes)	601,299	713,780	842,021	879,798	1.2%

*Compounded Annual Growth Rate
Sources: Esri BAO, US Census, Johnson Consulting

Population Growth

The table to the right shows the Historic, Current, and Forecasted Housing Units in Bluffton. The renter-occupied housing units nearly doubled from 2010 to 2024 while owner-occupied housing units nearly tripled during that same time. Both renter-occupied housing units and owner-occupied housing units are forecasted to increase by 2029, albeit at a much slower pace.

The three maps below show the population of Bluffton and the surrounding area's zip codes in 2010 and 2024 and the forecasted population for the same region in 2029. Bluffton and the surrounding area have seen a huge increase in population since 2010 and are forecasted to continue its growth. As this area continues to grow, Bluffton's strategic location in the center of the region will make it important in supporting the area's other rapidly growing towns like Hardeeville.

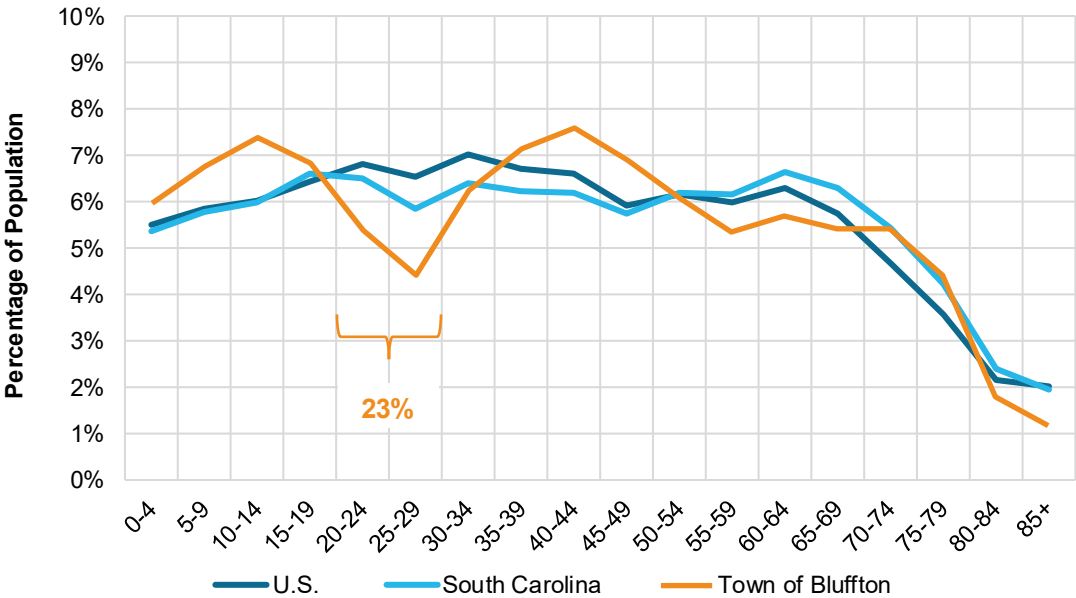


Age

Age is an important demographic indicator to consider when evaluating the market. Some markets seek to combat “brain drain,” a phenomenon where primarily college-educated young professionals are leaked to larger or different metropolitan markets. Other markets seek to attract wealthier retirees, which bring economic spending, leisure time, and philanthropic dollars with them to these markets. Bluffton’s small town feel and proximity to Hilton Head Island and Savannah has made it a popular destination for older, more established virtual workers. This can be seen in the increase in median age from 32.9 in 2010 to 39.9 in 2024.

Bluffton has an older age distribution relative to state and national averages. Only 23 percent of Bluffton residents are ages 20-39, which is more than 4 percent less than the national average. This is likely because of brain drain and young professionals seeking larger metropolitan markets like Savannah and Charleston. However, this trend may reverse as Bluffton has recently become a popular location to which young remote workers relocate. The proportion of middle-aged populations (ages 35-54) are higher than state and national averages. These demographics are particularly significant as they often represent heads of households. Heads of households drive long-term community investment through homeownership, school enrollment and stable employment. Attracting and retaining these residents is vital for sustaining of a community and ensuring continued demand for amenities like parks and performing arts centers.

2024 Age Distribution



Sources: Esri BAO, US Census, Johnson Consulting

Historic, Current, and Forecasted Median Age

	2010	2024	2029	CAGR* 2010-2024	CAGR* 2024-2029
U.S.	37.1	39.3	40.4	0.4%	0.6%
South Carolina	37.8	41.0	41.9	0.6%	0.4%
Beaufort County	40.6	47.6	48.3	1.1%	0.3%
Town of Bluffton	32.9	39.9	40.9	1.4%	0.5%
Bluffton Town Hall (30 minutes)	45.3	53.3	54.3	1.2%	0.4%
Bluffton Town Hall (60 minutes)	35.0	39.0	40.2	0.8%	0.6%
Bluffton Town Hall (90 minutes)	34.4	37.9	39.1	0.7%	0.6%

*Compounded Annual Growth Rate

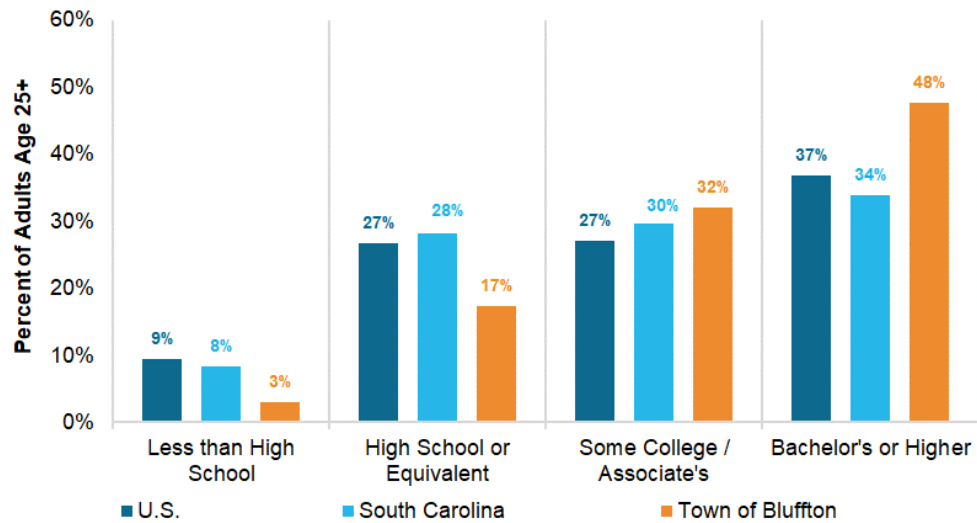
Sources: Esri BAO, Johnson Consulting

Education & Income

Education and income, although not strict predictors of PAC facility performance, are important market attributes for benchmarking the potential level of activity. Markets with higher educational attainment and income levels are more likely to have a robust economic base and healthy education system, which are key components of ensuring long-term growth and resiliency. Well-educated, higher income markets have a significant advantage when it comes to attracting new businesses and are also more likely to have the nightlife, retail, and tourism products that appeal to event planners and show organizers.

The Town of Bluffton has above average educational attainment levels among adults age 25+ for high levels of educational attainment. 48 percent of people in Bluffton age 25+ have a Bachelor's or higher educational attainment. This is higher than both the state and national levels. In contrast, Bluffton has a relatively low proportion of adults 25+ with less than high school education. The median household income in Bluffton is \$99,607 per annum, significantly above that of the U.S. (\$79,068). Income levels in Bluffton are projected to grow at a rate of 2.8 percent per annum over the next five years, which is slightly less than the United States. These education and income statistics reflect a strong economic trajectory. Bluffton's high educational attainment and above-average household income indicate a well-informed and financially capable population, providing a strong foundation for the success and sustained support of a new Performing Arts Center and Events Space.

2024 Educational Attainment



Sources: Esri BAO, Johnson Consulting

Current & Forecasted Median Household Income

	2024	2029	CAGR*
U.S.	\$79,068	\$91,442	3.0%
South Carolina	\$66,981	\$79,671	3.5%
Beaufort County	\$87,099	\$100,834	3.0%
Town of Bluffton	\$99,607	\$114,312	2.8%
Bluffton Town Hall (30 minutes)	\$91,530	\$104,413	2.7%
Bluffton Town Hall (60 minutes)	\$77,591	\$89,277	2.8%
Bluffton Town Hall (90 minutes)	\$71,474	\$83,478	3.2%

*Compounded Annual Growth Rate

Sources: Esri BAO, Johnson Consulting

Disposable Income and Entertainment Spending

The table below shows the differences in average disposable income and the propensity to participate in performing arts-related activities (attending live theater, engaging in fundraising, or have volunteered for a charitable organization) across various cities, states and regions. Successful Performing Arts Centers require not only financial capital but also an active and engaged population to support operations and affiliated organizations, such as symphony orchestras or local theater troupes. The table below shows that Bluffton stands out with above-average disposable income and a strong inclination toward attending live performances, participating in fundraising efforts and volunteering. This combination of financial capacity and civic engagement positions Bluffton as an ideal community for sustaining a successful Performing Arts Center.

2024 Average Disposable Income and PAC Trends								
Spending Category	South Carolina		Beaufort County		Town of Bluffton		Bluffton Town Hall (90 minutes)	
	Average	Index*	Average	Index*	Average	Index*	Average	Index*
Average Disposable Income	\$72,105	87	\$92,764	112	\$98,612	119	\$73,519	89
Spending Category	Total	Index*	Total	Index*	Total	Index*	Total	Index*
Went to a live theatre	333,346	90	16,014	112	2,270	110	55,356	95
Engaged in Fundraising	379,313	99	13,896	95	2,158	101	58,425	97
Volunteered for a charitable organization	666,108	99	28,894	113	4,292	115	103,351	98

* National Average = 100; where 110 is 10% more than the national average and 90 is 10% less than the national average.

Sources: Esri BAO, Johnson Consulting

Major Employers

A strong corporate and business presence can be important in the success of a PAC and event space, because local businesses support facilities by attracting residents to the area, and providing disposable income, as well as their use of event space, and through donations, sponsorships, and advertising.

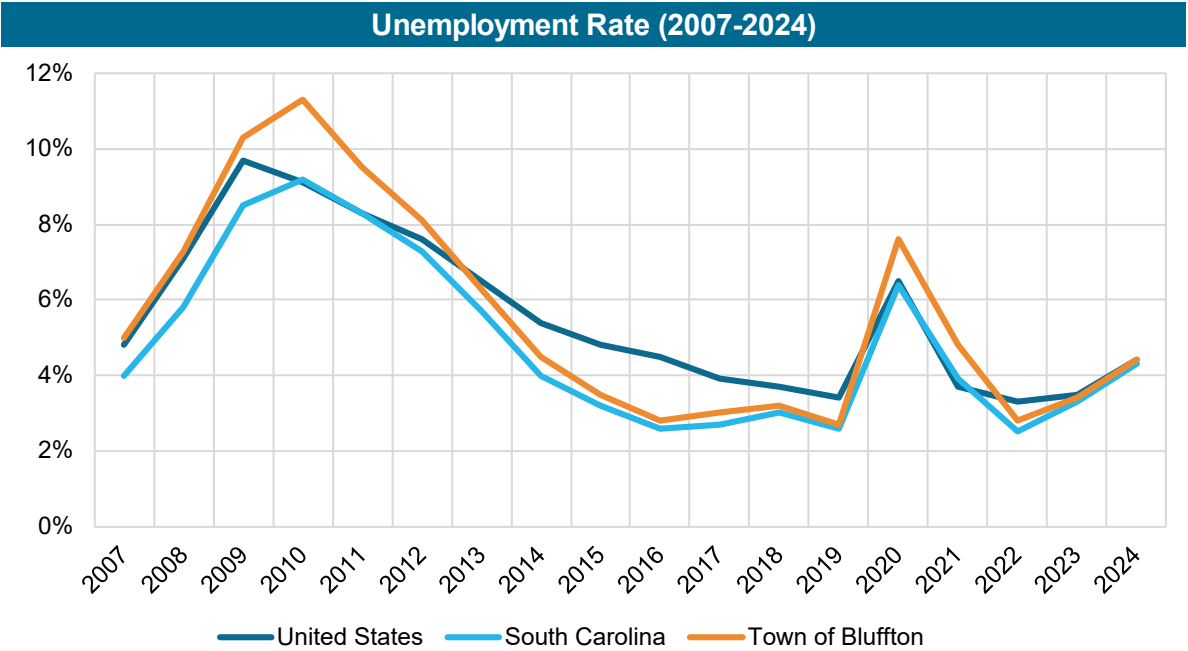
The resorts and other tourism attractions of Hilton Head Island represent a significant portion of Beaufort County’s employers and economic impact. The tourism and hospitality industry’s economic impact on the county was estimated to be around \$3 billion in 2023 according to the Hilton Head Island-Bluffton Chamber of Commerce.

Largest Employers in Beaufort County	
Employer	Industry
Alpha Genesis Inc	Biomedical Research
Beaufort County School District	Education
Beaufort Memorial Hospital	Health Care
County of Beaufort	Government
Dept of Defense	Government
Food Lion LLC	Retail
Gregory M Parker Inc	Retail
HES Facilities LLC	Custodial & Maintenance
Marine Corps Community Services	Military
Montage Palmetto Bluff LLC	Hospitality
Palmetto Bluff Investments LLC	Real Estate
Publix Super Market Inc	Retail
Sea Pines Resort LLC	Hospitality
Select Employment Services Inc	Healthcare Staffing
Sitel Operating Corporation	Outsourcing Consulting
Tenet Physician Svcs of Hilton Head	Health Care
TG Administration LLC	Golf Course Management
The Kroger Co	Retail
Wal-Mart Associates, Inc.	Retail

Source: South Carolina Department of Employment and Workforce, Johnson Consulting

Unemployment

From 2014 to 2019, both South Carolina and Bluffton’s unemployment rates tracked below the national average. However, during the COVID-19 pandemic, Bluffton’s unemployment rate exceeded the national rate. This was likely due to the town’s large tourism and hospitality industries both of which significantly impacted during the pandemic. Since 2022, Bluffton’s unemployment rate has dipped below the national averages, indicating a recovery of Bluffton’s tourism and hospitality industries. Unemployment rates do not always capture the entire picture as they ignore variables like underemployment and labor participation rate.



Sources: Bureau of Labor Statistics, Johnson Consulting

Location Quotient by Industry Sector

As of 2024, the two largest industries in Bluffton were Retail Trade and Accommodation/Food Services. These two industries help support the area’s strong tourism and hospitality industry. The top 5 industries with the most employees are:

- Retail Trade
- Accommodation/Food Services
- Health Care
- Professional/Tech Services
- Construction

The table on the right provides a location quotient analysis of the number of employees in the Bluffton area by industry sector relative to that of the U.S. as a whole. Location quotients of 1 indicate a similar relative concentration of that particular industry in the region, while values higher than 1 indicate higher concentrations of that industry, and values lower than 1 indicate lower concentrations of that industry. The location quotient values are color-coded accordingly. Real Estate was the industry with the largest relative concentration of jobs with a location quotient of 2.1. Bluffton’s Real Estate industry has benefited as the demand to live in Bluffton outpaces the housing supply.

Number of Employees and Location Quotient by Industry Sector					
Sector	Bluffton Town Hall (30 minutes)		United States		Location Quotient
	# of Employees	% of Workforce	# of Employees	% of Workforce	
Retail Trade	6,895	14%	17,466,958	11%	1.3
Accommodation/Food Svcs	6,003	12%	11,278,906	7%	1.8
Health Care	5,809	12%	23,456,971	14%	0.8
Professional/Tech Svcs	4,244	8%	13,809,183	8%	1.0
Construction	3,651	7%	11,451,823	7%	1.1
Educational Services	3,437	7%	15,195,307	9%	0.8
Admin/Waste Mgmt	3,271	7%	7,081,496	4%	1.5
Manufacturing	3,123	6%	16,689,169	10%	0.6
Other Services	2,413	5%	7,659,338	5%	1.0
Arts/Entertainment/Rec	2,193	4%	3,747,233	2%	1.9
Finance/Insurance	2,065	4%	8,016,748	5%	0.9
Real Estate	1,863	4%	2,954,414	2%	2.1
Transportation	1,427	3%	8,419,877	5%	0.6
Public Administration	1,263	3%	8,265,300	5%	0.5
Information	1,157	2%	3,255,572	2%	1.2
Utilities	446	1%	1,502,079	1%	1.0
Agriculture	413	1%	1,785,077	1%	0.8
Wholesale Trade	340	0.7%	3,291,578	2%	0.3
Management	63	0.1%	237,343	0.1%	0.9
Mining	1	0.0%	561,373	0.3%	0.0
Total Employees	50,077		166,125,745		

Sources: Esri BAO, Johnson Consulting

Implications

In 2010, Bluffton was a small town of just 12,626 residents and the May River Theater met the community's cultural and performing arts needs. Since then, Bluffton has experienced explosive growth. The population was 36,146 residents as of 2024, an increase of 188 percent since 2010. Despite this dramatic expansion, investment in arts and cultural infrastructure has not kept pace, which is a similar challenge in other fast-growing communities. The town remains without a dedicated, high-quality Performing Arts Center to serve its evolving community. Currently, Bluffton's main industry is tourism and hospitality due primarily to its proximity to Hilton Head Island, scenic location and small-town feel. A new multipurpose facility could help the Bluffton area's already well-established tourism and hospitality industry as large shows would be able to attract more tourists. As shown by the Town's above average spend on theater/opera/concerts, Bluffton's residents are already highly engaged in the arts. However, much of that engagement takes place outside of Bluffton itself. As Bluffton grows larger, more community assets are needed to suit its needs.

Bluffton's economic and demographic profile has extremely positive attributes. Bluffton has a strong median household income of \$99,607 and it is expected to increase by 2.8 percent to \$114,312 by 2029. Bluffton's population is also highly educated with 48 percent of the population age 25 or older with a bachelor's degree or higher level of educational attainment. Bluffton's median household income and educational attainment is well above state and national averages. Bluffton's median age is 39.9, which is higher than the national average of 39.3. This is largely due to the large influx of older working professionals and retirees. Bluffton's unemployment rate of 4.4 percent is in-line with South Carolina (4.3 percent) and the national average of 4.4 percent.

As indicated by their high educational attainment and median household income, Bluffton residents are likely to spend more on arts and cultural entertainment. According to ESRI, Bluffton residents spend on average 22 percent more on theatre/opera/concert tickets than the national average. Already, a large number of Bluffton residents travel to performing arts centers outside of Bluffton to Savannah and Hilton Head Island. Similarly, the residents of Beaufort County have similarly high spending trends. A flexible PAC with the capability to host large meetings and events in Bluffton could help to improve these already positive attributes and bring further access to the arts.



| 2.2 Regional Facility Audit

Regional Performing Arts Centers

The table to the right lists the Bluffton region's Performing Arts Venues. The main facility in Bluffton is the May River Theatre which has a seating capacity of only 181 people. While the May River Theatre does attract some shows from Atlanta and Charleston, the facility is in need of repairs. Nearby Hilton Head Island also has Performing Arts Centers. Located on Hilton Head Island, the Arts Center of Coastal Carolina has both a Mainstage Theater with capacity for 349 and a Studio Theater with a capacity of 175. The Main Street Theatre is also on Hilton Head Island, which has roughly 500 seats and caters primarily to local school organizations and does not have the capacity to regularly host larger-scale events. Sun City is a senior living community and the Sun City Community Theatre is monopolized by community programming or events tailored towards community residents and is seldomly used by Bluffton residents.

The Savannah market has a much larger inventory of large facilities, specifically in the city's downtown. With 2,524 seats, the Johnny Mercer Theater is the largest in the Savannah Market, and the 90-minute drive time catchment around Bluffton. The Lucas Center for the Arts is the next largest with seating for 1,200. Facilities in Savannah draw a considerable number of visits from Bluffton due to their size and ability to host larger touring acts.

Regional Performing Arts Venues

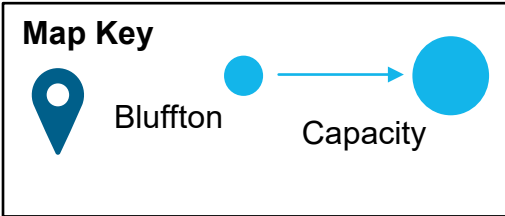
Venue	Distance from Bluffton	Location	Total Capacity
Bluffton Market			
May River Theatre	0	Bluffton, SC	181
Hilton Head / Beaufort County Market			
Sun City Community Theatre	11.6	Ridgeland, SC	540
Main Street Theatre - Hilton Head Prep	9.4	Hilton Head Island, SC	500
USCB Center for the Arts	29.7	Beaufort, SC	490
Arts Center of Coastal Carolina - Mainstage Theater	14.7	Hilton Head Island, SC	350
Arts Center of Coastal Carolina - Studio Theater	14.7	Hilton Head Island, SC	175
Savannah Market			
Martin Luther King Jr. Arena	23.6	Savannah, GA	9,600
Lucas Center for the Arts	24.0	Savannah, GA	1,200
Trustees Theater	23.9	Savannah, GA	1,100
Yamacraw Center for the Performing Arts	23.3	Savannah, GA	600
District Live	23.6	Savannah, GA	500
Victory North	25.3	Savannah, GA	380
Savannah Cultural Arts Center - Ben Tucker Theater	23.3	Savannah, GA	338
Mars Theater	40.4	Springfield, GA	233
Statesboro Market			
Georgia Southern University Performing Arts Center	76.1	Statesboro, GA	825
Averitt Center For The Arts	77.3	Statesboro, GA	359
Hinesville Market			
Liberty County Schools Performing Arts Center	61.3	Hinesville, GA	233

Sources: Relevant Facilities, Johnson Consulting

Regional Performing Arts Centers

The 90-minute drive time catchment around Bluffton has a large quantity of Performing Arts Centers (PACs) in and around Savannah. The map to the right shows the PACs within a 90-minute drive time of Bluffton with larger dots corresponding to PACs with larger capacities. The large dot over Savannah is from the Johnny Mercer Theater which is the largest theater in the analyzed area by capacity with seating for 2,524 persons. There are eight PACs with a capacity greater than 200 in the Savannah metropolitan area; three of these facilities have a capacity of greater than 1,000.

There are fewer Performing Arts Centers near Bluffton and Hilton Head Island. Bluffton has the Sun City Community, but according to Placer.ai, only 5.5 percent of visitors to the facility are coming from Bluffton. Outside of the Sun City Community Theatre, the May River Theatre is the only other theatre in Bluffton, but is at times unavailable or insufficient for larger performance events. Neighboring Hilton Head Island does have a 349-seat Performing Arts Facility at the Arts Center of Coastal Carolina, but can be inaccessible to Bluffton locals. Developing a larger, high-quality event and meeting facility in Bluffton would not only fill this market gap but also generate additional demand and visitation to Bluffton through new programming.



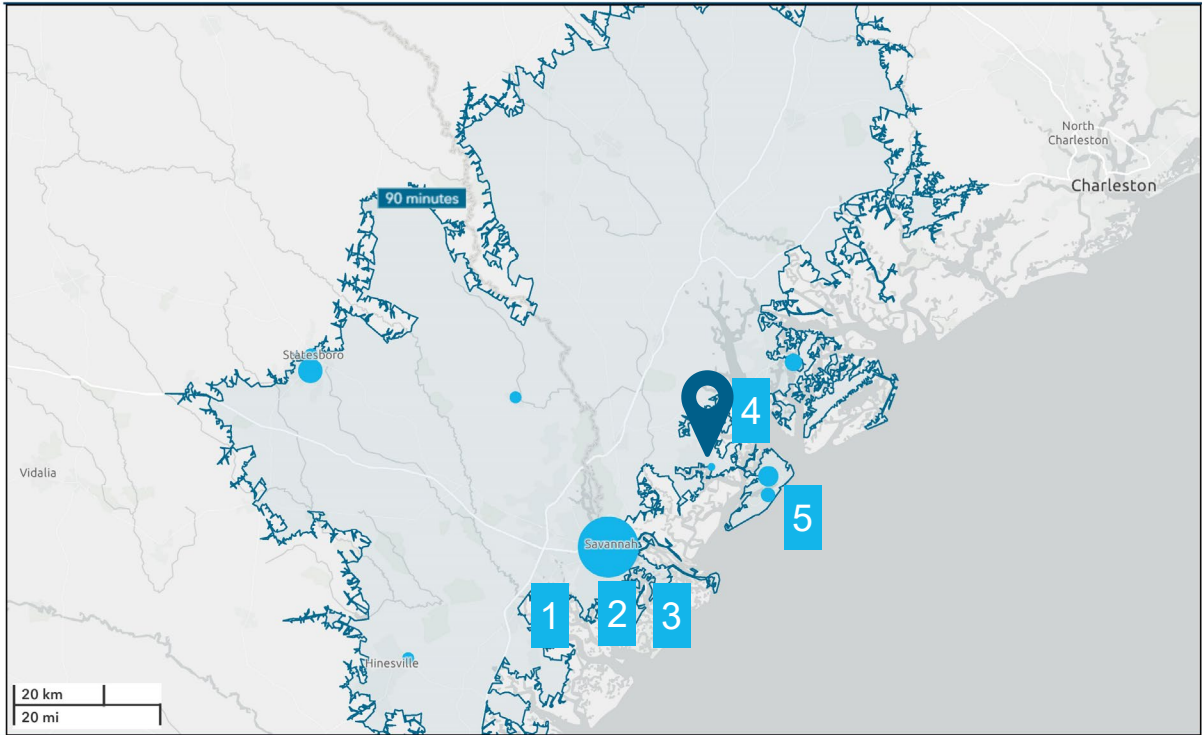
Notable Performing Arts Centers

Venue	Distance from Bluffton (miles)	Capacity
1 Johnny Mercer Theater	23.6	2,524
2 Lucas Center for the Arts	24.0	1,200
3 Trustees Theater	23.9	1,100
4 Sun City Community Theatre	0	540
5 Arts Center of Coastal Carolina - Mainstage Theater	14.7	350

Source: Relevant Facilities, Johnson Consulting



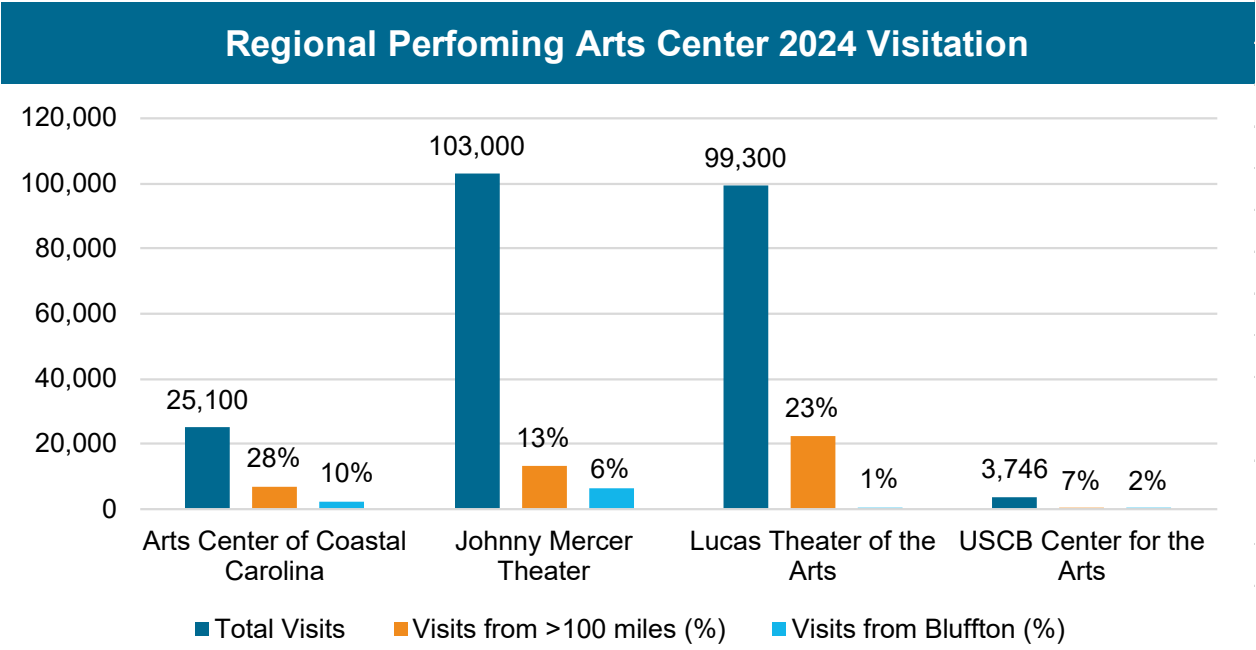
Regional Performing Arts Centers



Regional Facility Visitation

The chart to the right shows the total visitation of four different Performing Arts Centers in the region. Arts Center of Coastal Carolina is the closest to Bluffton. Visitation data from Placer.AI for this facility includes both the facility's Mainstage Theater and the Studio Theater which is a total of 525 seats across the two theaters. The USCB Center for the Arts is another university affiliated arts center in Beaufort County with a seating capacity of 460. Johnny Mercer Theater and Lucas Theater of the Arts are both located in downtown Savannah and have capacities of 2,524 and 1,200 respectively.

Total visitation to the two larger Savannah theaters is nearly four times as high as the Arts Center of Coastal Carolina. The Arts Center of Coastal Carolina did have a much higher proportion (28 percent) of its visitors from more than 100 miles away. This is likely due to its location in Hilton Head Island, a popular tourist destination. Bluffton residents made up 10 percent of the Arts Center of Coastal Carolina's total visitation for 2024 with 2,513 visits (10 percent of total visits). The Johnny Mercer Theater attracted 6,617 visits (6 percent of total visitors) from Bluffton residents while the Lucas Theater of the Arts attracted only 770 (1 percent of total visitors). USCB Center for the Arts had a very small number of total visits with only 3,746 visits in all of 2024. The facility also did not draw many visitors from Bluffton with only 84 visits (2 percent of total visits) from Bluffton.



Source: Placer.AI, Johnson Consulting

New and Recent Developments

Due to the region's massive growth, Bluffton and Hilton Head Island both have new large facilities that are set to open soon. The New Riverside Barn on Bluffton's west side underwent renovations recently. Renovations of the barn included an area for a concert stage and a covered outdoor porch. Its inside conditioned seating space will be 1,080 SF and will have the ability to host up to 170 visitors and have configuration options that include a dance floor, theater seating and banquet seating. The facility will also have a nearby pavilion that looks out over a park lawn. The New Riverside Barn will likely host weddings, social gatherings and small public performances, indicating that the facility will likely not compete with a larger performing arts center.

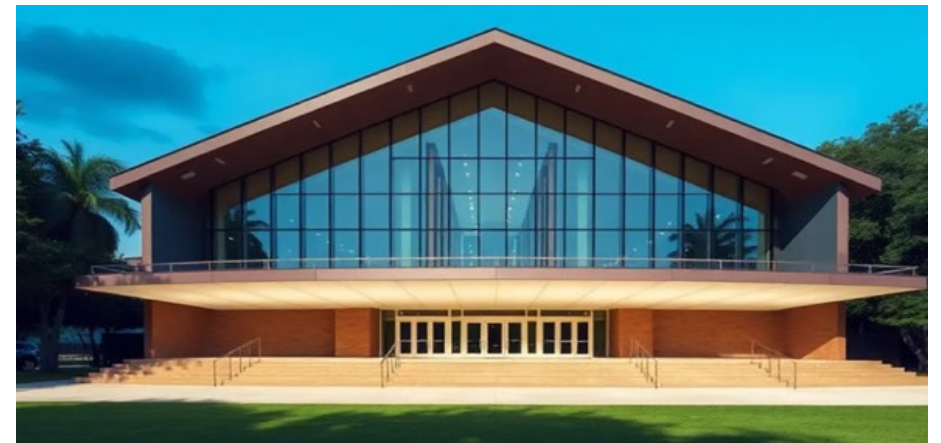
Recently, the Town of Bluffton took over a small amphitheater located in Buckwater Place Park in northern Bluffton. The amphitheater is a small outdoor venue that hosts some smaller performances and civic events. This facility would likely not compete with any of the programming offerings of a new proposed performing arts center.

Additionally, USCB's Bluffton campus is planning to develop a new \$70 million convocation center with seating capacity able to accommodate between 3,500 to 4,000. This facility will host athletic events as several of USCB's sports teams make the jump to NCAA DII. This facility will likely not compete against a performing arts center in Bluffton as USCB's new facility will predominately host athletic events and other school events like orientation and convocation.

Other local arts organizations like the Hilton Head Symphony Orchestra have attempted to construct new facilities to meet the growing demand. A new performing arts center in the region could be a home for these arts organizations as they outgrow their current venues.



New Riverside Barn



USCB Convocation Center

Regional Meeting and Event Facilities

The table to the right shows the Bluffton region's Meeting and Event Facilities. In order to narrow the search of event facilities relevant to this project, when considering facilities outside of Bluffton (and still within the 90-minute drive time catchment), Johnson Consulting only considered facilities that had between 10,000 and 100,000 SF of total meeting and event space as this would be the most competitive to a new facility in Bluffton.

Most facilities in Bluffton have limited total meeting space and are only able to host modest events. The three largest facilities in terms of total square footage in Bluffton are the Pickney Social Hall with 18,000 SF, the Montage Palmetto Bluff resort with 16,000 total SF, and the Seaquins Ballroom wedding venue with a total of 10,000 SF. Many other wedding spaces had ample outdoor space, but had much smaller indoor capabilities. While the temperature of South Carolina's Lowcountry region is often ideal for hosting outdoor events, the hottest months of summer and the coldest months of winter are not. The addition of a large indoor space in Bluffton would ameliorate this issue.

Bluffton Area Meeting and Event Facilities

Hotel	Facility Type	Largest Meeting Space (SF)	Total Meeting Space (SF)
Bluffton Market			
Pickney Social Hall	Venue Space/Ballroom	-	18,000
Montage Palmetto Bluff	Hotel Conference Center	6,696	16,000
Seaquins Ballroom	Wedding/Special Event Venue	2,842	10,000
May River Manor	Small Hotel Meeting Space	-	6,000
Burnt Church Distillery	Special Event Facility	3,500	4,650
Hewitt Oaks	Wedding/Special Event Venue	3,200	3,200
New Riverside Barn	Special Event Facility	2,700	2,700
May River Theatre	Performing Arts Theater	-	-
Beaufort County Library - Bluffton Branch	Government Facility	-	-
Hilton Head and Beaufort Market (10,000+ Total SF)			
Hilton Beachfront Resort & Spa Hilton Head Island	Hotel Conference Center	17,600	46,665
The Westin Hilton Head Island Resort & Spa	Hotel Conference Center	13,200	38,832
Sonesta Resort Hilton Head Island	Hotel Conference Center	9,880	22,930
Beach House Resort Hilton Head Island	Hotel Conference Center	3,510	18,863
Sea Pines Resort	Hotel Conference Center	4,600	18,000
Omni Hilton Head Oceanfront Resort	Hotel Conference Center	4,800	16,844
Hilton Head Isle Beach & Tennis	Hotel Conference Center	5,751	10,375
Haig Point Club	Special Event Venue	2,125	10,000
Golf Club at Indigo Run	Special Event Venue	-	20,800
Beaufort Inn	Hotel Conference Center	-	10,000
Fripp Island Golf and Beach Resort	Special Event Venue	4,100	10,150
Savannah Market (10,000+ Total SF)			
Richmond Hill City Center	Special Event Venue	4,000	30,000
Hyatt Regency Savannah	Hotel Conference Center	11,000	29,663
Savannah Quarters	Special Event Venue	-	29,000
Marriott Savannah Riverfront	Hotel Conference Center	14,863	24,556
The Westin Savannah Harbor Golf Resort & Spa	Hotel Conference Center	11,537	18,366
JW Marriott Savannah Plant Riverside District	Hotel Conference Center	6,336	18,052
The DeSoto Savannah	Hotel Conference Center	5,408	15,857
Victory North Savannah	Special Event Venue	-	15,000
Hotel Bardo Savannah	Hotel Conference Center	5,245	13,724
Savannah Hotel & Conference Center	Hotel Conference Center	4,324	12,748
Red Gate Farms	Special Event Venue	-	10,000

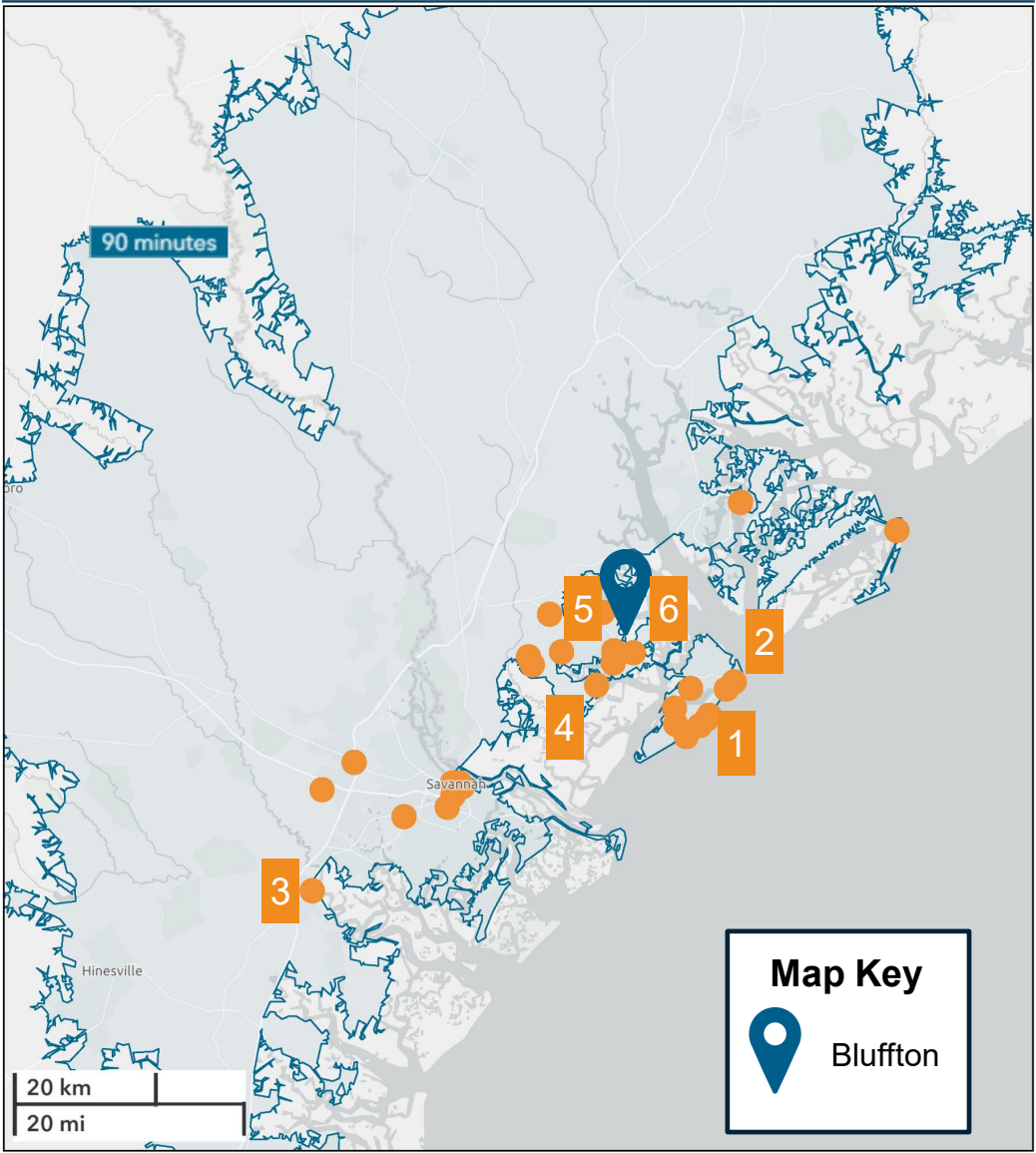
Source: Cvent, Johnson Consulting

Regional Meeting and Event Facilities

The map to the right shows the Meeting and Event facilities listed in the previous slide. Bluffton has a modest inventory of small facilities that are capable of hosting community events, weddings and other small events. While Bluffton currently has facilities that can host weddings or similarly small social events, the town lacks large spaces that can host larger events. Bluffton has three facilities with 10,000+ total SF of meeting space: Pickney Social Hall, Seaquins Ballroom and Montage Palmetto Bluff. If a performing arts center is built in Bluffton with hybrid capabilities, it could host both performing arts events and larger meetings and conferences that currently aren't able to be hosted in Bluffton. Most facilities in the region with more than 10,000 SF of total meeting and event space are hotels/resorts located in either Savannah or Hilton Head Island. The largest facility within the 90-minute drive time catchment is the Hilton Beachfront Resort & Spa Hilton Head Island, which has 46,665 total SF.

Notable Regional Meeting and Event Spaces			
Venue	Distance from Bluffton (miles)	Largest Meeting Space (SF)	Total Meeting Space (SF)
1 Hilton Beachfront Resort & Spa Hilton Head Island	15.5	17,600	46,665
2 The Westin Hilton Head Island Resort & Spa	12.6	13,200	38,832
3 Richmond Hill City Center	43.4	4,000	30,000
4 Pickney Social Hall	9.3	-	18,000
5 Montage Palmetto Bluff	11.0	6,696	16,000
6 Seaquins Ballroom	3.1	2,842	10,000

Source: Cvent, Johnson Consulting



Hotel Inventory

Data from CoStar, which is an independent hotel research firm whose statistics are widely used in the meetings and event industry, indicates that within a 30-minute drive time radius of the Bluffton Town Hall, there are 57 hotels with a total of 7,683 rooms. Of those 57 hotels, 28 have 100 or more rooms. The table to the right shows these hotels along with their exact number of rooms, hotel class, total and largest meeting space. The largest hotel by number of rooms is the Sea Pines Resort, which has 519 upscale rooms and 18,000 SF of meeting space. The hotel with the most total meeting space is the Hilton Beachfront Resort & Spa Hilton Head Island with 46,665 SF of meeting space; it is also the second largest hotel in terms of number of rooms with 513 guest rooms.

Bluffton Area Hotel Inventory

Hotel	Class	Year Built (Renovated)	Rooms	Largest Meeting Space (SF)	Total Meeting Space (SF)
Sea Pines Resort	Upscale	1991	519	4,600	18,000
Hilton Beachfront Resort & Spa Hilton Head Island	Upper Upscale	1976 (2023)	513	17,600	46,665
The Westin Hilton Head Island Resort & Spa	Upper Upscale	1985 (2024)	420	13,200	38,832
Sonesta Resort Hilton Head Island	Upscale	1981 (2025)	340	9,880	22,930
Omni Hilton Head Oceanfront Resort	Upper Upscale	1981 (2024)	323	4,800	16,844
Fiddler's Cove Beach Club	Luxury	1981	316		
Marriott's Grande Ocean, Hilton Head Island	Upper Upscale	1990	290		
Marriott's Barony Beach Club	Upper Upscale	2001	255		
Bluewater Resort and Marina	Economy	2008	213		
Montage Palmetto Bluff	Luxury	2004 (2016)	209	6,696	16,000
Beach House Hilton Head Island	Upper Upscale	1973 (2024)	202	3,456	6,299
Hilton Head Isle Beach & Tennis	Midscale	1981	200	5,751	10,375
Marriott's SurfWatch	Upper Upscale	2005	195		
Palmera Inn and Suites	Upper Midscale	1987 (2012)	156	3,000	3,100
Holiday Inn Express Hilton Head Island	Upper Midscale	1987 (2025)	153	1,000	1,000
Simple Rewards Inn	Midscale	1988 (1999)	127	2,850	2,850
Candlewood Suites Bluffton Hilton Head	Midscale	2010 (2014)	124	250	250
Hampton Inn Hilton Head	Upper Midscale	1988 (2018)	122	828	1,380
Extended Stay America Premier Suites Bluffton Hilton Head	Midscale	0	120		
Days Inn by Wyndham Hilton Head	Economy	1989	119		
Days Inn by Wyndham Hardeeville/ I-95 State Line	Economy	1985	116		
Courtyard Hilton Head Island	Upscale	2020	115	960	960
Holiday Inn Express & Suites Bluffton @ Hilton Head Area	Upper Midscale	2002 (2022)	112	1,200	1,200
Red Roof Inn Hilton Head Island	Economy	1986	111		
Marriott's Harbour Point and Sunset Pointe at Shelter Cove	Upper Upscale	1981 (2008)	111		
Hilton Garden Inn Hilton Head Island	Upscale	2001 (2009)	104	1,410	1,740
Hilton Grand Vacations Hilton Head	Upper Upscale	2019	100	0	0
Hampton by Hilton Inn Bluffton -Sun City	Upper Midscale	2002	100	1,204	2,055
Hotels <100 Rooms			1,898	6,793	7,612
Total			7,683	85,478	198,092

Sources: CoStar, Johnson Consulting


Hotel Inventory


The Bluffton area’s inventory of large hotels is on the higher end with all except one of their top ten largest hotels classified as Upscale, Upper Upscale or Luxury. The map to the right shows the location of the hotels with more than 100 rooms within a 30-minute drivetime of Bluffton’s Town Hall. Most major hotels in the Bluffton region are located on Hilton Head Island.

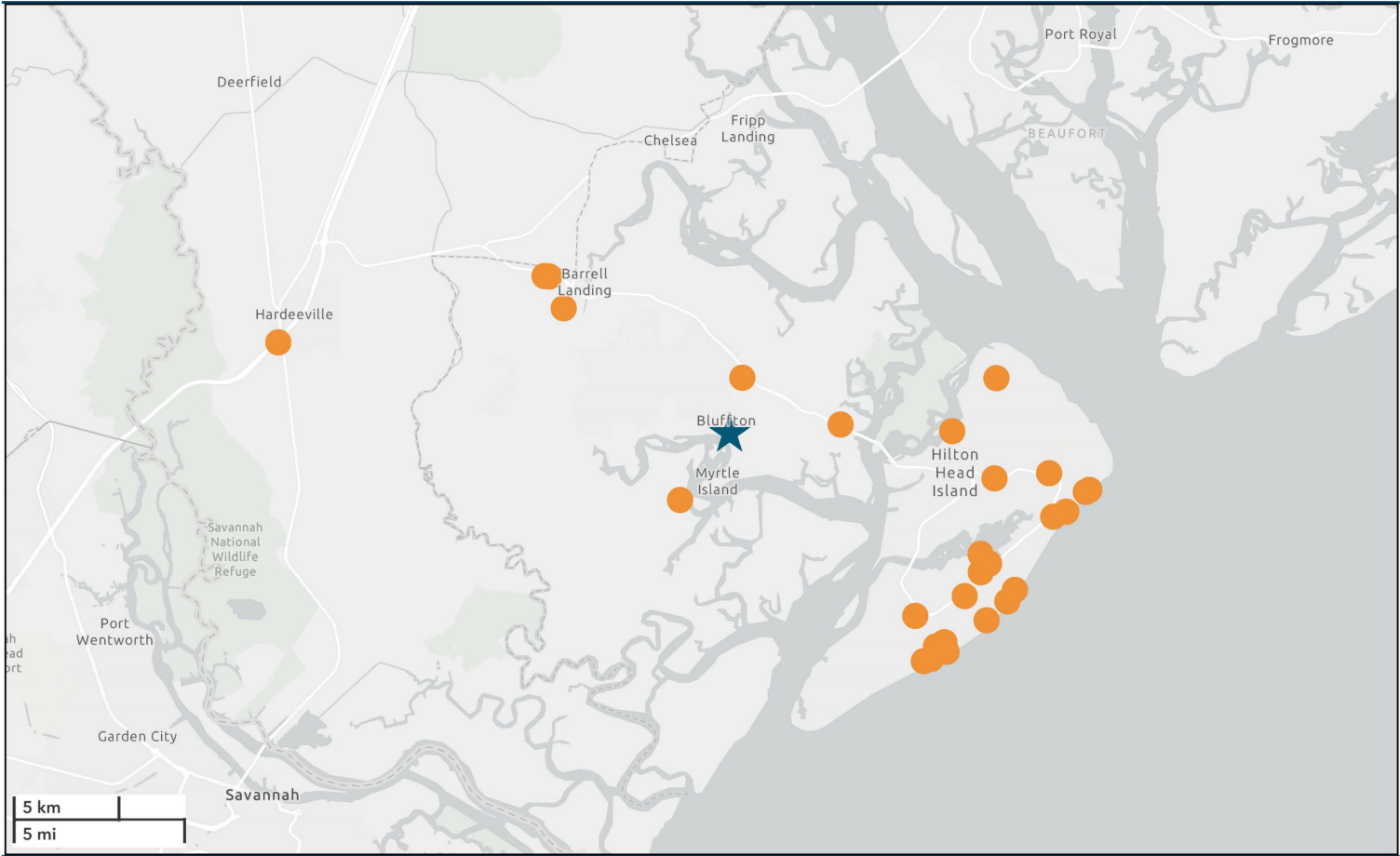


Bluffton Area Hotels, 100+ Rooms

Map Key

 Bluffton

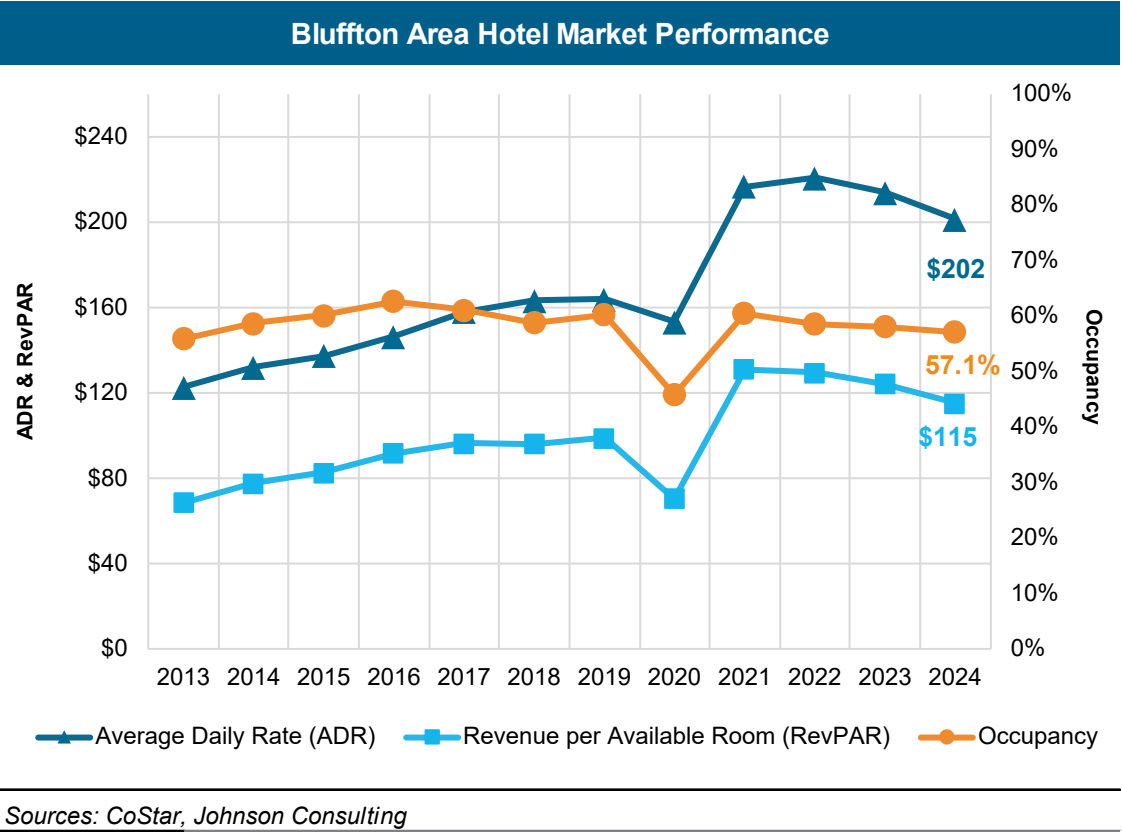
 Hotels



Hotel Market

The 30-minute drive time catchment around Bluffton is heavily influenced by Hilton Head Island and its inventory of large high-quality hotels. Like most hotel markets, the 30-minute drive time catchment around Bluffton took a huge dip in 2020 due to the COVID-19 pandemic. While most markets took years to recover to pre-pandemic levels, the hotel market in the 30-minute drive time catchment around Bluffton had a quick recovery in 2021 and has since leveled off. This can be seen in the huge increases in ADR and RevPAR. The rapid increase in 2021 was partially due to the lessening of COVID restrictions. However, the Hilton Head Island Airport added service options on American, United, and Delta airlines, which helped the airport experience a 66 percent increase in passengers from 2019 to 2021 with the addition of the new service options.

The chart to the right shows the 30-minute drive time catchment around Bluffton’s ADR, RevPAR and Occupancy since 2013. The Bluffton area’s RevPAR and ADR reached record highs in 2021 before declining slightly each year since. The market’s occupancy rate also increased in 2021, albeit not to record highs, and has also slightly declined every year since. If a new Performing Arts Center in Bluffton is able to attract large enough acts, it could help the local hotel market raise its ADR, RevPAR and occupancy.



Implications

A significant portion of Bluffton's residents attend performances at the Arts Center of Coastal Carolina on Hilton Head Island or the several large theaters in Downtown Savannah. This steady leakage represents a missed opportunity for not only local ticket sales but local restaurants, retail and hospitality businesses as well. A PAC in Bluffton would not only serve to prevent leakage, but also serve to attract visitors from outside of the community. Bluffton's hotel inventory is modest, but the town's proximity to Hilton Head Island provides an opportunity for a new facility if Bluffton is able to attract visitors from the island.

The town's existing performance venues are small, scattered, and generally not built for the performing arts. While black box theaters and other smaller community assets have served local organizations well, they are limited in their capacity. Bluffton's lack of a larger facility restricts it from hosting regional touring acts, large-scale performances, or larger community events. A dedicated multipurpose PAC would provide a centralized, professional space that would allow Bluffton to host larger and higher quality cultural and performing arts events. In addition to providing Bluffton with the ability to host large touring acts, a performing arts center can serve the rapidly growing community by providing local school and community organizations a place for events. Additionally, performing arts centers built with multi-use event center capabilities could be used to host larger school and civic events and meetings. The facility should serve both cultural programming and broader community needs, including meetings and civic events. A performing arts and event center built with the capability of hosting large meetings and events would allow the facility not only to enrich the town's cultural offerings, but also to serve as a multifunctional civic hub.



| 2.3 Stakeholder Engagement

Overview

The engagement of potential users of a new venue in Bluffton was emphasized as a priority of this study from the outset. As with any project of this importance, it is crucial to engage with a wide variety of individuals and organizations throughout the community and industry to foster a sense of buy-in and inform the study's observations, conclusions, and recommendations.

Johnson Consulting's outreach strategy involved conducting supplemental, targeted focus groups and interviews with key stakeholders in the proposed project, potential project partners, and local, regional, and national industry experts in the realm of performance, meeting, and event facilities.

The focus groups and interviews began with in-person sessions in March 2025 and continued throughout the remainder of the study. Johnson Consulting conducted interviews and focus groups with individuals representing almost 30 different organizations, including local arts organization leaders, local government leadership, educational institutions, and regional venues. These engagements helped us to understand the popularity and trajectory of the arts, culture, and events in the region, the needs of its stakeholders, and whether the proposed venue would help meet those needs.

A specific list of groups we met with is listed below.

- Beaufort County Economic Development Corporation
- Bluffton academy for the Arts
- Bluffton Public Art Committee
- Bluffton Rotary
- Bluffton Youth Theatre
- Don Ryan Center for Innovation
- Evolution Big Band
- Gullah Cultural Center
- Hilton Head Island-Bluffton Chamber of Commerce
- Hilton Head Symphony Orchestra
- Historic Bluffton Foundation
- Kiwanis Club
- Local and regional event planners
- Local Businesses
- Local Schools
- May River Theatre
- Society of Bluffton Artists (SOBA)
- Sun City
- Town of Bluffton
- USCB
- USCB OLLI Concert Band

Key Themes

There is an apparent need for additional, quality event space in Bluffton. The existing limited availability results in events and visitor dollars leaking into neighboring markets.

Community Need & Demand

Stakeholders identified a clear need for dedicated performing and visual arts spaces in Bluffton. While the town has a thriving arts scene, existing venues—such as small galleries, churches, and schools—are often inaccessible or inadequate for local artists and organizations. Many arts groups see potential for growth but lack proper facilities to present their work.

A new multipurpose performing arts center (PAC) could serve as both a home for these organizations and a hub for regional arts collaboration and marketing. Groups like concert bands, dance troupes, and youth theatre programs are actively seeking permanent space, emphasizing the demand for a flexible venue that accommodates various audience sizes and performance types. Currently, most performing arts facilities are located outside Bluffton, in communities like Hilton Head, which are small and not readily accessible. Within the geographic areas of Bluffton and Hardeeville the population is expected to approach 200,000 in the next two decades, the need for cultural infrastructure and community amenities will only increase.

Key Themes

Community
Need &
Demand

Multipurpose,
Flexible
Design

Financial
Viability

Tourism &
Economic
Impact
Potential

Key Themes

Community Need & Demand Continued

The PAC under consideration could serve local audiences while providing a unique asset to add to the region's existing entertainment landscape and serve as an attractor of outside visitors to the community. Bluffton has a strong presence of talented artists and programming and a new facility will enable Bluffton to showcase and nurture local talent in the community.

There was also an identified need in the community for a large indoor event venue to host not only performing and visual arts, but other public and private events. This was reiterated by most, if not all the groups that have been interviewed to date. As a result of this, it may be strategic to refer to the proposed venue as a multi-purpose event venue so that a wide range of users will consider using the venue and not think that it is only for performing arts.

Venue Design & Programming

The multipurpose sentiment trickled into the design conversation relative to being a multiuse and flexible venue. Versatility and multi-use design are key to ensuring the PAC/multi-purpose venue (MPV) can accommodate a variety of events including performances, conferences, fundraisers, social events, and other programming and activities. Stakeholders discussed capacities ranging from 200 to 2,000 and emphasized the need for modular/flexible seating, a black box theater, and studio or classroom spaces to maximize flexibility. A multi-purpose facility with diverse spaces from a large main venue to secondary theaters, artist studios, breakout rooms, and outdoor areas, would enhance usability and demand. High-quality acoustics, technology, and backstage amenities, including green rooms and kitchen space, lobby, restaurant/bar/café spaces are also desired amenities.

Key Themes

Venue Design & Programming Continued

Arts organizations shared that the space could be used for local and touring performances, as well as artist exhibitions. The facility could also be used for meetings, conferences, small conventions, fundraisers, graduations, weddings, and other events. Arts, cultural, and other educational programming was also discussed as a preeminent programming piece. The public schools do not offer a comprehensive arts program and a new facility may be able to fill that gap through afterschool or summer programs. Classes for youth, adults, and seniors would help activate the facility during the day, while ticketed performances and other community and private rentals will utilize the space on evenings and weekends. There is potential for a wide array of programming at a new event space in Bluffton, but scale, quality, and location will also influence impact and utility.

Location and accessibility remain key considerations, with the idea of future expansion being an important component of future site evaluation. Many residents prefer to stay in Bluffton as opposed to traveling to neighboring cities, siting Bluffton as an ideal location for a new facility given its central location and growing population. Bluffton is growing as a regional hub with increasing affluence and demand for cultural experiences. Furthermore, other supporting infrastructure may be needed to support a growth in regional events in Bluffton, including additional high-quality hotel room supply and dining options to support a boost in overnight visitors.

Key Themes

Financial Viability & Funding

While it is clear that public funding will be pivotal in advancing this project, financial sustainability is a concern, as previous PAC developments in the region have faced challenges. Stakeholders agreed that the venue should be self-sustaining with multiple revenue-generating features such as flexible event spaces, catering facilities, and partnerships with corporate sponsors and private donors through philanthropic giving. Bluffton has an evolving community profile and ensuring financial viability of this project is a key success metric to move forward from the perspective of community members and the overall viability of the venue.

There are also some shared ideas on a public-private-partnership for funding and operations. Other planned or future developments were also a consideration. USCB is exploring the idea of a new convocation center/arena and as other neighboring communities grow, they may also develop their own arts and cultural assets. While planned developments at USCB will be complementary to the scale of a potential new facility in Bluffton, it will be important to consider other future developments and projects similar to what is under consideration for Bluffton.

Economic & Tourism Impacts

Infrastructure and economic impact were key discussion points. Existing arts organizations and regional festivals report a large draw of non-local visitors already and a new venue with multiple types of demand layers would only increase tourism. While a surge in visitors would naturally boost local accommodations, restaurants, and retail, supporting a new performing arts center or multipurpose event facility would require broader, higher-quality development. Investment in upscale lodging, fine dining, and diverse entertainment options is essential. Such a venue could significantly stimulate the local economy by drawing touring performances, enhancing arts education, and serving as a central hub for cultural, civic and conference events. However, its long-term success would depend on the implementation of expert management and best practices drawn from successful projects nationwide.

Survey Overview

Johnson Consulting also distributed a survey to meeting and event planners to gauge the interest, needs, and expectations for a new facility in Bluffton. The following are key themes and observations gleaned from those survey responses:

- On average, event planners hold 6-20 events per year.
- These events include numerous event types such as conferences, banquet events, and other social and entertainment events, such as weddings.
- Most meeting planners require ballroom space, with some noting the need for exhibit space, theatre space, as well as programmable outdoor space.
- On average, meeting planners require 5,000 to 10,000 SF of space for their most frequent and largest events.
- Event planners reported that their smallest events attract less than 100 people, most frequently occurring events attract 100-249 people, and the largest events can attract up to 750 people.
- When planning events, meeting planners reported an average of 50-100 hotel rooms needed for guests.
- If meeting planners host events outside of Bluffton, they most often host them in Hilton Head.
- When considering the location for events, planners identified the following as most important:
 - Proximity to tourism, leisure, and recreational activities
 - Proximity to retail, food, bars, and nightlife
 - Proximity to hotel rooms
 - Parking & transportation
 - Safety
 - Affordability

Implications

The development of a new venue in Bluffton is not just a cultural investment, it is an economic development strategy. The town's existing arts organizations already attract regional visitors, but they operate without the infrastructure necessary to fully capitalize on that demand. A purpose-built, multi-use facility would address a clear gap in the market, offering space not only for performances and exhibitions but also for conferences, fundraisers, and private events that generate revenue and draw consistent foot traffic and generate hotel room night demand.

From a regional economic standpoint, the venue would help solidify Bluffton's role as a growing destination for arts, entertainment, and tourism. With limited local options, residents currently travel to neighboring cities for cultural experiences. By retaining this spending, and capturing new dollars from outside visitors, a well-programmed facility could directly support local businesses, particularly in the hospitality, dining, and retail sectors. Larger conferences and state associations will provide a steady source of revenue for the region's hospitality sector through attendees' large room block needs. Additional infrastructure, such as higher-end hotel accommodations and dining options, will be needed to meet the expectations of visiting patrons and event organizers, providing further opportunities for private investment and job creation.

Stakeholders recognize that long-term success depends on sound financial planning and operational sustainability. While public funding will likely be required to initiate development, the facility must be structured to generate ongoing revenue through rentals, programming, sponsorships, and philanthropic support. Models from comparable communities show that when performing arts centers are designed for versatility and managed effectively, they can become self-sustaining anchors for year-round activity and economic vitality.

In a fast-growing town like Bluffton, a new venue is more than a cultural amenity - it's a practical response to market conditions and community demand. Its development would not only support local artists and residents, but also strengthen the town's economic foundation by attracting visitors, creating jobs, and increasing local spending. With intentional planning and strategic partnerships, a new venue in Bluffton has the potential to become a reliable and impactful driver of Bluffton's long-term economic growth.



| 3. Industry Trends

Overview

Performing arts centers and event venues serve as vital anchors of cultural expression, economic development, and community engagement. These facilities host a broad spectrum of activities from theatrical productions and concerts to lectures, conferences, and civic celebrations, and are increasingly recognized as essential components of vibrant, livable communities. More than just stages or gathering spaces, performing arts centers are dynamic institutions that contribute to regional identity, enhance quality of life, and support year-round economic activity.

As part of a broader ecosystem that includes conference and event facilities, performing arts centers are adapting to evolving audience expectations and operational demands. Today's venues must accommodate diverse programming with flexible, high-performing spaces that can transition from a symphony performance to a corporate presentation or community event with ease. Public and private stakeholders alike see value in investing in these adaptable spaces, which generate both cultural and fiscal returns.

Behind every performance or event lies a complex infrastructure of technical and operational systems. Emerging trends, such as hybrid formats that blend in-person and digital experiences, sustainable building practices, and inclusive design, are reshaping how performing arts and event centers are conceived and operated. Advanced lighting and acoustical systems, adaptable seating arrangements, and integrated audiovisual technology are no longer optional but essential features of modern facilities.

This section explores the technical, design, and operational trends driving the next generation of performing arts and event centers, and considers how these elements can be thoughtfully applied in planning for venues like the one envisioned for Bluffton.

Venue Types

Each event type has unique facility needs. Certain events require large amounts of contiguous space, while others require many smaller meeting rooms. Often a single meeting will use many different types of spaces, such as large exhibit halls, banquet facilities, breakout meeting rooms, and theater seating. The diverse nature of this industry and the characteristics of various event types necessitate a variety of facility types. The main types of public assembly facilities are summarized as follows:

Hotel and Meeting Room Facilities: Many markets have developed a multipurpose or small convention or conference center complex within or adjacent to a hotel, as a means of improving the lure of the hotel and subsidizing its operations. These facilities, which have been undertaken in markets of varying sizes, are frequently developed through public-private partnerships whereby the public sector may assemble land, build parking, and fund meeting space components as a way to execute a project. Often the various project elements are developed as a joint project, in terms of timing, but in some markets, the public elements have been built first with the hotel coming later.

Conference Centers: Conference centers provide a specialized combination of meeting spaces, high-tech amenities, and services in support of training and education initiatives. Most conference centers are smaller than a convention center and may be operated in conjunction with a hotel, some are part of a university, and some operate as stand-alone venues.

Convention Centers: On a larger scale, convention centers combine the meeting capabilities of a conference center with exhibit space. These facilities are designed to meet the broad needs of the Meetings, Incentive, Convention, and Exhibition (M.I.C.E.) industry and primarily serve as economic development enterprises for the community. Their mission is to bring outside visitors and associated spending into the community, although they may also host large locally oriented consumer events.



The Hilton Orlando



Kauffman Foundation
Conference Center



Overland Park
Convention Center

Venue Types

Theaters: Theaters typically host theatrical events such as plays and musicals, but can also host other entertainment such as concerts, comedians, or lectures. Theaters range in size and stage types.

Black Box: A rectangular room, painted flat black to prevent glare from overhead lighting. It usually has a complex overhead lighting grid and moveable seats. While total number of seats is usually around 200, their moveable nature allows for experimentation with the shape and size of the performance space.

Amphitheaters: Round or oval-shaped venues with tiered seating in front of a central stage. Amphitheaters are typically outside and are among the oldest types of performing arts venues.

Stadiums: Typically used for sports such as baseball and football, concerts, and other large-scale entertainment events, stadiums are open-air venues elevated seating on one or more sides of a playing surfaces. For entertainment events, the stage is usually set up on part of the playing surface, with the rest of it sold as seating.

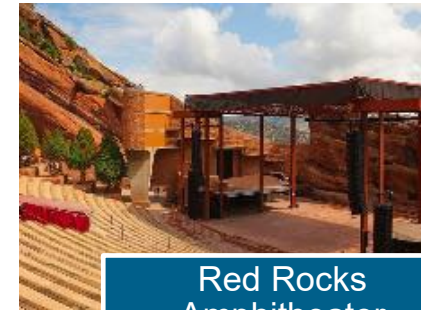
Arenas: Similar to stadiums but generally smaller and indoors, arenas are typically used for entertainment events, as well as sports such as basketball and hockey.



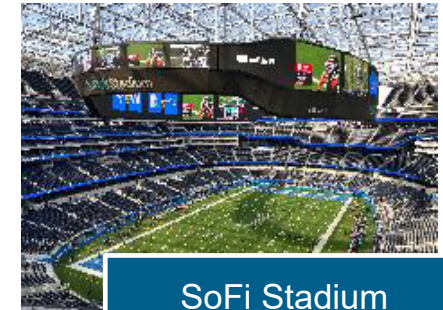
Fox Theatre Tucson



Rolling Meadows
Black Box Theatre



Red Rocks
Amphitheater



SoFi Stadium



Crypto.com Arena

Venue Types

Trademarts: Trademarts or merchandise marts typically combine an exhibit facility, permanent display space that is occupied by businesses under long-term lease agreements, and specialized office space. These facilities provide space for the wholesale distribution of products in specific industries and typically occur in large cities that serve as regional wholesale and marketing centers.

Exposition Halls: Focus exclusively on product and consumer shows that require little meeting space. Pure exposition halls generally exist in markets that have other convention and/or meeting venues available or in situations where the private sector has responded to a lack of supply by developing an inexpensive facility. Fairgrounds also offer facilities that are exposition-oriented.

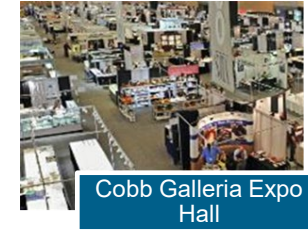
Fairgrounds: Fairgrounds combine a number of assembly and exposition elements on a large campus. Facilities may include one or more exhibition halls, along with arena and meeting hall functions, although little meeting space is usually offered on the property. Typically located away from downtown areas, fairgrounds provide acres of parking for large events.

Convocation Centers: Similar to an events center, a convocation center is a flexible, community venue often used as a conference or arena facility, typically located on a higher education institution's campus. These facilities host a variety of event types that utilize arena-type bowl seating or take advantage of retractable seating and use the entire arena floor as exhibition space.

Multi-Purpose Events Centers: Events centers, or arenas, are used as multi-purpose facilities to host a wide range of events, from small to mid-size conventions, and trade shows, to sporting events, concerts, and banquets. These facilities typically host many more locally oriented events than dedicated exhibit and ballroom space within convention centers. Events centers also incorporate breakout and meeting rooms, and often have a full commercial kitchen to cater banquet events.



Mississippi Trade Mart



Cobb Galleria Expo Hall



Indiana State Fairgrounds



Ohio University Convocation Center



Century Multipurpose Event Center

Venue Types

Concert Halls: Venues constructed specifically for classical music, with elevated and tiered seating sections and acoustics designed for symphony-orchestras.

Bandshells and Bandstands: Large, outdoor stages that are often found in public parks. Bandshells and Bandstands typically feature covered roofs and closed backs and often have permanent, non-elevated seating.

Opera Houses: Similar to a concert hall but constructed specifically for opera. Opera houses have high ceilings, tiered seating, and acoustics geared towards opera performances.

Clubs: Often paired with a bar and sometimes even a restaurant, clubs are smaller, indoor venues that typically host rock, hip-hop, and other popular music shows. Clubs usually just have general-admission floor seats, though some also sell more premium balcony or VIP seats.

Performing Arts Center: A purpose-built facility designed to host live performances such as theater, music, dance, and opera. These centers often include multiple performance spaces and support areas, serving as cultural hubs for both professional productions and community engagement.



Walt Disney Concert Hall



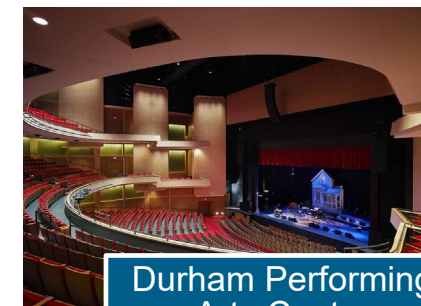
Daytona Beach Bandshell



Sydney Opera House



Tao Nightclub



Durham Performing Arts Center

Stage Types

Across live performance venues, there are a variety of stages that can accommodate different styles of performance. Most common stage types are described below.



Proscenium Theater:

The most typical type of stage in theatrical productions – features a rectangular stage opening made from the proscenium arch and the stage floor. The proscenium arch separates the actors from the audience, and is commonly called “the fourth wall.”



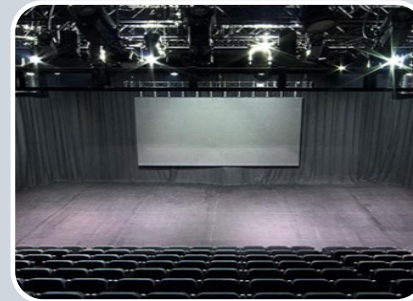
Area Stage Theater:

Commonly referred to as a Theater in the Round, this is the type of stage one would find at certain concerts and theatrical productions. It can also be used in conjunction with a proscenium, as is seen at the Grammys or the Oscars. It places the stage at the center of a square or circle, surrounded by spectators on all sides. It is generally thought of as less formal than types like the proscenium theater.



Open Stage Theater / Thrust Stage:

This theater type combines features from arena stage and the proscenium theater. It often has seating on three sides or in a semicircle with the stage “thrusting” out into the middle. Usually, the stage is low platform and has a proscenium opening at the back for entry/exit and scene changes. It can also be referred to as a Thrust Stage Theater.



Black Box:

A rectangular room, painted flat black to prevent glare from overhead lighting. It usually has a complex overhead lighting grid and moveable seats. While total number of seats is usually around 200, their moveable nature allows for experimentation with the shape and size of the performance space.



Found Space Theater:

Structures that were originally designed for a different function, but were repurposed into theaters. There are examples of companies converting many different types of buildings into theaters, like urban store fronts and even “Big Box” retail spaces, etc.

Other Important Entertainment Venue Terms

Fly / Fly Loft – The system of lines, pulleys, and counterweights / electrical hoists located above the stage that is responsible for dropping in scenery and lifting it back up. It is generally the most challenging and expensive part of the stage to consider. The fly loft, which is the structural tower that accommodates the fly system, should be at least 2.5 times the height of the proscenium to allow a full-length curtain to be raised completely out of audience view without exceeding the travel distance of standard counterweights.

Green Room – The waiting room for those involved in the show before they go on stage. If there is a high-profile individual, they will usually get their own room. Bigger groups will also get a green room, but it will be separate from that of the high-profile individual. Sometimes very large performance groups will stage out of a large rehearsal room.

House – The area where the audience sits, which is basically the front of the stage and beyond. The term is also used to describe the audience in general.

Orchestra Pit – A sunken area directly in front of the stage created for an orchestra in musicals or operas. It is not meant to be seen by the audience.

Rake – The angle of the stage floor so that it is not horizontal. A traditional raked stage has an upstage area that is raised higher than the downstage area.

Set – The physical scenery used to describe the setting of a particular point in a play. These items will generally be dropped from and lifted back to the fly loft.

Scene Shop – An area backstage where scenes and sets are built.

Trap – An area below the stage where individuals can be raised on and off the stage from underneath.

Wings – The offstage area to the right and left where people get ready to come on and off the stage. This area will have to be bigger if a fly loft is not installed.

Event Types

While there are a number of unique events that are hosted across venues, the most prevalent event classifications are listed below with commonly associated facilities, duration, level of economic impact, and other event attributes.

Event Types							
	Conventions & Conferences	Exhibitions & Trade Shows	Meetings & Assemblies	Consumer Shows	Entertainment Events	Sporting Events	Performing Arts
Purposes	Networking Education Idea Sharing Lobbying/Legislation	Sale of Goods & Services Advertising Networking	Organizational Business Idea Sharing Networking	Sale of Goods & Services Advertising Community Partnerships	Entertainment Arts & Culture Leisure	Tournaments & Competitions Recreation Leisure	Arts, Culture, & Education Entertainment Leisure
Facility Types	Hotels Convention Centers	Hotels Convention Centers Expo Centers Fairgrounds	Hotels Convention Centers Arenas Theaters	Hotels Convention Centers Expo Centers	Arenas & Stadiums Theaters & Amphitheaters Convention Centers	Arenas & Stadiums Convention Centers Sports Complexes	Performing Arts Centers Theatres & Amphitheaters Arenas & Stadiums
Event Duration	2 - 5 Days	3 - 6 Days	1 - 2 Days	2 - 5 Days	1 - 3 Days	1 - 3 Days	1 - 3 Days
Visitor Stay	2 - 4 Days	1 - 3 Days	1 - 2 Days	1 - 2 Days	1 Day	1 - 2 Days	1 - 2 Days
Visitor Type	Industry Specific	Industry Specific	Organization Specific	General Public	General Public	General Public	General Public
Visitor Origin	Mostly Non-Local	Mostly Non-Local	Local & Non-Local	Mostly Local	Mostly Local	Local & Non-Local	Local & Non-Local
Economic Impact	\$\$\$\$\$	\$\$\$\$\$	\$\$\$\$	\$\$\$	\$\$\$	\$\$\$	\$\$\$

Venue Management Consolidation

In recent years, the live entertainment and venue management industry has undergone significant consolidation, reshaping its competitive landscape. In August 2024, Legends finalized its acquisition of ASM Global for an estimated \$2.3 billion. This marked a major turning point in the facility management sector. ASM Global, created in 2019 through the merger of AEG Facilities and SMG, had grown to operate more than 350 venues worldwide, including many NFL and NBA stadiums and arenas. By absorbing this expansive portfolio, Legends instantly became the world's largest third-party facility manager. The acquisition not only expanded Legends' operational footprint but also integrated ASM's capabilities with Legends' existing strengths in feasibility analysis, market research, project management, food and beverage, merchandise, premium seating, sponsorship sales, and naming rights consulting. The result is a fully integrated, 360-degree service model that supports every phase of a venue's lifecycle. This consolidation significantly narrowed the field of major players in the industry, positioning Legends and Oak View Group (OVG) as the two dominant forces.

OVG has emerged as a formidable competitor, having bolstered its position in 2021 through the acquisition of Spectra. OCV blends real estate development with facility operations and event booking. While Legends now manages a broader and more unified portfolio, OVG continues to grow its influence through high-profile developments and a robust suite of services.

While Legends and OVG dominate the venue operations space, Live Nation Entertainment remains a powerful and distinct player. Unlike its counterparts, Live Nation does not focus on day-to-day facility management. Instead, its strength lies in controlling the live entertainment supply chain—most notably through its ownership of Ticketmaster and major artist management firms. With exclusive booking rights, long-term venue leases, and partial ownership stakes, Live Nation exerts substantial control over performance venues without directly operating them. This gives the company a unique competitive edge: the ability to prioritize its own venues for tours, bundle services for artists and sponsors, and dictate terms through its dominance in talent and ticketing.

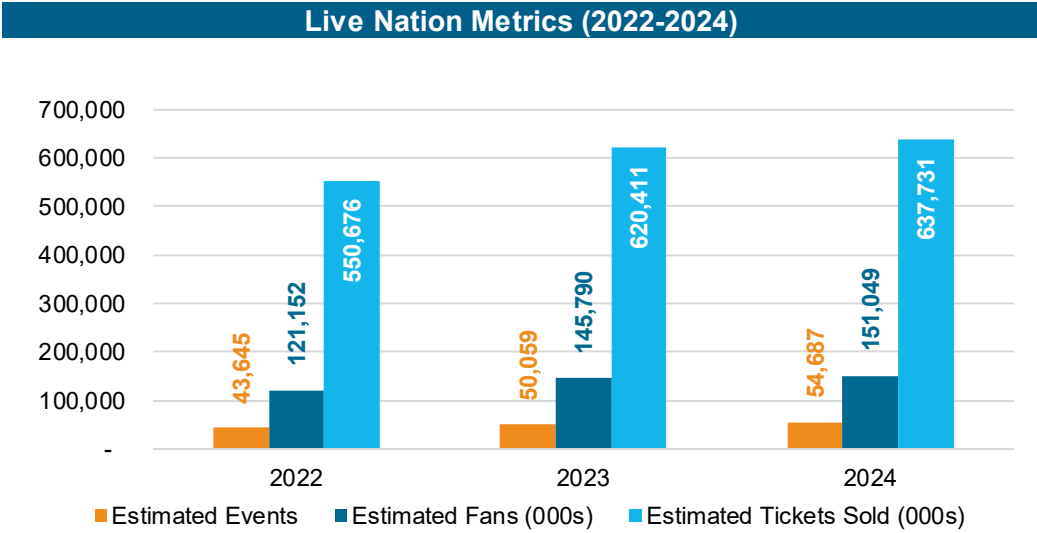
As of 2025, the live entertainment and venue management ecosystem is largely shaped by these three major players, Legends (with ASM Global), OVG, and Live Nation, each pursuing distinct but overlapping strategies. Legends and OVG focus on full-service facility development, operations, and event management, while Live Nation controls the talent pipeline, ticketing infrastructure, and promotional apparatus. Together, they form a tightly concentrated and increasingly vertically integrated industry, where success hinges on the ability to control not just venues, but the content and consumer relationships that flow through them.

Industry Promoter - Live Nation

Live Nation Entertainment Inc. (Live Nation), one of the world’s leading live entertainment and e-commerce companies, controls bookings for approximately 70 percent of the talent available and owns or controls nearly 300 venues around the country and over 100 international venues. In 2024, Live Nation promoted over 54,000 live music and other events, reaching over 788 million fans, generating over \$23 billion in total revenues. Concert business generated \$19 billion, or 82 percent of total revenues in 2024 and ticketing generated \$3 billion, or 13 percent of total revenues in 2024.

This widespread control by Live Nation along with the demand by the gaming industry has led to higher guarantees to the acts, which impacts the cash flow available for operation of venues. This has made it more difficult for the smaller, more regional promoters to succeed in large venues. These factors combined with the reality that there are few artists who are able to draw enough concert goers to fill large facilities (over 10,000 seats) make independent booking of large arenas and amphitheaters harder to compete and succeed at.

Live Nation Concerts recorded an increase of 25 percent in total events and estimated fans between 2022 and 2024, resulting in a 15 percent increase in ticket sales and the largest fan count in Live Nation history. A portion of the increase in ticket sales can be attributed to the heightened demand for events at amphitheaters, arenas, theatres, and club venues. In particular, arena fan count increased by almost 8 million fans to over 50 million fans globally.

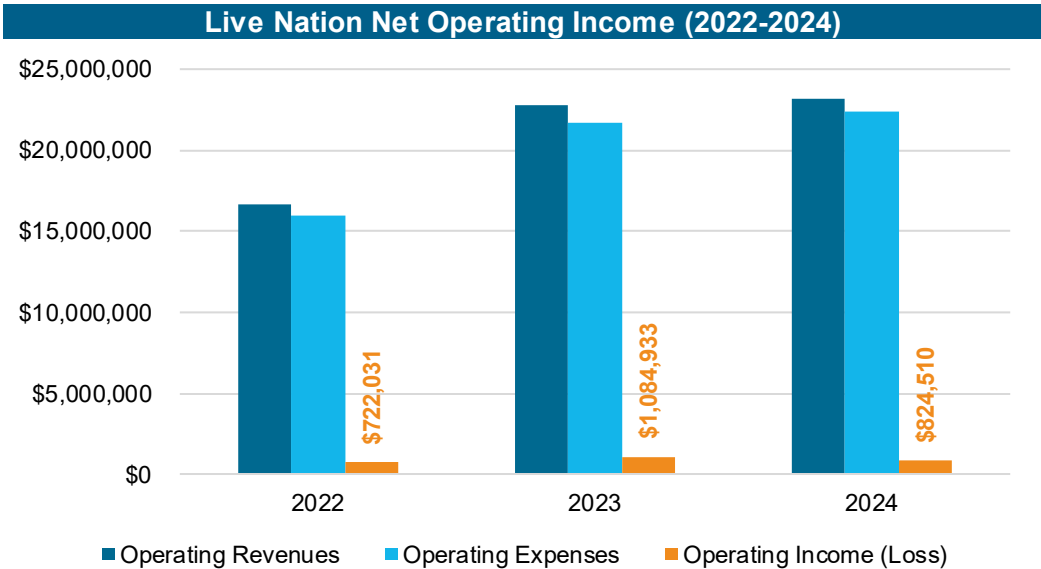


Source: Johnson Consulting, Live Nation

Industry Promoter - Live Nation Continued

Costs borne by Live Nation increased in 2024 as well, primarily driven by decreased operating income in the Concerts segment, but were partially offset by increased income in the Sponsorship and Advertising segment. There was also a reported 15 percent increase in administrative expenses, driven by additional compensation expenses related to venue growth and increased global activity. Finally, corporate expenses rose due to costs associated with strategic initiatives and operational growth. Despite rising operating costs, Live Nation reported a Net Operating Income of \$824,510 in 2024.

The downside of this strong performance is that talent prices are at an all-time high. Gaming venues have also been a big factor in talent price increases – they can afford the show, and they know that as long as they can get the attendance, the money will be made elsewhere. The adage that the acts get a majority of the ticket revenue, and the venues are really in the rent, concession and parking business could not be more accurate – especially for casinos, where gambling produces sizable profits.



Source: Johnson Consulting, Live Nation

The VIP Experience

In recent years, more and more entertainment venues have been offering VIP (very important person) spaces and experiences in addition to typical seating options. These experiences can take many forms, with some common ones being dedicated VIP seating or standing sections (often with more comfortable seats), amenities such as higher-quality food and beverage options, dedicated restrooms and lounges, and backstage access where VIPs get to spend time before or after the show and even, in some cases, meet the entertainer or artist. VIP experiences provide venues the opportunity to sell premium tickets, often at multiple times the price of normal tickets, and serve customers who are interested in paying more for elevated experiences. They also provide sponsorship and partnership opportunities between venues and premium brands. Similarly, artist green rooms and dressing rooms have become much nicer and often have a meet and greet area for VIPs.

Consumers are seeking this type of exclusive access to connect more intimately with the event and/or performers. The heightened level of involvement and access create a more memorable experience that general admission tickets do not offer. This sentiment of an increased focus on customer experience carries throughout event types from concerts to sporting events and numerous existing facilities are reimagining their VIP options when planning future expansions and improvements. With the realities of smaller attendance at live events, venues are inspired to be more strategic and creative than ever to engage guests.



Americans for the Arts

Every five years, Americans for the Arts releases a research study named Arts and Economic Prosperity, which details the economic impact of nonprofit arts and cultural organizations and their audiences. Currently, the research publication is on its sixth edition and highlights data primarily from 2022. The study includes data about spending, jobs, revenue, and household income among others, as well as survey results relating to the overall importance of arts and attendance trends. These findings include a wide array of event types ranging from jazz and outdoor entertainment festivals to non-musical plays and ballet.

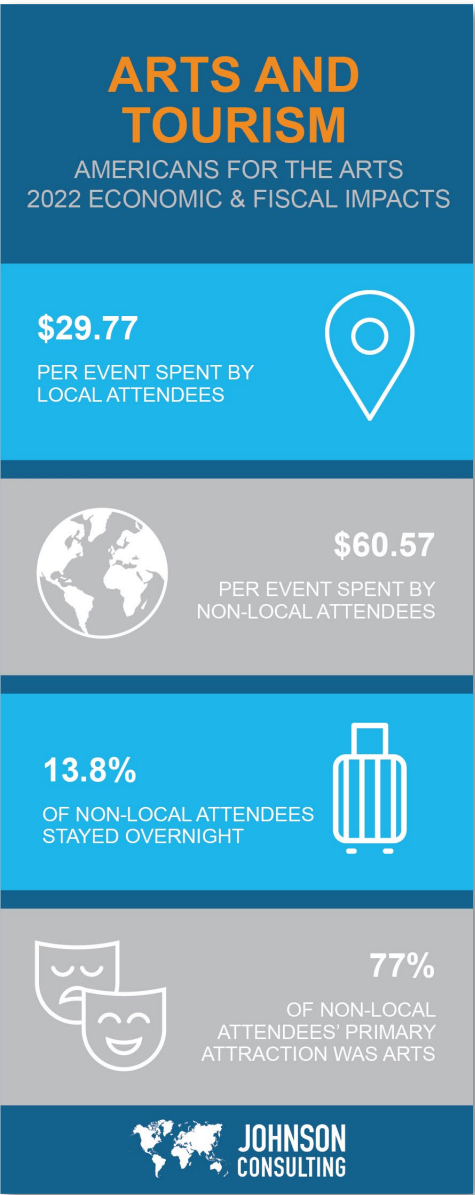
In 2022, nonprofit arts and cultural organizations and their audiences accounted for a total of \$151.7 billion in economic activity. This figure can be broken down further into two parts – spending by the organizations (\$73.3 billion) and event-related spending by the audiences (\$78.4 billion). As a multibillion-dollar industry, one can imagine the financial impact these nonprofit organizations have on government revenue as well. While audience spending generated \$10.8 billion in government revenue, the organizations added another \$18.3 billion for a total of \$29.1 billion. Compared to the initial budgets most municipalities provide for nonprofit arts and cultural groups, they make for a substantial return on investment. The graphic to the right highlights these statistics.



Americans for the Arts

In addition to spending and government revenue, the arts are essential in generating the resources that help a community thrive – jobs and income. 2.6 million total full-time equivalent jobs were supported through these nonprofit organizations, with the organizations accounting for roughly 1.6 million of them. Furthermore, \$101 billion in resident household income was created, with roughly two thirds of that figure coming from organizations, and the audiences responsible for the rest.

One big aspect of nonprofit arts and cultural events is tourism, and the ability of an event to draw attendees locally and from other counties. The reason it is so important to attract visitors from out of town is their propensity to spend more money – and thus generate more revenue for local economy. While the average attendee spends \$38.46 per person per event (not include cost of admission), this number is weighted because on average only 30.1 percent of attendees are nonlocal. While local attendance may outnumber that of nonlocals, the opposite is true when it comes to average spending. Local attendees only spend \$29.77 per person per event, compared to \$60.57 for nonlocal attendees. This means that on average, individuals attending from out of town spend more than twice as much as those attending their local event. This surely creates an enormous increase in revenue and economic activity. Of the nonlocal attendees, 13.8 percent reported utilizing overnight lodging – another big economic generator for a community. The graphic to the right highlights these statistics.



National Endowment for the Arts

The National Endowment for the Arts (NEA) estimates state-level arts and cultural value derived from the Arts and Cultural Production Satellite Account (ACPSA), which is produced jointly by the NEA's Office of Research & Analysis and the Bureau of Economic Analysis, U.S. Commerce Department. State-level arts and cultural estimates are available for total arts and cultural production, and for 35 ACPSA groups.

As shown, the state of South Carolina has experienced \$8.6 billion of added value to the economy by the arts, \$4.3 billion in worker's compensation, and 60,500 workers employed by the art's industry.

National Endowment for the Arts	
State-Level Estimate of Art's Economic Value & Employment (2022)	
\$8.6 Billion	2.9%
Value added to South Carolina's economy by the arts	Art's value-added as a share of South Carolina's economy
\$4.3 Billion	60,500
Arts worker compensation	Arts employment
Source: ASPSA, NEA, U.S. BEA, Johnson Consulting	

Survey of Public Participation in the Arts

In July 2022, the Survey of Public Participation in the Arts (SPPA) was administered by the National Endowment for the Arts as a supplement to the U.S. Census Bureau’s Current Population Survey (CPS). The total sample size of the 2022 SPPA was 40,718 U.S. adults, aged 18 and over, of which 23.2 percent were represented by proxy respondents.

The 2022 SPPA covers the following topics and components:

Core 1: Arts attendance and literary reading

Core 2: Arts attendance and venue types

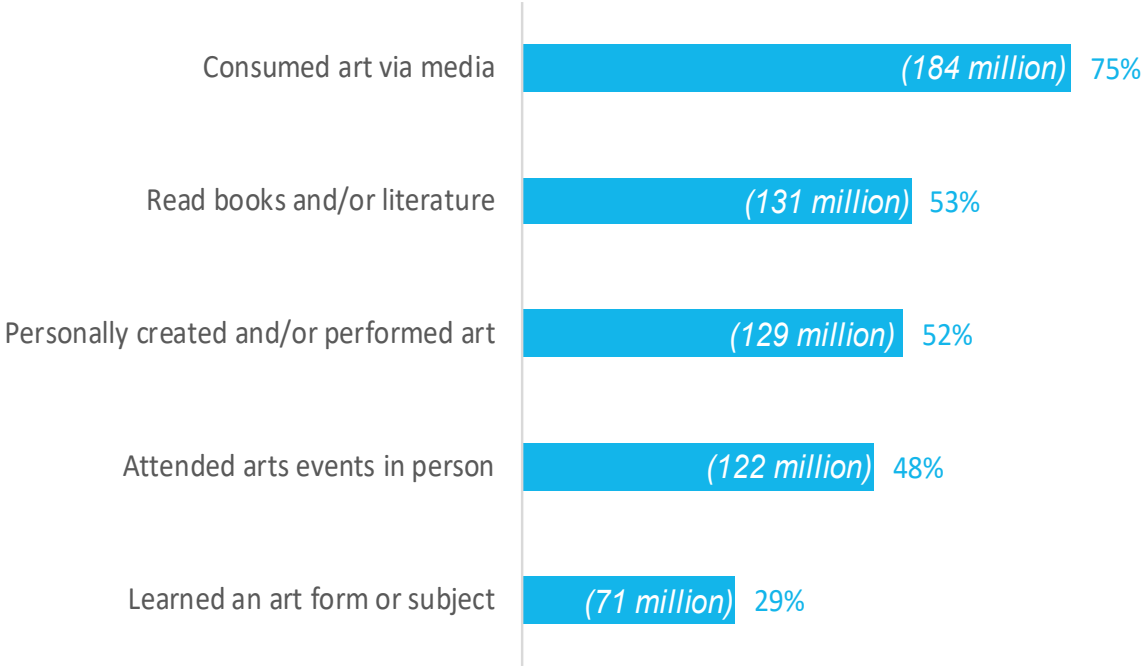
Module A: Consuming art via electronic or digital media

Module B: Performing art, creating visual art, and writing

Module C: Other artistic, cultural, and civic activities

Module D: Arts education

The chart to the right illustrates the percent of U.S. adults who participated in various arts activities at least once in a 12-month period in 2022. As can be seen, though in-person arts consumption is still very prominent, the ability to consume art via media offers flexibility which is increasingly popular for consumers.

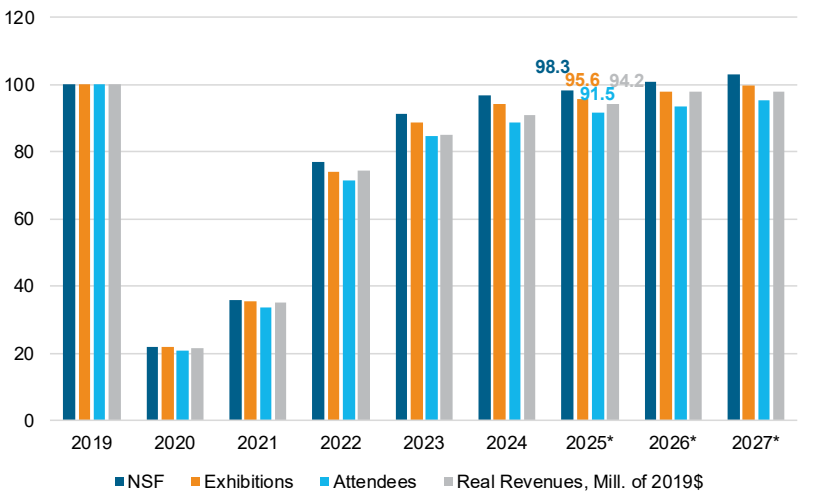


Multipurpose Venue Trends

Like other sectors of the broader hospitality industry, the events industry was devastated in by the COVID-19 pandemic and the resulting lockdowns and travel restrictions. According to the most recent Index Report produced by the Center for Exhibition Industry Research (CEIR), after a decade of growth following the 2008 economic crash, the number of net square feet utilized in the United States fell from 249 million in 2019 to 55 million in 2020, while real revenues (in 2019 dollars) went from \$12.5 billion to \$2.9 billion. The numbers of event exhibitors and attendees similarly declined sharply, from 1.4 million and 32.6 million in 2019, respectively, to 296,000 and 6.8 million in 2020.

The industry has bounced back to some degree over the past few years but has yet to achieve pre-pandemic levels of success and is not forecast to do so by CEIR until 2026. However, recovery from this most recent economic shock does appear to be moving more quickly than it did after the 2008 economic crash, with the overall events industry making sizeable year-over-year gains in square feet utilized, real revenues, exhibitors, and attendees.

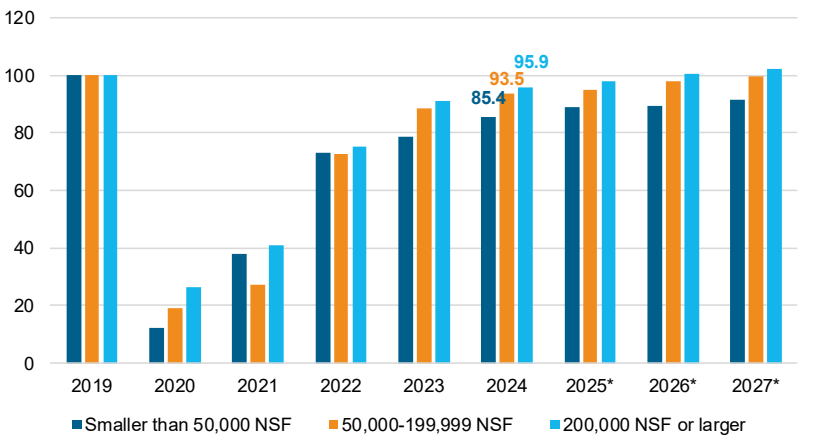
(2019-2027) Overall Exhibition Industry Index, 2019 =100



*Forecasted

Source: CEIR

(2019-2027) CEIR INDEX and Metric Performance by Event Size, 2019 =100



*Forecasted

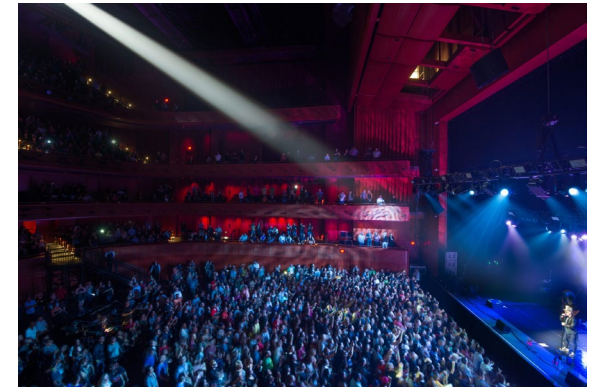
Source: CEIR

Multipurpose Venue Trends – Flexible Seating Technology

The event and entertainment industry, particularly performing arts venues, are increasingly embracing flexible seating solution as a response to evolving audience expectation, programming needs, and economic opportunities. Traditional fixed-seat theaters often limit a venue's ability to accommodate diverse event types or audience configurations. In contrast, flexible seating systems, such as retractable seating, motorized risers, and modular platforms, allow venues to transform quickly between theatrical, concert, banquet, or open-floor layouts. This adaptability not only maximizes usage and revenue potential but also supports a wider range of artistic expression and community engagement. As venues seek to remain relevant and financially sustainable, especially in mid-sized and regional markets, these technologies are becoming a hallmark of forward-thinking design. Industry leaders have responded with innovations like spiral lift mechanisms, movable audience towers, and automated floor systems, enabling seamless transitions between formats without extensive manual labor or downtime.

The trend is particularly prominent in new construction and major renovations, where flexibility is seen as essential infrastructure rather than an optional feature. Beyond technical adaptability, flexible seating also contributes to inclusive and accessible design, allowing venues to better accommodate patrons with diverse mobility needs and to host nontraditional performances that challenge conventional spatial norms. As consumer demand continues to shift toward immersive and customizable experiences, venues equipped with flexible seating are better positioned to serve as vibrant, multifunctional cultural anchors in their communities.

Shown at right is the H-E-B Performance Hall at the Tobin Center in San Antonio, Texas. The main floor is convertible from traditional theatrical seating for approximately 2,000 to a flat floor capable of seating 600 or more for a banquet-style event.



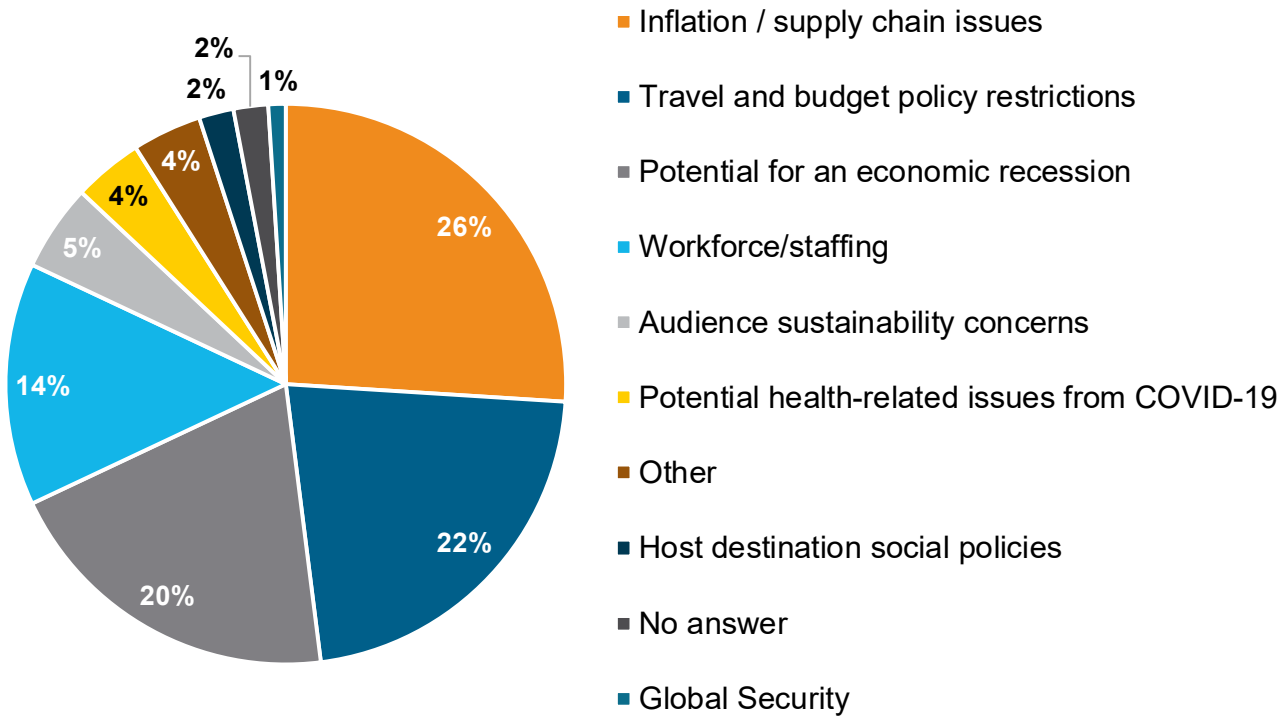
H-E-B Performance Hall, Tobin Center
San Antonio, Texas

The Future of Meetings and Events

The convention, meeting, and exhibition industry is in a state of significant flux as it adapts to the new realities of the post-pandemic landscape. In the November, 2022 issue of *Convene Magazine*, an events industry trade publication, the Professional Convention Management Association (PCMA) presented its annual industry forecast for 2023 and beyond. This report and others like it help provide insight into the direction of the events industry is going in the short and medium terms.

As part of the report, the PCMA surveyed over 200 event professionals about their outlook on the industry going forward. When asked what they believed will have the biggest impact on their events-related business in 2023, the top four responses were inflation / supply chain issues (26 percent), travel and budget policy restrictions (22 percent), potential for an economic recession (20 percent), and workforce / staffing (14 percent). By contrast, only 4 percent said that health-related issues from COVID-19 would have the biggest impact on their business. Though much of the concerns around the health-related implications of the pandemic have abated, the economic, social, and political consequences of COVID-19 remain very relevant and continue to have a significant impact on the events industry.

What do you believe will have the biggest impact on your events-related business in 2023?



Source: PCMA Annual Industry Forecast November 2022, Johnson Consulting

The Future of Meetings and Events

The pandemic hasn't just impacted the events industry's bottom line: It has altered the criteria by which a successful event is judged. In its June, 2023 *Meeting Room of the Future Barometer* report, the International Association of Conference Centers surveyed more than 250 meeting planners from venues around the world. When asked how the criteria for meetings space has changed since the COVID-19 pandemic, respondents highlighted the five following categories:



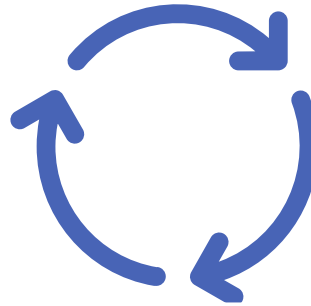
More Space

Due to the pandemic, people are used to having more space, making larger event venues more popular.



Outdoors

Outdoor spaces have also become more in demand since the pandemic, with attendees increasingly wanting a more airy, natural setting



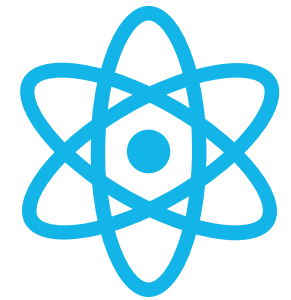
Flexible

Flexibility not only enables greater social distancing; it helps event planners cater to attendees' desire to have less rigid events with more breakout sessions



Hybrid

Hybrid work, socialization, and events are a legacy of the pandemic that appears to be here to stay. As such, it is important to consider how a venue will perform in a hybrid setting.



Evolved Technology

Beyond just hybrid events, the pandemic accelerated adoption of new technology and, as a result, attendees now expect more advanced, high-tech events to be the norm.

The Future of Meetings and Events

In August 2023, JCA Arts Marketing published a report on Trends in Audience Behavior. For the purposes of these findings, pre-pandemic refers to data prior to March 13th, 2020 and post-pandemic is referring to data after July 2021. The key takeaways of that report are highlighted at right.



Across all genres, ticket sales and ticket income have increased since the reopening season. Theatres were nearly as full as they were pre-pandemic in December 2022.



Decrease in ticket sales post-pandemic is not due to pricing, but subscriber ticket sales are down with standard tickets making up the bulk of ticket sales.



Growing new audiences will be imperative to increase audience members and replace non-renewing subscribers and create new returning audiences in the future.



The timing of when people buy tickets has not changed since the pandemic, but single ticket sales earlier in the runs of productions should be encouraged due to decreasing subscribers.



A focus on overall experience that is welcoming and encourages return visits.

Implications

As Bluffton considers developing a venue, it is critical to select the right facility type aligned with market demand and programming strategy. Outdoor-oriented facilities such as festival grounds, amphitheaters, and bandshells benefit from lower capital costs and can tap into the growing interest in open-air event spaces. However, these venue types are inherently limited by weather conditions and seasonal use. Indoor venues—such as concert halls, opera houses, and theaters—offer more controlled environments and are well-suited for specific programming types but lack the flexibility of arenas or multipurpose facilities. Ultimately, Bluffton has an opportunity to create a venue that reflects both current market realities and future trends. In doing so, the following key factors should be thoughtfully evaluated:

Venue Management

Given the likely scale of the proposed facility, securing a private venue management company may be less feasible or advantageous. Consolidation in the industry has led many such companies to prioritize larger, more profitable venues. As a result, private management may not be an ideal fit at this time. However, partnering with a private catering vendor could be a strategic way to enhance the facility's event offerings and revenue generation potential.

Space Offerings

Multipurpose venues and versatile design elements are also becoming increasingly important, such as divisible meeting rooms and flexible seating options. This design versatility will be paramount for a new venue in Bluffton in order to adapt to a variety of event types and sizes. Another trend is planners and attendees increasingly favoring outdoor environments for receptions, gatherings, and other pre- or post-function activities. Outdoor spaces also offer the opportunity to create stronger connections to the surrounding community and businesses, enhancing both the venue's sense of place and its economic impact. As such, integrated and adjacent outdoor event spaces should be a core consideration in the facility's design.

Shifting Patron Bases

Across the U.S., many performing arts venues are experiencing demographic shifts in their audiences. Although the sector is recovering post-pandemic, traditional subscriber bases—often composed of older patrons—have declined. Acknowledging these shifts in future revenue projections is essential to developing a realistic and sustainable financial outlook for the contemplated venue, as well as considering the forecasted changes in Bluffton's demographics in the coming years.



| 3. National Case Studies

Overview

The following case studies were chosen as examples of leading industry trends and best practices in relation to a proposed Performing Arts Center in Bluffton. This subsection of the report includes detailed profiles of each destination that describe key programming, development, and operating characteristics as well as a benchmarking exercise to compare each of the venue’s markets and other attributes to that of Bluffton. A key theme across each case study facility is the multifunctionality of the space.

Map Legend	
Index	Facility
1	Cain Center
2	Chapman Cultural Center
3	Peace Center Concert Hall
4	Newberry Opera House
5	College of Coastal Georgia Center for the Arts
6	Parker Arts, Culture & Events (PACE) Center
7	Wake Forest Renaissance Centre

Source: Johnson Consulting



Case Studies



Cain Center – Cornelius, NC

Year Opened: 2023

Construction Cost: The total construction cost was \$22.6 million. \$2.5 million came from the state of North Carolina while the remaining \$20 million came from private contributions. Additionally, the town allocated \$4 million in municipal bond funds to the construction of an arts district. Total construction costs were originally estimated to be \$25 million. When final construction costs were less than expected, the additional money fundraised was allocated towards future facility maintenance.

Ownership & Operations: The facility is operated and owned by the Cain Center for the Arts, a 501(c)(3) which seeks to bring quality visual and performing arts to the Lake Norman region of North Carolina through their live performance events, visual exhibitions, and educational programming. In addition to the 17-member board, the Cain Center employs approximately 24 full time staff that run the events, programming, and support operations at the facility.

Location: The Cain Center is located in downtown Cornelius, NC. Cornelius has a population of 31,364 and is 21 miles north of Charlotte.

Rental Rates: Shown to the right are the rental prices for the Cain Center and its various facilities. In addition to the main theater, the Cain Center offers multiple meeting, events, and gathering spaces available for public rental. These spaces can be modified to accommodate events that require seating and tables; however, such modifications reduce the overall capacity due to the corresponding reduction in available floor space.



Cain Center Rental Rates

Space	Max Seating Capacity	Max Standing Capacity	Rate	Minimum Rental Time
Theater	400	300*	\$1,800 / day	Full day
Large Classroom	24	75	\$65 / hour	3-hours
Small Classroom	16	40	\$50 / hour	3-hours
Lawn			\$125 / hour	3-hours
Lobby	<350, varies	350	\$150 / hour	3-hours
Dance Studio		75	\$35 / hour	3-hours
Board Room	24	50	\$35 / hour	3-hours
Gallery			\$100 / hour	3-hours
Plaza			\$125 / hour	3-hours

*Requires the stage to be extended over the orchestra seating, additional \$3500 installation fee

Source: The Cain Center

Cain Center – Cornelius, NC

Facilities: The theater has over 400 total seats – 192 orchestra seats, 79 rear orchestra seats and 130 balcony seats. The main theater can also be adapted to host banquet/dance events by extending the stage over the orchestra, but predominately hosts ticketed performances. In addition to the theater, the Cain Center has several other facilities that can be rented out and utilized to host events such as lobbies, a board room, large and small classrooms, and a dance studio. The Cain Center’s two floor lobby is typically rented out for receptions, banquets and other social gatherings. It can provide additional connected space for events that take place in the theater. The lobby overlooks the Cain Center Patio which acts as a pre-event gathering space. The board room and classrooms are used to host virtual and in-person meetings and classes. Additionally, the Cain Center uses the classrooms to host arts classes, camps, workshops, and other activities. The Cain Center’s dance studio can be rented to host small recitals and has a 75-person maximum capacity.

Programming: The Cain Center offers different events in the categories of Musical Performance, Comedy, Live Speaker and Theatre Performance. The center also hosts educational arts classes in topics such as ceramics, painting, drawing, theatre, other miscellaneous visual arts events, as well as summer camps and other educational programming.

Demand: The Cain Center typically hosts around 40 ticketed events every year. The facility had 41 ticketed event days in 2023. In addition to ticketed events, the facility hosts a variety of various arts related classes, which accounted for 13 percent of the facility’s revenues in 2023. The Cain Center regularly hosts visual art exhibitions which feature a range of artistic mediums and typically highlight the work of local artists.



Cain Center – Cornelius, NC

Financials: Cornelius Arts Community Center’s financial information is shown in the tables to the right. The facility’s net operating income dropped drastically from the 2022 to 2023. The chart on the bottom right shows that the decrease in contributions and grants was from both government grants and private contributions. The \$2.0 million in 2021 was a state allocation and the \$4.1 million in 2022 was due to the sale of a bond. These funds were allocated towards the construction cost of the facility. Starting in 2023, the town of Cornelius has allocated roughly \$400,000 in subsidies to keep the Cain Center operational. The Cain Center’s revenue does not come solely from ticket revenue; the facility also collects various other sources of revenue from facility rental, art class revenue, and food & beverage revenue.

Observations: The Cain Center offers a versatile facility design, including a 400-seat theater and multiple flexible rental spaces that support both performances and community events, maximizing usage and revenue. Its programming is diverse, blending musical performances, theater, comedy, and educational classes, which fosters broad community engagement and year-round activity. Financially, the Cain Center successfully leverages both public and private funding sources, with over half of its revenue in 2024 coming from contributions and grants, helping to offset operational costs. The center’s modest but consistent schedule, coupled with targeted arts education offerings, demonstrates a sustainable model for blending cultural enrichment with fiscal responsibility.

Cornelius Arts Community Center Net Operating Income

	2021	2022	2023	2024
Total Revenue	\$8,259,432	\$7,473,472	\$3,033,554	\$3,417,708
Contributions & Grants	\$8,208,799	\$7,317,639	\$2,266,038	\$2,034,874
Program Service Revenue	\$0	\$136,907	\$727,658	\$1,201,190
Investment Income	\$69,150	\$31,429	\$49,717	\$165,345
Other Revenue	(\$18,517)	(\$12,503)	(\$9,859)	\$16,299
Total Expenses	\$480,022	\$779,726	\$2,157,682	\$3,034,505
Grants and similar amounts paid	\$0	\$7,000	\$8,260	\$40,927
Salaries, Wages, Benefits	\$235,279	\$368,026	\$646,328	\$859,651
Other Expenses	\$244,743	\$404,700	\$1,503,094	\$2,133,927
Net Operating Income (Deficit)	\$7,779,410	\$6,693,746	\$875,872	\$383,203

Source: GuideStar, Johnson Consulting

Cornelius Arts Community Center Program Service Revenue

	2023	2024
Ticket Revenue	\$368,174	\$565,956
Facility Rental	\$53,708	\$202,188
Food & Beverage	\$56,160	\$150,542
Art Class Revenue	\$208,979	\$135,852
Summer Camp Revenue		\$80,540
Box Office Fees	\$27,036	
All Other program Service Revenue	\$13,601	\$66,112
Program Service Revenue	\$727,658	\$1,201,190

Source: GuideStar, Johnson Consulting

Cornelius Arts Community Center Contributions and Grants

	2021	2022	2023	2024
Fundraising Events	\$22,140	\$16,635	\$43,496	\$37,484
Government Grants	\$2,022,287	\$4,144,746	\$426,000	\$487,000
All Other Contributions	\$6,164,372	\$3,156,258	\$1,796,542	\$1,510,390
Non Cash Contributions	\$7,500	\$630,000	\$0	\$57,525
Contributions & Grants	\$8,208,799	\$7,317,639	\$2,266,038	\$2,034,874

Source: GuideStar, Johnson Consulting

Chapman Cultural Center – Spartanburg, SC

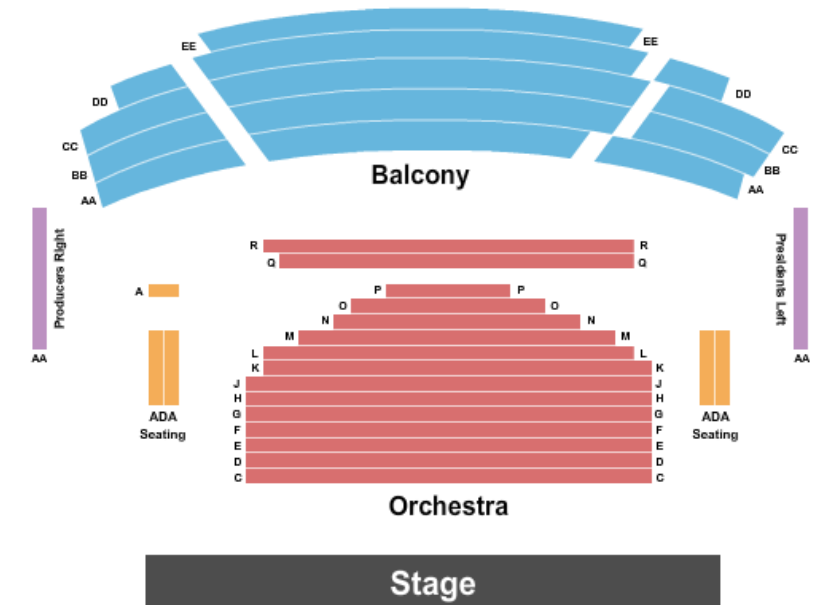
Year Opened: 2007

Construction Cost: The total construction cost was \$42 million and was funded by private donations and contributions.

Ownership & Operations: The Chapman Cultural Center is owned and operated by The Arts Partnership of Greater Spartanburg, a nonprofit organization dedicated to supporting cultural organizations in Spartanburg County. The venue has a board with 32 voting members and 28 full-time employees and 52 volunteers.

Location: The Chapman Cultural Center is located in downtown Spartanburg, SC. Spartanburg has a population of 40,623 and is located in northwestern South Carolina and is 30 miles east of Greenville, SC and 75 miles southwest of Charlotte, NC.

Facilities: The Chapman Cultural Center is made up of three separate buildings that are connected via the centrally located outdoor Zimmerli Plaza. The Chapman Cultural Center's theater seats 476 persons and has a proscenium stage and dressing rooms. The theater can be configured to host different events like live performances, small orchestral groups, and chamber group performances. The Chapman Center's Jennifer Evins Lobby has a standing capacity of 542 persons and is capable of hosting banquets and other social events. The facility also includes three meeting rooms with capacities ranging from 25 to 50 people. The Mayfair Arts Center located at the Chapman Cultural Center is a two-story facility with a variety of large and small educational spaces. These spaces include a ceramics studio, photography studio and 2D/3D arts studios. The campus also includes a history museum and an art museum, which frequently showcase local and student art work.



Chapman Cultural Center – Spartanburg, SC

Programming: The Chapman Cultural Center offers a wide variety of events including touring Broadway shows, live performances, speaker events, comedy events, culinary events and art galleries. Additionally, the center’s arts studios provide a space for smaller recurring community arts classes.

Demand: The Chapman Cultural Center hosted 245 unique events over 269 event days in 2024. According to Placer.ai, a location analytics platform, the Chapman Cultural Center had 83,700 visits in 2024 with the average visit lasting 131 minutes. Only 3.3 percent of the total visits in 2024 came from more than 100 miles away. The large number of events, high visitation and low proportion of non-local visitors indicates that the Chapman Cultural Center is frequently used for community use. For example, many of the events that the Chapman Cultural Center hosted were recurring arts classes. While typically not as well attended as large ticketed events, these smaller events provide more opportunities for community members to utilize the facility.

Rental Rates: The rental rates for the various Chapman Cultural Center spaces are listed to the right. Facility rental rates vary by the type of organization renting out the facility with non-profit organizations getting various levels of discounted rates for each facility feature like the theater, lobby and meeting space. The Chapman Cultural Center’s Mayfair arts studio has rentable arts facilities like a photography studio, dance studios and ceramics studio.

Chapman Cultural Center Rental Rates						
Space	Theater		Lobby		Meeting Rooms	
	Non-Profit	Commercial/ Other	Non-Profit	Commercial/ Other	Non-Profit	Commercial/ Other
Full Day*	\$1,500	\$2,000	\$1,200	\$2,000	\$225	\$375
Non-Event Day	\$800	\$900	-	-	-	-
Part Day (5 Hours)	\$800	\$1,000	\$600	\$1,000	-	\$200
Part Day (2 Hours)	\$200	\$250	\$400	\$600	\$100**	-

*8am - 11:59pm

** +\$25 per additional hour

Source: Chapman Cultural Center, Johnson Consulting

Mayfair Arts Studio Rental Rates	
Space	Hourly Rate*
Photography Studio	\$30
Dance Studios	\$40
2D/3D Studio	\$55
2D/3D Studio Table	\$8
Ceramics Studio	\$55
Pottery Wheel	\$8

*Max Rental Time of 12 Hours per day

Source: Chapman Cultural Center, Johnson Consulting

Chapman Cultural Center – Spartanburg, SC

Financials: From 2020-2023 the Chapman Cultural Center has incurred a net operating deficit except for 2022. That year the facility received nearly double the number of contributions and grants than in each of the previous two years. In 2023, 77 percent of the Chapman Cultural Center’s Program Service Revenue came from Program Related Rent. Ticket Sales made up a far smaller portion of Program Service Revenue. The Chapman Cultural Center also received dedicated allocation from the city of Spartanburg’s Hospitality tax (roughly \$100,000/year).

Observations: The Chapman Cultural Center’s wide variety of spaces allows the facility to not only host large ticketed events but also host smaller arts and community lessons. A Performing Arts Center in Bluffton could benefit from a similar array of spaces—hosting both touring and large ticketed events as well as catering to community organizations. A diverse set of spaces allows a facility to not only serve different audience types but also maximizes facility usage and potential revenue streams. The recent decrease in contributions and grants that led to Chapman’s net operating deficit in 2023 emphasizes the need for consistent, diversified funding strategies, especially in smaller markets like Bluffton.

Chapman Cultural Center Net Operating Income

	2020	2021	2022	2023
Total Revenue	\$2,240,546	\$2,123,080	\$3,689,346	\$2,614,576
Contributions & Grants	\$1,493,680	\$1,486,564	\$2,831,471	\$1,560,750
Program Service Revenue	\$565,433	\$558,165	\$594,776	\$709,352
Investment Income	\$612	\$44	\$155	\$1,197
Other Revenue	\$180,821	\$78,307	\$262,944	\$343,277
Total Expenses	\$3,290,647	\$2,700,858	\$3,210,577	\$3,852,199
Grants and similar amounts paid	\$552,634	\$200,427	\$387,490	\$576,743
Salaries, Wages, Benefits	\$1,004,296	\$839,815	\$929,424	\$1,092,490
Other Expenses	\$1,733,717	\$1,660,616	\$1,893,663	\$2,182,966
Net Operating Income (Deficit)	(\$1,050,101)	(\$577,778)	\$478,769	(\$1,237,623)

Source: GuideStar, Johnson Consulting

Chapman Cultural Center Program Service Revenue

	2020	2021	2022	2023
Program Related Rent	\$446,515	\$488,314	\$498,030	\$544,415
School Fees	\$74,819	\$69,284	\$61,221	\$87,499
Ticket Sales	\$44,099	\$567	\$35,525	\$77,438
Program Service Revenue	\$565,433	\$558,165	\$594,776	\$709,352

Source: GuideStar, Johnson Consulting

Chapman Cultural Center Contributions and Grants

	2020	2021	2022	2023
Government Grants	\$485,254	\$609,725	\$874,806	\$675,483
All Other Contributions	\$1,008,426	\$876,839	\$1,956,665	\$885,267
Contributions & Grants	\$1,493,680	\$1,486,564	\$2,831,471	\$1,560,750

Source: GuideStar, Johnson Consulting

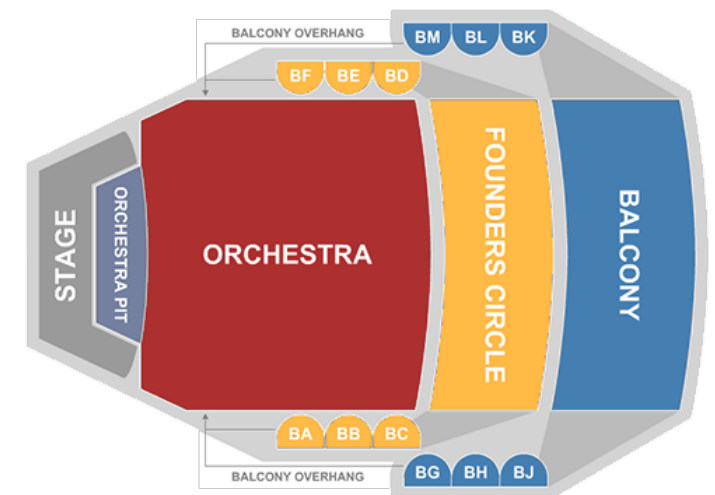
Peace Center – Greenville, SC

Year Opened: 1990

Construction Cost: The Peace Center Theater and the surrounding development was constructed for \$42 million in 1990. The Peace Family's donation of \$13 million was a major catalyst for construction. \$14 million came from various governmental organizations; \$6.5 million came from the city, \$1.5 million came from Greenville County and \$6 million came from a state issued bond. The balance was raised via private donations and partnerships. In 2010, the facility underwent a series of renovations that cost \$23 million and was financed through a fundraising campaign. In 2023, the facility underwent another series of renovations that cost \$36 million. \$20 million was taken from cash reserves, \$10 million came from philanthropic gifts and the remaining amount from tax credits.

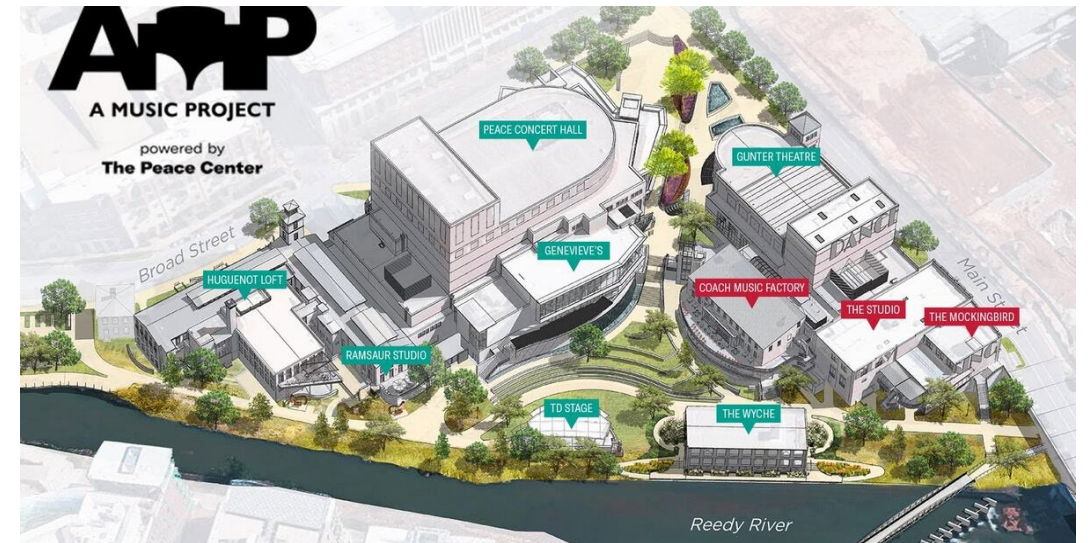
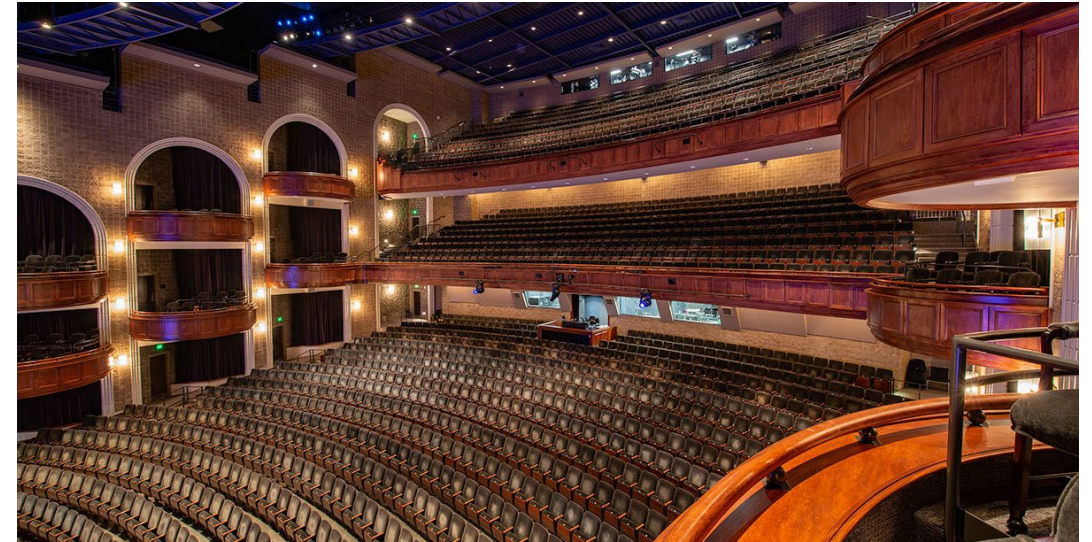
Ownership & Management: The Peace Center is owned, managed, and operated by the Peace Center Foundation, a non-profit organization. The Peace Center is run by its president and CEO but also has a Board of Trustees that includes an executive committee a chair, a treasurer and a secretary, an additional 11 trustees and two ex-officio trustees. Additionally, in 2023, the center employed 204 staff and had 120 volunteers.

Location: The Peace Center, shown on the right, is located along the bank of the Reedy River at the intersection of W. Broad and S. Main Streets in downtown Greenville, South Carolina. The Greenville metro area is one of the largest in the state of South Carolina; the 30-minute drivetime radius surrounding the Peace Center has a population of 700,462.



Peace Center – Greenville, SC

Facilities: Peace Concert Hall is the Center's premiere indoor venue. Constructed in 1990 and renovated in 2010 and 2023, the Concert Hall features a 60-musician orchestra pit, proscenium stage, and can accommodate more than 2,115 persons in its 3-tier, auditorium-style seating area. Gunter Theatre is a 439-seat auditorium-style performing arts venue. It offers a more intimate setting for certain acts that may not be appropriate for, or may not require the capacity of the Peace Concert Hall. The Pavilion, which opened in 2012, is the Peace Center's outdoor concert venue. The amphitheater-style facility sits between the Reedy River and the Peace Center's main building. It has seating for 1,200 within the multi-tiered open lawn seating area. The elevated, covered stage features in-house lighting and audio systems. In addition to the three large stages, the Peace Center also includes the Genevieve patron lounge which is used for hosting patrons before and after events and has a balcony that overlooks the Peace Center's outdoor pavilion. The Wyche building was built in the early 1900s and is currently under renovation, but has historically held large events like weddings, dinner parties and large social gatherings. The Huguenot Loft is a similarly old facility, built around the 1880s, and has 8,000 SF of event space. Historically, the space is typically used for weddings, receptions and corporate events. The Ramsaur Studio is 2,700 SF and is home to master classes, workshops, small gatherings and intimate receptions. The Peace Center does not have any parking available on-site, but there are over 4,500 parking spots in parking garages within a 10-minute walk of the facility. There are additional, paid, surface-level parking lots, as well as free street parking space nearby. The map in the bottom right shows the Peace Center's campus with existing facilities labeled in green and soon-to-be repurposed facilities in red.



Peace Center – Greenville, SC

Programming: The Peace Center has a wide variety of ticketed events offerings including plays, musicals, live musical performances, live orchestral performances, comedy events, magic shows, live speaker events, live cooking competitions and movies. The facility typically hosts ten touring Broadway shows in a season, with each show staying in town for a week. Additionally, student matinee programs provide shows with an educational emphasis specifically for local students. The Peace Center's various spaces also host private events like weddings, corporate events, and other social gatherings.

Greenville's Fine Arts Center is located at the Peace Center and provides local students an opportunity to study theatre, music, visual arts, dance, creative writing, and film and video production. Roughly 450 students attend the Greenville Fine Arts Center every year. The Peace Center provides various other teaching opportunities for community members like the Artist Residency and Artists-In-Residency programs.



Peace Center – Greenville, SC

Demand: The Peace Center hosted 131 unique events over 174 event days in 2024. According to Placer.ai, the Peace Center Concert Hall had 49,600 visits in 2024, with the average visit lasting 106 minutes. Only 13 percent of the total visits in 2024 came from more than 100 miles away, indicating strong local participation in arts events in Greenville. The facility was especially busy during the spring and fall months with April and September being the two most visited months out of the year.

Rental Rates: Shown in the bottom right are the rental prices for the Peace Center. The Gunter Theater is the only theater venue in the facility that is able to be rented out. This facility can only be rented out for private non-ticketed events like corporate gatherings. Despite having been rented out in the past, the Pavilion, the Peace Center’s outdoor venue, is currently not able to be rented due to ongoing construction. Both the Ramsaur Studio and Huguenot Mill Conference Room are available to rent with the Huguenot Mill Loft.



Peace Center Rental Rates

Space	Max Seating Capacity	Max Standing Capacity	Rate	Rental Time
Huguenot Mill Loft	300	400	\$3,500	10 Hours*
Ramsaur Studio	60	150	\$750	10 Hours**
Huguenot Mill Conference Room	25	-	\$200	10 Hours**
Gunter Theater	400	-	\$5,000	1 Day

*\$250 for an additional event hour

**With rental of Huguenot Loft

Source: The Peace Center

Peace Center – Greenville, SC

Financials: Unlike most local performing arts facilities, the Peace Center has had a multimillion-dollar NOI for the past three years. This level of profitability is uncommon for performing arts centers. The past two reported years (2022 and 2023), the facility had program service revenue greater than \$20 million, which came largely from their ticket revenue. While the facility's main source of revenue is from ticket revenue, it also heavily relies on contributions and grants. In 2021, the Peace Center received nearly \$9 million as a part of South Carolina's COVID relief act to update ventilation and other building upgrades. The nearly \$12 million in "All Other Contributions" in the fiscal year of 2023 comes from philanthropic gifts to support new proposed renovation plans to the Peace Center Campus. In 2023, 27 percent of the Peace Center's total revenues came from contributions and grants.

Observations: The Peace Center's integration into downtown Greenville and its proximity to a large regional population underscores the value of selecting a strategic, accessible location to maximize community engagement and attendance. The indoor and outdoor venues of varying capacities accommodate the facility's diverse programming and audience sizes. Although a significant portion of the Peace Center's revenue comes from its ticketed events, philanthropic dollars and public support are still required to keep the facility profitable. Hosting educational programs, artist residencies, and student matinees has not only supported the arts ecosystem in Greenville but also created lasting ties with schools and families.

Peace Center Foundation Net Operating Income

	2020	2021	2022	2023
Total Revenue	\$17,298,653	\$17,581,209	\$36,406,643	\$42,840,019
Contributions & Grants	\$3,065,985	\$13,634,419	\$5,963,920	\$11,851,380
Program Service Revenue	\$12,836,179	\$780,428	\$23,079,198	\$26,005,211
Investment Income	(\$109,351)	\$2,138,681	\$5,189,785	\$2,841,479
Other Revenue	\$1,505,840	\$1,027,681	\$2,173,740	\$2,141,949
Total Expenses	\$17,826,336	\$7,034,741	\$26,095,933	\$28,989,487
Grants and similar amounts paid	\$0	\$0	\$35,500	\$10,000
Salaries, Wages, Benefits	\$4,379,915	\$2,788,884	\$5,026,459	\$5,044,004
Other Expenses	\$13,446,421	\$4,245,857	\$21,033,974	\$23,935,483
Net Operating Income (Deficit)	(\$527,683)	\$10,546,468	\$10,310,710	\$13,850,532

Source: GuideStar, Johnson Consulting

Peace Center Foundation Program Service Revenue

	2020	2021	2022	2023
Ticket Revenue	\$12,588,486	\$665,805	\$22,691,600	\$25,545,389
All Other program Service Revenue	\$247,693	\$114,623	\$387,598	\$459,822
Program Service Revenue	\$12,836,179	\$780,428	\$23,079,198	\$26,005,211

Source: GuideStar, Johnson Consulting

Peace Center Foundation Contributions and Grants

	2020	2021	2022	2023
Government Grants		\$8,895,008	\$2,248,515	
All Other Contributions	\$3,065,985	\$4,739,411	\$3,715,405	\$11,851,380
Contributions & Grants	\$3,065,985	\$13,634,419	\$5,963,920	\$11,851,380

Source: GuideStar, Johnson Consulting

Newberry Opera House– Newberry, SC

Year Opened: 1882

Construction Cost: The facility was constructed in 1882 for \$30,000. A series of renovations took place in the mid-1990s that cost \$5.5 million which was fundraised by local residents. \$1.35 million of the recent \$1.7 million refresh to the Opera House's interior was funded by the state while the rest was covered by private fundraising.

Ownership & Operations: The Newberry Opera House is owned and operated by the Newberry Opera House Foundation, which is a 501(c)(3) organization. There are 17 voting members and in 2023 the venue reported 25 employees and 118 volunteers.

Location: The Newberry Opera House is located in downtown Newberry, SC which is located in Central South Carolina and is roughly 40 miles northwest of Columbia, SC. Newberry is a smaller market that has a population of 10,580.

Facilities: The Newberry Opera House features an auditorium that can seat 425, including the balcony. The facility also features a lobby that is more than 10,000 SF. As a part of the renovation that took place in the 1990s, a 10,000 SF addition that included a rehearsal room was added to the facility. The rehearsal room is directly adjacent to the theater's stage and is joined to it by a pneumatically sealed sliding door. The facility's Romanesque revival architecture style and 130-foot-high tower helps the facility serve as a distinguishing landmark for the city of Newberry.

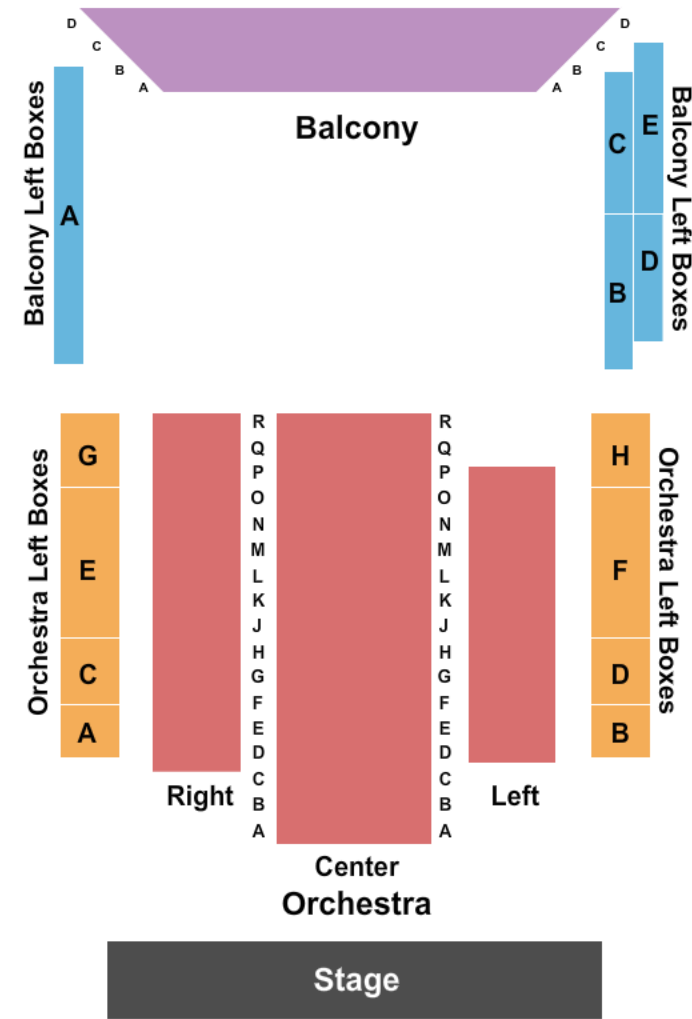


Newberry Opera House– Newberry, SC

Programming: The Newberry Opera House offers a variety of events. A majority of the events held at the facility are live musical performances, but the facility also hosts plays, operas, and ballets. The Newberry Opera House also offers film showings throughout the year.

Demand: During the Spring portion of the Newberry Opera House’s 2024-2025 season (which lasted from January 2025– May 2025), the Newberry Opera House hosted 51 live performances. During the 2023-2024 season, the Newberry Opera House hosted 85 different live performances. According to Placer.ai, the Newberry Opera House had 39,100 visits in 2024 with the average visit lasting 112 minutes. Only 7 percent of the total visits in 2024 came from more than 100 miles away. This indicates the facility does not have a larger regional draw.

Rental Rates: Newberry Opera House rental rates are not publicly available.



Newberry Opera House– Newberry, SC

Financials: Since 2020, the Newberry Opera House has had a negative net operating income three of the four years. 2022 was the only year in that window to have a positive net operating income. In that same year, the Newberry Opera House received \$1.9 million in government subsidies and grants, which was \$1.5 million more than the previous and following years. This \$1.5 million grant was to renovate the facility with new seats, fresh paint and new lighting. Newberry County typically gives \$100,000 a year in quarterly payments to help the facility with operational costs.

Observations: With its focus on live performances and touring acts, the Newberry Opera House is a historic venue and a source of pride for the Newberry community. While the Newberry Opera House hosts a steady stream of live performances and movies in its auditorium, the lack of multi-use spaces reduces its potential for daytime programming, arts education or civic engagement opportunities. The lack of regional draw from the theater further underscores the need for more multipurpose spaces that could further diversify the facility's programming. The volatility tied to fluctuating contributions and grants underlines the importance of a diversified funding base. A facility in Bluffton could maximize its usefulness and potential revenue streams by designing a versatile, community-driven facility that supports both large live performances and smaller community events.

Newberry Opera House Net Operating Income

	2020	2021	2022	2023
Total Revenue	\$1,795,800	\$1,320,069	\$3,673,500	\$2,286,331
Contributions & Grants	\$541,829	\$776,647	\$2,388,872	\$1,098,121
Program Service Revenue	\$1,175,999	\$492,444	\$1,199,434	\$1,098,778
Investment Income	\$8,887	\$9,610	\$23,991	\$20,660
Other Revenue	\$69,085	\$41,368	\$61,203	\$68,772
Total Expenses	\$1,996,282	\$1,365,435	\$2,020,800	\$2,519,694
Grants and similar amounts paid	\$0	\$0	\$0	\$0
Salaries, Wages, Benefits	\$450,062	\$409,867	\$425,559	\$760,053
Other Expenses	\$1,546,220	\$955,568	\$1,595,241	\$1,759,641
Net Operating Income (Deficit)	(\$200,482)	(\$45,366)	\$1,652,700	(\$233,363)

Source: GuideStar, Johnson Consulting

Newberry Opera House Foundation Program Service Revenue

	2020	2021	2022	2023
Production Revenue				\$1,092,801
Facility Usage				\$5,977
Program Revenue	\$1,175,999	\$492,444	\$1,199,434	
Program Service Revenue	\$1,175,999	\$492,444	\$1,199,434	\$1,098,778

Source: GuideStar, Johnson Consulting

Newberry Opera House Foundation Contributions and Grants

	2020	2021	2022	2023
Membership Dues and Other Amt	\$1,941	\$2,902	\$738	
Fundraising Events	\$1,750	\$150,000		
Related Organizations				\$371,864
Government Grants	\$96,028	\$200,902	\$1,928,488	\$170,464
All Other Contributions	\$442,110	\$422,843	\$459,646	\$555,793
Non Cash Contributions				\$500
Contributions & Grants	\$541,829	\$776,647	\$2,388,872	\$1,098,621

Source: GuideStar, Johnson Consulting

College of Coastal Georgia Center for Arts – Brunswick, GA

Year Opened: The facility is currently under construction with completion anticipated for fall 2025.

Ownership & Operations: The College of Coastal Georgia will own and operate the facility once construction is completed.

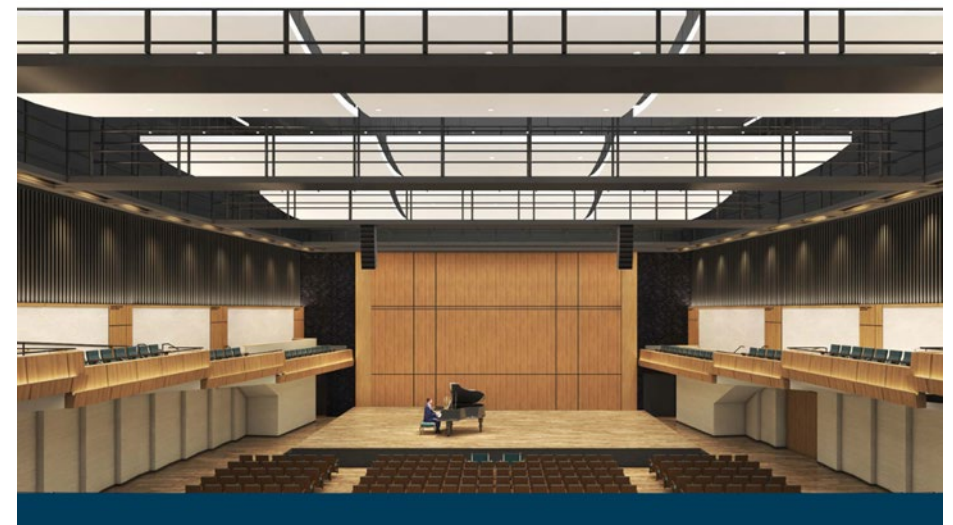
Construction Cost: \$20 million in ESPLOST (Education Special Purpose Local Option Sales Tax) funds was raised in 2015 for the construction of the building. The COVID-19 pandemic delayed the project and now an additional \$17 million is needed to enhance and sustain the center and the facility is currently running a Founding Friend of the Center program to fundraise.

Location: The Center for the Arts will be located on College of Coastal Georgia's campus. The College of Coastal Georgia is located on the northside of Brunswick, Georgia which is a town of 14,830. Brunswick is located in eastern Georgia on the Atlantic Ocean and is 70 miles north of Jacksonville, FL and 78 miles south of Savannah, GA. College of Coastal Georgia had an undergraduate enrollment of 3,189 as of the fall 2023 semester.

Facilities: When completed, the facility will feature an auditorium with professional level acoustics and flexible seating for up to 1,000 guests. The auditorium will be able to host musicals, concerts, orchestras, dance performances, lectures, meetings, banquets and various other community events. The facility will also include auxiliary building features like two dressing rooms, a green room and a large lobby.



Auditorium Overview | Orchestra Stage

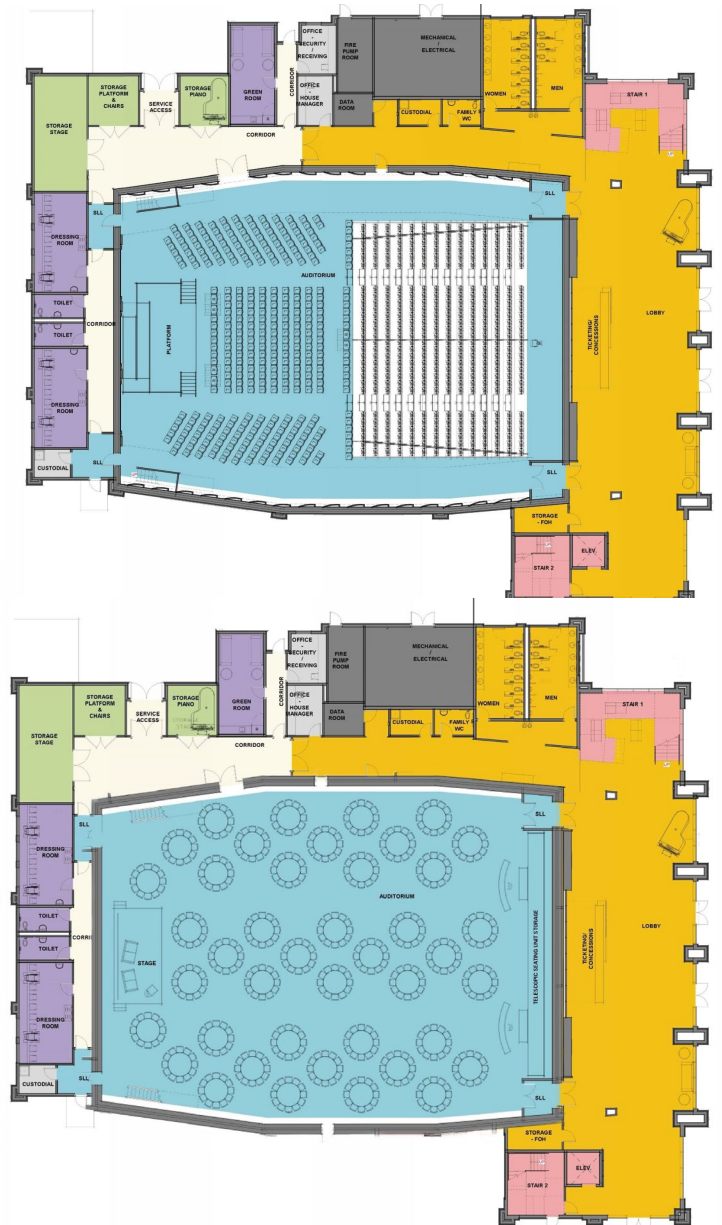


College of Coastal Georgia Center for Arts – Brunswick, GA

Flexible Seating: The floor plan to the top right shows the 1,000-seat auditorium. The two sections of the seating: the floor seats closer to the stage (shown in blue) and the riser seats (shown in white) can be reconfigured to support a variety of event types. As shown on the middle and bottom right, the auditorium can transform into a concert hall with an orchestra pit as well as a flat floor to accommodate a banquet-style event.

Programming: The facility's auditorium will be used to both host local performances and attract larger touring acts. The facility will be located on the College of Coastal Georgia's campus; however, due to the Glynn County Board of Education's involvement in securing the funding for the facility, it is possible the local school system will also have the ability to use the facility for school plays, graduations, and other large events.

Observations: The new Center for the Arts at the College of Coastal Georgia is an example of a performing arts facility serving both educational and community purposes through a strong institutional partnership. Its location on a college campus opens opportunities for academic integration, student performances, internships, and shared programming, which could be a model for Bluffton if a similar partnership with a local college or school system is pursued. It should be noted that the Center for the Arts exclusion of smaller classroom space and rehearsal rooms could limit the educational programming and local arts engagement beyond large-scale events, however, the key design element at this venue, the flexible seating technology, will become the status quo for new construction of performing arts spaces to ensure multifunctionality and financial sustainability.



Parker Arts, Culture & Events Center – Parker, CO

Opened: 2011

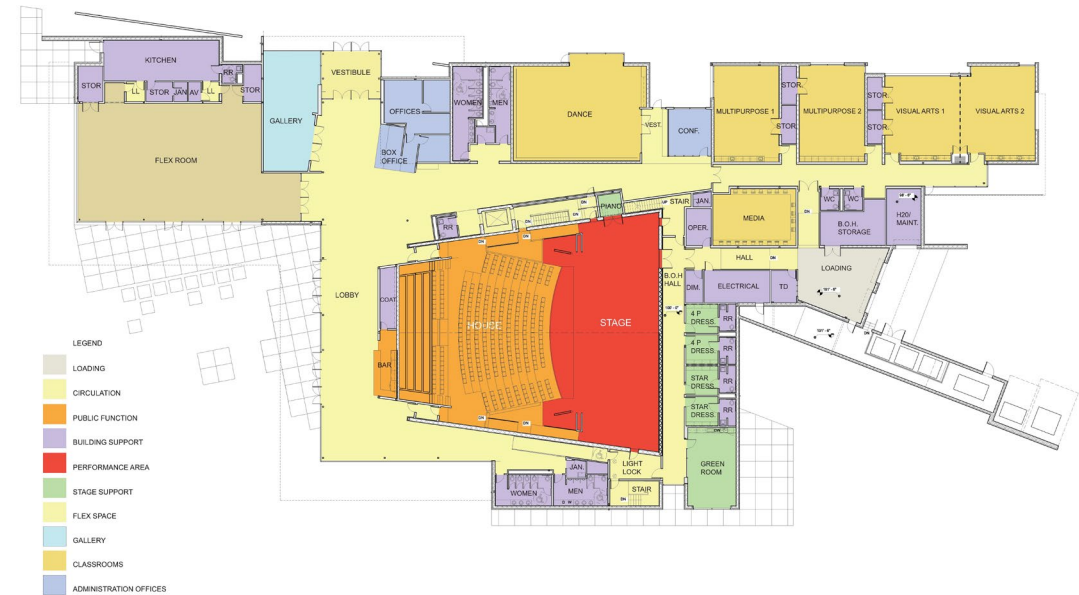
Construction Cost: The total construction costs were \$21.7 million and was funded through a 25-year municipal loan.

Location: The Parker Arts, Culture & Events Center (PACE Center) is located in Parker, CO, 24 miles southeast of Denver.

Ownership & Operations: Owned and operated by the Town of Parker and the Town's Cultural Department, the venue offers unique gathering spaces and provides access to a wide variety of performances, exhibits, and educational programs in arts, culture, history, and science. The facility is led by a 17-person leadership team.

Facilities: The 2,992 SF Mainstage Theater has 500 seats without Orchestra Pit seating, and 534 seats with it. A 2,992 SF event room accommodates up to 270 people for theater seating, 60 for classroom setups, and a maximum of 200 for banquets. In addition to hosting visual arts exhibits, the 828 SF art gallery can host 75 people for theater seating and 50 for banquets. Additionally, the dance studio and smaller reception rooms range from 600 to 1,680 SF, seating between 25 and 100 guests. The Fance Studio is outfitted with a garage door, allowing the space to transform into a hybrid indoor/outdoor reception space, in addition to the 200-capacity West Terrace Plaza that is also available for rent. There is also an 824 SF teaching kitchen that is used to host culinary arts classes and events.

The adjacent historic Schoolhouse complex features the 200-seat Schoolhouse Theater, along with additional event spaces, classrooms, dressing rooms, and a dance studio. Throughout the facility, the PACE Center utilizes skylights and glass walls to maximize natural light and provide views of the surrounding landscape.



Parker Arts, Culture & Events Center – Parker, CO

Programming: The PACE Center has multiple different offerings in the categories of art exhibits and receptions, classical music, comedy, community events, cultural events, dance, Family Discovery Series, free concert series, fundraisers, interactive events, jazz performances, musicals, lectures, plays, school group matinees, and more. Additionally, the center hosts unique educational classes and camps in content creation, music, STEM, theater, painting, calligraphy, watercolor, ceramics, journaling, photography, cooking, and more.

Demand: The PACE Center typically hosts 120 events each year in their event room. According to Placer.ai, the PACE Center attracted 38,300 visitors in 2024 with only 2.85 percent coming from more than 100 miles away. While the facility doesn't have anchor tenants, they collaborate with partner organizations like the Parker Symphony Orchestra and the Parker Chorale. In addition, they present around 164 commercial and touring acts, along with 50 rental events.

Rental Rates: Shown to the right are the rental prices for the PACE Center. Similar to varying rates based on full-day rental or hourly rentals, and different rates for residents for profit, and not-for-profit organizations, the PACE Center has rates that vary by the day of the week. This can encourage a higher rate of utilization during weekdays as weekends are typically in higher demand for private rentals.

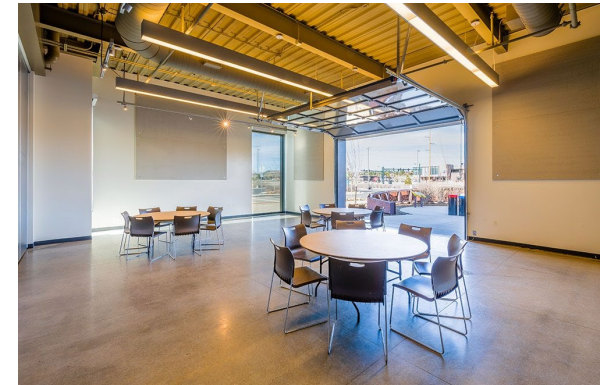
Parker Arts, Culture & Events Center Rental Rates (Per Day)			
	PACE Center	The Schoolhouse	Notes
Meeting Package Monday - Thursday	\$1,500	\$1,000	Package not available Friday - Sunday Non-Ticketed Only; Includes 5hrs
Theater Package Monday - Thursday	\$4,000	\$1,500	Includes 9hrs
Theater Package Friday - Sunday	\$6,000	\$1,850	Includes 9hrs
	\$5,000	\$1,500	Multiple Days

Source: The PACE Center, Johnson Consulting

Parker Arts, Culture & Events Center – Parker, CO

Financials: The PACE Center generates approximately \$3.5 million in revenue each year, against \$6 million in expenses, resulting in a net operating loss of about \$2.5 million. They receive between \$1.7 million and \$2.8 million in public subsidies, and a grant from the Scientific and Cultural Facilities District (SCFD). This grant is funded by a penny on every \$10 in sales and use tax collected, distributed annually to qualifying organizations across seven counties in the Denver metro area. The SCFD grant provides vital operational support to small, medium, and large organizations and helps bring world-class exhibits and events to the region that might not otherwise take place. The PACE Center receives approximately \$535,000 annually from this grant, along with around \$259,000 from private contributions, including memberships, sponsorships, and donations.

Observations: In addition to its various meeting and event spaces that can accommodate large groups and different events, the PACE Center has the third largest theater in the analyzed set. Unique design elements, such as integrated indoor spaces with outdoor spaces, should be thoughtful considerations for a new venue in Bluffton. Outdoor spaces provide more flexibility for event planners and attendees, while also providing a unique event experience by capitalizing on the local climate. The facility's robust programming in the arts, combined with unique educational classes and camps on topics like content creation, calligraphy, and photography, sets it apart from other facilities and allows it to attract visitors outside of show performances. This diverse offering not only enhances its appeal but also positions the PACE Center as a leading destination for both entertainment and learning in the community.



Renaissance Center – Wake Forest

Year Opened: The Renaissance Center opened in 2013 and underwent major renovations in 2018.

Location: The Renaissance Center is located in downtown Wake Forest. The Town of Wake Forest recently engaged Johnson Consulting to conduct a feasibility study for a new arts and events center that would complement the existing facility.

Ownership & Operations: The Town of Wake Forest purchased the Renaissance Center as part of the Renaissance District, a 220 acre downtown municipal district.

Rental Rates: Currently, the facility features a multipurpose Grand Hall that totals 4,700 SF with a banquet capacity of 200 and divisible classroom space in the Arts Annex totaling 718 SF, resulting in 5,418 SF of total function space.

The facility offers an “à la carte” rental structure, with graduated rates for different types of customers. Non-residents are charged the highest rates, while residents or business owners and cultural organizations are charged lower rates. Additionally, there are fees for various other services and amenities such as laying out a dance floor, serving alcohol, and bringing in an additional AV tech specialist.

Note that these fees only apply to rentals – the facility also generates revenue from the ticketed performances it hosts as well as its educational programming and camps.

Wake Forest Renaissance Center Summary of Rental Rates and Fees				
Space	Non-Resident	Resident or Business Owner	Non-Wake Forest Cultural Org.	Wake Forest Cultural Org.
Grand Hall				
Full Hall (4-Hour Min.)	\$350 / hour	\$200 / hour	\$150 / hour	\$100 / hour
Arts Annex				
Classroom A (1-Hour Min.)	\$40 / hour	\$30 / hour	\$20 / hour	\$20 / hour
Classroom B (1-Hour Min.)	\$40 / hour	\$30 / hour	\$20 / hour	\$20 / hour
After-Hours Attendant	\$20 / hour	\$20 / hour	\$20 / hour	\$20 / hour
Other Fees				
Refundable Deposit (No Alcohol)	\$250	\$250	\$250	\$250
Refundable Deposit (Alcohol)	\$500	\$500	\$500	\$500
Dance Floor	\$100	\$100	\$100	\$100
Rentals with 151+ Guests	\$50 / hour	\$50 / hour	\$50 / hour	\$50 / hour
Additional AV Tech Specialist	\$25 / hour	\$25 / hour	\$25 / hour	\$25 / hour
Serving Wine & Beer	\$250	\$250	\$250	\$250
Serving Liquor	\$500	\$500	\$500	\$500
<i>Source: Wake Forest Renaissance Center, Johnson Consulting</i>				

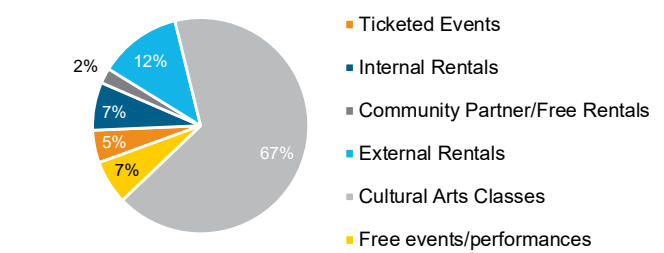
Renaissance Center – Wake Forest

Programming: The facility hosts a variety of programming types including ticketed events, internal rentals, external rentals, community rentals, art classes, and free events. 67 percent of events are free community events and 12 percent of programming is external rentals. The majority of programming occurs in the Grand Hall.

Demand: Historically, the Renaissance Center hosts an average of 330 annual events including ticketed events, private rentals, and classes, attracting a total of 23,479 attendees, or an average of 75 attendees per event. In 2024, the facility hosted 397 events and welcomed 24,330 patrons. The majority of attendees are generated from external rentals.

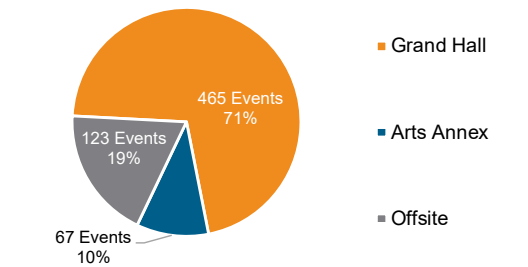
The main reason for lost business at this facility is date availability due to the high volume of bookings and lack of competitive venues in the market.

Wake Forest Renaissance Center
Events by Type, FYE 2023 & 2024



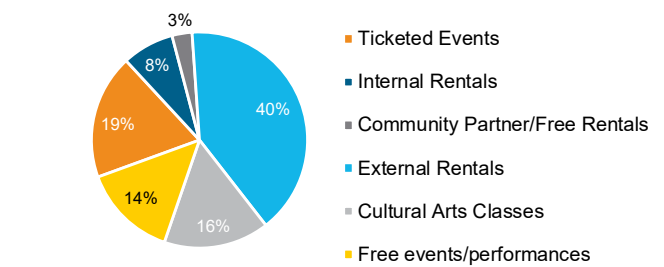
*RC's fiscal year is July-June
Source: Wake Forest Renaissance Center, Johnson Consulting

Wake Forest Renaissance Center
Events by Space, FYE 2023 & FYE 2024



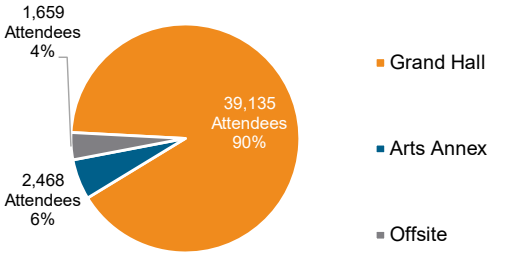
*RC's fiscal year is July-June
Source: Wake Forest Renaissance Center, Johnson Consulting

Wake Forest Renaissance Center
Attendance by Event Type, FYE 2023 & 2024



*RC's fiscal year is July-June
Source: Wake Forest Renaissance Center, Johnson Consulting

Wake Forest Renaissance Center
Attendance by Space, FYE 2023 & FYE 2024



*RC's fiscal year is July-June
Source: Wake Forest Renaissance Center, Johnson Consulting

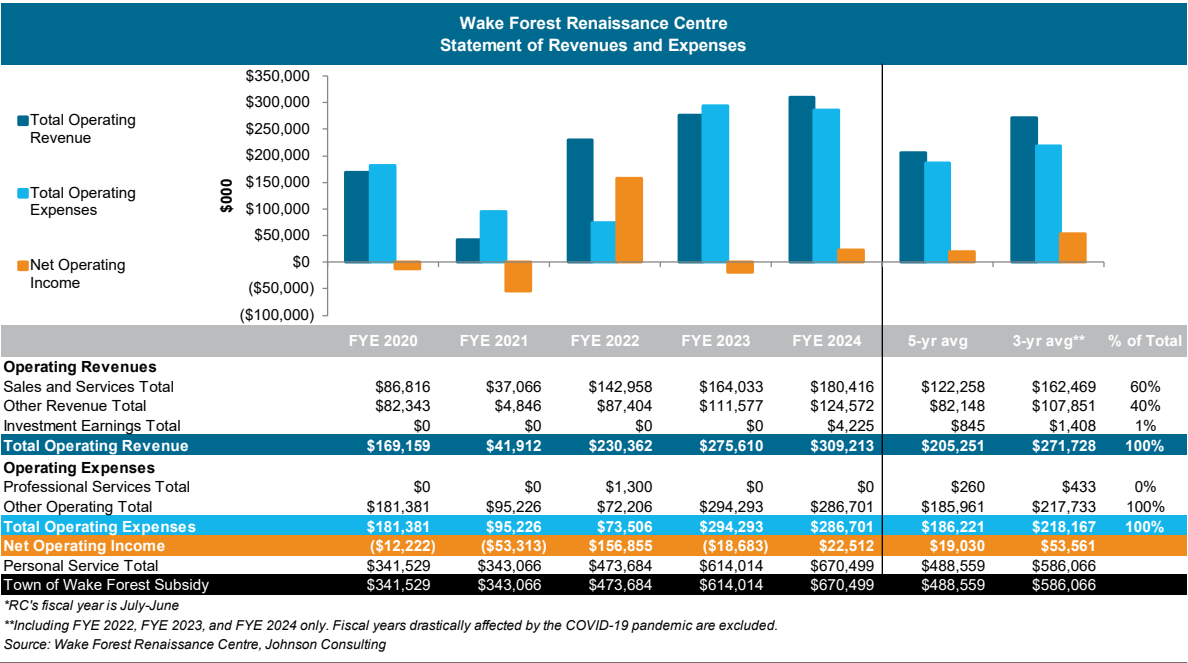
Renaissance Center – Wake Forest

Financials: In FYE 2024, the facility generated \$309,213 of revenues and incurred \$286,701 of operating expenses for a net operating income of \$22,512. The majority of the revenue is generated by its sales and services, which includes facility rentals and recreation programs. Another significant revenue stream comes from events and performances, totaling almost \$100,000 in FYE 2024.

Note that the Town of Wake Forest subsidizes the Renaissance Centre’s operations by covering all of the facility’s personnel costs (such as salaries and wages).

Observations: The high volume of activity occurring at the existing Renaissance Center facilities also indicates an opportunity for expanding facility offerings. The existing facility is essentially full, averaging more than an event per day and turning down the majority of its lost business due to a lack of available dates. More multipurpose, performance, and classroom space would help accommodate existing demand and capitalize on the demand which is currently present in the community. An expansion of the Renaissance Center would be a strong opportunity for Wake Forest, allowing the town to further tap into a strong community interest in the arts while also addressing gaps in the local entertainment and event space infrastructure.

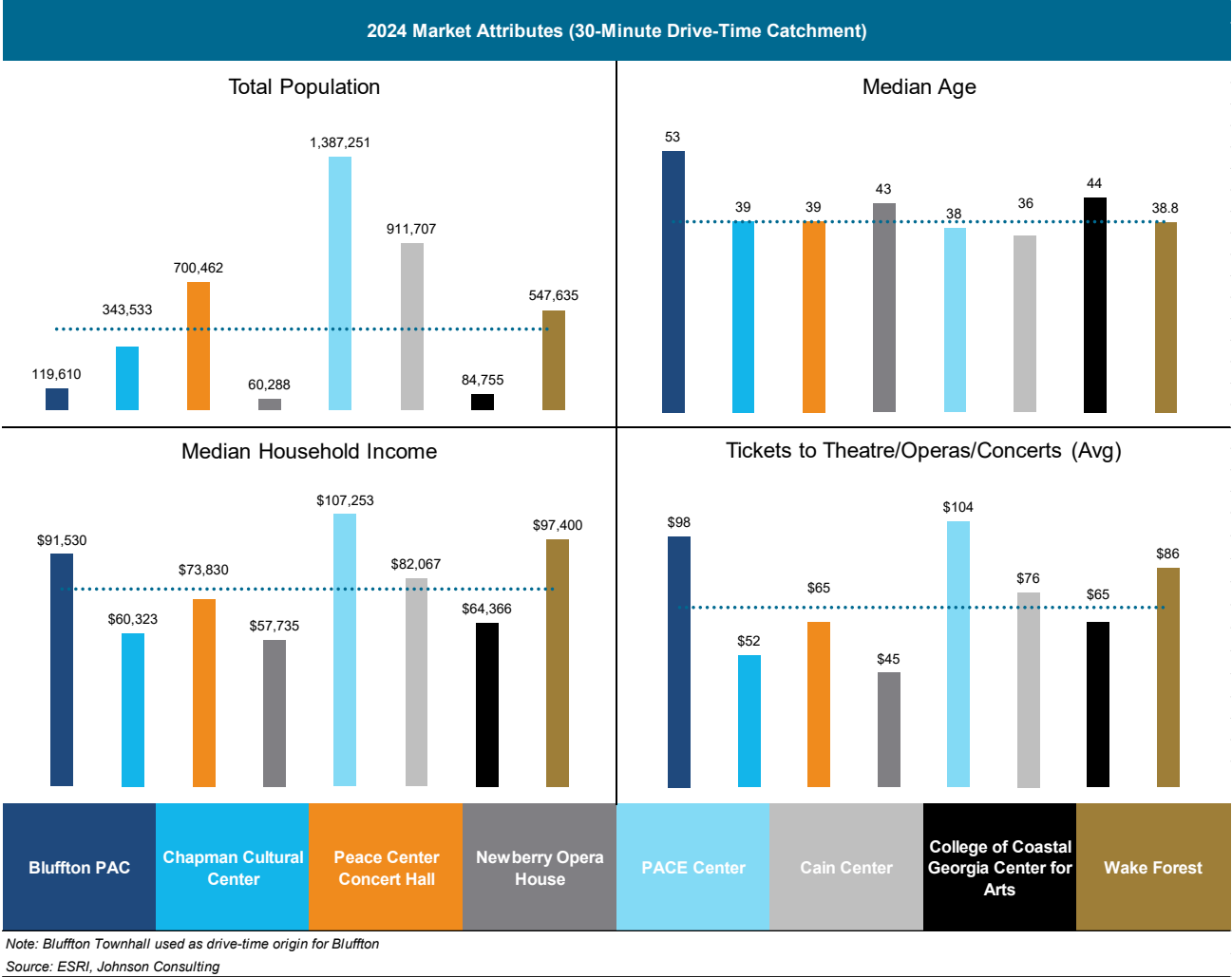
Like Bluffton, Wake Forest is growing rapidly in population and has identified the significance in investing in quality-of-life assets, such as multipurpose arts an event venters. This type of facility and projected demand is comparable to expected operations at a new multipurpose venue in Bluffton.



Benchmarking - Market Attributes

The chart to the right analyzes the market attributes of the 30-minute drive time catchments around Bluffton and the seven comparable facilities analyzed in the case study set. The total population, median age and median household income of these drive time catchments can determine the long-term viability of these facilities. Among the eight markets analyzed, Bluffton has a total population that falls well below the median, with only the 30-minute drive time catchments around the Newberry Opera House and the College of Coastal Georgia Center for the arts reporting smaller populations. In contrast, the 30-minute drive around the PACE Center stands out with the largest population and highest median household income.

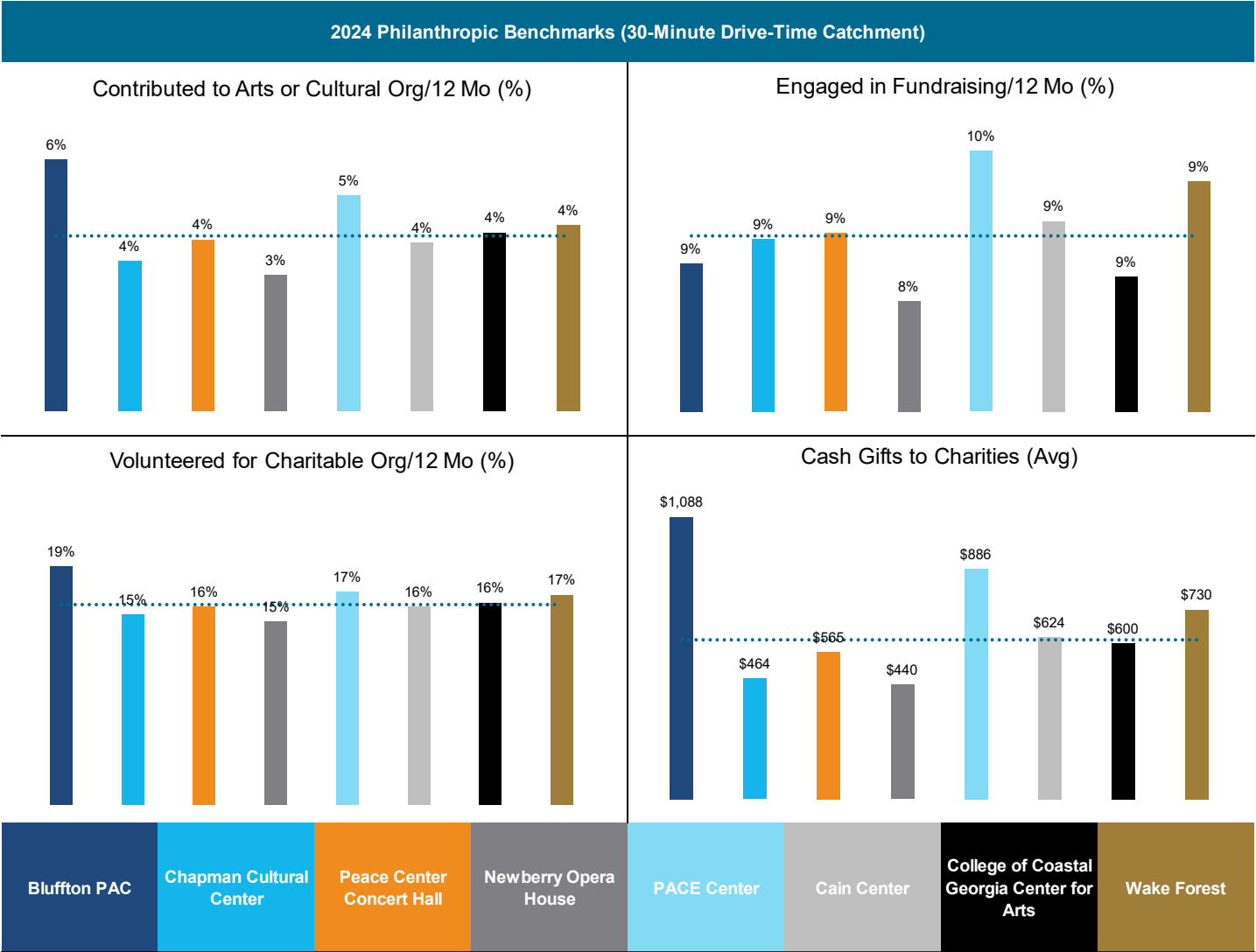
With the highest median age among the compared markets, Bluffton’s market may demonstrate higher levels of cultural engagement and a financial capacity for ticketed events. The Bluffton market also ranks highly compared to the other markets in median household income. Specifically, Bluffton’s willingness to spend on arts events was the second highest in the analyzed set. These economic indicators suggest that while Bluffton’s total population may be smaller, its residents may have the financial means and demographic characteristics conducive to sustaining a performing arts center.



Benchmarking – Philanthropic Behavior

The chart to the right analyzes the philanthropic and community engagement attributes of the 30-minute drive time catchments around Bluffton and the seven comparable facilities analyzed in the case study set. Volunteer participation rates in cultural organizations, fundraising and charitable organizations in addition to cash gifts to charities were analyzed for each market.

Among the eight markets analyzed, Bluffton has the highest rates for both contributing to arts or cultural organizations and volunteering for a charitable organization. Bluffton also had the highest average cash gifts to charities. Bluffton’s residents spend both their time and their money on supporting arts and charitable organizations. This is an important factor as Performing Arts Centers often need patrons to champion the development and support continual operation of a facility. A high propensity to volunteer and a large donation base are important factors that will help a Performing Arts Center thrive in Bluffton.



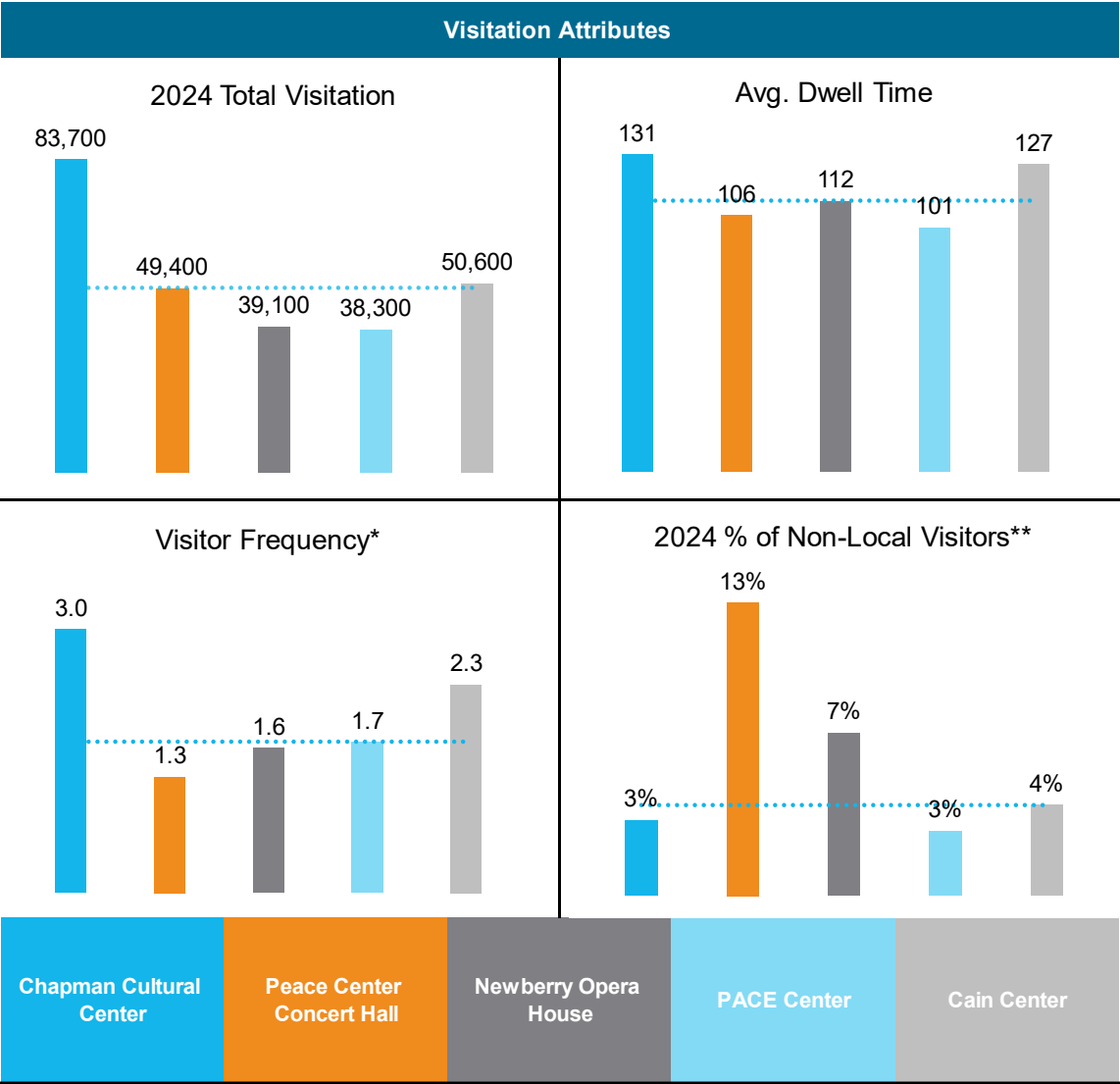
Note: Bluffton Townhall used as drive-time origin for Bluffton

Source: ESRI, Johnson Consulting

Benchmarking – Visitation

Among the five existing performing arts centers analyzed, the Chapman Cultural Center recorded the highest total visitation, the highest average dwell time, and the highest visitor frequency during 2024. Its visitation of 83,700 notably exceeded that of the four other compared facilities which ranged between 39,100 and 50,600 annual visits. Chapman also led in average dwell time at 131 minutes, indicating a strong level of engagement per visit. The Cain Center consistently ranked second across these visitation metrics. Chapman’s success is attributed in part to its diverse facility offerings, which include not only a large theater but also multiple arts studios that provide space for community programs, classes, and creative use beyond traditional performances.

While the Chapman Cultural Center attracted the most overall visits, it did not have the highest percentage of non-local visitors. The Peace Center Concert Hall had the largest share of visitors traveling from more than 100 miles away. This is likely due to the Peace Center’s 2,115-seat auditorium which was the largest among the compared facilities. This larger theater is able to host higher-profile touring productions that attract broader regional audiences. Additionally, the Peace Center’s location within a larger arts and entertainment campus enhances its ability to serve as a regional destination. These patterns suggest that while larger venues and campuses can drive long-distance visitation, smaller but more flexible and community-oriented facilities like Chapman can achieve high engagement and repeat usage through localized and multipurpose space design.



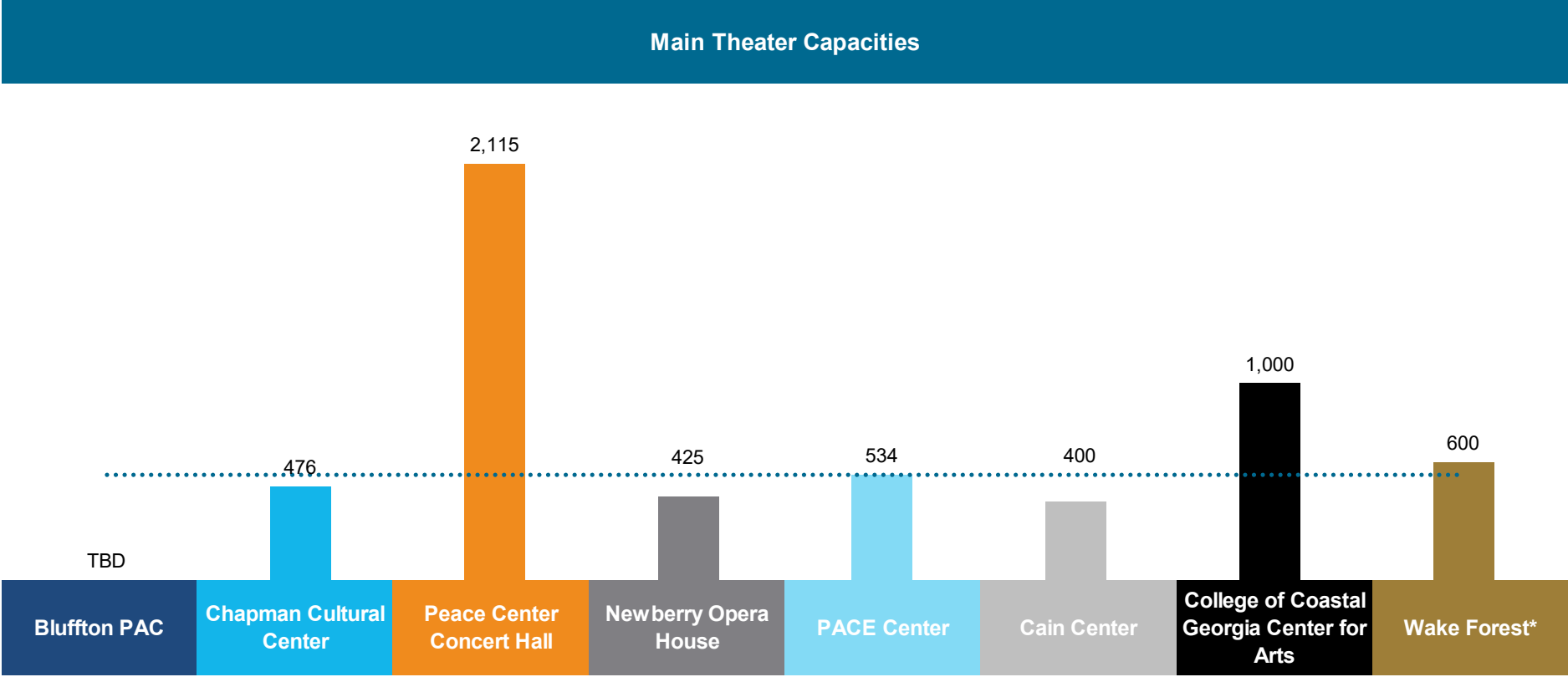
*Visitor Frequency defined by average times a visitor attends a facility

**Defined as visitors traveling from over 100 miles away

Source: Relevant Facilities, CoStar, Johnson Consulting

Benchmarking – Theater Capacity

The chart below shows the different theater capacities of all the analyzed facilities. The Peace Center Concert Hall has the largest theater by seat capacity at 2,115 seats, while the College of Coastal Georgia Center for the Arts is set to be the second largest upon its construction. The Peace Center has additional facilities like the Gunter Theater and the outdoor Pavilion which have capacities of 439 and 1,200 respectively. Besides the Peace Center Concert Hall and College of Coastal Georgia Center for the Arts, the five other analyzed performing arts centers have relatively similar seating capacities, ranging from 400 to 600.

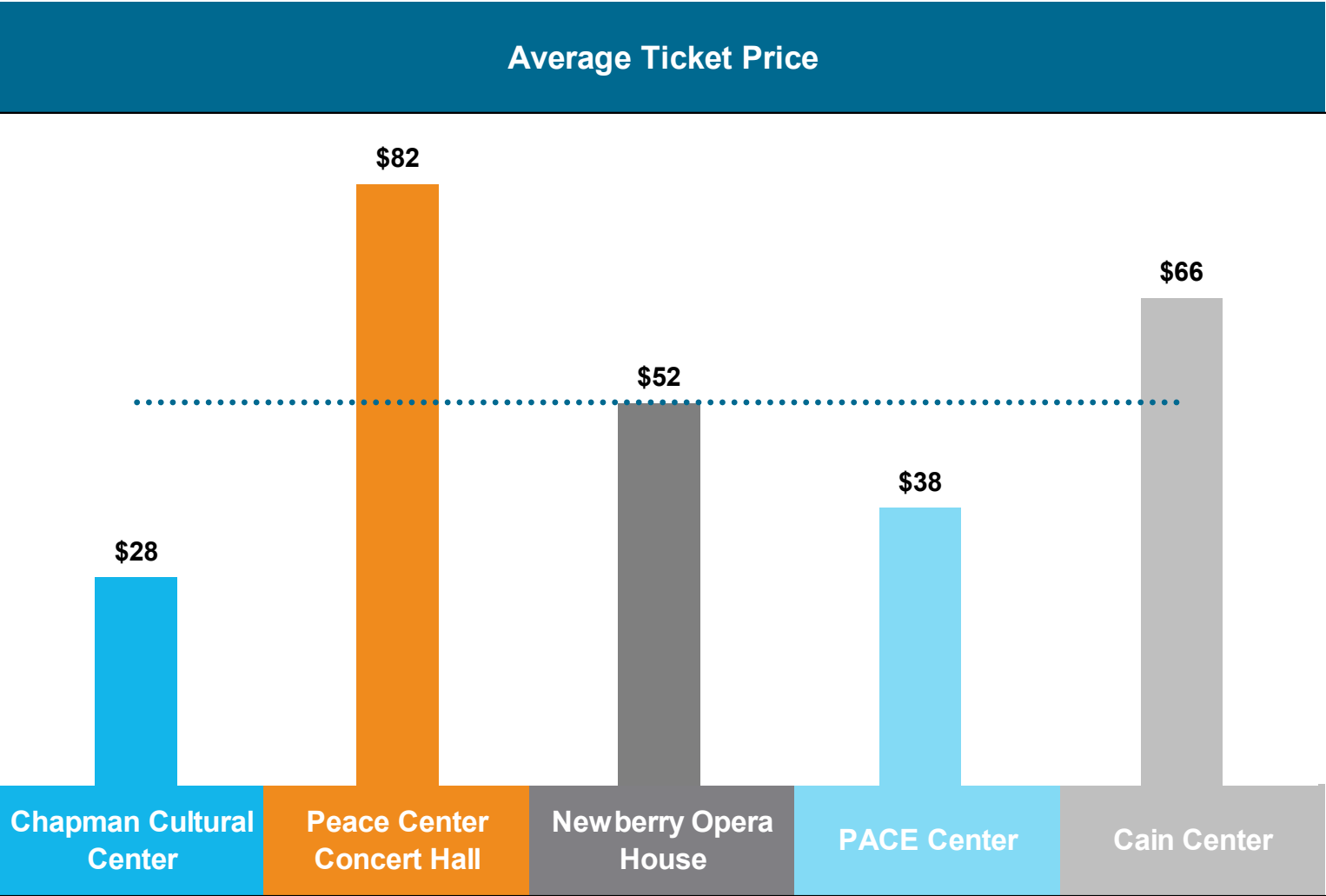


*Capacity for proposed facility

Source: Relevant Facilities, Johnson Consulting

Benchmarking – Average Ticket Price

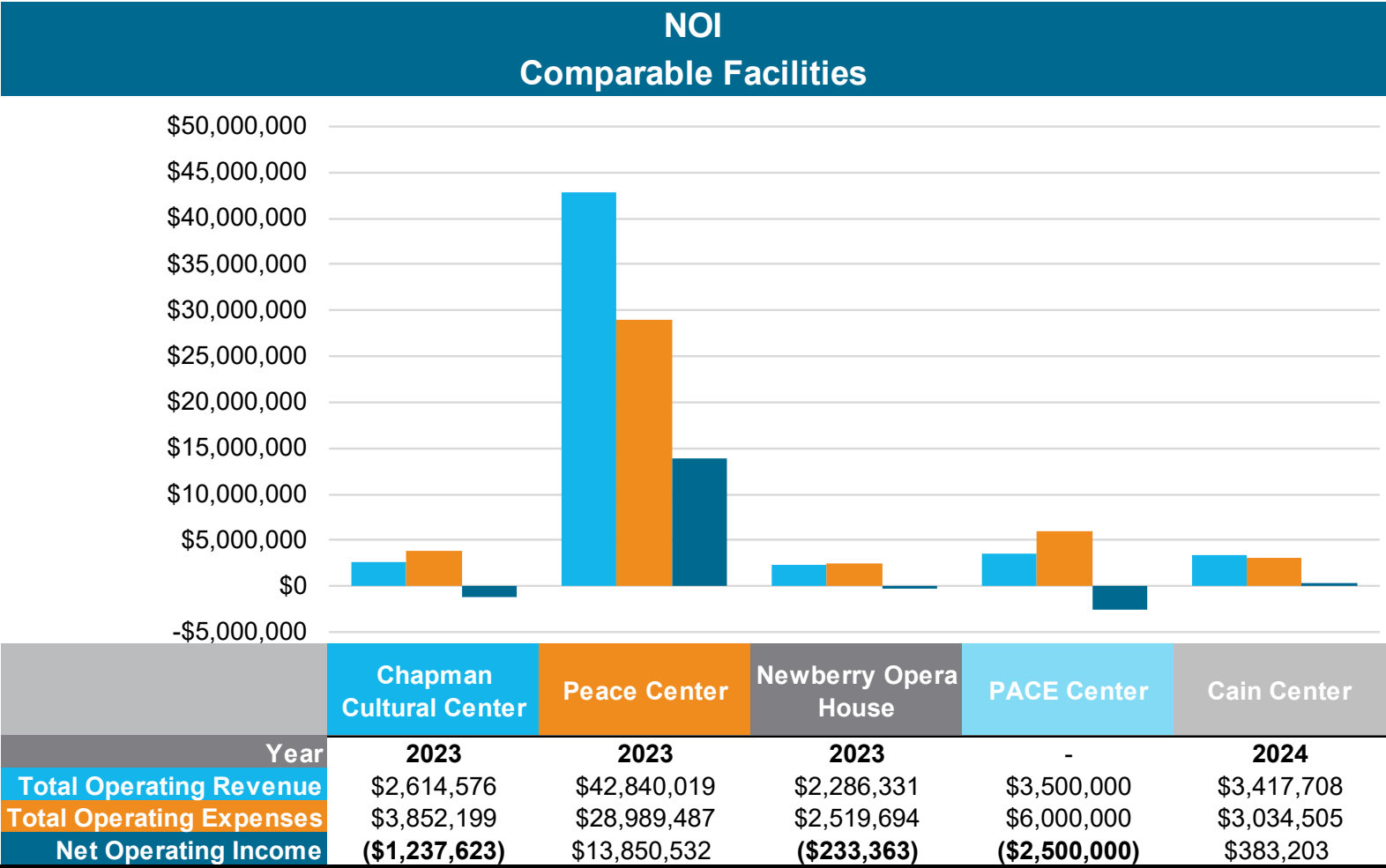
The chart to the right shows the different average ticket prices of all the existing analyzed facilities' upcoming events. The Peace Center Concert Hall has the highest average ticket price. This is likely because the Peace Center has the largest theater of the analyzed set at 2,115 seats. This larger theater is able to attract larger and more popular acts that can charge a higher ticket price. The two facilities that had below average ticket prices were the Chapman Cultural Center and the PACE Center. Both of these facilities did not have many larger ticketed touring events and rather put an emphasis on more local community events. Many of the events put on by the PACE Center were part of a free concert series. Similarly, the Chapman Cultural Center did not have many ticketed touring events, but rather smaller community events were free.



Source: Relevant Facilities, Johnson Consulting

Benchmarking – NOI

The chart to the right shows the net operating income (NOI) of the existing five analyzed facilities. Three of the five facilities operated at a net loss. The only facilities that had a positive net income was the Peace Center in Greenville and the Cain Center in Cornelius, NC. The Peace Center Concert Hall’s financial information was not separated from the other components of the larger arts campus on which it sits that includes an additional 439-seat theater, an outdoor pavilion and several wedding/event spaces. These additional venues and spaces are likely what makes the facility’s total operating revenue and expenses much higher than the other four facilities.



Source: Relevant Facilities, Johnson Consulting

Implications

Across all case studies, venues with multiple, adaptable spaces such as theaters, classrooms, studios, and lobbies were better positioned to serve both community and commercial functions. Centers like the Cain Center and Chapman Cultural Center successfully use multipurpose designs and accommodate performances, banquets, classes, and rentals, maximizing utilization, community engagement and revenue streams. Venues featuring flexible seating also increase overall utility and functionality.

In addition to the facilities' multipurpose designs, all analyzed facilities offered a broad array of programming. These events ranged from musical and theatrical performances to visual arts, comedy, lectures, and educational workshops. These venues are often flexible and also host other events such as civic programming, social banquets, corporate meetings, and other special events and private rentals. Some of the analyzed facilities kept their art galleries open to the public during operating hours, allowing the community the opportunity to utilize the facility even if there are not dedicated events planned, increasing site activation, and gives local artists the opportunity to display their visual art. Arts and cultural education are another big part of the offerings provided by these facilities. Frequent, varied offerings like routinely scheduled arts classes contributed to repeat visitation and broad public support. Due to its weekly arts classes and access to various arts studios, the Chapman Cultural Center hosted the highest number of events and recorded the most annual visits in 2024 with 83,700.

The proposed Wake Forest Arts and Event Center offers a valuable model for the type of operations expected in Bluffton. Both Wake Forest and Bluffton share similar market characteristics, including rapidly growing populations and strong demand for cultural and community amenities, factors that support comparable building programs. While Bluffton may experience a longer ramp-up period due to Wake Forest's existing programming and infrastructure, strategic partnerships, particularly with local schools, will help position Bluffton for long-term success.

Despite the diverse set of programming and strong attendance, most venues analyzed operated at a net loss or have minimal profits. Only the Cain Center and the Peace Center reported positive net operating income in the most recently reported year. Performing arts centers commonly rely on public subsidies, grants and private contributions to sustain operations. Bluffton's high median income and older demographics indicate strong philanthropic potential to support long-term operations in a growing market. While Bluffton's 30-minute drive-time population is among the smallest in the analyzed set, it ranks highly in median age, household income, and tickets to theaters/operas/concerts. Furthermore, the regional population is projected to grow at an exponential rate. These are strong indicators of cultural participation and event attendance. Case studies show that success is less dependent on total population and more influenced by strategic location, adaptable programming, multifunctional design, and consistent and diverse revenue streams.



5. Recommendations & Demand Projections

Recommendations

In response to Bluffton’s sustained population growth, rising household incomes, and increasing regional prominence, Johnson Consulting recommends the development of a flexible, multi-purpose performing arts and event center. This venue should be designed to meet the evolving needs of the community and capitalize on a range of market opportunities, including arts, culture, education, tourism, and economic development. Based on the research and analysis presented in the previous sections of this report, Johnson Consulting recommends the program of function spaces for the contemplated new facility presented in the table below.

Facility Concept and Functionality

The facility must be positioned as multipurpose venue in order to capture a wide range of event and programming types, organizers, and audiences. The proposed facility would be anchored by a 10,000 square foot multipurpose event / performance hall. This hall would feature telescoping riser seating built into one of the walls, or other flexible seating technology, with seating for up to 600 patrons, thereby allowing it to quickly convert from a flat-floor multipurpose space to a traditional theatre space. This technology is becoming increasingly popular in venues across the world and provides significant flexibility to accommodate numerous types of events and programming. With a flat-floor, the space can host 800 attendees for a banquet-style event and fit approximately 50 vendor booths for an event with exhibits. Additionally, this hall would feature a 2,400 square foot stage with a fly loft, wing space, audio/visual technology, and other acoustical design elements to ensure high-quality live events for both performers and audience members.

Supporting the main hall would be a smaller, 3,000 square foot studio theatre / meeting space. This would be a highly flexible space, able to seat up to 175 for a performance (with movable chairs) and to be divided into three smaller spaces with air walls. In addition to the primary function spaces, we recommend that the facility offer ample support and ancillary spaces, including a large lobby, circulation spaces, a catering kitchen, offices, stage and event support rooms, and loading docks. Additionally, we would advocate that the facility be built with a plan identified for potential future expansion that would include an outdoor or hybrid indoor/outdoor space; as Bluffton continues to grow and develop, expansion may become necessary to accommodate increased market demand and community needs.

Town of Bluffton Multipurpose Arts and Events Center Proposed Program of Function Spaces		
Space	Size	Notes
Multipurpose Event / Performance Hall	10,000 SF	Features a 2,400 SF stage
<i>Seated Performance Capacity</i>	600 Seats	
<i>Banquet Event*</i>	800 Attendees	
<i>Tradeshow**</i>	50 Booths**	
		Divisible into three smaller spaces
Studio Theatre / Meeting Space	3,000 SF	
	175 Seats	

*6' round tables

10'x10' booths

Source: Johnson Consulting

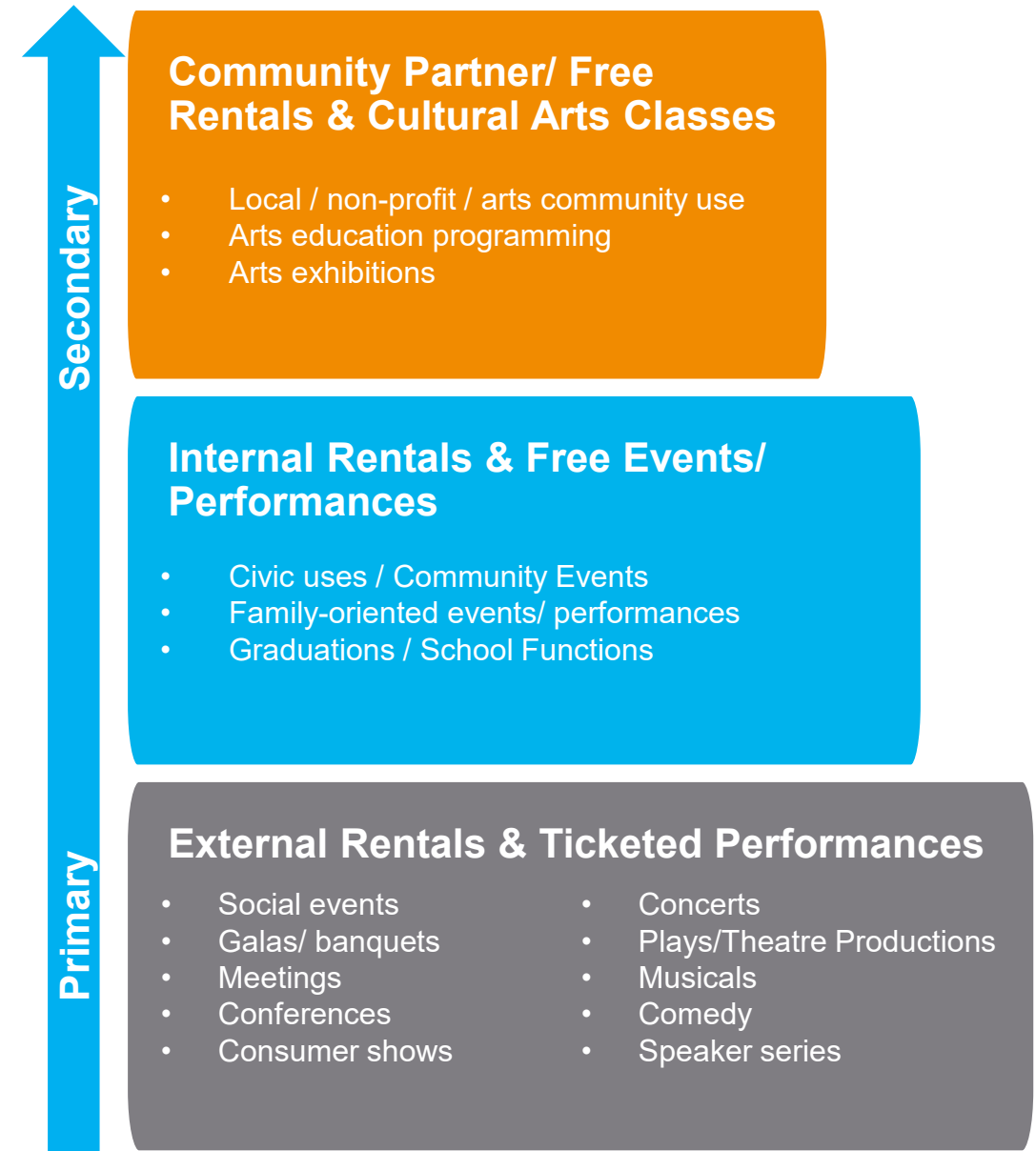
Demand Projections

Demand Strategy

Key demand drivers for the proposed facility include a wide range of potential user groups and audience segments, such as local arts organizations, schools, nonprofits, and regional event producers, along with the broader tourism market. These local stakeholders will play an essential role in building community partnerships and enhancing the depth and diversity of programming. Bluffton's proximity to Hilton Head and the regional shortage of high-quality venues also position it well to capture events that might otherwise go to competing markets.

The diagram on the right outlines the recommended demand layers for the proposed facility. The primary demand layer is external rentals and ticketed performances. These events are expected to generate the most revenue and form the financial backbone of the facility. Currently, Bluffton lacks adequate infrastructure to support this type of demand.

The secondary demand layer is internal rentals and free events. These would include events hosted by the Town of Bluffton and other civic or public gatherings. The third demand layer will be community partner usage and arts education programming. This includes discounted rentals for local nonprofits, schools, and arts organizations, as well as classes and workshops. While these events may not be major revenue drivers, they are vital to community engagement, site activation, and present opportunities for strategic partnerships, particularly with the local school district and higher education institutions.



Demand Projections

The balance of this section summarizes event demand and attendance projections of the proposed multipurpose arts and event center in Bluffton, based on the building program that includes a 10,000 square foot Multi Purpose Hall with a 600-seat capacity, a 3,000 square foot studio theatre / meeting space, divisible into three smaller spaces, as well as various public and support spaces (lobby, circulation, catering kitchen, loading, etc.).

The table below summarizes projected event demand for the facility for the first 10 years of operations. As shown, the facility is projected to accommodate 194 events in Year 1, 226 events in Year 5, and 234 in Year 10, including ticketed events, non ticketed events, and educational programming.

Town of Bluffton Multipurpose Arts & Events Center Projected Event Demand										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Ticketed Events	16	18	19	21	22	27	28	28	28	29
Internal Rentals	12	12	12	12	12	12	12	12	12	12
Community Partner/ Free Rentals	6	8	10	12	12	13	13	13	13	13
External Rentals	40	42	45	47	50	50	50	50	50	50
Free Events/ Performances	16	20	24	25	26	26	26	26	26	26
Subtotal Events	90	100	110	117	122	127	128	129	130	130
Arts & Culture Classes	104	104	104	104	104	104	104	104	104	104
Total	194	204	214	221	226	231	232	233	234	234

Source: Johnson Consulting

Attendance Projections

The tables below summarize the projected total attendance and average attendance for the first 10 years of operation at the proposed facility. As shown, the new multipurpose arts and events center is projected to attract over 29,500 attendees in Year 1, 54,700 attendees in Year 5, and nearly 62,000 attendees in Year 10. It is estimated that ticketed events and external rentals will generate the highest rate of average attendance. In Year 10, ticketed events are projected to have an average attendance of 475, a 95 percent occupancy rate for the 600-seat performance hall.

Town of Bluffton Multipurpose Arts and Events Center Projected Total Attendance										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Ticketed Events	6,000	6,836	7,715	9,034	10,122	12,539	13,039	13,172	13,300	13,680
Internal Rentals	1,644	1,692	1,752	1,894	1,970	2,010	2,030	2,051	2,072	2,093
Community Partner/ Free Rentals	958	1,384	1,820	2,270	2,361	2,570	2,596	2,622	2,649	2,676
External Rentals	15,360	18,190	21,280	24,231	26,492	27,027	27,303	28,026	28,312	28,601
Free Events/ Performances	3,408	6,200	9,768	10,909	11,716	11,953	12,075	12,198	12,707	12,837
Subtotal	27,370	34,302	42,335	48,337	52,661	56,098	57,043	58,070	59,040	59,887
Cultural Arts Classes	2,080	2,080	2,080	2,080	2,080	2,080	2,080	2,080	2,080	2,080
Total	29,450	36,382	44,415	50,417	54,741	58,178	59,123	60,150	61,120	61,967

Source: Johnson Consulting

Town of Bluffton Multipurpose Arts and Events Center Estimated Average Attendance										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Ticketed Events	375	388	402	434	452	461	466	470	475	475
Internal Rentals	137	141	146	158	164	167	169	171	173	174
Community Partner/ Free Rentals	171	173	175	189	197	201	203	205	207	209
External Rentals	384	429	475	513	534	545	550	556	562	567
Free Events/ Performances	213	310	407	440	458	467	472	476	481	486
Cultural Arts Classes	20	20	20	20	20	20	20	20	20	20
Combined Average	152	178	207	228	243	252	255	258	262	264

Source: Johnson Consulting

Other Considerations

Site and Design Considerations

Location will be a critical determinant of the venue's success. The multipurpose arts and events center should be centrally located and easily accessible, with sufficient parking and strong pedestrian connectivity to promote walkability. Proximity to existing town infrastructure or opportunities for complementary development will be essential to maximize pre- and post-event spending, helping to activate surrounding areas and enhance the overall event experience.

Design considerations should also prioritize future adaptability, allowing for technology upgrades and physical expansion over time. Outdoor connectivity should be thoughtfully integrated into the design such as amphitheater-style green spaces, terraces, and patios that will allow for outdoor receptions, intimate performances, and community festivals. These features will not only enrich the user experience but also capitalize on Bluffton's favorable climate and natural setting.

Economic, Fiscal, and Social Impact Potential

A new, high-quality, professionally managed venue in Bluffton has the potential to deliver meaningful economic, fiscal, and social impacts. By hosting regional arts programming, conferences, and special events, the facility can attract non-local visitors and increase tourism-related spending on hotels, restaurants, and retail. Currently, much of this activity is concentrated on Hilton Head Island; a venue in Bluffton would help retain more of this spending locally while attracting new visitors.

The construction and operation of the venue will generate direct and indirect jobs in construction, event operations, hospitality, marketing, and the arts. Local businesses, vendors, artists, and educational institutions will benefit from new partnership opportunities and expanded visibility. Socially, the venue would serve as a cultural anchor and civic hub, strengthening community identity and pride. Its flexible programming could support a wide range of uses, from public meetings and arts education to multicultural festivals and civic ceremonies, offering something for residents of all ages and backgrounds. Over time, the presence of this facility could spur catalytic development, driving new investment, infrastructure improvements, and rising property values, helping position Bluffton as a cultural and economic hub in the Lowcountry.

Conclusion & Next Steps

The next phase of work should include detailed business and financial analysis, site and program analysis, and refined conceptual and space planning. This includes forecasting operational performance, assessing the fiscal and economic impacts of the project, evaluating potential sites, and developing phasing strategies. These efforts should be paired with a comprehensive funding and implementation strategy that supports both capital development and ongoing operations.

As the project advances, ensuring operational and financial sustainability will be paramount. A public-private partnership model is recommended to balance public benefit with professional management expertise. Funding should be pursued through a diverse mix of public, private, nonprofit, philanthropic, and tourism-related sources. Revenue streams should be equally diverse, including ticket sales, space rentals, private events, sponsorships, memberships, and on-site amenities such as a café, studio space, or merchandise area. Securing one or more anchor tenants and pursuing naming rights or capital sponsorships will further enhance long-term viability.

Bluffton is uniquely positioned to develop a high-impact, flexible performing arts and events venue that addresses community needs, fills a critical gap in the regional venue landscape, and generates substantial economic and social benefits. The opportunity aligns with the Town's long-term goals of cultural enrichment, economic diversification, and enhanced quality of life. With strong leadership, coordinated stakeholder engagement, and a shared community vision, this initiative has the potential to serve as a cultural anchor and economic catalyst, providing not only artistic programming but also driving tourism, community engagement, and local spending in Bluffton.