Revenue and Cost Projections
With Implementation
And Operating Recommendations

Sapelo Island Interpretative Village

Prepared for: Sapelo Island Cultural & Revitalization Society, Inc (SICARS)

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Introduction

The following has been developed to assist the Sapelo Island Cultural & Revitalization Society, Inc (SICARS) in the creation of an interpretative village. The proposed village will illustrate the various eras in the evolution of the Gullah/Geechee cultural on Sapelo Island. The interpretative village will help the Gullah/Geechee preserve their unique culture and enhance the Sapelo Island/McIntosh/Liberty economy by adding a unique dimension to the historic and cultural travel venues in the region.

This study is a follow-up phase to the conceptual study prepared by Mr. Griffin Lotson and SICARS, *Cultural Village Feasibility Study*, 2008. In that report SICARS outlines its vision for the village and provides some beginnings for estimating the operating costs, revenues and cost of construction for the proposed project.

The purpose of this study is to move the conceptual framework one step forward. This report will include a market analysis describing the characteristics of the market segments the Sapelo experience will most likely attract. Working with data on the current number of visitors and a proposed revenue structure, estimates of expected growth in visitors and revenue will be developed.

In the evolution of this research and the preparation of this report it has been determined that the conceptual plan does not provided sufficient guidance with respect to certain areas of the proposed operations. This makes the completion of a feasibility study at this time problematic. However, this report highlights options and makes assumptions that will be actionable by SICARS and are consistent with the expectations of the markets segments likely to be enticed to visit a cultural village. In particular this report makes some assumption as to operations and services during each phase of the project that, if provided, address the core expectation of the target market groups. The assumptions made have been designed to help SICARS determine the minimum conditions for feasibility. However, it should be noted that before a final feasibility study can be done, SICARS will need to make some additional decisions as to proposed operations and services to be offered.

In the following report there is first, a discussion of the market. The market analysis consists of a discussion of each of three segments: historic/cultural travelers; African-American travelers; and, soft- adventure travelers. The discussion of the market segments is followed by estimates of visitors and estimates of visitor revenue.

A third section of the report contains discusses jobs by type of occupation that will be required to develop and operate village. Also discussed are the use of volunteers and the costs associated with a volunteer work force.

The final section of this study estimates the economic impact of the proposed project. To make an estimate of the potential impact it is assumed that the presence of the village will cause the net new visitors to the island to spend one additional day in the region.

Market Analysis

The Georgia coast is rich in history and has enormous environmental beauty. Most of the region's tourism economy is built around the opportunity to experience high quality, outdoor, soft adventure travel and the opportunity to visit historic sites dating from the colonization of the region first by the Spanish and later by the English to the Civil War, World War II and the Civil Rights Era.

Sapelo Island is located at the nexus of Liberty and McIntosh Counties. Both counties have tourism strategies based on the area's historic, cultural and environmental assets. Sapelo Island is a barrier island accessible only by ferry. The Gullah/Geechee cultural was established on the island circa 1834. In 1956, what remained of five dispersed settlements on the island were consolidated into one village, Hog Hammock. Today's Hog Hammock residents are direct descendents of the Africans brought to Sapelo in the early 1800's to work on the Thomas Spalding plantation. After the Civil War those descendents purchased land on the island and carried on an agricultural economy that evolved with a unique blend of African and American social, economic and cultural elements.

The proposed interpretive village will provide visitors with an opportunity to see the cultural journey of the Gullah/Geechee people from Africa to the present. In addition to the cultural village, the project proposes a gift shop, educational theater, museum, picnic area, primitive camping, and system of walking trails. To this package of on-island services this report recommends consideration for the development of some high-end overnight accommodations in the form of a small hotel, inn and/or bed-and-breakfast accommodations. This report assumes the availability of 100 such rooms. The reason for the proposed development of accommodation will be clear from an analysis of the market segments most likely to be interested in the interpretative village experience.

Market Segments

The historic and cultural traveler is the primary market segment for the proposed cultural village. However, the African-American traveler and the soft adventure traveler are also strong sub-segments of the travel market for the proposed village. These market segments are generally compatible, but each of the segments has unique requirements if, for them, a travel experience is to be enjoyed and valued.

Approximately 80% of U. S. adults, who took at least one trip of 50 miles or more, one way, indicate participation in an event or activity of historic or cultural nature.[1] Within the historic and cultural market niche 70% of historic/cultural travelers say that their most memorable trips are ones in which they were able to learn something new. The cultural village at Sapelo Island will offer a unique learning experience in coastal Georgia. Other than historic and cultural attractions the activities of historic/cultural travelers include: visits at parks, 20%; outdoor activities, 17%; and beaches 13%. As with most travel segments, shopping is the number two activity for the historic and cultural traveler.

[1] Travel Industry Association of America, Cultural and Historic Traveler, 2003.

Twenty-two percent (22%) of African-American households travel each month.[2] As a primary reason for traveling, historic and cultural travel is less prevalent as the cause of a trip in this market segment than the general travel market. However, 13% of all trips by African-Americans include a visit to a museum or historic place and another 14% include attending a cultural event or festival. Shopping is the number one activity on trips for African-Americans. Only about 8% of African-American trips involve an outdoor activity.

The soft adventure, nature traveler is a traveler who seeks locations for such activities as camping, hiking, wildlife watching/photography; canoeing/kayaking; and sailing. The rich natural environment of Sapelo as a barrier island with no access by automobile, the proposed nature/walking trails and primitive camping make this segment of the travel market one which will likely seek out the Sapelo experience.

Going forward, the challenge for the proposed interpretive village and in planning what amenities to offer on the island, will be to present a blended venue that will meet the expectations of these three travel segments. The challenge for SICARS will be to plan how to provide for the overlapping interest of each segment, while accommodating the unique wants of each group. For example, the African-American traveler shares the interest of the historic/cultural traveler in the 'experience of a historic site,' but few African-American will be interested in a 'camping' and nature walk experience. And since shopping and entertainment will be top the activities sought by African-American travelers some focus will have to be give to providing shopping and event experiences.

On the other hand, while the historic/cultural traveler has very high rates of participation in soft-adventure activities they virtually never consume primitive accommodations. In fact, the historic/cultural traveler is also much more likely to desire an overnight stay than the African-American traveler. The historic/cultural traveler is the most lucrative segment of the market seeking out destinations with high quality accommodations, fine quality local dinning, and high levels of access to outdoor activities. Hence, while historic/cultural travelers share the environmental values of the soft adventure traveler they seek a very different set of amenities.

All three segments share overlapping interests in the proposed Sapelo experience. However, to appeal to each segment, the core requirements of that segment will need to be met by the Sapelo experience.

Timeline for Development

On January 15, 2009 Dr. Jackie Eastman conducted a focus group for SICARS. The purpose of the focus group was to determine if the plan for the village had cohesive support from the overall community and to identify any potential concerns or reservations about the village's impact on the island residents. Based on the focus group it was concluded that the SICARS organization has a workable vision for the development of the cultural village. This vision includes a short-term or planning period ending in early 2010 with the completion of a feasibility study. The mid-range vision or pre-construction phase, expected to end about 2015, will include completed village designs and architectural plans. The final or the long-term vision for operations will

[2] Travel Industry Association of America, Minority Traveler, 2003.

begin with the completion of the construction phase in 2020. The operations phase will feature a completed cultural village open to tourists with overnight accommodations available on Sapelo Island.

Recommendations for Consideration: Timeline

1. It is recommended that SICARS retain a planner or landscape architect to prepare a professional rendering of the village. Additionally, the development of the proposed accommodations should be completed as soon as possible to be in place during the planning phase. At a minimum the accommodations should include both primitive camping sites, estimated here at 25 sites, as well as a recommended 100 rooms in the style of a country hotel/inn and/or in the form of bed-and-breakfast accommodations. Finally, the nature/walking trail should be completed by the planning phase as well.

Based on the research conducted by BBRED and since this study takes place in the early phases of planning, BBRED recommends that SICARS considers incorporating some type of high quality overnight accommodations on the island in addition to the proposed primitive camping. A high quality overnight accommodation venue will be essential for capturing the expenditures of the historic/cultural traveler, on the island. With proper planning and design the ownership of the land and accommodations can be retained in SICARS hands; and the facility can be blended into the landscape of the village.

There are several sources of funds that may be available for the development of on-island overnight accommodations. SICARS should work with McIntosh County and the McIntosh County Development Authority to seek Community Development Block Grants to support infrastructure development. Additionally, the Coastal Area District Development Authority (CADDA) can assist by providing loan participation with banks to support economic development initiatives. Finally, the USDA can assist with grants and loans for rural economic development.

2. A second recommendation is that in each phase of the proposed timeline SICARS have a prepared program about the village for visitors to see, listen to and from which to take a learning experience. For example, in the planning phase it is assumed that there is no increase in annual rate of growth of visitors to the island. However, to pre-sell return experiences and increase the value of a trip it is assumed that there will be displays showing the elements of the village as it will be when completed. Volunteer guides should be available to tell the story of why the village is important, provide a narrative history of the island's history and discuss the vision of the village through professionally renderings of the plans for the village.

It is also assumed that overnight accommodations be given a priority for development and that accommodation be ready by 2020, the development stage. Additionally, again to enhance the experience of visitors, it is recommended the nature path and a walking tour of the proposed village be completed. This will allow for visitors to observe the portions of the village as it is being developed and will permit guided/narrated walking tours.

Estimates of Visitors and Visitor Direct Spending

Each of the visitor segments discussed above have different travel party characteristics and different trip expenditure patterns. The following discusses these differences and the data developed will serve as the basis for estimating direct spending.

The typical historic/cultural travel party has only two persons. Children are included in less than a third of trips. About 40% of historic/cultural trips are by Baby Boomers, now ages 45 to 65 and about 35% are by mature households, ages 55 plus. Ninety percent (90%) of all historic/cultural trips include an overnight stay and, on average, the length of a trip is 5.2 nights. The preference for lodging is hotels, motels and bed-and-breakfasts. Almost no trips include a camping experience. The higher than average number of days in a trip and the preference for paid lodging make historic/cultural travel trips higher than average in total expenditures, $623 dollars per trip not including transportation compared to $475 per trip for the average travelers. About 25% of all trips involve expenditures of $750 or more. While the attraction to the location is the historic and cultural experience, the experience sought is the whole bundle, the site plus the amenities.

Most African-American trips, 80%, include an overnight stay. The average duration of a trip is 4.2 nights. However, the preferred lodging on a trip is with family or friends meaning that only 60% of trips include a stay in paid lodging. Over half of African-American travel is by a single individual or includes a non-family member as the second party on the trip. Only 25% of trips include a child under the age of 18. The average spending per trip is about $496 and the average spending for a day trip is about $165. The African-American traveler will be there to see the village, shop and dine. Only 8% of this segment seeks an outdoor activity on a trip.

The soft adventure segment of the market is concentrated with 51% of participants falling into the age 24 to 45 demographic.[3] The median expenditure per trip for those ages 18 to 34 is about $258 and about $378 for those in the age 35 to 54 demographic. Focusing on the camper component of the soft adventure market, about 45% of all trips include children. For those on hiking, wildlife watching, canoe/kayak trips, about a third include children. The village and Sapelo experience will be of great interest to this segment, but there presence also creates challenges for blending the different market segments. This group is much younger than the average historic/cultural traveler and will much more likely include children in the travel party.

Visitation Patterns

Two types of expenditure estimates need to be developed from the above data. First, in terms of the total economic impact of the trip, it will be assumed that the visit to the island will be part of a trip to the area. In other words, the market for Sapelo is the mix of travelers already coming to McIntosh and Liberty Counties. It is assumed that the visitors will choose to spend one extra day in the area because of the village. The direct impact of the trip will be estimated as the average expenditure per day for each type of traveler.

The second type of expenditure estimate that is required is visitor fees or the 'gate revenue' for the village. The ability of Sapelo to capture revenues from these two streams will be key to

[3] Travel Industry Association of America, Special Report: Adventure Travel.

establishing a self-sustaining tourism economic base for the village.

The projection of 'gate revenue' is fairly straight forward once the potential number of visitors is estimated. Fee and charges for such things as gift shop operation, over night camping, etc were estimated from a survey of historic site, parks and nature education parks and facilities.

To examine the potential for revenue from over night accommodations, its will be assumed that the island will provide 100 rooms. Assumptions are made about occupancy rates for two seasons, the peak and off, each is assumed to be six months in length.

Estimates of Visitors

According to the *2007 Travel Profile-Georgia State Travel Economic Impact: Regional Analysis*, McIntosh County ranked 94th with $12.44 million in expenditure by travelers. Based on the average expenditure per person per day of $102, the estimated number of visitors to McIntosh County in 2007 was 127,352 people. The Liberty county market with an estimated 813,823 visitors is approximately six times larger than the McIntosh county market. Hence, slightly less than 1.0 million visitors travel to the Sapelo area each year.

From the perspective of a feasibility analysis, the above means that in essence the 'geographic' market for the village on Sapelo is the approximately 1.0 million visitors to McIntosh and Liberty County. To succeed Sapelo will only need to convince a small portion of this market to spend one day of their trip at the village.

In 2007, about 70,000 passengers traveled on the ferry to Sapelo Island. If it is assumed that about half of the trips were essentially commuter trips by local residents, then the visitor base in 2007 was approximately 35,000. However, the collective estimation by the focus group placed actual active visitors to the island at about 20,000. This means that Sapelo currently captures a visit from between 2.0% and 3.5% of the current McIntosh/Liberty visitor pool.

There has been about a 3.9% annual increase in travel on the ferry in the 17 years between 1990 and 2007. Nationally, overall growth in tourism expenditures, adjusted for inflation for approximately the same 20 year period, has been about 6.3% per year. Hence the assumed growth rate for total visits the island will be about 5% per year.[4]

[4] The increase above the historic average increase of ferry visits, is an adjustment for the effect of the add amenities associated with the village.

Table 1

Total projected Visitor to the Sapelo Island

Years	2010	2011	2012	2013	2014
Pre-Planning Period Phase	20,780	21,590	22,432	23,307	24,216
	2015	**2016**	**2017**	**2018**	**2019**
Planning Phase	25,282	26,394	27,556	28,768	30,034
	2020	**2021**	**2022**	**2023**	**2024**
Development Phase	31,535	33,112	34,768	36,506	38,332

Table 1 is the pivotal table for the following analysis. During the pre-planning phase it assumed that growth in visitors will follow the historic rate of growth of about 3.9%. During the planning phase it is assumed that the enhanced experience created by the visualization tours will increase the learning experience and therefore the value of the visit. As this occurs it is assumed that the number visitors increase by 4.4% per year.

During the development or construction phase, expected to begin in 2020, it is assumed that growth in visitors increases to 5% per year. The higher rate of growth is assumed for the development phase since, again, as it is expected that as the educational experience increases as components of the village emerge which will increase the visitor's value of the experience.

The following revenue projections are developed from the expected underlying growth in visitors. These estimates are built in component parts. Further, it is assumed that the development of over night accommodations is actually completed as a separate project and that all over night accommodations are available by 2020.

Tables 2 and 3, show the expected revenue from admission fees, at $10 per adult and $5 per child, and gift shop sales for day visitors at $25 and $10 spent by adults and children respectively.[5] Table 2 is for the planning period. During this period it is assumed that there will be displays showing the elements of the village as it will be when completed and that a 'tour' will include a narrative of the history of the island and the vision of the village.

Table 2

Planning Phase: Total Day Visitor Revenue in 2009$

	2015	2016	2017	2018	2019
Total Revenue	209,006	218,202	227,803	237,826	248,291
Adults	188,780	197,086	205,758	214,811	224,263
Childern	20,226	21,116	22,045	23,015	24,028

[5] The estimated rates for fees and for gift shop spending were developed from the survey of practices at historic site, parks and nature/education center.

Table 3 shows the revenues generated during the development phase. It is assumed that portions of the village will emerge throughout the phase and, that like, the planning phase there will be a 'tour' that includes a narrative of the history of the island and the vision of the village.

Table 3[6]

Development Phase: Total Day Visitor Revenue in 2009$	2020	2021	2022	2023	2024
Total Revenue	260,705	273,741	287,428	301,799	316,889
Adults	235,476	247,250	259,612	272,593	286,222
Children	25,230	26,491	27,816	29,206	30,667

Table 4 shows the estimated revenue from the soft adventure segment of the market for both the planning phase and development phase. The estimates are expenditures for camping fees, estimated at $4 per day per adult, gift and shopping expenditures at $50 per adult visitor and $15 per child, and plus admission fees of $10 and $5 per day for adults and children respectively.

It is assumed that there are 25 camping sites with 50% occupancy in the slow season and 80% occupancy during the pick season. Each season is assumed to last six months. It has also been assumed that the typical camping party averages 2.8 adults and 0.7 children.

Table 4

Planning and Development Phase : Total Overnight Revenue
Soft Adventure Travelers with Admission 2009$

	2015	2016	2017	2018	2019
Total Overnight Revenue	**311,209**	**324,902**	**339,198**	**354,123**	**369,704**
Overnight Adults	288,658	301,359	314,618	328,462	342,914
Overnight Children	22,551	23,544	24,580	25,661	26,790

	2020	2021	2022	2023	2024
Total Overnight Revenue	**320,678**	**336,712**	**353,548**	**371,225**	**389,786**
Overnight Adults	303,800	318,990	334,940	351,687	369,271
Overnight Children	16,878	17,722	18,608	19,538	20,515

Table 5 shows the estimated revenue from the over night visits by historic/cultural and African-American visitors. It is assumed that there are 100 rooms available and that the occupancy rate during the peak season is 80% and in the off season the occupancy rate is 50%. It is assumed that each season lasts for six months. It is assumed that total spending for an over night visitor is $120. This is most probably low, but provides a conservative baseline estimate for the potential impact of bed-and-breakfast or county inn style accommodations.

[6] Note the rates for fees and for gift spending are the same as for Table 2.

Table 5

Planning and Development Phase: Total Overnight Revenue for Historical and Cultural and African American Travelers with Admission 2009$

	2015	2016	2017	2018	2019
Total Overnight Revenue	**2,057,905**	**2,148,453**	**2,242,985**	**2,341,676**	**2,444,710**
Overnight Adults	1,820,260	1,900,352	1,983,967	2,071,262	2,162,397
Overnight Children	141,576	147,805	154,309	161,098	168,186

	2020	2021	2022	2023	2024
Total Overnight Revenue	**2,743,542**	**2,880,719**	**3,024,755**	**3,175,992**	**3,334,792**
Overnight Adults	2,270,517	2,384,043	2,503,245	2,628,407	2,759,828
Overnight Children	353,192	370,851	389,394	408,863	429,307

Table 6 shows the combined revenue projections for all source of revenue. These are all net new revenues and do not include any fees and revenues currently collected. The revenues do not include potential increases in fees or costs of any potential need to expand the number of ferry seats available per day. All estimates are annual revenues in 2009$.

Table 6

Planning and Development Phase: Total Revenue 2009$

	2015	2016	2017	2018	2019
Total Revenue	**2,578,120**	**2,366,655**	**2,470,788**	**2,579,503**	**2,693,001**
Adults	2,009,040	2,097,438	2,189,725	2,286,073	2,386,660
Children	161,802	168,921	176,354	184,114	192,215

	2020	2021	2022	2023	2024
Total Revenue	**3,324,925**	**3,491,171**	**3,665,730**	**3,849,016**	**4,041,467**
Adults	2,809,793	2,950,283	3,097,797	3,252,687	3,415,321
Children	395,299	415,064	435,817	457,608	480,488

Development and Initial Operations Phase of the Village: Soft Costs

The above provides estimate of the revenue for the purposes of estimating the direct and total economic impact on the island and in McIntosh County. In this section the focus will be on the estimation of operating costs both during the development phase and the post construction. These estimates of operating costs are soft costs and do not include the cost of construction or capital costs.

To develop the operating estimates of 'gate' fees, gift shop revenues and group tour revenues, a survey of parks, historic sites and natural/cultural educational center were surveyed. The survey group was those venues located in coastal South Carolina, Georgia and Florida. The survey questionnaire also included questions about the size of operating budgets, number of staff and number of visitors. For a site with an average of between 10,000 and 20,000 visitors per year the typical staffing level was three full-time equivalent employees. For those sites with average annual visitors of between 20,001 and 30,000 per year the typical staffing level was seven full-time equivalent employees. Virtually all locations responding depended in part on part-time and volunteer staff.

Staffing by Occupation

In the typical organization the largest operating cost is associated with the professional staff. The cultural village staffing needs will change over time based on the timeline described previously. However, it is expected the expertise of four professional/managerial occupations will be required.

1. Physical Plant Engineer – estimated annual salary for an individual with significant experience as described below will be between $47,900 and $50,400
2. Marketing and Events Coordinator - $45,000 (median) to $75,400 (high)
3. General Manager – estimated annual salary for an individual with significant experience as describe below will be between $73,900 (median) and $145,600 (high)
4. Historian and Curator - $49,100 (median) to $80,600 (high)

In terms of timing of staff expansion, the physical plant engineer should be hired during the late planning phase. This will mean that the physical plan engineer will initially served as construction manager/overseer. This will greatly assist in controlling construction costs. It will also mean the physical plant engineer will have an intimate knowledge of the development and its need for maintenance.

Second, in the initial stages the general manager should be expected to have both general management experience and marketing/events coordination experience. This person should also have experience training and managing volunteer staffs.

The optimal timing for hiring a historian/curator is in the pre-planning stage. In this stage the role might be filled by a consultant or by a part-time employee. The value of the historian/curator during the pre-planning stage will be in the ability to guide the planners and insure authenticity of the village lay-out, the appearance and finishing of the buildings and to prepare the narrative tours that explain the vision of the village.

The role of the historian/curator will expand as the proposed project is developed. However, a portion of the charge to the historian/curator may include developing hands-on events and seasonal events that will be carried out through the planning and development phase. Additionally, the development of an inventory of artifacts, life-stories, etc needs to take place to 'populate' the village as it is built.

Beyond the professional staff it should be assumed that much of the work-force will be volunteers through at least the development phase. However, from a budgeting perspective SICARS should plan at least $20,000 to $40,000 per year as the cost of a volunteer staff. Such costs include training costs and insurance.

Economic Impact of the Interpretative Village: McIntosh and Liberty Counties

The economic impact of the proposed Cultural village is based on the total number of 'net new' visitors. As stated previously the normal growth rate increase in visitors to the island is 3.9%. During the planning phase the growth rate is assumed to increase to 4.4% so the 'net new' visitors are the additional 0.5% increase in visitors. During the development phase the rate of growth in visitors is assumed to increase to 5.0% so the 'net new' visitors are the 1.1%. These assumptions result in an estimated 2,607 'net new' visitors.

The 2,607 'net new' visitors are assumed to spend one extra day in the McIntosh/Liberty County area. It is assumed that they spend estimated $120 on that extra day. It is further assumed that they spend the extra day on the island, so the direct impact is to the island economy.

The $120 per day spending is assumed to be spent on five basic categories of goods. Table 7 shows the typical distribution of tourism expenditures.

Table 7
Distribution of Traveler Expenditures by Type

Auto Trans	10.5% (at 50% for orig & 50% dest)
Lodging	22.6%
Foodservice	43.1%
Entertainment/Rec.	10.1%
General Retail	13.7%

Since all of the spending is assumed to take place prior to the completion of the village, the extra spending has a modest impact on the regional economy. However, note again that it is assumed that the extra day is spent on the island, so the direct benefits will accrue to the islands economy. Additionally, these economic impacts should be viewed as a starting point. The region wide impacts should be significantly higher after the village is fully in place.

The economic impact was conducted by using the economic model IMPLAN and measures the impacts by changes in the total employment, Gross Regional Output and Labour Income. Tables 8 through 10 show the direct, indirect and induced impact for employment, Gross Regional Product and Labor Income.

Total direct Gross Regional Output, Table 9, increases by $313,079. This is actually the total increase in goods and services produced on the island. The multiplier effect expands the regional economy by approximately an additional $50,000.

The direct effect of on employment, Table 8, is five additional jobs. Note the additional jobs shown here are over an above the professional jobs and volunteer jobs discussed above. The multiplier effect adds another two jobs to the regional economy.

Table 10 show the impact of the additional jobs on labor income. The direct, or on island effect is an estimated $115,165. The multiplier effect adds another approximately $20,000 to labor income in the region.

Table 8

Employment Impacts: Interpretative Village Net New Visitors

Industry	Direct	Indirect	Induced	Total
Ag, Forestry, Fish & Hunting	0	0	0	0
Mining	0	0	0	0
Utilities	0	0	0	0
Construction	0	0	0	0
Manufacturing	0	0	0	0
Wholesale Trade	0	0	0	0
Transportation & Warehousing	0	0	0	0
Retail trade	2	0	0	3
Information	0	0	0	0
Finance & insurance	0	0	0	0
Real estate & rental	0	0	0	0
Professional- scientific & tech svcs	0	0	0	0
Management of companies	0	0	0	0
Administrative & waste services	0	0	0	0
Educational svcs	0	0	0	0
Health & social services	0	0	0	0
Arts, Entertainment & recreation	1	0	0	1
Accommodation & food services	2	0	0	3
Other services	0	0	0	0
Government & non NAICs	0	0	0	0
Total	**5**	**0**	**0**	**7**

Table 9

Gross Regional Output: Interpretative Village Net New Visitors 2009$

Industry	Direct	Indirect	Induced	Total
Ag, Forestry, Fish & Hunting	0	469	103	573
Mining	0	0	0	0
Utilities	0	3,526	971	4,497
Construction	0	891	74	965
Manufacturing	0	2,112	228	2,340
Wholesale Trade	0	294	156	451
Transportation & Warehousing	0	2,987	605	3,592
Retail trade	118,579	2,056	5,043	125,679
Information	0	4,311	972	5,283
Finance & insurance	0	4,308	1,939	6,248
Real estate & rental	8,218	6,758	1005	15,981
Professional- scientific & tech svcs	0	5,502	740	6,242
Management of companies	0	1,645	64	1,709
Administrative & waste services	0	3,351	318	3,669
Educational svcs	0	55	382	437
Health & social services	0	0	1,285	1,285
Arts, Entertainment & recreation	31,621	207	473	32,301
Accommodation & food services	138,225	1,602	2,514	142,341
Other services	16,436	1,628	1,698	19,763
Government & non NAICs	0	2,609	7,659	10,268
Total	**313,079**	**44,312**	**26,231**	**383,622**

Table 10

Labor Income: Interpretative Village Net New Visitors 2009$

Industry	Direct	Indirect	Induced	Total
Ag, Forestry, Fish & Hunting	0	82	29	111
Mining	0	0	0	0
Utilities	0	776	214	990
Construction	0	349	33	382
Manufacturing	0	330	37	367
Wholesale Trade	0	110	59	169
Transportation & Warehousing	0	1,646	241	1,887
Retail trade	50,438	813	2,001	53,253
Information	0	1,033	199	1,232
Finance & insurance	0	1,349	512	1,861
Real estate & rental	2,074	1,043	186	3,303
Professional- scientific & tech svcs	0	2,735	344	3,079
Management of companies	0	540	21	561
Administrative & waste services	0	1,257	120	1,377
Educational svcs	0	22	152	174
Health & social services	0	0	666	666
Arts, Entertainment & recreation	9,575	64	158	9,796
Accommodation & food services	46,747	500	767	48,013
Other services	6,331	591	728	7,650
Government & non NAICs	0	787	418	1,205
Total	**115,165**	**14,027**	**6,883**	**136,075**

Conclusions and Recommendations

First, the findings of this report are not those of a traditional feasibility study. Such a study could be complete once SICARS refines and clarifies more details of development costs and operation of on-island serves.

However, it should be noted that for the village to succeed, given the assumptions and recommendations provided in this study, it will only have to capture visits by about 4.0% to 4.5% percent of the travelers who currently visit the McIntosh/Liberty County area. This is a low threshold for success.

Some of the assumptions and/or recommendations which are critical, or viewed by these authors as a minimum requirement for success include the following:

1. Development by the planning phase of a gift operation;

2. Development of professionally designed and historical rich ‘visualization’ tours that provide an educational experience for visitors;

3. Development by the planning phase of at least 25 primitive camping sites and the proposed walking/nature trails; and,

4. Development by the planning phase of approximately 100 country hotel/inn or bed-and-breakfast rooms.

Finally, today’s tourist is experienced and will have high expectations for quality and authenticity. It will be critical to the long run success of the village that it be authentic and provide a rich educational experience.

Appendix One: Survey Data

Table 11 displays the information for the survey that was used in the report in total 28 surveys had good usable data. The bolded organizations are nature center.

Attendant and Employee Number by Organization

Organization Name	General Public	Educational Groups	Other Groups	Total Vistiors	Full-time	Part-Time
Cochran Mill	200	25	10	235		5
Birds of Prey	1,500	75	75	1,650	4	
Castellow Hammock Preserve	3,000	100		3,100	3	4
Highlands Nature Center	5,000			5,000		3
Ed Yarborough	5,000	50	50	5,100	3	
Elachee Nature & Sc.	5,000	400		5,400		
Savannah Ogeechee Canal	7,000	50	20	7,070	1	
William H Memorial Nature Pres.	5,000	5,000	1,000	11,000	3	
Reedy Creek Nature Preserve	10,000	14	12	14,026	2	3
Clark Park	15,000	150		15,150	3	
Fort Morris State Historic Site	11,749			11,749	3	
Yellow Bluff Fort	12,800	8,000	2,500	23,300	8	6
Bulow Plantations Ruins	14,000	5,000	1,000	20,000	5	2
Sewee Environ Ed	21,000	3,000		24,000	5	
Hofwyl-Broadfield Plantation	19,000	2,000	5,000	26,000	5	0
Crane Point Museum & Nat. Ctr	30,000		100	30,100	4	2
Driftwood Beach / Jekyll Island	16,400	3,000	15,200	34,600	7	12
Tybee Island Marine Science Center	20,000	15,000		35,000	4	4
Hampton Plantation House	33,750	11,250		45,000	3	2
Fort Clinch	42,000	5,000		47,000	7	12
Cumberland Island National Seashore	45,000	1,000		46,000	22	1
Drayton Hall	42,000	10,500		52,500	20	40
Charles Towne Landing	42,500	15,350		57,850	5	3
Coastal GA Historical Society	75,000	10,000	5,000	90,000	7	7
Gamble Rogers State Park	99,110	5,830	5,830	110,770	12	10
Fort McAllister Historic Park	145,000			145,000	7	2
Skidaway Island State Park	180,000			180,000	6	6
Deleon Spring	181,500	24,200	36,300	242,000	18	12
Total	**1,087,509**	**124,994**	**72,097**	**1,288,600**	**167**	**136**

Additional, 95% of the Historic Sites/Park had a gift shop and 80% of this collected less the $50 per visitor per day.

Appendix Two: Historic Sites and Visitors Centers Survey

HISTORIC SITES and VISITORS CENTERS

Hello, this is Ms. MJ Brunson at Georgia Southern University. I am calling to speak to the director or general manager of the ____.

(If not available) Is there a time when I could call back? ______________________________.

Day and Time of Call Back ____.

> Hello, this is Ms. MJ Brunson at Georgia Southern University. We have been asked to estimate the economic impact of a typical historic site and to describe how a historic site serves its customers/visitors. We would appreciate it if you could answer a few questions. To make it as easy as possible for you, I would like to e-mail you an advance copy of the questions I have. In fact, if you would prefer you may responded back to me by e-mail.

E-mail ____.

We have been asked to estimate the economic impact of historic site venues and to describe how historic venues present their story to visitors. The following questions will help us understand the operations of historic sites and will help us to estimate the typical economic impact of the sites as well as the impact of the visitors sites attract.

General Information

1. When did your site first begin its operation?
   a. _____year(s)

2. Are you
   a. Publically funded
   b. Privately funded non-profit corporation
   c. Supported by a foundation
   d. A combination of the above
   e. Other ____

3. Do you charge fees for admission and if so how much of your annual cost is covered by those fees? YES NO $ of Cost _________________________

4. How many visitors, and what type of visitors, came to your venue in 2007?
   a. General Public _____________
   b. Educational Groups _____________
   c. Other Groups _____________

4a. Do you have any special programs that act as 'friends of'? YES NO

   d. If yes, how many members to you have annually? ________________
   e. Is their attendance number included in any of the numbers above?

5. What was your annual operating cost for 2007? ______________________

6. Have any major capital projects been undertaken in the past 5 years? YES NO
   If yes, how much was spent?
   Please describe the project. ____

   ____

7. Are there any anticipated capital projects expected to be undertaken in the next 5 years?
   YES NO
   a. Yes, Please explain, dollar amount and type(s) of improvement
      ____

8. How many staff members?
   a. Full-time ________________ annual
   b. Part-time ________________ annual
   c. Volunteers _______________ *daily weekly monthly annually*

Profile of the Center

9. Please describe the typical visitor party:
   a. Single person age 18 to 25____ age 25 to 55 _____ age 55+ ____
   b. Two Person Party age 18 to 25____ age 25 to 55 _____ age 55+ ____
   c. Three Person Party age 18 to 25____ age 25 to 55 _____ age 55+ ____
   d. Four Person Party age 18 to 25____ age 25 to 55 _____ age 55+ ____
   e. More than Four age 18 to 25____ age 25 to 55 _____ age 55+ ____

10. On average how much time does the typical visitor spend at your site?
   a. Several hours
   b. Half a day
   c. The whole day
   d. Two or more Days

11. What percentage of your visitors comes from within a 60 minute drive of the site?
   a. ________________%

12. How do your visitors find/learn about your site?
   a. Family/Friends
   b. Brochure
   c. Road signs/Billboard Located on _____________
   d. Internet/Website
   e. Other ____

13. Is there a gift shop?
    a. Yes
    b. No

14. Are there other place(s) within your site to spend money? (camp ground, lodge, restaurant, etc.)
    a. Yes, please explain____________________
    b. No

15. How much does the average visitor spent per day at your site?
    a. Less than $50 per person per day
    b. $100-$149 per person per day
    c. $150-$199 per person per day
    d. $200 or more per person per day

16. Of your annual operating costs in 2007, what percent of those costs were covered by non-fee revenues? ___________%

17. Do you plan/package special programs for group tours? YES NO
    If YES, What would be the charge for your typical program? ______________________

18. Independent of package programs for groups, do you have group a special group admission rate for tour packages?
    a. Yes, please explain_____________________
    b. No

19. What are your fee rates for each type of program you offer?
    (Indicate all that apply)

a. General Admission	$______________	per person
b. Narrated tours	$______________	per person
c. Educational programs for teachers	$______________	per person
d. Package programs for schools	$______________	per person
e. Package programs for groups	$______________	per person
f. Customized programs for special events	$______________	per person *on average*

Please note any discounts for senior citizens, children, etc. Additionally, did you have a Membership plan? If so, what was included in a membership? ____________________

20. What is the average size of a school group? __________________________

21. What is the average size of non-school groups_________________________
   a. Number of Adults__________
   b. Number of Children Under 18____________

Types of Activities and Displays available for visitors

22. What venues do you use at your site to explain and educated visitors about the importance of the site and/or the period of history.

(Indicate all that applied)
   a. Self Guided tours
   b. Narrated tours
   c. Static displays/DVD
   d. Reenactment of daily life (if yes ask 13 a and b)
   e. Occasional reenactments of major events (if yes ask 13 a and b)
   f. Customized programs for special events (if yes ask 13 a and b)

22a. Please explain the types of reenactments carried out at your site.
____

____

____

22. b. In a reenactment are visitors able to participate interactively, i.e. do visitors have the opportunity to engage in the reenactments activities, such as make things?

---

23. How often are your occasional reenactments performed?
   a. Two to three times a week
   b. Weekly
   c. By weekly
   d. Monthly

24. Are there additional costs to patrons for the reenactment?
   a. Yes, what are they _________, any discounts______________
   b. No

Thank you for your time and have a great day.