

#HHIOURFUTURE

In OUR FUTURE
I hope to see....



HILTON HEAD ISLAND - OUR FUTURE
COMMUNITY ENGAGEMENT REPORT

This report outlines the Community Engagement processes that were conducted as part of the Hilton Head Island - Our Future visioning project.

15 February 2018

Hilton Head Island – Our Future Community Engagement Report

This report outlines the Community Engagement processes that were conducted as part of the Hilton Head Island – Our Future visioning project.

This report provides a compilation of findings, analyses, and conclusions that have been used to support the development of the Vision for the future of Hilton Head Island. This report has been produced as part of the wider Hilton Head Island – Our Future visioning project.

15 February 2018

REPORT PREPARED BY:

future→iQ

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1.0 INTRODUCTION

The Hilton Head Island – Our Future visioning process was undertaken by Future iQ to reflect the Town of Hilton Head’s desire to develop a long range community vision through a transparent and inclusive community engagement process. There is a stated desire to preserve the heritage and character of the Island while at the same time progressing with “sensitive redevelopment” that continues to attract and retain young professionals, retirees and tourists alike. Taking this complexity into account, Hilton Head Island – Our Future has been a unique community visioning process that will provide a guide to future Island development and help build a comprehensive quality of place that is key to both visitor experience and the life of residents. This long-range visioning process was designed to ensure that residents, business owners, local institutions and all community stakeholders within Hilton Head Island had a voice, and that their input would provide the Town with the insight needed in order to set intelligent, coordinated, and creative future priorities. There are five definitive phases of the Hilton Head Island – Our Future process.

Hilton Head Island – Our Future has brought the citizens of the Island together within a large-scale community visioning process, in order to meet the future challenges of the Island, looking out as far as 2040.

1. **Exploring Issues:** Examination of the issues shaping the future of Hilton Head Island through background research and scoping interviews, Community Profile and Benchmark Analysis Report and the extensive Community Survey.
2. **Developing Scenarios:** Development of the scenarios for the future of Hilton Head Island through the Think Tank Workshop.
3. **Examining Implications:** Exploration of the preferred and expected futures through twenty-four Community Engagement sessions
4. **Alignment on Vision:** Identification of the areas of shared vision for Hilton Head Island through the reconvening of the Think Tank Workshop
5. **Action Steps:** Definition of the action steps for the future of Hilton Head Island within the Strategic Roadmap for Hilton Head Island

Hilton Head Island is known for being a world-class resort destination. Tourism is one of the key features of the Island, along with its unique natural beauty. However, the Island is trying to balance a number of factors as it looks out to the future. This report will outline the community engagement methodologies carried out from inception through to conclusion of the Hilton Head Island – Our Future visioning process. As each methodology is explained, the outcomes from each step in the process will be outlined with the key themes that have been generated. A community engagement communications strategy ran concurrently throughout the project which enabled stakeholders to engage with the project throughout the duration. The community engagement communications strategy will also be addressed in this report.



2.0 ENGAGEMENT APPROACH AND TIMELINE

The engagement methodologies were designed to progress in a sequential manner and were tailored to mirror each phase of the project.

2.1 ENGAGEMENT APPROACH

In order to be most effective, it was necessary to combine a range of complementary engagement methodologies which would suit the progression and momentum of the project at each stage.

- **Scoping interviews and benchmark analysis:** Scoping interviews were held in March 2017 within the local community and were used in order to explore the issues that were seen to be shaping the future of Hilton Head Island. In May 2017, the Hilton Head Island Community Profile and Benchmark Analysis was produced. This report consisted of a description of Hilton Head Island and included population projections; current population make up by age and race; select characteristics of households and labor force, income, and, employment characteristics.
- **Community Survey:** The issues generated through the scoping interviews were explored further and community input was acquired by means of an extensive Community Survey which ran from May to November.
- **Future Think Tank:** Scenario Planning was conducted within a full day Think Tank workshop in late June in order to generate plausible futures for Hilton Head Island and to ascertain the preferred and expected futures.
- **Community Engagement Workshops:** The preferred and expected future scenarios were taken out to the wider Hilton Head Island community within twenty-four engagement sessions to test the plausibility of the scenarios. An engagement survey was used to gauge the reactions and perspectives of each of the attendees at the end of each engagement session. The engagement sessions were held throughout August and October.
- **Data Visualization Portal:** The results from the Community Survey and Engagement Sessions were subsequently compiled and displayed via an online data visualization platform. This platform consisted of filterable charts which enabled stakeholders to view the results from a range of options including age, location, importance of factors, and preparedness of Hilton Head Island for change and other variants.
- **Reconvening of Think Tank:** The original Think Tank was then reconvened in early December and the results from the Community Surveys and engagement sessions were shown to participants. This workshop was also used to clarify the areas of shared vision for the future of Hilton Head Island.
- **Focus Groups:** Focus groups were formed in early December to expand on information in key areas such as education, business, and the environment amongst other areas which had been identified throughout the project.

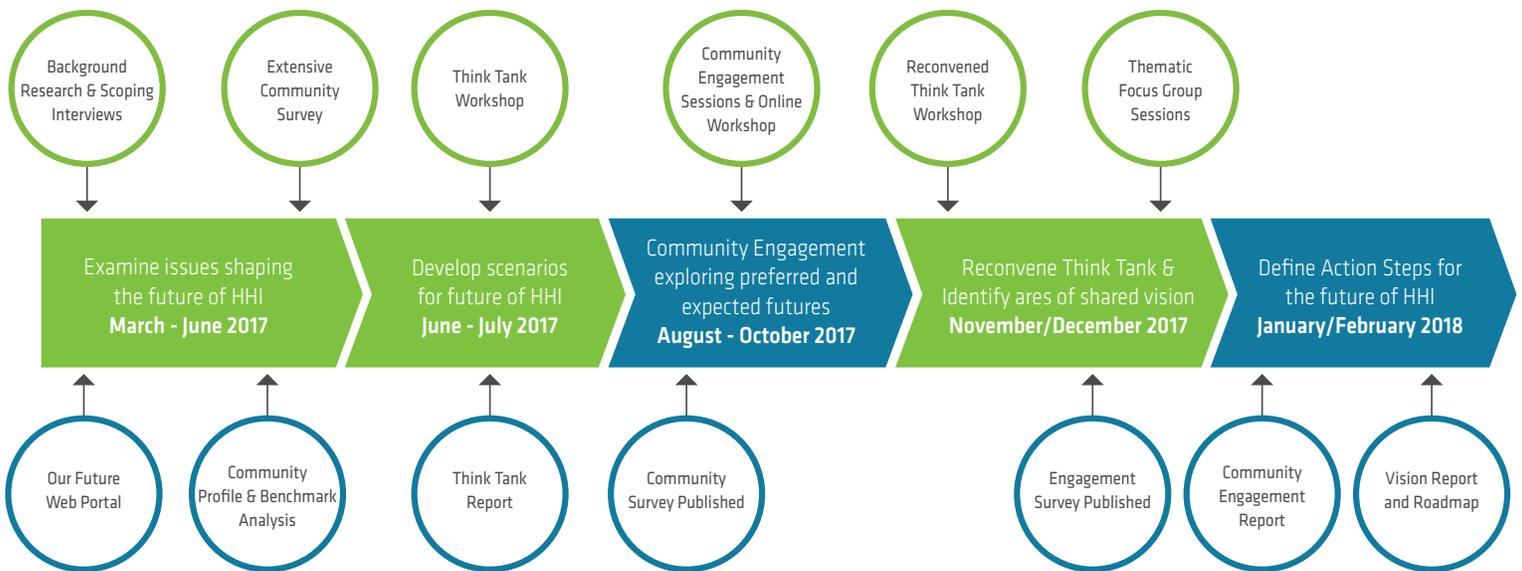
The Hilton Head Island – Our Future process was designed to offer an inclusive and transparent community engagement model. This process has included extensive outreach and open dissemination of results.

Each engagement methodology will be expanded upon in the following sections of the report.



2.2 ENGAGEMENT TIMELINE

The community engagement process ran from March through to December 2017. The diagram below demonstrates the sequential manner in which engagement methodologies were used and deliverables were produced during this timeframe.





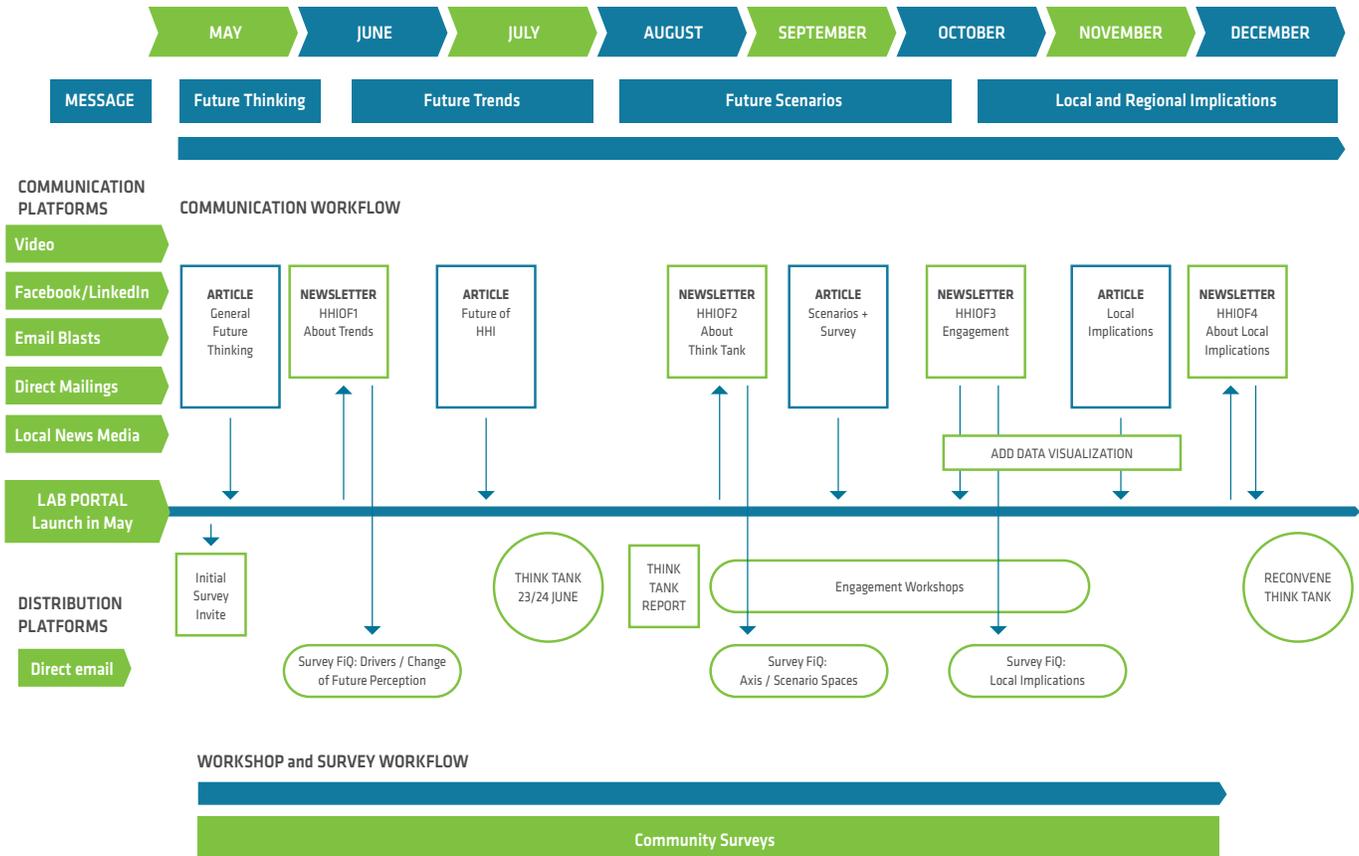
3.0 COMMUNICATIONS PROCESS

A communications process ran concurrently throughout the project which enabled community stakeholders to learn about and engage with the visioning process. The communications process consisted primarily of the branding/naming of the visioning process, the design of the Our Future logo and the production of the Our Future website/portal. Articles, video interviews, e-mail blasts and newsletters were then produced and released at each key phase of the project. Social media engagement was used consistently via the Our Future Facebook page and LinkedIn group. Two direct mailings of postcards inviting the public to attend the engagement workshops were sent to residents and property owners.

The communication process has aimed to use multiple media and communication methods.

A series of full, half and quarter page advertisements were run in the local newspaper to notify stakeholders of events and visioning progress. Staff attended group meetings and large public events to increase awareness of the visioning process and distribute outreach materials.

Conceptual Schematic of the Engagement and Communications Process





3.1 SOCIAL MEDIA ENGAGEMENT

Social media was used consistently during the visioning process. The Our Future Facebook page and LinkedIn group were set up in early May 2017. The Facebook page had 766 overall likes and 825 followers by January 2018. The content consisted of posting of articles which were relevant to the Hilton Head Island visioning process, coverage of key events such as the Think Tank, engagement sessions and reconvening of the Think Tank and the release of key reports. The social media coverage reflected what was happening in the project at any given time. There were some innovative ideas which contributed to the success and popularity of the social media engagement campaign, as they encouraged participation by stakeholders online and created momentum and motivation. Without the role of social media the process could have occurred in a vacuum with regard to publicity and exposure.

Social media was an essential tool to encourage community engagement virtually throughout the process and provide momentum and visibility to the project.

Our Island, OUR FUTURE

THANK YOU Citizens & Stakeholders of Hilton Head Island!

Hundreds of YOU attended 34 engagement sessions over six days. Your participation makes Our Future inclusive and meaningful!

Thank you to our host locations:

- University of South Carolina Beaufort
- First Baptist Church of Hilton Head Island
- Hilton Head Island High School
- Town Hall, Council Chambers
- FISH Seafood • Raw Bar
- Providence Presbyterian Church
- Central Oak Grove Missionary Baptist Church (2 sessions)
- Hilton Head Area Association of Realtors
- First Presbyterian Church Sea Pines CSA
- Palmetto Electric
- Sheiler Cove Community Park
- Fishcamp on Broad Creek

We appreciate your willingness to step forward and provide a location for our engagement sessions!

Did you miss the engagement sessions? Here is what's next for the process.

- Data Visualization**
View Responses In An Online Format
Coming In Mid-November!
- Virtual Engagement Workshop**
Join Us For Online Sessions
Coming In Mid-November!
- Sign Up For Our Emails & Take The Survey!**
- Talk With A Community Champion**
Learn more about the process!

[CLICK HERE](#)

"I love Hilton Head Island because _____!"

#HHIOurFuture



"We fell in love with Hilton Head Island as a result of the planning and vision of Charles Fraser. Yes, it needs a new vision to benefit ALL for generations to come. We ALL need to offer our input into the visioning process to ensure the future quality of life on our Island is maintained."

Andy Twisdale
Community Champion

"Best in class communities do not let things happen organically... they are purposeful and envision the future."

Sandy West & Star
Vision Project Management Team, Chair



3.2 COMMUNITY CHAMPIONS

The Community Champions were local stakeholders who were asked to nominate themselves as individuals who were committed to a shared vision for the future of Hilton Head Island. To qualify as a Community Champion, the individual had to be:

- A Hilton Head Island resident, daily commuter, or stakeholder
- Willing to show commitment to at least one of the following activities
 - Share information about the process on social media
 - Request and distribute information cards or posters
 - Invite people to attend the project’s events
 - Demonstrate a unique way they had supported the visioning process

The purpose of the Community Champions was to recognize the participation and engagement of Hilton Head Island citizens who showed commitment to the project. There was a section on the website/portal which showed the individual Community Champions with their testimonial to the project.

3.3 RADIO AND TELEVISION INTERVIEWS

Throughout the communication process there were podcasts and local news interviews carried out with the project lead. This publicized the project at various stages throughout the overall process and the interviews were then posted on social media to increase momentum and coverage.

“ I moved to Hilton Head Island in 1981, never having visited, and not planning to stay. I did, however, and having been here 35 years, I am vested in this community. I have contributed to its successes and I have a lot of pride in what we have sustained in nearly four decades. ”

Michael “Mick” Mayers
with daughters Emma, Caroline, and Honora
Community Champion

“ I moved here over eight years ago for a five month internship and stayed for the people. I remember the first time I went to a festival at Shelter Cover and thought “Wow, I want to be a part of this.” I think the visioning process is a part of the “Wow.” As a community we get to shape how our future looks, how cool is that? ”

Caitlin Lee
Community Champion

“ A smart visioning approach will give us the information we’ll need to make the best choices for those coming after us. It’s the least we can do for future generations. ”

Terry Herron
Community Champion

“ As a young professional who works remotely for a tech company, I could live anywhere! But I love Hilton Head Island and choose to live, work and play on these beautiful shores. I want to be a part of the solution for the challenges ahead with an open mind, giving hands and a full heart for my home... sweet home. ”

Hannah Horne
Community Champion



4.0 ENGAGEMENT METHODOLOGIES AND RESULTS

4.1 COMMUNITY SURVEY

The online Community Survey endeavored to understand the perspectives of the community about key trends shaping the future of Hilton Head Island. **Running from May to November, community members were asked to respond to questions which explored:**

- The importance of a range of issues facing Hilton Head Island and when they would impact Hilton Head Island and the individual
- Positivity or negativity related to the range of issues and overall impact
- Preparedness of Hilton Head Island to adapt to projected changes
- Opportunities for the future of Hilton Head Island in the next 10 and 20 years
- Threats to the future of Hilton Head Island in the next 10 and 20 years



The range of issues which had been established as a result of the scoping interviews and background research at the start of the project were:

- Aging population
- Workforce and skills shortage
- Loss of younger adult generations
- Health and wellness
- Workforce, housing and transportation
- Tear down and rebuild of traditional neighborhoods
- Traffic congestion associated with tourism season
- Status as world class resort
- Diversified and expanded recreational offerings
- Traffic issues associated with daily commuting patterns to and from the Island
- Availability of post-secondary or technical education
- Changing long term weather conditions and patterns
- Protection of eco-system and enhanced environmental sustainability
- Trend of less brick and mortar retail and more online shopping

Community members were also asked profiling questions which investigated:

- Whether the participant was interested in Community/Social issues, Environmental issues or Economic/Industry issues
- When the participant had first experienced Hilton Head Island
- Whether the participant was a full-time resident, part-time resident, daily island commuter, tourist or other
- The area of Hilton Head Island in which the participant lives
- Year of birth
- Gender
- How the participant heard about the survey



4.1.1 STRUCTURE OF COMMUNITY SURVEY

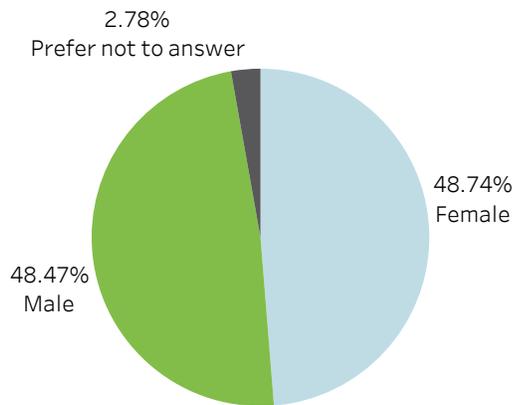
The Community Survey was available for participants to complete online. It consisted of 19 questions which took 15-20 minutes to complete. Community members could also request a hard copy of the survey to complete and send to the Town of Hilton Head Island staff, if they were unable to access the online survey. The survey consisted of a mix of open-ended, ranked, matrix and close-ended questions. While the closed-ended, ranked and matrix questions were particularly advantageous for the data visualization, the open-ended questions gave the powerful individual perspective of each participant regarding the opportunities and threats facing Hilton Head Island.

4.1.2 SURVEY RESPONDENT PROFILE

2,462 stakeholders opened the online survey and there was an overall completion rate of 68% with 1,672 stakeholders completing the survey.

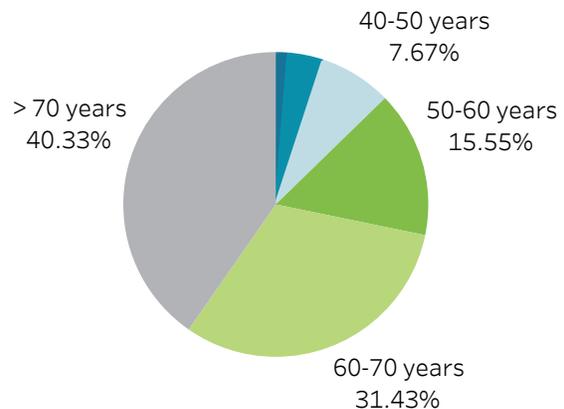
The gender division between respondents was almost equal as 48.47% respondents were male and 48.74% respondents were female.

Gender



The majority of respondents were over 60 years of age. With the largest age cohorts being 60-70 years and over 70 years.

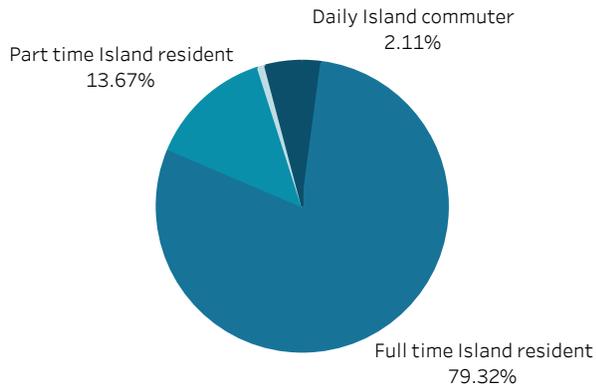
Age Distribution





The vast majority of the respondents were full time island residents, with a smaller number of part time island residents, daily island commuters and tourists.

Residential Status



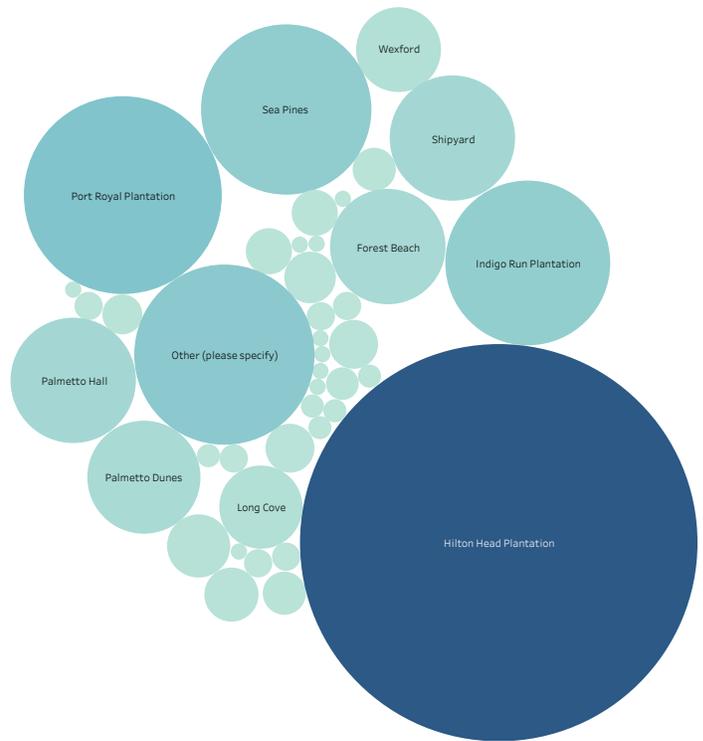
The correlation between gender and age range showed that the strongest cohort of respondents were males over 70 years and females aged between 60-70 years.

Correlation between Gender and Age Range

Gender	Age Range						
	0-20 years	20-30 years	30-40 years	40-50 years	50-60 years	60-70 years	> 70 years
Female		12	34	58	136	248	230
Male	1	5	18	50	86	201	353
Prefer not to answer	1		3	5	7	14	11

Most of the respondents lived in one of the three largest gated communities; Hilton Head Plantation, Port Royal Plantation and Sea Pines. However, there was representation from many other areas across Hilton Head Island.

Location of Residence





4.1.3 COMMUNITY SURVEY RESULTS

The results from the Community Survey were compiled and displayed via an online data visualization platform. This platform consisted of filterable charts which enabled stakeholders to view the results from a range of options including age, location, importance of factors, and preparedness of Hilton Head Island for change and other variants.

The background research and scoping interviews at the start of the visioning process revealed important factors related to Hilton Head Island. These factors are referred to in the following Community Survey data visualization results. They will also be referred to across each of the phases of engagement within this report.

Factor Key

- Aging population of Hilton Head Island
- Availability of post-secondary or technical education
- Changing long-term weather conditions or patterns
- Diversified and expanded recreational offerings
- Health and Wellness
- Loss of younger adult generations from Hilton Head Island
- Protection of ecosystem and enhanced environmental sustainability
- Status as world class resort destination
- Tear-down and rebuild of traditional neighborhoods
- Traffic congestion associated with tourism season
- Traffic issues associated with daily commute patterns to and from the Island
- Trend of less brick and mortar retail and more online shopping
- Workforce and skills shortage on the Island
- Workforce, housing and transportation



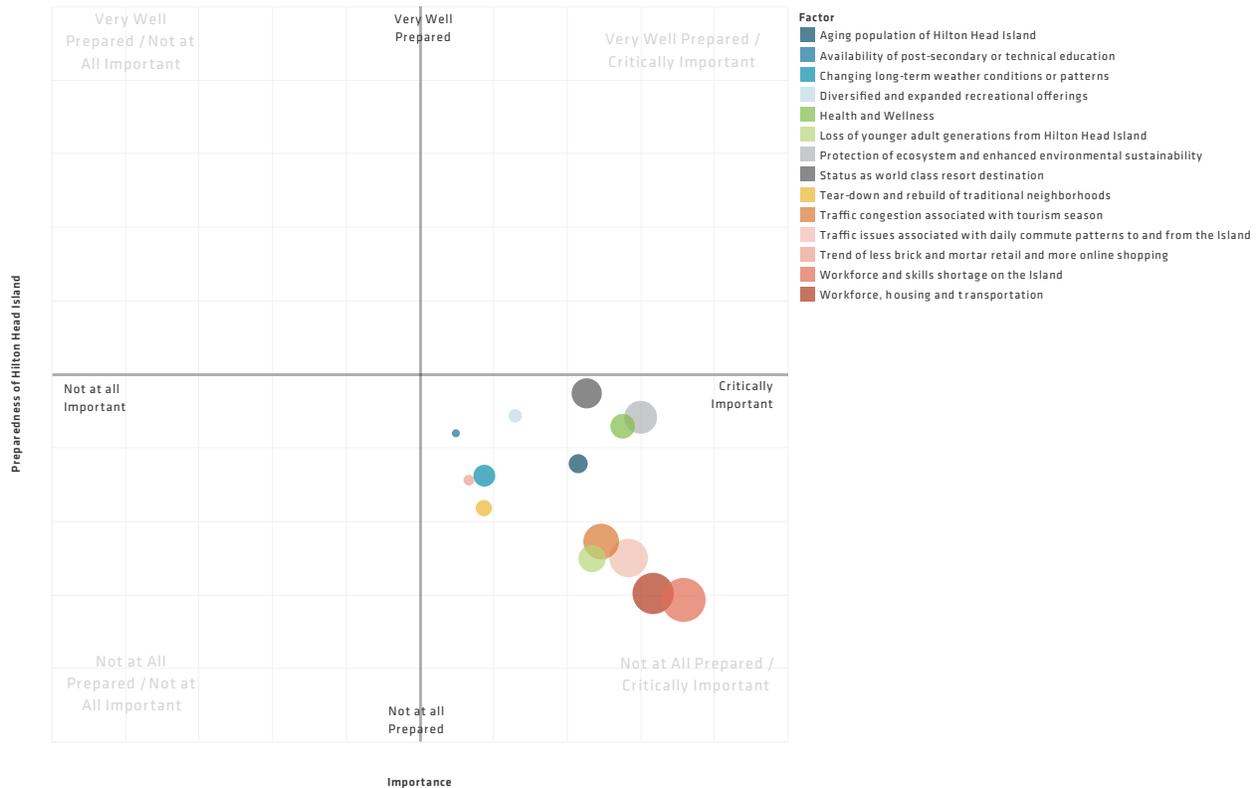
4.1.3.1 Key Factors - Importance x Preparedness

Importance and Preparedness Chart

This chart explores how important a range of topics are to the future of Hilton Head Island and how prepared the Island is to adapt to these changes. The chart combines responses to three questions to create an interactive scatter plot. The chart is structured as follows:

- X-Axis is the response to the question “Please indicate how important you think the following topics are to the future of Hilton Head Island” The scale is 1= Not Important; 10 = Critically Important
- Y-Axis is the response to the question “How well prepared is Hilton Head Island to adapt to these changes?” The scale is 1= Not at all prepared; 5= Very well prepared
- The size of the dot is the response to the question “Please score what you believe will be the overall impact or magnitude of the changes within each of the topic areas” The scale is 1=Very Small; 10= Very Large

This chart presents the average results based on all respondents. The most critical factors are located in the bottom right side of the quadrant, which represent the issues that respondents consider to be critically important and perceive Hilton Head Island to be unprepared for.



DataInsight

Key Things to Note

- Workforce and skills shortage was seen to be the issue which is most critically important and that the Island is not prepared for looking out to the future. The size of the circle indicates that many people selected this as the most critical and timely issue.
- Workforce, housing and transportation was the second most critical and less prepared for issue.
- Status as a world class destination was seen as not as critically important as many of the other issues, however it was seen as being the issue that Hilton Head Island is most prepared for.
- Protection of the eco-system and enhanced environmental sustainability was also seen as one of the issues that the Island was more prepared for.

4.1.3.2 Key Factors - Nature of Impact x Preparedness

Nature of Impact and Preparedness Chart

This chart explores the impact of a range of topics on the future of Hilton Head Island and how prepared the Island is to adapt to these changes. This chart combines responses to three questions to create an interactive scatter plot. The chart is structured as follows:

- The X-Axis is the response to the question “Please score what you believe will be the overall impact or magnitude of the change within each of the topic areas” The scale is 1= Very Small; 10= Very Large
- The Y-Axis is the response to the question “How well prepared is Hilton Head Island to adapt to these changes?” The scale is 1= Not at all prepared; 5= Very well prepared
- The size of the dot is the response to the question “Please indicate how important you think the following topics are to the future of Hilton Head Island” The scale is 1= Not Important; 10= Critically Important

This chart presents the average results based on all respondents. The most critical factors are located in the bottom left side of the quadrant, which represent the issues that respondents believe will have a negative impact on the Island and perceive Hilton Head to be unprepared for.



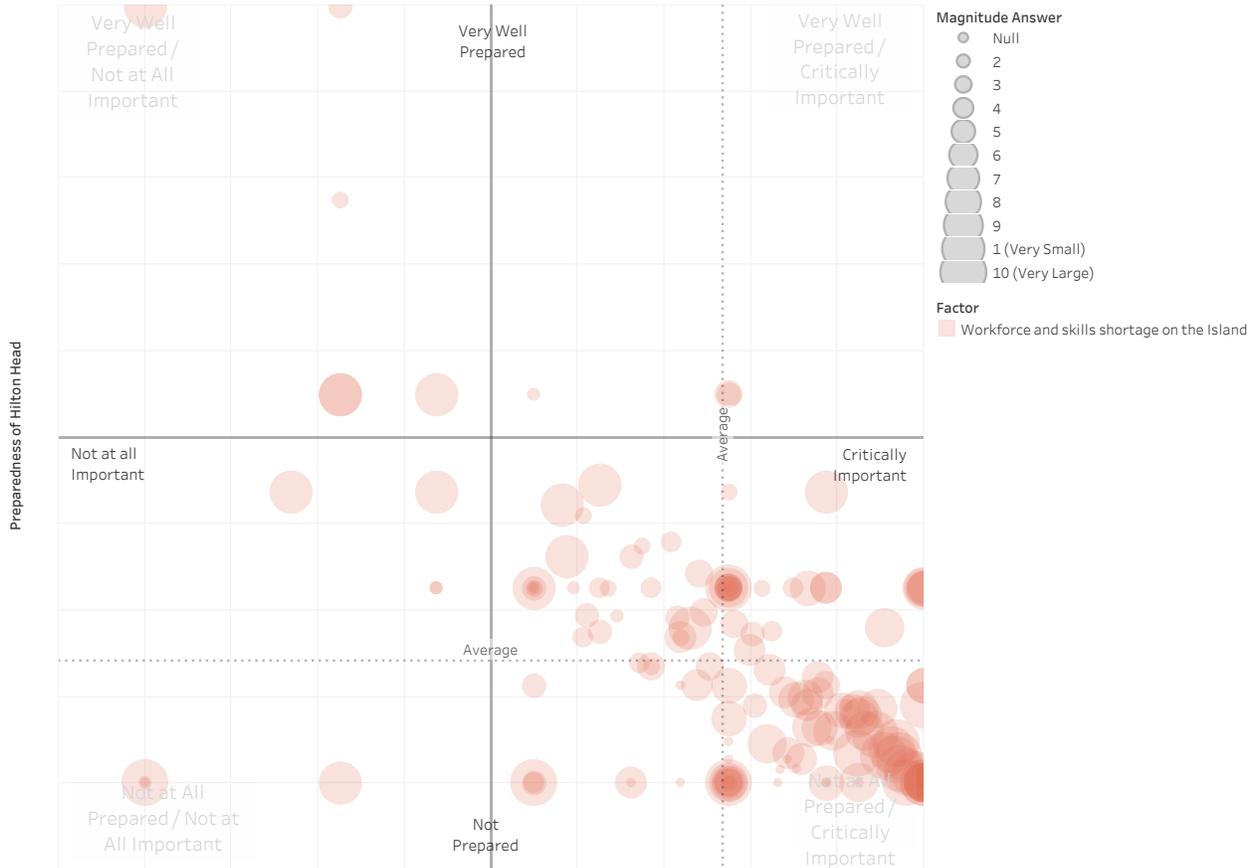
DataInsight

Key Things to Note

- Workforce and skills shortage was seen to be the issue which would have the most negative impact and which the Island was least prepared for looking out to the future.
- Similar to the previous chart workforce, housing and transportation was seen as the second issue with regards to negative impact and preparedness.
- Traffic issues associated with the daily commute to and from the island and traffic congestion associated with tourism were seen as the next two issues which would have the most negative impact and were least prepared for.

4.1.3.3 Workforce and Skills

In the previous Importance and Preparedness chart it was outlined that workforce and skills shortage was seen to be the issue which is seen to be most critically important and that the Island is not prepared for looking out to the future. In this enhanced chart, it is clear that the average viewpoint is reiterating this perspective but there is more emphasis between the average point and the critically important end of the axis.



DataInsight

Key Thing to Note

- The issue of workforce and skills shortage, followed by workforce, housing and transportation were issues of great importance to the participants who completed the Community Survey. When filtered on age or location, there was minimal change in distribution of responses in the chart.

4.1.3.4 Changing Long-Term Weather Patterns

It is interesting to note the changing long-term weather conditions or patterns chart. The respondents did not see this issue as critically important as the workforce and skills shortage and workforce, housing and transportation issues. The chart shows a spread of responses with many responses being situated between the average point and 'Not at all important'. Some responses were situated between the average point and 'Very well prepared'.



Key Things to Note

- The findings from the Community Survey demonstrate that there are varying degrees of agreement around the key issues which had been highlighted as of concern to the future of Hilton Head Island through the original background research and scoping interviews.
- The emerging findings from the Community Survey would inform the next stage of the process, the Think Tank.

DataInsight



4.2 OUR FUTURE THINK TANK

The Hilton Head Island – Our Future scenario-based Think Tank workshop was conducted in late June 2017, and involved invited community members and an open application process. This one-day workshop was attended by approximately 150 participants. The workshop was intended to assist in the understanding of future drivers that will affect Hilton Head Island and to build cohesion around a unified vision for the community.

Full details of the Hilton Head Island – Our Future Think Tank workshop including the full methodological process and outcomes from the event have been produced in the Hilton Head Island- Our Future Scenario-Based Think Tank Workshop Report. For the purposes of this Community Engagement Report the Think Tank workshop will be addressed from a high-level perspective as part of the overall visioning project engagement process.

The 'Our Future' Think Tank workshop enabled participants to create and describe four plausible scenarios for Hilton Head Island in 2040.

4.2.1 OUTLINE OF THE OUR FUTURE THINK TANK WORKSHOP

The Think Tank began with an in-depth presentation on future trends and global conditions, before moving on to conduct scenario planning for Hilton Head Island. The emerging results from the Community Survey were presented to the participants and the key issues from these results were discussed.

The Scenario Planning process provided a methodology from which to explore plausible futures and to consider the implications of various future scenarios. The scenarios developed during this Scenario Planning process and outlined in this report were important in order to provide a framework to discuss future possible outcomes and implications. Workshop deliberations assisted in identifying key actions for Hilton Head Island and how various groups might effectively contribute to future developments. Participants were guided through the Scenario Planning process in order to develop four plausible scenarios for the future of Hilton Head Island. The process involved an exploration and discussion of global, regional, and local trends and forces of change; development of a scenario matrix defining four plausible scenario spaces for the future; and, the development of descriptive narratives of each scenario. The event concluded with an in-depth discussion of the scenarios, selection of a preferred scenario and plausibility mapping.

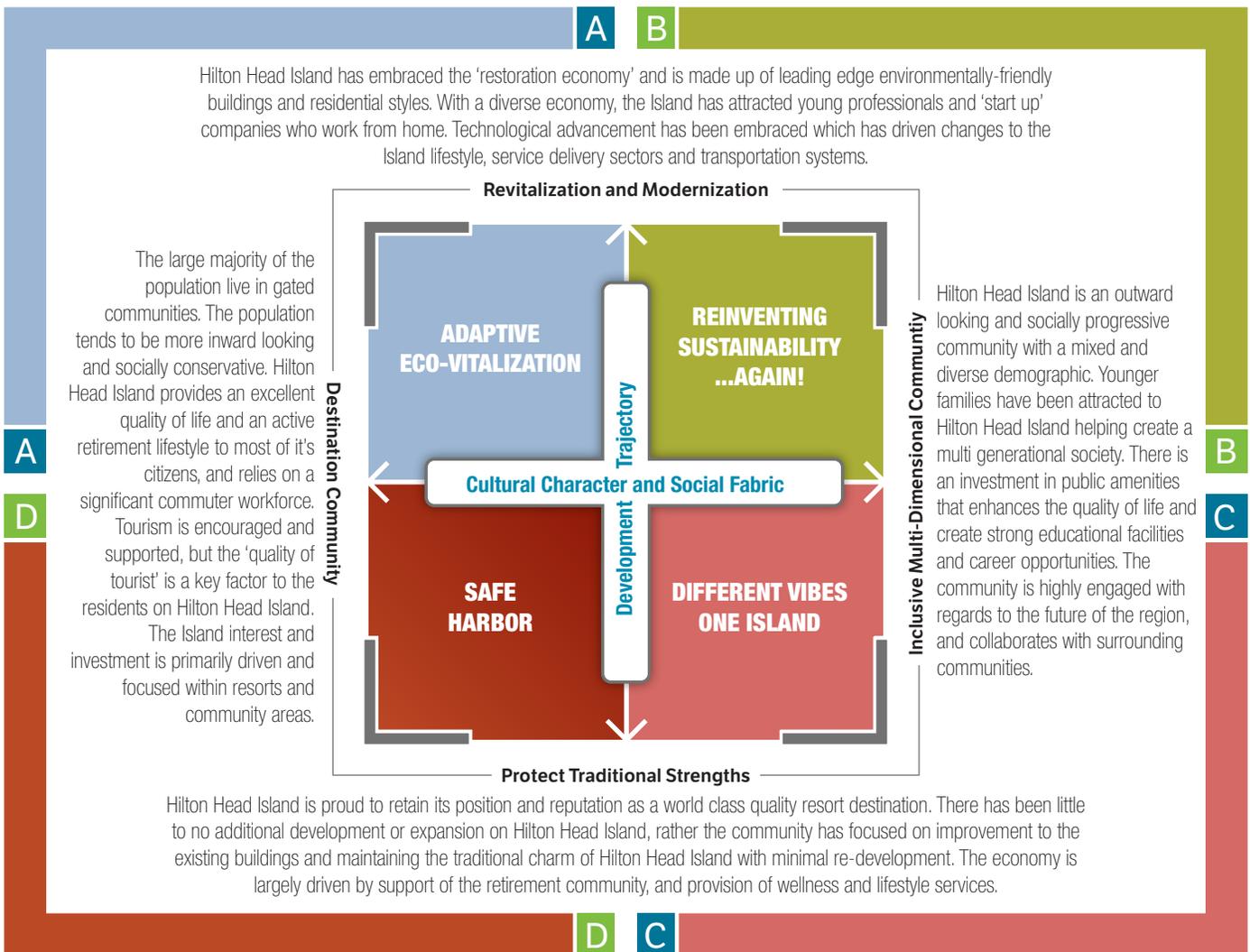


4.2.2 CREATING FOUR PLAUSIBLE FUTURES

In developing the scenario framework, the Think Tank considered the two primary clusters of drivers which were identified from the Community Survey. These would form the horizontal and vertical axis. These were:

- Cultural Character and Social Fabric
- Development Trajectory

The following scenarios were then developed by the Think Tank participants.





4.2.3 SCENARIO DESCRIPTIONS

The following descriptions were formed which conveyed the characteristics of each scenario for Hilton Head Island in 2040.

HILTON HEAD ISLAND SCENARIOS OF THE FUTURE

VIEWS OF THE FUTURE - 2040



SCENARIO A – ADAPTIVE ECO-VITALIZATION - 2040

Hilton Head Island has become a community which is focused on diversity and environmentally sustainable tourism. It enjoys a wide ethnic mix of citizens and as a result of an emphasis on revitalization there are new pockets of communities emerging. There are also an increased diversity of tourists visiting the Island. To meet the needs of this diverse range of tourists, the Island offers a wide range of upgraded tourism product taking advantage of the ecological reputation of the area. Bicycles have become a popular mode of transport, replacing cars as the priority method of transportation. Infrastructural changes have taken place to match this focus. As an aging population had been seen to be a challenge previously, there are now more young families moving to and living in the area and this has led to an increased energy in the community. A proliferation of highly educated younger professionals working from home has resulted. Smaller mixed use units have developed to support new businesses. Hilton Head Island focuses on ecological sustainability in the form of clean air, enhanced recycling and composting and neighborhood farm plots. The whole of the island is now on one sewer service. The notion and ethos of the Cradle to Cradle idea has been embraced whilst maintaining the Island as a world class destination for tourists as well as citizens.



SCENARIO D – SAFE HARBOR - 2040

Hilton Head Island is largely populated by an aging population, and predominantly gated communities. This has led to an increased medical workforce, and healthcare and wellness facilities being set up in abandoned buildings. There is a continued provision of an 'Active Lifestyle'. Older citizens are more mobile due to an increase in autonomous vehicles. Much has been developed to address the needs of an aging population. Tourism is still important to Hilton Head Island, and there is a continued large seasonal service industry workforce recruited from overseas. To meet the needs of tourism, enhancements have been made with regards to the bridge, airport and an improvement in public transportation. Environmental standards have been set and existing buildings are upgraded with environmental sustainable methods. In order to meet international trends and standards regarding the environment, cycling and walking lanes have been increased in order to promote a healthy lifestyle. However, this is predominantly to meet the needs of an aging population.



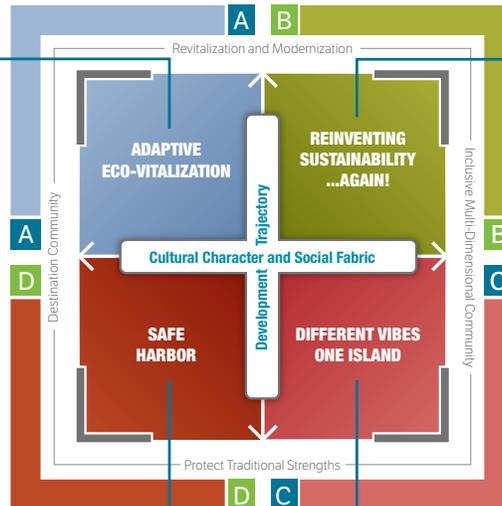
SCENARIO B – REINVENTING SUSTAINABILITY...AGAIN! - 2040

Hilton Head Island focuses on revitalization, and building an inclusive and diverse community. As a result, the Island is now populated with younger and ethnically diverse citizens. Communities have become more accessible and less separated, and mixed use properties with shared living has become increasingly popular with the younger population. A deliberate attempt has been made to source an international population, which has led to a multilingual community. The increase in mixed use offerings has enabled a broader range of incomes, and a lower median income making the Island more accessible. An increase in employment has resulted from technology companies relocating to the area and with a family friendly environment, there are now more teaching opportunities and schools. Due to Hilton Head Island's international and award winning reputation, the island is enjoying year-round tourism which embraces both cultural and eco-tourism. The focus on the island's culture has led to a historical district being set up within the island, which has encouraged a 'downtown/town center' environment and, thus, enhanced walkability. There has been a shift from using cars as the predominant mode of transport to green 'mass transit' and environmentally friendly modes of transport, such as water taxis. With a shift in focus to the environment, the Island experiences an enhanced environmental quality. There is one main sewer system on Island, a renewable energy infrastructure and more green space. Ecologically friendly businesses have been attracted to set up or relocate to the Island. The new town center has become the economic hub of the Island.



SCENARIO C – DIFFERENT VIBES ONE ISLAND - 2040

While Hilton Head Island is seen as a forward thinking community with a traditional atmosphere, it is a community made up of two distinct groups – families and retirees. Therefore, there are a lack of 35-50 year olds within the community. Gated communities are prevalent but are matched by mixed use residential communities. However, the two groups live easily with one another. Tourism is important to the island, and as the island embraces a more environmentally friendly attitude, there is an increase in eco-tourism. With another bridge opening, this has lessened the congestion problem for the island and there is an emphasis on zero waste, an increase in agriculture and under utilized spaces being opened up to the population. Families enjoy facilities for recreation and the Island offers more affordable housing and higher density living. However, the Island is still largely marked by separation between families and retirees.



The scenario descriptions were developed by the Hilton Head Island – Our Future Think Tank workshop participants. The descriptions represent a range of plausible futures for Hilton Head Island (2040), based on the associated conditions defined by the axes.



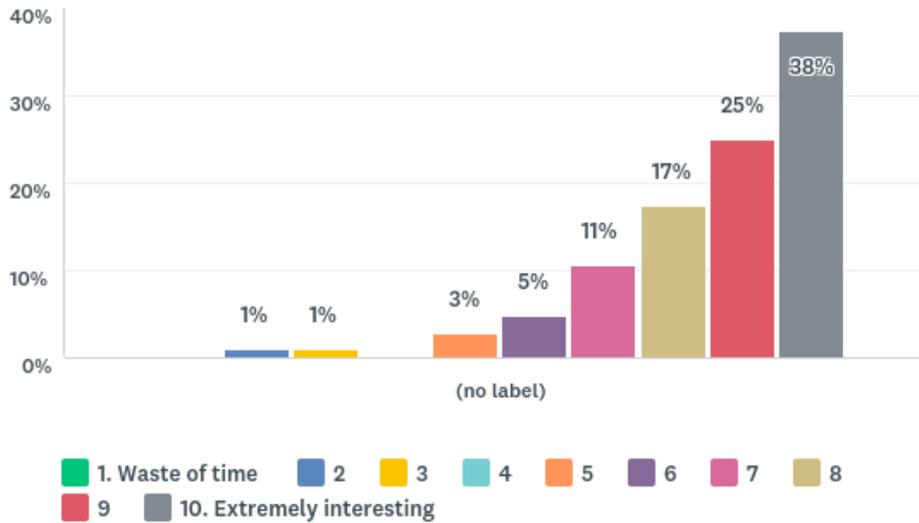
The Think Tank was successful in terms of beginning the community discussion about future scenarios for Hilton Head Island. 89% of participants viewed the Think Tank as successful to extremely successful.

4.2.5 STAKEHOLDER ASSESSMENT OF THE THINK TANK

The participants from the Think Tank were asked to fill out a short survey at the end of the workshop, to give their views on the effectiveness of the Think Tank and of the process to date.

How interesting and valuable did you find this future scenario planning process for the future of Hilton Head Island? The scale used was: 1= Waste of time; 10 = Extremely Interesting and valuable

Participants view of the Think Tank workshop



What are your top three takeaways from the Think Tank?

The participants responses included:

- There is a need and desire for change.
- The Think Tank is a great start to the process and opens up diversity.
- There are clear choices for the future of Hilton Head Island.
- The community and Town are working as a team to move the Island forward.
- The importance of workforce and housing issues.
- There is a surprising level of commitment and desire to improve Hilton Head Island.
- There is strong agreement around key issues and the need to protect values.
- People are much more connected to each other than expected.
- Change and planning are not easy but are essential.
- There are real concerns for the future workforce.
- There is a wish for environmental reform on the Island.
- People are not alone in their thinking and everyone is invested in the future.
- The Town of Hilton Head Island is committed to act and concerned about the citizens.
- The importance of future thinking.
- Hilton Head Island is a strong community.



4.3 COMMUNITY ENGAGEMENT WORKSHOPS

4.3.1 STRUCTURE OF COMMUNITY ENGAGEMENT WORKSHOPS

From the microcosm of the Think Tank environment, the visioning process moved out into the next phase of engagement into the wider Hilton Head Island community. For the overall Hilton Head Island – Our Future visioning process to be successful, it was essential that there would be broad engagement across the Island. Citizens from across Hilton Head Island were able to attend and participate in one of 24 two-hour community engagement sessions during August and October 2017. In order to reach as many citizens as possible a combination of direct postcard mailings, newspaper advertisements and e-mail blasts were generated. The sessions were held at the following locations:

- Hilton Head Plantation
- Boys and Girls Club
- Beaufort County Library – HHI Branch
- The Children’s Center
- Public Service District
- Central Oak Grove Baptist Church
- University of South Carolina Beaufort
- First Baptist Church of HHI
- Hilton Head High School
- Town Hall
- FISH Seafood Raw Bar
- Hilton Head Island Area Association of Realtors
- First Presbyterian Church
- Palmetto Electric
- Shelter Cove Community Park
- Fishcamp On Broad Creek
- Providence Presbyterian
- Port Royal Plantation
- Sea Pines, Community Center
- Holy Family Catholic Church

There were sessions produced in Spanish with live interpretation and translated materials, in addition. These workshops were included to reach out to the Latino and Hispanic communities within Hilton Head Island.

In order to gather input from citizens who were unable to attend the engagement sessions or citizens who were second home owners and lived away from the island, a virtual engagement workshop was accessible from the Hilton Head Island – Our Future web portal. This workshop took the form of an online presentation which outlined the phases of the visioning process, described the development of the scenarios and enabled people to learn about the project to date, read the Think Tank Report, and to participate in the engagement survey.



The purpose of the engagement sessions was to review the process with citizens and gather their input. The overall project, Community Survey and Think Tank were discussed in detail to inform the wider range of citizens. The results emerging from the project were discussed against a context of macro global trends. At the end of each of the engagement sessions, every participant was asked to complete a survey which explored their views about what reflects the best future balance and priorities for Hilton Head Island.



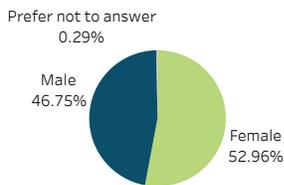
4.3.2 COMMUNITY ENGAGEMENT WORKSHOP SURVEY RESULTS

There were approximately 1000 people who attended workshops, and 700 completions of the associated Engagement Survey. It is essential to explore the results of this survey in full as the participants were asked to give their individual perspective on both the process but also of the issues raised since the inception of the visioning process. The engagement phase of the project was an opportunity to include as many voices from across Hilton Head Island on the range of topics, which have already been outlined within this report.

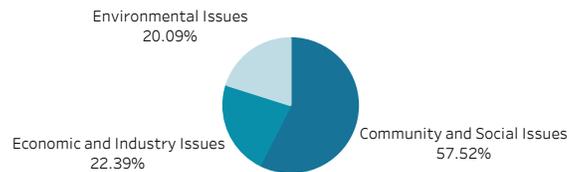
4.3.2.1 Community Engagement Participant Profile

The following charts show the profile of survey respondents.

Respondents by Gender



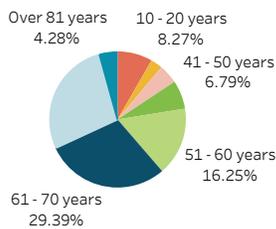
Most Interested In



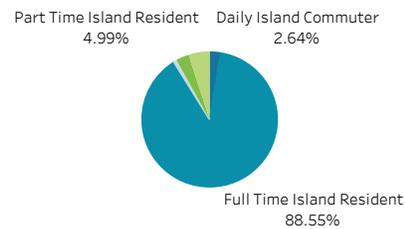
Gender
 Female
 Male
 Prefer not to answer

Age Group
 10 - 20 years
 21 - 30 years
 31 - 40 years
 41 - 50 years
 51 - 60 years
 61 - 70 years
 71 - 80 years
 Over 81 years

Respondents by Age Range



Which Best Describes You?



Self Description
 Daily Island Commuter
 Full Time Island Resident
 Guest
 Other
 Part Time Island Resident

Most Interested In
 Community and Social Issues
 Economic and Industry Issues
 Environmental Issues

Approximately 80% of engagement session participants were White/Caucasian. The process had tried to reach all ethnic groups and had run specific engagement sessions with the Native Islanders, Hispanic and Latino groups. The majority of participants were in the 61-70 and then the 71-80 age ranges. However, there was a general spread between the younger age range cohorts. Efforts had been made to run engagement sessions with high school students and these responses were represented in the 10-20 years cohort. The majority of the participants were living in the largest gated community, Hilton Head Plantation, followed by Port Royal Plantation and Sea Pines. However, there was a wide geographic spread of participants from across Hilton Head Island.

Participants were asked a number of questions about the key issues affecting Hilton Head Island.

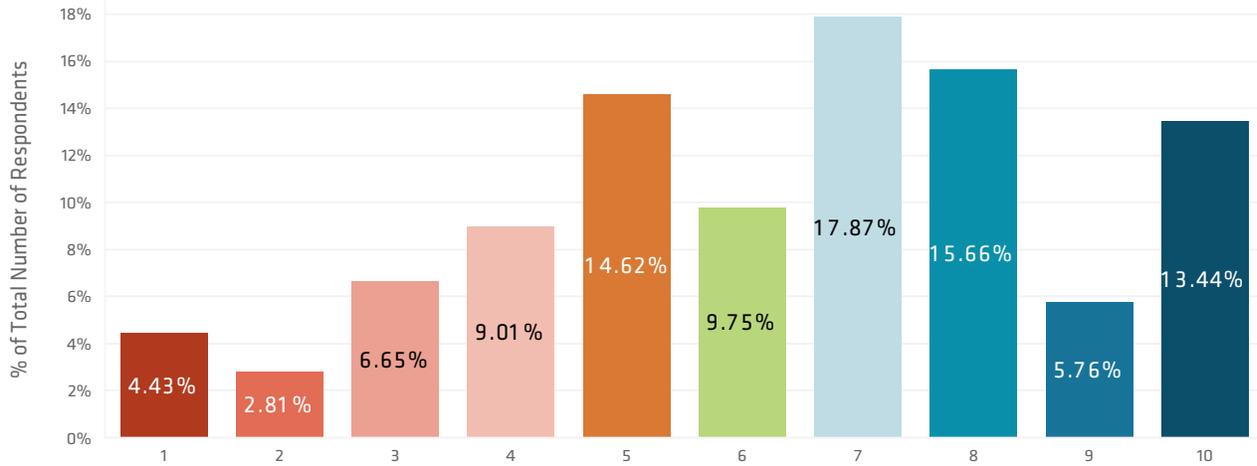


4.3.2.2 Responses about Social Fabric

Question: Social Fabric - The population of Hilton Head Island is aging. In terms of future population mix and demographics, how would you like Hilton Head Island to be in 2040?

Please select your preference on the following continuum: 1= 'An ideal active-aging and healthy retirement community'; 10= 'More diverse, mixed-age community attractive to families and younger professionals'.

Social Fabric of Hilton Head Island



A selection of participant responses around the issue of future population mix and demographics in 2040 included:

- A diverse population of young families and professionals from all ethnic and social backgrounds as well as a diverse group of retirees.
- Ideal population will include youth to bring down the average age on the Island, this leads to increasing innovation and smart economic growth.
- Attract diversity in age groups and generations while protecting the healthy retirement community. Note that the retirement age is decreasing.
- We will need a more diverse and mixed age community which is attractive to families and younger professionals in order to support the active aging and healthy retirement community.
- Our future is dependent on the next younger generation.
- 50,000-60,000 population with 50% older retirees and 50% younger professionals and families.



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Key Things to Note

- The combined data of all respondents shows a clear desire to build more of a 'diverse, mixed-age community attractive to families and younger professionals', with over 60% of respondents at that end of the continuum.
- Using the filters, this figure jumps to over 90% of respondents when you select the 10-50 year age groups. This suggests that this topic is of deep interest to the younger cohorts, and could be instrumental in their future view of the community.
- The 50-80+ year cohorts were distributed evenly, with about 45% leaning to the 'An ideal active-aging and healthy retirement community' end of the continuum, but most responses in this age group were clustered around the mid-point (responses 4-8 on scale).

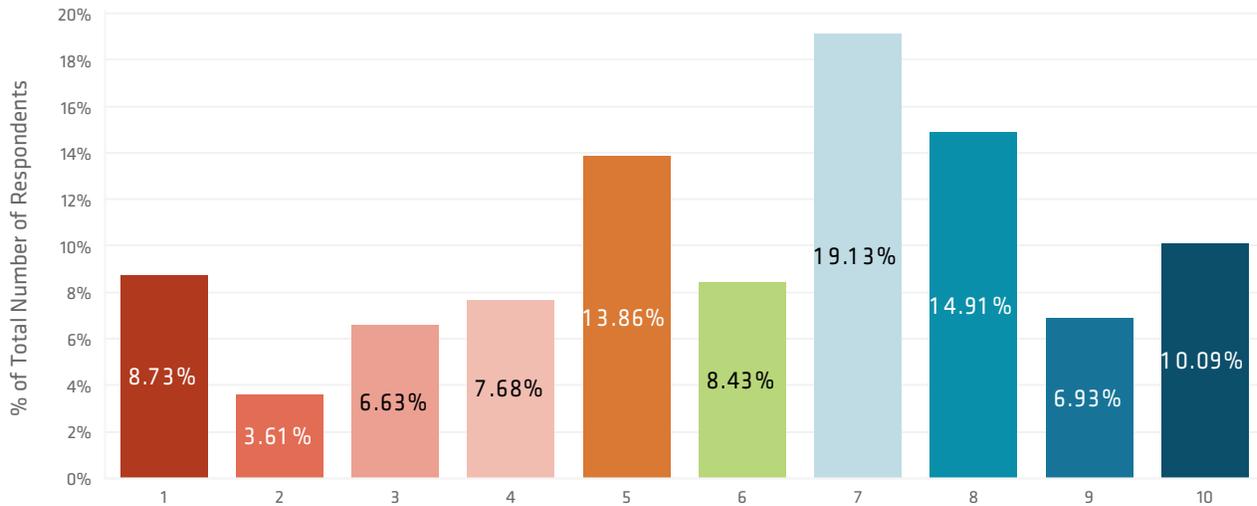


4.3.2.3 Responses about Nature of Tourism

Question: Nature of Tourism - Hilton Head Island has a reputation as a 'world class' tourist destination, attracting over 2.5 million visitors per year. In terms of future tourism, how would you like Hilton Head Island to be in 2040?

Please select your preference on the following continuum: 1= 'Year-round tourism industry which attracts a wide variety of tourists'; 10= 'More selective tourism appealing to the right type of tourist'.

Nature of Tourism



A selection of participant responses around the issue of tourism in 2040 included:

- *The ideal scenario will have diversity in tourism – not just golf, beach and tennis. We need to incorporate eco-tourism to keep pace with competition.*
- *Eco and activity based tourism to include outdoor and nature orientated activities.*
- *We need both but it needs to be high end tourists. This is not a place for everyone and tourism should be focused on the same caliber as the residents who live here.*
- *To maintain our 'world class' reputation we need to attract more discerning tourists.*
- *We need our tourists and to appeal to families who enjoy beach and family togetherness rather than entertainment parks, etc.*
- *Year-round is important. A diverse offering is also important but it has to be sustainable and affordable.*



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Key Things to Note

- The participants had a spread of views on the issue of tourism with agreement situated around the average point towards 'More selective tourism appealing to the right type of tourist'. However, there were participants who would like to see a 'Year-round tourism industry which attracts a wide variety of tourists'.
- The cross section of participants with regard to age, location and even occupation could explain the lack of agreement in this question. Businesses who rely on the tourism industry may prefer a year-round tourism industry as this would contribute to the success of their business, however year-round residents may prefer more selective tourism.

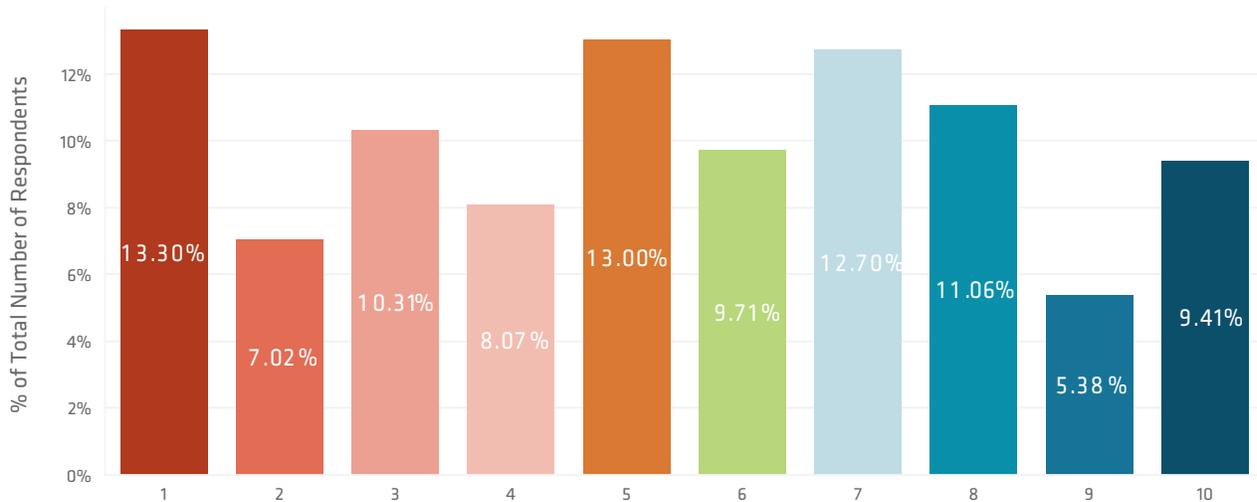


4.3.2.4 Responses about Residential Fabric

Question: Residential Fabric - Hilton Head Island is regarded as an 'exclusive' and prestigious residential location, with a high percentage of the population living within gated communities. How would you like Hilton Head Island to be in 2040?

Please select your preference on the following continuum: 1= 'Strongly retain the exclusive and select residential focus'; 10= 'More diverse residential and neighborhood options'.

Residential Fabric



A selection of participant responses around the issue of residential fabric in 2040 included:

- A more 'open' feel. It is too restricted now. Gates and guard shacks are negative and can make visitors feel unwelcome.
- More options for everyone. Mixed use buildings and diversity in most of the residential choices.
- More communal and multi-living arrangements.
- Retain gated communities while developing communities which are open, accessible and affordable.
- Improvements of non-gated areas is vital to attract younger families. The non-gated areas are needed for returning family youth.
- I love my gated neighborhood but I realize the need for workforce housing.



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Key Things to Note

- In aggregate, respondents had a spread of views on the issue of residential fabric.
- The cross section and diversity around age, location and ethnic groups represented in the engagement sessions could explain how some participants wanted to 'strongly retain the exclusive and select residential focus' and other participants wanted 'more diverse residential and neighborhood options'.
- Selecting filters for those who live in gated communities, and those who live outside gated communities, shows a polarized view on this topic. Those outside the gated communities have a strong preference for 'More diverse residential and neighborhood options' with over 70% leaning to this option. The reverse is true for those living within gated communities.

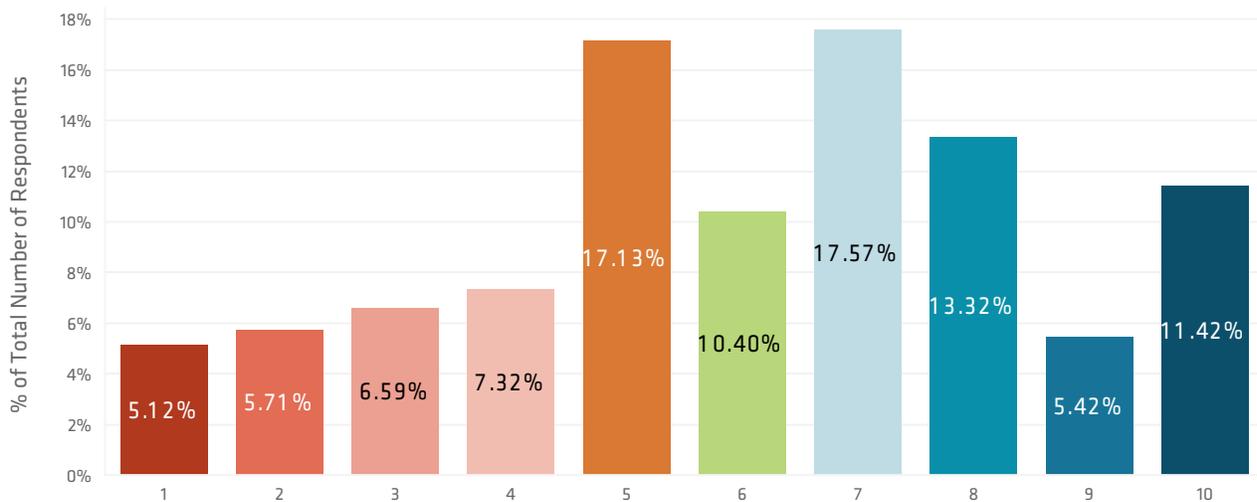


4.3.2.5 Responses about Workforce Pattern

Question: Workforce Pattern - Today, many people commute to work on Hilton Head Island each day. In terms of employment and work locations, how would you like Hilton Head Island to be in 2040?

Please select your preference on the following continuum: 1='Continued strong reliance on commuter workforce'; 10='Many more people who can live and work on the Island'.

Workforce Pattern



A selection of participant responses around the Workforce issue in 2040 included:

- *Commuter workforce with improved options for the commuter (i.e.: Second bridge and light rail).*
- *Keep the workforce on the Island and it will help the overall economy.*
- *More people working from home.*
- *Allowing for a higher percentage to live on the island will improve the sense of community on the Island.*
- *It is impossible to have a non-commuter workforce. We need to make it easier for them to get to the Island.*
- *It is imperative we provide for more affordable housing for our workforce.*
- *Workforce should be able to live and work in their community.*



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Key Thing to Note

- While there were responses which supported a future which had a continued strong reliance on a commuter workforce, this could be represented by retirees who were less affected by the workforce issue in comparison to the younger population.
- Filtering by different cohorts shows variations between people who commute, different ethnic groups and age groups.

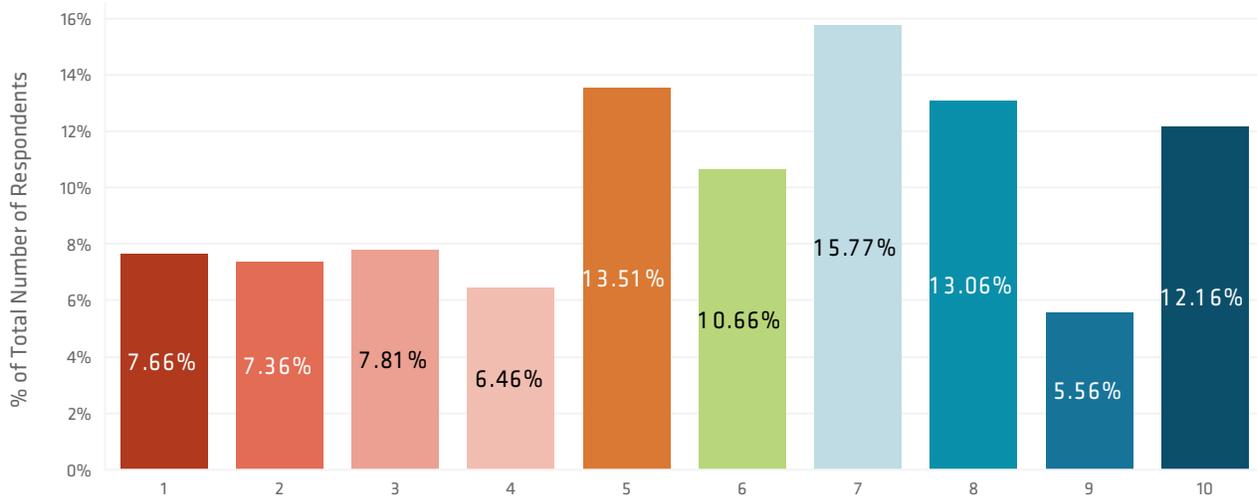


4.3.2.6 Responses about Community Focus

Question: Community Focus – Historically, the local interest and investment has been mainly driven and focused internally within resorts and residential areas. There is emerging interest in more investment in public amenities that create shared community infrastructure, and connect the island to the broader regional community. In terms of community focus, how would you like it to be in 2040?

Please select your preference on the following continuum: 1= ‘Maintain internal focus and investment on existing community infrastructure’;10= ‘Outward looking focus that leverages new collaborations and shared infrastructure’.

Community Focus



A selection of participant responses around the Community issue in 2040 included:

- We need strong community connections embracing cultural and intellectual diversity.
- A progressive and united community.
- Need to continue attempts to create a diverse community.
- Hilton Head Island should be a live, work and play community for all.
- This should be a community which welcomes all who wish to live here whether in a gated community or in a village atmosphere.



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Key Things to Note

- The participants had a spread of views on the issue of Community Focus.
- There was more agreement from the average point towards an outward looking focus that leverages new collaborations and shared infrastructure, with 58% of respondents leaning towards that end of the continuum.
- This could reflect the diverse cross section of participants in the engagement process in relation to age, ethnic group and location. Younger cohorts, and those living outside gated communities leaned towards a more ‘outward looking focus that leverages new collaborations and shared infrastructure.’

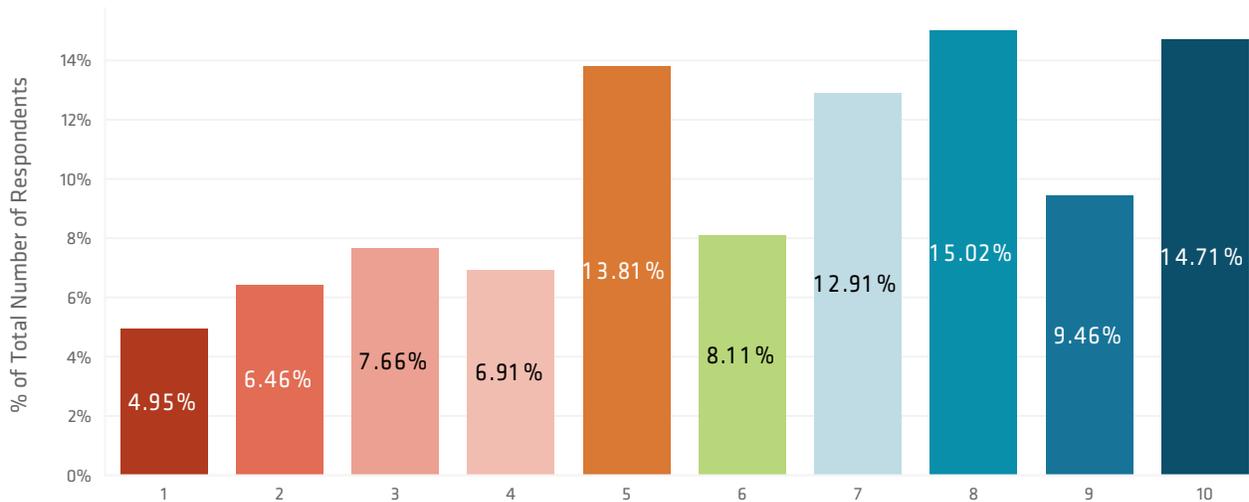


4.3.2.7 Responses about Residential Redevelopment

Question: Residential Redevelopment - Hilton Head Island has been through decades of resort and residential development. Future redevelopment of areas of the island is a possibility. There is some discussion about upgrading areas to be more modern and environmentally friendly.

Please select your preference on the following continuum: 1= 'Little or no redevelopment or expansion, maintaining existing charm'; 10= 'Embrace restoration economy and apply leading edge standards to design and construction'.

Residential Redevelopment



A selection of participant responses around the Residential Redevelopment issue in 2040 included:

- *Redevelopment is needed, however, maintenance of existing and open natural land should be preserved to risk 'over development'.*
- *If we lose our existing 'charm' we lose our tourist attraction as well.*
- *Any future development should be modern, environmentally friendly and more affordable.*
- *Large parts of the island need redevelopment of abandoned buildings – this can create housing, neighborhoods and a more cohesive community.*



Key Things to Note

- There was more agreement at the end of the continuum defined as 'embrace restoration economy and apply leading edge standards to design and construction', with 60% of respondents favoring this direction.
- The younger cohorts and those living outside gated communities more strongly favored the approach of 'Embrace restoration economy and apply leading edge standards to design and construction.'

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4.3.2.8 Responses about Transportation Infrastructure

Question: Transportation Infrastructure – Hilton Head Island has long invested in good infrastructure. However, population and visitor numbers are placing pressure on the transportation infrastructure. In terms of ease of access, and local transportation issues, how would you like Hilton Head Island to be in 2040?

Please select your preference on the following continuum: 1= ‘Maintaining a reliance on good quality roads and vehicle systems’; 10= ‘Much stronger multi-dimensional integrated local transportation network’.

Transportation Infrastructure



A selection of participant responses around the Transportation issue in 2040 included:

- *Not too much public transport but sufficient enough to facilitate certain social and economic groups.*
- *Ferries, light rail/monorail, buses and cars.*
- *Better transportation would help the service industry recruit and maintain the workforce.*
- *Automated public transportation using renewable energy is a true reality and is needed.*
- *Mass transit and better bridge system is needed.*
- *Electric on/off buses for workers and tourists. They don't have to be big, but they have to be cheap. Run peak busy traffic with parking near the bridge to elevate traffic issues.*
- *Need to start working on expanding the current bridge and find a location to build a second bridge. Introduce more waterway taxis.*



Key Things to Note

- There was strong agreement from the average point to the ‘Much stronger multi-dimensional integrated local transportation network’ end of the continuum., with 70% of respondents leaning this way, and over 30% responding with values of 8,9 or 10 on the continuum.
- Not surprisingly, daily commuters and younger cohorts favored the move to a stronger multi-dimensional integrated local transportation network.

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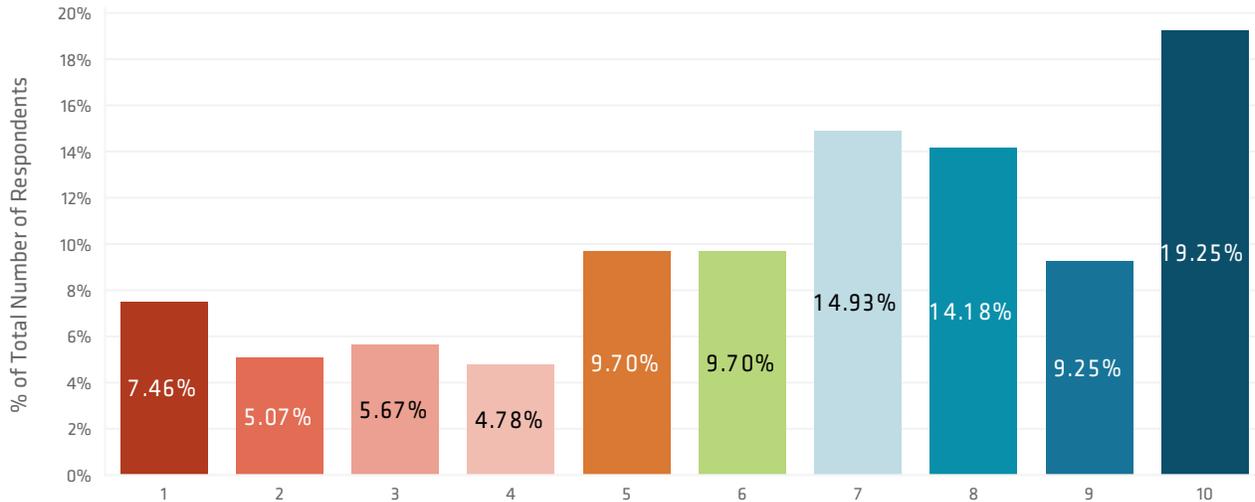


4.3.2.9 Responses about Environmental Focus

Question: Environmental Focus – Hilton Head Island was developed based on a clear environmental focus and vision. Today, Hilton Head Island is being challenged by changing weather patterns and other environmental issues. In terms of environmental focus, how would you like Hilton Head Island to be in 2040?

Please select your preference on the following continuum: 1= ‘Maintain existing environmental focus and practices’;10= ‘Aggressively pursue new sustainability actions and focus’.

Environmental Focus



A selection of participant responses around the Environmental issue in 2040 included:

- *The existing environmental focus should be maintained when looking at new sustainable practices. Key focus on air and water quality should be reviewed.*
- *Sustainability is what ‘put us on the map’ – it just wasn’t designed at that time as sustainability. We need to embrace our heritage and build on it. Get a town led recycling program.*
- *We need to stay on top of environmental issues – beach erosion, hurricane and surge protection, marsh protection and canopy management.*
- *Climate change cannot be ignored. Beaches/dunes are in danger.*



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Key Things to Note

- There was more particularly strong agreement towards “Aggressively pursue new sustainability actions and focus” on the continuum, with over 67% of respondents favoring this direction.
- With recent severe disruptive weather events occurring in Hilton Head Island, it was perhaps not surprising there is a focus on pursuing new sustainability actions and focus. Additionally this supports one of the core island values. The younger cohorts and people living outside gated communities particularly favored the notion of aggressively pursuing new sustainability actions and focus.



4.3.2.10 Responses about Economic Focus

Question: Economic Focus – The economy on Hilton Head Island is driven by tourism, retirement and associated industries. This is strongly driven by the Island’s position and reputation as a world class resort destination and retirement destination. In terms of economic focus, how would you like Hilton Head Island to be in 2040?

Please select your preference on the following continuum: 1= ‘Maintain existing focus on tourism and retirement related industries’, 10= ‘Diversify the economy to help attracted young professionals and ‘start up’ companies.’

Economic Focus



A selection of participant responses around the Economic issue in 2040 included:

- *The economy should not rely solely on tourism and retirement, but that does not mean eliminating it altogether. Simply incorporate an economy attractive to youth.*
- *In 2040 retirees will be younger than the 2017 retirees, and will want to live in a more vibrant community.*
- *Mixed between retirement and young professionals.*
- *Hilton Head Island is too expensive for young families and ‘start ups’ building on our current tourism makes the most sense.*
- *It is a huge take to ‘diversify the economy to help attract young professionals and ‘start up’ companies because there are many pieces to it.*
- *A happy medium – we have many retirees but we need more young people driving the workforce.*
- *Focus on tech, for example, identify what attracts tech companies to other destinations and determine whether we can and/or should emulate.*



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Key Thing to Note

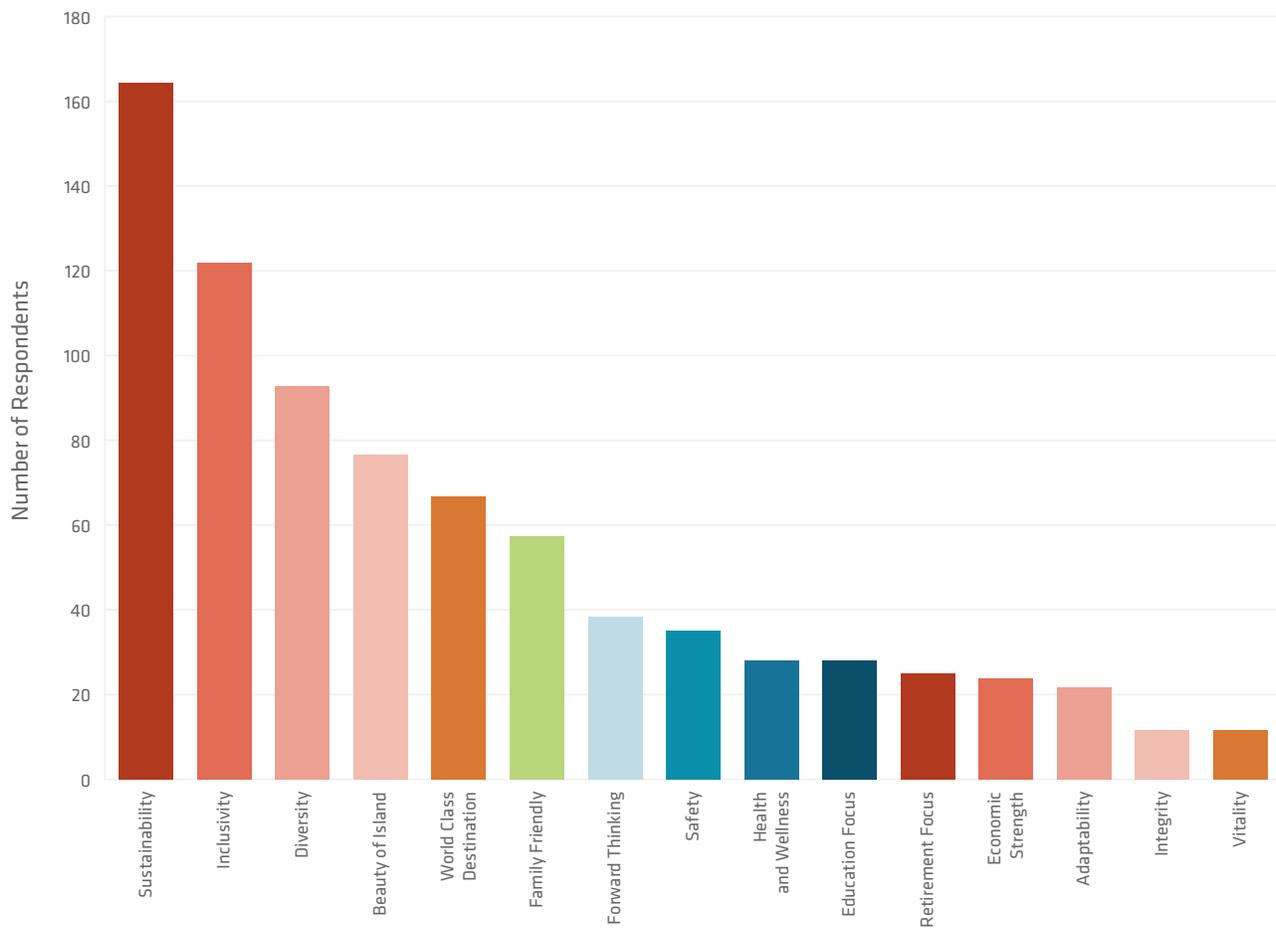
- The 10-50 year age groups was strongly orientated to the concept of diversifying the economy to help attract young professionals and ‘start up’ companies, with 80% leaning in this direction.
- Those respondents not living in gated communities also leant heavily to the end of the continuum that focused on diversification of the economy.
- Those respondents who self-identified as being most interested in ‘Economic and Industry issues’ also leant more heavily to the end of the continuum that focused on diversification of the economy.



4.3.2.11 Responses about Important Values

Following the questions on the key issues affecting Hilton Head Island, the engagement session participants were asked: ‘What do you think are the values that should represent the community of Hilton Head Island in 2040?’

HILTON HEAD ISLAND VALUES IN 2040



Key Things to Note

- Interestingly, the predominant values which had also been discussed during the Think Tank session, were sustainability, inclusivity and diversity.
- The recognition of the aesthetic appeal and world class destination status was reiterated as was the wish for the island to be family friendly and forward thinking.

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4.3.3 SUMMARY - COMMUNITY ENGAGEMENT SURVEYS

The findings from the Engagement Survey show that the predominant profile of survey respondents was white/caucasian and aged between 61-80 years. There was strong agreement on some issues, and less agreement on others.

- There was a leaning towards a more diverse, mixed age community attractive to families and young professionals.
- People were divided on the issue of tourism with an inclination towards more selective tourism which appealed to the 'right type of tourist'. There was also much support for year-round tourism which would attract a wide mix of tourists, however as tourism is a key industry within the region, this could have been an influencing factor.
- Respondents were divided regarding the issue of housing, between the retention of an exclusive and selective residential focus and the need for more diversified residential and neighborhood options. As the majority of respondents lived in the three largest gated communities, this could have been a contributing factor to the division on this issue.
- When asked about workforce patterns, the inclination was towards people living and working on the island in 2040, rather than commuting. While there were responses which supported a future which had a continued strong reliance on a commuter workforce, this was largely represented by retirees who were less affected by the workforce issue in comparison to the younger population.
- When asked about residential redevelopment, there was an inclination to embracing a restoration economy and applying leading edge standards to design and construction. When asked about the transportation infrastructure, people were more interested in a future with a much stronger multi-dimensional integrated local transportation network.
- Respondents were more inclined to aggressively pursue new sustainability actions and focus with regards to the environment. However, there were people who wanted to maintain the existing environmental focus and practice.
- With regard to the future economy of Hilton Head Island there was a lack of clear alignment regarding maintaining the existing focus on tourists and retirement related industries and diversifying to attract young professionals and 'start up' companies. The demographic profile of survey respondents could have been a factor to retain the status quo regarding focusing on tourists and retirees.





4.4 OPEN TOWN HALL AND KIOSK ENGAGEMENT

In order to enable the engagement process to be accessible to all citizens both an online Open Town Hall Engagement Platform and Kiosks were set up.

4.4.1 OPEN TOWN HALL

After the engagement sessions were completed, the Town of Hilton Head Island ran an online Open Town Hall engagement platform to invite further input from the stakeholders of Hilton Head Island. This ran from mid-October through to mid-November. Stakeholders were asked to complete the phrase “In Our Future: I want to see a Hilton Head that....!”. The Open Town Hall engagement platform received 91 responses. The Open Town Hall engagement platform was useful to the overall engagement process as it sought out responses from participants who may not have been able to attend the engagement sessions.



Key Things to Note

- The Open Town Hall engagement responses reiterated the ongoing themes of affordable housing, workforce, traffic congestion and maintaining the balance of retaining the island’s beauty with redevelopment.
- There were also comments around the Gullah culture and incorporating it into the tourism offerings from Hilton Head Island, as well as some focus on arts and culture.

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4.4.2 KIOSK ENGAGEMENT

During the engagement process, three kiosks were placed on Hilton Head Island and moved to different places on the island over the weeks. This enabled individuals to further engage in the visioning process off-line. This was an innovative idea generated by the project staff and was intended to build momentum to the overall engagement process. The kiosks were set up with response cards which included three questions for the individual to respond to in writing. The questions were:

- What do you see as the most important challenges facing Hilton Head Island in the next 10 years?
- What do you believe are the biggest opportunities for the future of Hilton Head Island in the next 10 years?
- Please complete the following:
 - I love Hilton Head Island because ...
 - In the future I want to see a Hilton Head Island that is ..



4.5 RECONVENING OF THINK TANK WORKSHOP

The original Think Tank from June was reconvened in early December 2017 with approximately 130 participants. The overall community engagement process was reviewed and the results from the Community Survey and engagement sessions were shown to the participants and discussed. This workshop was used to clarify the areas of shared vision for the future of Hilton Head Island. The respondents were asked to discuss their ideal preferred future and feedback was obtained from the group. They were invited to then select their preferred future from the original Think Tank plausible futures, before prioritizing the key themes affecting Hilton Head Island.

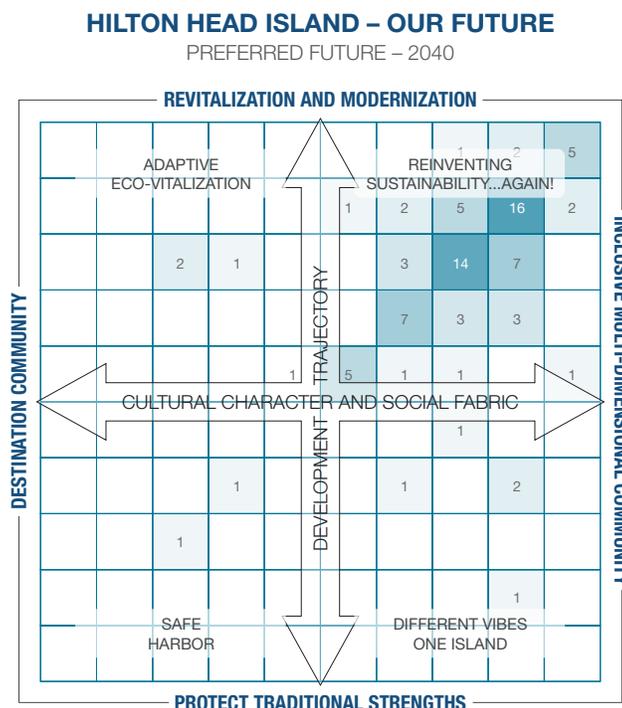
The 'Our Future' Think Tank was reconvened in order to clarify the areas of shared vision for the future of Hilton Head Island.

4.5.1 REVISITING PREFERRED FUTURE

During the reconvened Think Tank, the participants were invited to revisit the Scenario Quadrants which had been generated from the original Think Tank held six months previously.

Having taken part in the original Think Tank, the engagement sessions which followed and the reconvened Think Tank, the participants were asked to take part in an exercise where they selected the box that represented their preferred future.

In the reconvened Think Tank, the following heat map shows even stronger agreement around Scenario B - 'Reinventing Sustainability... Again!'. The numbers reflect the concentration of votes. Each person was give one 'dot' to place within the matrix.



EXPECTED FUTURE PLAUSIBILITY MATRIX

This grid displays the plausibility level assigned by the workshop participants.

The darker the colour, the greater the aggregate weighted plausibility score.





4.5.2 RECONVENED THINK TANK – DESCRIPTION OF PREFERRED FUTURE

The reconvened Think Tank participants were asked to work at table groups, and add some detail to the description of the ‘preferred future’. The summaries of the group discussion is outlined below:

Group 1

- Better public transportation within the Island
- Affordable housing including repurchasing of existing structures
- A fiber optic infrastructure
- Year-round tourism and cultural heritage tourism
- More professionals working from home

Group 2

- Environmental sustainability
- More varied housing options
- Embrace our cultural history
- More events to celebrate and bring together/unify the community
- Use current resources in healthcare to help meet our workforce issues
- High quality schools to recruit younger families

Group 3

- Multi-modal transportation
- An independent, communal and automated island
- Re-development to higher environmental standards via energy efficiency

Group 4

- Focus on sustainability
- Node Development to allow public transit across island
- A sewer system for the entire island
- Walkable community with bikes and paths
- Application of creativity and Charles Fraser – like-minded thinking to solve challenges in an inclusive manner
- Enhancing the “Hilton Head Island” brand
- Ensure affordable housing

Group 5

- The entire island served by roads, sewers and utilities
- Transportation allows for ease of access around the island and to and from the island
- Prepared and resilient – local food, net waste is zero, power and water, self-sustaining
- Robust medical care with connection to regional facilities

Group 6

- Connectivity – Internet, advances in technology, communication and transportation
- Work and housing for young professionals
- Plan for sea level rise

Group 7

- Emphasize revitalization in lieu of reinventing
- Foster environmental heritage
- Add recreational opportunities for all ages
- Support work/life balance opportunities
- Expand opportunities for houses/living for young people
- Promoting/supporting the Island’s history

Group 8

- A place where everyone feels welcome
- Alternative infrastructure on/off island (another bridge)
- Re-evaluate green space – accessibility to land/parks and water

Group 9

- Achieve sustainability through waste, energy and water transportation
- Protect and preserve the eco system
- Responsible governance to protect environment
- Limited development

Group 10

- Create sound fiscal health and financial sustainability
- Identify and sustain the Gullah community
- Identify and develop a plan for an integrated and vital downtown area
- Demonstrate renewed sustainability and recycling leadership
- Provide affordable housing and improved workforce availability including solving the town’s transportation problems
- Establish collaborative growth and regional collaboration
- Provide a world class recreational system



Group 11

- Increasing relevance of Hilton Head Island will be able to attract private investment
- Sociological integration
- Advancing millennials
- Public transportation
- Environmental excellence
- Cultural corridor

Group 12

- Low crime rate
- More support for native islander community and increased respect and support for historical significance
- Increased visitors for historical sites
- Improved ease of access to the island
- Easier commute to the island
- Repurposing/revitalization of aging and abandoned commercial buildings for affordable housing

Group 13

- Increased access to mass transit
- Renewable energy
- Development with access to bike/pedestrian infrastructure
- Encouraging jobs for young professionals
- Expanding economic development for future operations
- Expand the Island beyond tourism
- Improved healthcare
- New industries – maybe a sea level rise lab/innovation center.
- Environmental education
- Renewable energy on island

Group 14

- Density increase provides more affordable homes
- Mixed use neighborhoods
- Public transportation
- Think regionally
- Higher value tourism

Group 15

- Hilton Head Island forms its own school district
- Financial support funding for 2nd homeowners
- Outstanding schools attract families and jobs
- Funding to build quality schools
- Technology
- Improve technological infrastructure
- Attract more families with higher incomes
- First wireless island (free) on East Coast
- Bring in more business
- Environment
- Access to meaningful environment and recreation
- More green space
- Eco friendly and organic landscape
- Eco-tourism
- Open farm communities
- A real recycling island
- Plastic bags
- Beach nourishment
- Transportation
- Public transport everywhere





4.5.3 THINK TANK RECONVENE – BRAINSTORMING ACTIONS BY TOPIC

The workshop was given the task of identifying actions that would help move the community toward the preferred future. Participants self-selected into key topic areas. Participants gave the following responses with regard to the following key questions. The questions and responses are laid out below to mirror the priority areas:

4.5.3.1 Transportation infrastructure

How does Hilton Head Island move to create a much stronger multi-dimensional integrated local transportation network?

- There is a need for a ferry system which includes Savannah, Bluffton and Beaufort
- We need an 'on-island' shuttle system
- There is a need for a designation of 'no vehicle' areas
- We need to produce an electric charging sub-station
- We need to produce destination parking areas for workers coming to the island
- There needs to be shared vehicle incentives
- An 'above-ground' rail system would be useful



4.5.3.2 Environmental Focus

How does Hilton Head Island best pursue new sustainability actions and focus?

- There is a need to set up Hilton Head Island as an Environmental Lab to attract scientists
- We need to see Hilton Head Island as premier water based habitat
- We should use the golf courses as models for sustainability
- We need to look at storm water management practices and adapt these on the island
- We should use responsible development to control water run off
- There is a need for better and mandatory recycling
- There is a need for focus on forestry management and the use of more native trees
- We need to develop more parks on city owned golf courses
- We should use recycled water for residential irrigation (not just golf courses)
- We need to plan for different scenarios of sea level rise
- We should adopt the Cradle to Cradle system across island





4.5.3.3 Community Focus

How do we build a community that has a more outward looking focus and which leverages new collaborations and shared infrastructure?

- We need a clear statement within the vision document that every part of the island has the same focus as the focus which exists within the gated communities such as:
 - Quality of life
 - Decent place to live for everyone
 - Infrastructure and utilities
- We need a clear statement in the vision document that our mission includes a thriving and prosperous Gullah community within Hilton Head Island



4.5.3.4 Workforce Pattern

How do we move from a strong reliance on a commuter workforce to where many more people can live and work on the island?

- We need to provide attractive wages in order to attract talent, and so the appropriate compensation
- Hilton Head Island needs liveable housing appropriate to the economic needs of the diverse citizens
- We need to focus on mobility and proximity of the worker to the workplace
- There is a need to amend ordinances for density and residential uses
- We need more mixed use housing and incentives for people to live and work on Hilton Head Island

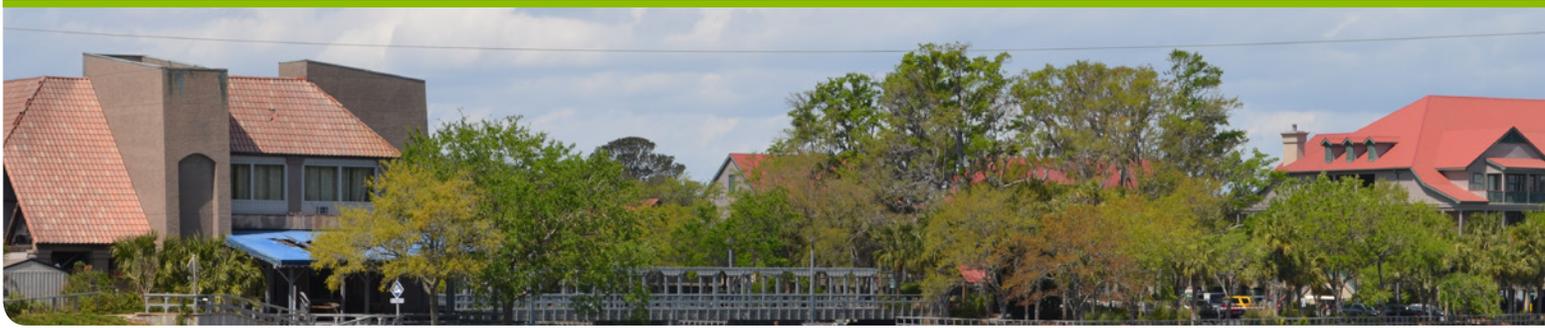


4.5.3.5 Economic Focus

How does Hilton Head Island best diversify and modernize the economy to help attract young professionals and 'start-up' companies?

- There is a need to appeal actively to 'knowledge' workers to relocate to Hilton Head Island and work from here
- We have to modernize the tourism infrastructure to remain world class
- We need to ensure that the telecommunication infrastructure is absolutely 'state of the art' to then allow 'professional tele-commuting' and work from the Hilton Head Island home base





4.5.3.6 Residential Redevelopment

How does Hilton Head Island best embrace the restoration economy and apply leading edge standards to design and construction?

- There is a need to bring retro-fit residential housing into tiered commercial areas
- We need energy independence/solar/hydro
- We need a new housing model center for the island
- There is a need for an Island wide inventory of available land (areas for re development/native islander focus/other)
- We need neighborhood revitalization studies and creative plans
- There is a need to focus on the Gullah neighborhood/s
- Affordable rental apartments are essential
- We have to bring in transportation shuttles connecting housing to workplaces
- There is a need to consider a housing authority for Hilton Head Island



4.5.3.7 Residential Fabric

How does Hilton Head Island create more diverse residential and neighborhood options?

- There is a need for tax breaks to encourage multi-age/generational housing options
- We need to change density options island wide
- We need to develop a master planned community that includes availability and access for a diverse workforce
- Remove the exclusivity of the island
- Create more urban like, downtown and residential areas
- We need residential options above retail and commercial spaces





4.5.3.8 Social Fabric

How do we create a more diverse, mixed age community attractive to families and younger professionals?

- We need high quality school choices, with an independent Hilton Head Island School District
- Hilton Head Island should consist of Downtown, Midtown and Uptown areas
- There is a need for multi-family options above retail and cultural venues
- We need more family friendly open areas with parks
- There is a need for more connectivity into the gated communities (bike path/shuttle)
- We need activities and a center for teenagers.
- We need more family friendly, affordable and traditional activities (i.e.) crabbing, fishing and water activities
- We need more dog parks



4.5.3.9 Healthy Aging:

How do we create a world-best active lifestyle and healthy aging community?

- We need a Parks and Recreation Plan
- We need within our community:
 - Nutrition
 - Access to healthy food
 - Education and healthy lifestyle
 - Sleep
 - Social stimulation
 - Arts and cultural stimulation
 - Engagement
- There is a need for centralizing information at community events
- There is a need for alternatives to golf/tennis





4.5.3.10 Nature of Tourism

What would be the optimal nature of the tourism industry in the future?

- New directions and new opportunities and approach new markets
 - Focus on history and the Gullah culture
 - Improve the appeal of our history and eco assets
 - Create better infrastructure within our historic sites
- We need more festivals
- There is a need to improve air access
- There is a need for more aggressive promotion of eco experiences, outdoor experiences and bike experiences
- We need to put a different emphasis on year-round activities
- We need to help to foster visual and performing arts
- Mayor's Task Force
 - Heritage Development Corporation
 - Public-Private Partnerships
- The Chamber should be a central source for marketing plans and as a platform for local groups, festivals, attractions and initiatives – for culture, arts, history, culinary, physical, recreation, performing and visual arts





4.5.4 PRIORITIZATION OF KEY TOPICS

During the reconvening of the Think Tank, the participants were asked to prioritize the key topics which had been identified through the process to date.

Key Topics	Now	1-2yrs	3-5yrs	6-10yrs	11-20yrs	TOTAL
1. Environmental Focus - pursuing new sustainability actions and focus	84	41	22	19	5	171
2. Transportation Infrastructure - creating a much stronger multi-dimensional integrated local transportation network	96	40	21	7	3	167
3. Workforce Pattern - moving to where more people can live and work on the island	84	41	27	9	2	163
4. Economic Focus - diversify the economy to help attract young professionals and 'start up' companies	70	38	32	14	1	155
5. Healthy Aging - creating 'best-in-world' active lifestyle and aging community	47	41	34	14	4	140
6. Nature of Tourism - creating the most optimal tourism industry for the future	46	33	30	11	5	125
7. Residential Redevelopment - embracing the restoration economy and applying leading edge standards to design and construction	67	30	22	4	1	124
8. Residential Fabric - creating more diverse residential and neighborhood options	50	38	27	7	0	122
9. Community Focus - building a more outward looking focus, which leverages new collaborations and shared infrastructure	50	37	25	9	1	122
10. Social Fabric - creating a more diverse, mixed aged community attractive to families and younger professionals	49	31	28	1	0	109



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Key Things to Note

- With regard to time frame, all of the topics were seen to be of a priority now , rather than in 1-2 years, 3-5 years, 6-10 years or 11-20 years.
- Of these key topics, the following four areas were seen to be of the highest priority now -Environmental Focus, Transportation Infrastructure, Workforce Pattern and Economic Focus



4.6 FOCUS GROUP SESSIONS

Following on from the reconvened Think Tank, six focus group sessions were held between December 5 – 7, 2017. The purpose of the focus group sessions was to bring together between 8-10 people into a round-table discussion about pre-determined topics of interest to the visioning process. Focus groups differ from informal group discussions in a number of aspects. Primarily, specific, pre-determined criteria are used for recruiting focus group participants. Second, the topics to be discussed are decided beforehand, and the moderator uses a pre-determined list of open-ended questions arranged in a natural and logical sequence. The focus group sessions were used to further inform the areas pertaining to the issues addressed so far in the visioning process.

4.6.1 FOCUS GROUP DISCUSSIONS





4.6.1.1 Focus Group - Sustainability, Environment and Resiliency

The participants were asked to describe their preferred future in relation to this area. They noted the need for:

- Waste sites and recycling
- Energy star efficiency
- Use of technology with waste handling
- Smart infrastructure for workforce housing
- Sustainability grants
- Support from the Town
- Incentive from the Town to spend money on sustainability
- Positive water recycling
- Retraction from commitment to Storm water responsibilities

The participants were asked:

How does Hilton Head Island best provide new sustainability actions and focus?

- Leadership follows the vision
- Accountability and enforcement of following certain criteria
- Marketing and educate and get all involved in telling our story - i.e.) eco-tourism story example
- Incentive - no penalizing to follow maintaining the environment
- Develop a business case
- Team up with other communities to find out what works and what does not work
- Smart infrastructure for workforce housing
- Mandatory Recycling - commercial and residential
- Case Example: One gated community providing an experimental approach to prove that it can work.
- Ban single use plastic bags
- Trash control options or educating the public and giving options for disposal
- 'Turn off' to potential residents (Trash on ground will 'turn off' those who may consider HHI)
- Image - protecting environment visibility
- Create a habit of picking up trash
- Invest and innovation for trash removal
- Sustainability - energy (there is a solar panel ban). Town support to encourage gated communities to use 1/2 tap water going to irrigate lawns
- Landscape paradigm change -covenants
- Money saved by planting native trees
- Cap development - confined boundaries



4.6.1.2 Focus Group - Restaurants, Resorts, Recreation and Entertainment

The participants were asked:

What would be the optimal nature of the Hilton Head Island tourism industry in the future?

- Year-round tourism - shoulder season filled out by high spenders
- Activities and amenities which appeal to young active lifestyles and/or communities
- Live - Work - Play based on local workforce
- Investment in promoting the island as a cultural and heritage island
- The need to expand the shoulder season through the cultural tourist
- Higher quality tourist through offerings in recreation/culture/art - this will mean that they will stay longer and spend more
- Capitalize on day trippers and attract new residents to recreation/events/culture/art on the island
- Expand bike offerings on and off island. Different offerings, commute, active and off-road
- Adopt a Regional Plan similar to those adopted by Beaufort and Jasper
- There is a big opportunity for sports tourism
- There is a need to market Hilton Head Island beyond a 50 mile radius
- Focus on family tourist and more recreational facilities - need to carry out a recreation assessment
- Tourism is evolving and changing - who will be the new tourists?

4.6.1.3 Focus Group - Faith-based, Philanthropic and Community

The participants were asked what was needed to achieve the ideal social fabric in Hilton Head Island in 2040:

- There needs to be a focus on young people as the people of Hilton Head Island are getting older
- There is a need to keep children and young professionals in the area
- We will never merge the community unless we merge the working class and privileged children
- The combination of housing/workforce and transportation is crucial to Hilton Head Island.
- Workers have nowhere to live in Hilton Head Island.
- Rents have also increased
- Working class families cannot rely on consistent pay due to the up and down nature of tourism
- People cannot get a second job due to inconsistent schedules in supermarket and restaurant work
- There needs to be an inter-island focus



4.6.1.4 Focus Group - Education

The participants were asked what was needed to achieve the ideal education system in Hilton Head Island in 2040:

- Affordable housing for teaching staff.
- Lots of teachers travel 30-50 minutes to Hilton Head Island
- Hospitality, Tourism and Healthcare are the three main drivers in education for this Island
- Which industries will young people be employed within Hilton Head Island in the future? They will want to live and play in Hilton Head Island - which industries are there beyond tourism?
- We need a young support workforce (hospitality) - probably pre family/single people. How do we also attract a higher end industry workforce?
- We would love to see Hilton Head Island recognize educational opportunities (public/private) as these are attracting families.
- Education facilities are stretched regarding both funding and space to attract more students.
- Lots of families are weekend residents and commute to big cities each week. Families come here as they enjoyed holidaying here but need more once they move here.
- Higher wages are going to hospitality workers on Hilton Head Island but not to public service workers (i.e.: teachers)
- We could look to see how neighboring communities in Beaufort and Bluffton are trying to attract people to their areas.
- There is a difficulty in integrating students into community/businesses in Hilton Head Island. People are not as welcoming to collaborate with education on the island as Bluffton and other areas regarding internships/work experience
- Children need to have valuable experiences in Hilton Head Island so that they return to the island once they graduate
- We need to recognize the importance of partnership between Hilton Head Island and Bluffton
- What will 'Reinventing Sustainability' look like in relation to careers? STEM initiatives for example. Economic Development is essential. STEM jobs are not here.
- STEAM needs to be introduced.. (traditional STEM with the creativity of the Arts)





4.6.1.5 Focus Group - Native Island/Gullah Geechee

The participants were asked what was needed by the Native Island/Gullah Geechee community to achieve the ideal social fabric in Hilton Head Island in 2040:

- We need to focus on non-gated communities going forward, as some of us have doubts that the gated communities want change.
- We need substantial changes in the Town Council to make these changes.
- We should focus on inter-connectivity – not having walls and barriers.
- There is a level of receptivity in Sea Pines. We should work with Sea Pines and Hilton Head Plantation regarding breaking down barriers and increasing connectivity. We need to get people to start talking to each other.
- There needs to be changes in the Land Management Ordinance. Native owners of land will need a lot of assistance with this as there are many restrictions that native islanders are not aware of. Perhaps start with Mitchelville?
- Housing – native islanders' children and grandchildren will need housing.
- The Road Map should move into measurable action points with an annual reporting structure and accountability from the Town. There needs to be bottom up support from the communities also.
- This vision has to be institutionalized as Town Council will change over the next 23 years (leading to 2040). We need someone to convene this and produce the dialogue.
- We need to start with things that we can get done quickly and that are achievable. This will make people own the process and create momentum. Plastic bags, recycling and solar panels are good places to start.
- We need to make sure that the community doesn't relent when the louder minority is negative.
- Is every decision going to stack up regarding the Revitalization Scenario.
- We need a Task Force for this process going forward – a member from the Gullah community should be on this task force to keep the vision on the agenda





4.6.1.6 Focus Group - Real Estate, Gated Communities and Construction

The participants were asked what was needed by Real Estate, Gated Communities and Construction to achieve the ideal Hilton Head Island in 2040:

- Need 5G- what have we done to give people the services needed?
- We should be the 1st Wireless Island
- Safety – one of the original reasons why people went into gated communities (i.e. Charles Fraser’s vision). It has worked so well, however now people are worried about what would happen regarding safety without gates.
- Transportation – we need 3 lanes each way over the bridge
- Palmetto Dunes is keen on connectivity rather than keeping the gates. Sea Pines and Hilton Head Plantation can already access each other’s communities
- We need flood insurance for Sea Pines
- We need a way for children to return after graduation, like they did in the 1970s to start businesses
- Retirees are the best prospects for island – they bring money into the area
- Recycling – need to do commercial and residential review
- Bad service is a big issue for holiday makers and it will drive people away from the island.
- Tourism is becoming just ‘day trippers’
- Decline in golf has a big effect on Hilton Head Island – there is so much land wrapped up in the golf courses this needs to be looked at.

The focus group sessions built upon the topics and themes that had been generated throughout the visioning process. However by focusing on small groups of individuals who were directly associated with these areas of interest, ideas were able to be generated regarding ‘how’ to achieve these goals.





5.0 ANALYSIS OF MAJOR THEMES

At the beginning of the visioning process and outlined earlier in this report, the following key issues arose from the original scoping interviews and background research, and formed the basis of the initial community survey.

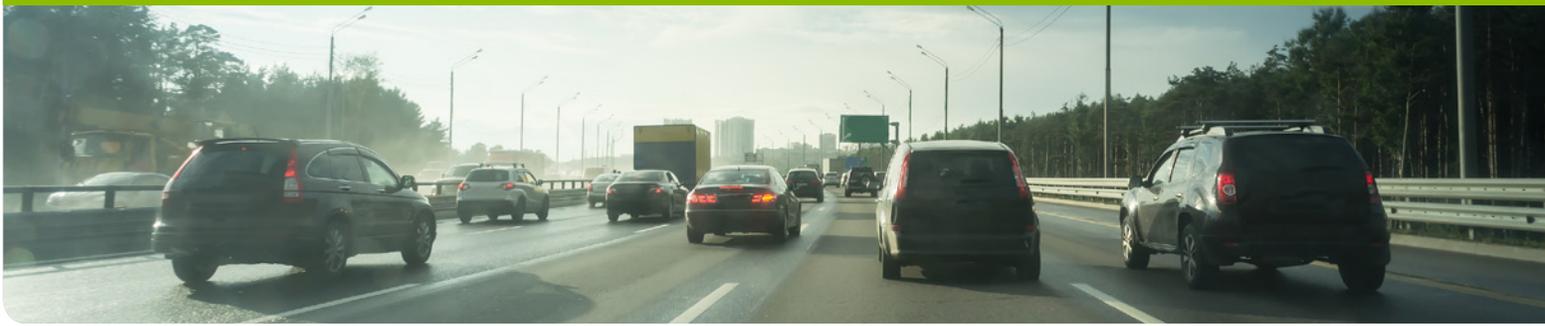
- Aging population
- Workforce and skills shortage
- Loss of younger adult generations
- Health and wellness
- Workforce, housing and transportation
- Tear down and rebuild of traditional neighborhoods
- Traffic congestion associated with tourism season
- Status as world class resort
- Diversified and expanded recreational offering
- Traffic issues associated with daily commute patterns to and from the Island
- Availability of post-secondary or technical education
- Changing long term weather conditions and patterns
- Protection of eco-system and enhanced environmental sustainability
- Trend of less brick and mortar retail and more online shopping

As the engagement process advanced the key discussions became more refined and succinct.

As the visioning process advanced, clear repeated themes emerged.

The following overarching themes represent the major threads of discussion throughout the visioning project. There is much cross over between themes and they are inter-connected in relation to the issues facing Hilton Head Island.

- Workforce
- Tourism
- Sustainability and environment
- Aging population
- Transportation
- Housing
- Economy



5.1 WORKFORCE

Workforce and skills shortage was seen to be the issue which was most critically important and that the Island was not prepared for looking out to the future from analysis of the Community Surveys. Workforce in relation to housing and transportation was seen as the second issue with regards to negative impact and preparedness.

Participants felt that people choose to live on Hilton Head Island and ideally there should be opportunities for them to work in the place that they live. This would enhance the Hilton Head Island economy and build a sense of community, rather than the younger working age citizens leaving the island each day to travel to work. With improved 5G connectivity, young professionals could work from home or be incentivized to start up their own companies on the island.

As tourism and hospitality are the key industries on Hilton Head Island, the workforce who commute to Hilton Head Island are predominantly people who work in these industries.

Affordable housing was seen as key to assist the workforce who commute to the island each day. It was also recognized that this commuting workforce included public workers such as teachers. The high rents and property prices on Hilton Head Island were seen as a barrier to young professionals and hospitality/tourism workers living on the island. Some participants believed that it was impossible to consider that Hilton Head Island would not have a commuter workforce in 2040, but believed that it was essential to provide improved transportation options to ease the daily commute. These would include light-rail, buses, shuttles and water taxis.



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Key Things to Note

- Many people commute to work on Hilton Head Island each day.
- This has a direct connection to the transportation issue as the commute has an impact upon heavy traffic congestion to and from the island.
- Similarly, there is a direct link to housing as many people whom commute to work are unable to secure affordable housing on the island.



5.2 TOURISM

There was resonance throughout the visioning process to retain Hilton Head Island as a world-class resort destination, a reputation that the island has built over the past decades. Currently Hilton Head Island attracts 2.6 million visitors a year, which contributes significantly to the local economy. How would this reputation continue looking out as far as 2040? Participants of the Think Tank were asked about the optimal level of visitation in 2040. 58% chose the level of visitation to remain at between 2.5 and 3 million visitors. Consequently, the majority of participants would prefer to retain the same number of visitors in 2040. However, there was less agreement regarding whether to work towards a year-round tourism industry which attracts a wide range of tourists or to work towards more selective tourism and the right type of tourist. The cross section of participants with regard to age, and even occupation could explain the lack of agreement to this question. Businesses who rely on the tourism industry may prefer a year-round tourism industry, while year-round residents may prefer more selective tourism.

An opportunity is for Hilton Head Island retain its status as a world class destination, and adapt to more diverse emerging forms of tourism.

While Hilton Head Island built its reputation as a world class resort destination in the 1970s, the tourism industry has changed and will continue to change looking out to 2040. Tourists are now looking for different experiences rather than the beach, golf and retail opportunities that Hilton Head Island offers. Indeed, the trend for online shopping rather than brick and mortar retail may render the retail experience very different in 2040, thus Hilton Head Island cannot rely on its boutiques and shopping centers to appeal to tourists going forward. Two issues that were agreed upon was that there was a need for high end tourists and a diversity in tourism going forward. Eco and activity tourism were frequently discussed as options during the visioning process regarding future tourism in 2040. Cultural and heritage tourism was another popular new direction for tourism in Hilton Head Island, particularly in relation to the Gullah culture.



Key Things to Note

- Hilton Head Island attracts 2.6 million visitors a year
- Participants of the Think Tank were asked about the optimal level of visitation in 2040. 58% chose the level of visitation to remain at between 2.5 and 3 million visitors.

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5.3 SUSTAINABILITY

There was agreement throughout the process that Hilton Head Island would need to pursue new sustainability actions as it was recognized that there was no recycling system, renewable energy options and the island was falling behind in what was generally believed to be mainstream in terms of sustainability and environmental actions. There was concern that citizens of Hilton Head Island would need to stay on top of environmental issues such as beach erosion and hurricane protection. If sustainability is to be the value that represents Hilton Head Island in 2040, it would seem that there is much progress to be made in the interim.

Hilton Head Island will need to pursue new sustainability actions to avoid falling behind the mainstream in terms of sustainability and environmental actions.



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Key Things to Note

- As the visioning process advanced there seemed to be a sharper focus on the issues surrounding sustainability. This was seen as the most important value that should represent the community of Hilton Head Island in 2040 during the reconvened Think Tank session towards the end of the visioning process.
- Pursuing new sustainability actions and focus was seen as the second most important topic to address by 2040 during the reconvened Think Tank. It was the highest rated community value.



5.4 AGING POPULATION

Hilton Head Island consists largely of an aging population with a median age of 54 years, in comparison to the wider South Carolina median age of 38 years. The majority of respondents to the Community Survey were over 60 years of age. This was replicated in the post Engagement Session survey, whereupon 60% of respondents were 61-80 years.

Hilton Head Island prides itself on its resort status but also as a retirement destination. There was agreement that there was a need to encourage a diverse and mixed age population to the Island, such as young professionals and families. However, the tone throughout the visioning process was that while Hilton Head Island needed to encourage a younger population, it was necessary to maintain and protect the 'healthy retirement community'. Looking out to 2040, how does Hilton Head Island maintain its retirement community within gated communities yet appeal to a younger demographic? Respondents during the process noted that the future of Hilton Head Island was dependent on the next generation. Conversely, when young people leave the island to attend college or university, will they return to the island after graduation? This is intrinsically connected to the workforce and housing issues. If the property prices are high and there is a lack of affordable housing, it will be difficult for the young professional or family to enter the Hilton Head Island property market. If there is a lack of work on the island, there is insufficient appeal for the young professional or family to move to the island. This will be a challenging balance to achieve, a Hilton Head Island in 2040 with a mixture of young families, young professionals and retirees.

Hilton Head Island prides itself on its resort status but also as a retirement destination.



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Key Things to Note

- Hilton Head Island has a median age of 54 years, in comparison to the wider South Carolina median age of 38 years.
- The majority of participants in the visioning process were over 60 years



5.5 TRANSPORTATION

Analysis of the Community Survey results indicates that traffic congestion was seen as the second most critical issue facing Hilton Head Island in relation to the nature of impact and lack of preparedness of the Island to solve the issue. As the visioning process progressed through the engagement sessions, there was agreement that there was a need for a much stronger multi-dimensional integrated transportation network.

The issue of transportation is inherently linked to the workforce and tourism issues. As Hilton Head Island is made up of a commuting workforce of people travelling to work off of the island each day, there is also a commuting workforce of hospitality and tourism workers travelling to the island daily. Similarly, with a huge tourism industry, people are travelling to and from the island through the tourist season.

Participants stated the need for new modes of transportation which will alleviate this congestion such as ferries, light/mono rail, buses, shuttles and water taxis. Not only was a multi-dimensional integrated transportation network seen as necessary to ease traffic congestion but it would also attract tourists and the necessary labor force. A second bridge was also a much-cited option as was encouragement of cycling to ease congestion within Hilton Head Island.

A multi-dimensional integrated transportation infrastructure could alleviate the traffic congestion issue caused by a commuting workforce and tourists.



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Key Things to Note

- Hilton Head Island has a population of approximately 39,000 residents (2015) which is forecast to rise to 44,000 in 2030 (a projected growth of 12%). As stated earlier in this report, 2.6 million people visit the Island each year, however Hilton Head Island is connected to the mainland by one bridge.
- The traffic congestion associated with the tourism season and traffic issues associated with the daily commute patterns to and from the Island, were consistently raised regarding transportation during the visioning process.



5.6 HOUSING

The issue of housing was a key issue during the visioning process both in terms of residential fabric but also residential redevelopment. Housing was seen as one of the most critical and less prepared for issues facing the island.

As the report has outlined in previous sections, housing is directly linked to both the workforce and transportation issues. There was consensus during the visioning process that there was a severe lack of affordable housing options available in Hilton Head Island. This directly affected the possibility of young families and young professionals moving to the island. It also contributed to the daily commute to the island from people who worked on the island as they could not afford to live on the island and enter the property market. Renting was also highlighted as a non-viable option, due to the elevated cost of renting on the island. It was widely viewed that it was necessary to create more diverse residential and neighborhood options. The preferred future for Hilton Head Island in 2040 (Reinventing Sustainability..

Again!) describes a future which includes mixed use properties with shared living and lower cost multi-family housing.

There was consensus during the visioning process that there was a severe lack of affordable housing options available in Hilton Head Island. This directly affected the possibility of young families and young professionals moving to the island.



DataInsight

Key Things to Note

- Hilton Head Island is regarded as an exclusive and prestigious residential location with a high percentage of the population living within 'gated communities'. Looking forward to 2040, participants were divided regarding maintaining this exclusive residential focus or adopting more diverse residential and neighborhood options.
- There was agreement on retaining the gated communities while developing communities which were accessible and affordable. This improvement of non-gated areas was seen to be vital in attracting young families and young professionals. The 'gated community' versus 'non-gated community' perspectives were apparent throughout much of the engagement process.



5.7 ECONOMY

There was more general support for the diversification of the economy to help attract young professionals and 'start up' companies, yet a lack of clear ideas about how to attract young professionals and companies to the island. Hilton Head Island has been economically supported by both tourism and the retirement community/industry and to move towards an economy which is diversified and attracting young professionals/'start ups' would be a bold move. However, this issue is entwined with the workforce, housing, tourism and transportation issues that have been addressed in previous sections. Without improving the infrastructure in terms of housing, schools and transportation, workforce will still be a huge challenge with regard to attracting the young professionals and families to the island.

How will the economy of Hilton Head Island adapt to attract young professionals and families to the island.



DataInsight

Key Thing to Note

- Currently the economy of Hilton Head Island is driven by tourism, retirement and associated industries. During the visioning process there was an overall lack of clear agreement regarding the direction the future economy should take. There was a cohort of participants who wanted the Island to maintain its existing focus on tourism and retirement related industries. The age demographic of both participants in the visioning process, as well as the age demographic of Hilton Head Island residents may have been a reason for the focus on retirement and related industries.



6.0 CONCLUSION

The focus of the visioning process was to look out to 2040 and ascertain the preferred scenario for 2040, exploring the issues and challenges facing Hilton Head Island in 2017 in order to work towards the ideal Hilton Head Island in 2040. In order for the island to resemble the preferred future it was necessary to examine the issues that were currently a challenge to Hilton Head Island. The 'Our Future' visioning process involved approximately 3,000 participants from the Hilton Head Island community. This extensive engagement was carried out through sequential stakeholder engagement methodologies which have been outlined in this report. These methodologies included a Community Survey with over two thousand responses, two Think Tank workshops, twenty-four engagement sessions, an Open Town Hall engagement platform and five focus group sessions. The communications strategy via the 'Our Future' portal/website and Facebook page enabled citizens to remain involved and engaged throughout the visioning process from May through to December 2017. The preferred future for Hilton Head Island was generated within the Think Tank in June and the appetite for this preferred future was reiterated at the reconvening of the Think Tank in December, following the twenty-four engagement sessions and input gathered from those events. The preferred future in 2040 was of a Hilton Head Island which would focus its development trajectory on revitalization and modernization. The cultural character and social fabric would be represented by an inclusive and multi-dimensional community.

The same challenges which Hilton Head is facing were represented throughout all of the stages of engagement. These issues are all directly connected. People commute to and from the island daily for work due to the reliance on the tourism industry that has earned Hilton Head Island the 'world class destination' reputation that it enjoys. Tourism and hospitality workers commute to the island each day as residents commute from the island to work on the mainland due to the lack of work opportunities and industries on the island for the residents.

The lack of affordable housing on the island means that the hospitality and tourism workers have to commute to the island and cannot live on the island. It also raises the issue that Hilton Head Island cannot attract young families and professionals due to the lack of affordable housing. The commuting to and from the island is seen to be detrimental to the island with regards to traffic congestion which is also caused by the lack of a transportation infrastructure.

The traffic congestion is also connected to the issue surrounding tourism for Hilton Head Island as 2.6 million people visit the island every year. The revenue for Hilton Head Island comes from tourists, the retired communities and associated industries. There is an acknowledgment that there needs to be a change and refocus regarding tourism for the island towards select tourists and branching out to tourism opportunities such as cultural, eco and activity tourism.

Hilton Head Island is an island that is separated into gated and non-gated communities. The aging demographic of the island and this separation ensures that currently the island is seen to be a place to either go to visit or to retire to. The cascading issues that arise with regards to workforce, housing, transportation and the economy are challenges that Hilton Head Island needs to face in order to move towards the preferred future.

7.0 ABOUT FUTURE IQ

Future iQ is a market leader in the development and application of scenario planning; network analysis, industry and regional analysis, and community engagement and capacity building. Future iQ specializes in applying innovative tools and approaches to assist organizations, regions and industries shape their economic and community futures. With over a decade of business experience, the company has grown to have a global clientele spanning three continents.

future*→*IQ GLOBAL PRESENCE - LOCAL SOLUTIONS



FOR MORE INFORMATION

To learn more about Future iQ, and our recent projects visit www.future-iq.com or contact us by email at info@future-iq.com

Stakeholder Engagement Report prepared by:



CELINE BEURLE, COO, FUTURE IQ

With an academic background in Sociology and Philosophy, Celine is passionate about understanding society and this has led to her ongoing interest in pursuing societal change. She has drawn upon her research background, to write policy and scientific papers. Drawing upon her life-long passion to instigate change, Celine has led many major projects and initiatives within her career, and is passionate about helping to create powerful and effective future strategies for communities and organizations.



DAVID BEURLE, CEO, FUTURE IQ

As CEO of Future iQ, David specializes in creating future planning approaches for the use in regional, community and organizational settings. David has worked in the field of organizational and regional economic and community planning for over 20 years. His work in community and economic development has earned his work international, national and state awards.

8.0 ACKNOWLEDGMENTS

Future iQ would like to acknowledge the substantial support from the staff at the Town of Hilton Head Island, Town Council, Town Manager and the Vision Project Management Team (VPMT) for the significant time and effort put into the planning and execution of the Hilton Head Island – Our Future visioning project. In particular, we would like to especially acknowledge Emily Sparks and Jennifer Ray from the Town of Hilton Head Island, who both provided strong leadership, guidance and support for this work.

Future iQ would like to acknowledge the citizens of Hilton Head Island who have engaged with passion, interest and great commitment to this extensive visioning process.

The Vision Project Management Team (VPMT)



9.0 FOR MORE INFORMATION



For more information on Hilton Head Island – Our Future, please contact:

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FOR MORE DETAILS, AND TO ACCESS COPIES OF ADDITIONAL REPORTS, PLEASE VISIT:

www.future-iq.com or <http://lab.future-iq.com/hhiourfuture/>



**Town of Hilton Head Island
 Community Profile and
 Benchmark Analysis**
 May 2017



**Hilton Head Island – Our
 Future Scenario-Based Think
 Tank Workshop Report**
 June 2017



**Hilton Head Island – Our Future
 Web Portal**
 2017 - 2018

10.0 APPENDICES

10.1 COMMUNITY SURVEY - KEY ISSUES

WELCOME! - We would like to understand your perspective about key trends shaping the future of Hilton Head Island. By answering these questions, you will be contributing to an important community visioning and planning project exploring the future of the Island

community. Your responses to this survey will join the responses of your fellow citizens to form the basis of the data driven visioning process, and will be used to develop a unique, innovative, and interactive data visualization platform that will allow you to examine the data collected for yourself.

PLEASE NOTE: We are asking a series of multi-dimensional and in-depth questions in this survey. There are 19 Questions, and it will take approximately 15-20 minutes to complete. Some might occur as repetitive, but we are asking your views in terms of impact of issues at different scales (you personally, your neighborhood, the island etc.). We really appreciate your INPUT and EFFORT in completing this survey. Even if you skip answering some questions, please take the time to also complete the profiling questions at the end of the survey.

Stay tuned for survey results and data visualizations by signing up for the email newsletter at <http://lab.future-iq.com/hhiourfuture/>.

1. **How would you rate the future prospects for the following bodies in the next 5 years? (1-Pessimistic 10-Optimistic)**

Hilton Head Island

Your Organization/Industry

Your Household

2. **Please indicate how important you think the following topics are to the future of Hilton Head Island (Not Important/Somewhat Important/Moderately Important/Very Important/Critically Important)**

Aging population

Workforce and Skills shortage

Loss of younger adult generations

Health and Wellness

Workforce, Housing and Transportation

Tear down and rebuild of traditional neighborhoods

Traffic congestion associated with tourism season

Status as world class resort

Diversified and expanded recreational offerings

Traffic issues associated with daily commute patterns to and from the Island

Availability of post-secondary or technical education

Changing long term weather conditions and patterns

Protection of eco-system and enhanced environmental sustainability

Trend of less brick and mortar retail and more online shopping

3. **When do you think the following factors will significantly impact YOUR life? (Now/1-2yrs/3-5yrs/6-10yrs/11-20yrs/Never)** (i.e. Traffic Congestion will impact my ability to maintain my quality of life.)

Aging population

Workforce and Skills shortage

Loss of younger adult generations

Health and Wellness

Workforce, Housing and Transportation

Tear down and rebuild of traditional neighborhoods

Traffic congestion associated with tourism season

Status as world class resort

Diversified and expanded recreational offerings

Traffic issues associated with daily commute patterns to and from the Island

Availability of post-secondary or technical education

Changing long term weather conditions and patterns

Protection of eco-system and enhanced environmental sustainability

Trend of less brick and mortar retail and more online shopping

4. **When do you think the following factors will significantly impact the neighborhood(s) where you live or work on Hilton Head Island? (Now/1-2yrs/3-5yrs/6-10yrs/11-20yrs/Never)** (i.e. Loss of younger adult generation will increase amount of vacant housing in my neighborhood.)

Aging population	Diversified and expanded recreational offerings
Workforce and Skills shortage	Traffic issues associated with daily commute patterns to and from the Island
Loss of younger adult generations	Availability of post-secondary or technical education
Health and Wellness	Changing long term weather conditions and patterns
Workforce, Housing and Transportation	Protection of eco-system and enhanced environmental sustainability
Tear down and rebuild of traditional neighborhoods	Trend of less brick and mortar retail and more online shopping
Traffic congestion associated with tourism season	
Status as world class resort	

5. **When do you think the following factors will significantly change the overall Hilton Head Island community? (Now/1-2yrs/3-5yrs/6-10yrs/11-20yrs/Never)** (i.e. Less brick and mortar retails will impact the Island economy)

Aging population	Diversified and expanded recreational offerings
Workforce and Skills shortage	Traffic issues associated with daily commute patterns to and from the Island
Loss of younger adult generations	Availability of post-secondary or technical education
Health and Wellness	Changing long term weather conditions and patterns
Workforce, Housing and Transportation	Protection of eco-system and enhanced environmental sustainability
Tear down and rebuild of traditional neighborhoods	Trend of less brick and mortar retail and more online shopping
Traffic congestion associated with tourism season	
Status as world class resort	

6. **Considering your answers to the above questions, how positive or negative do you think the changes will be within each topic area? -5(Very Negative) 5 (Very Positive)**

Aging population	Diversified and expanded recreational offerings
Workforce and Skills shortage	Traffic issues associated with daily commute patterns to and from the Island
Loss of younger adult generations	Availability of post-secondary or technical education
Health and Wellness	Changing long term weather conditions and patterns
Workforce, Housing and Transportation	Protection of eco-system and enhanced environmental sustainability
Tear down and rebuild of traditional neighborhoods	Trend of less brick and mortar retail and more online shopping
Traffic congestion associated with tourism season	
Status as world class resort	

7. **Considering your answers to the above questions, please score what you believe will be the overall impact or magnitude of the changes within each of the topic areas. 1-Very Small 10 Very Large**

Aging population	Traffic issues associated with daily commute patterns to and from the Island
Workforce and Skills shortage	Availability of post-secondary or technical education
Loss of younger adult generations	Changing long term weather conditions and patterns
Health and Wellness	Protection of eco-system and enhanced environmental sustainability
Workforce, Housing and Transportation	Trend of less brick and mortar retail and more online shopping
Tear down and rebuild of traditional neighborhoods	
Traffic congestion associated with tourism season	
Status as world class resort	
Diversified and expanded recreational offerings	

8. How well prepared is Hilton Head Island to adapt to these changes? Not at all prepared/Somewhat prepared/Prepared/Well Prepared/Very well prepared

Aging population	Diversified and expanded recreational offerings
Workforce and Skills shortage	Traffic issues associated with daily commute patterns to and from the Island
Loss of younger adult generations	Availability of post-secondary or technical education
Health and Wellness	Changing long term weather conditions and patterns
Workforce, Housing and Transportation	Protection of eco-system and enhanced environmental sustainability
Tear down and rebuild of traditional neighborhoods	Trend of less brick and mortar retail and more online shopping
Traffic congestion associated with tourism season	
Status as world class resort	

9. What do you believe are the biggest opportunities for the future of Hilton Head Island in the next 10 years?

10. What do you believe are biggest opportunities for the future of Hilton Head Island in the next 20 years?

11. What do you believe are the biggest threats to the future of Hilton Head Island in the next 10 years?

12. What do you believe are the biggest threats to the future of Hilton Head Island in the next 20 years?

Now that we have had a chance to learn about your perspective, please help us understand more about you.

13. In which broad category of topics do you identify yourself as being most interested?

- Community and social issues
- Environmental issues
- Economic and industry issues

14. What year was your first experience of Hilton Head Island

15. Which best describes you?

- | | | |
|---------------------------|-----------------------|------------------------|
| Full time Island resident | Daily Island commuter | Other (please specify) |
| Part time Island resident | Tourist | |

16. Which best describes where you currently live?

Hilton Head Plantation	Chaplin	Broad Creek Landing	Leamington	Shelter Cove
Indigo Run Plantation	Gardner	Cedar Wells	Middleton Place	Spanish Point
Spanish Wells	Grassland	Cedar Woods	Oakview	Sylby Tub
Palmetto Hall	Marshland	Central Park	Old House Creek	Tide Pointe
Port Royal Plantation	Mitchellville	Chinaberry Ridge	Paddocks at Jarvis Creek	Timbercrest
Palmetto Dunes	Jarvis	Creekside on Jarvis	Peregrine Point	Victoria Square
Long Cove	Squire Pope	Crosswinds	Point Comfort	Wells East
Shipyard	Stoney	Evian	Port Royal Tennis Village	Wild Horse Court
Wexford	Ashton Cove	Folly Field	Reggies Way	Woodlake Villas
Sea Pines	Barony Woods	Forest Beach	Seagrass Landing	Yacht Cove
Baygall	Beach City	Graham Lane Plantation	Shearwater	Other (please specify)
Big Hill	Bermuda Pointe	Jarvis Creek Club		
	Brighton Bay			

- 17. **In what year were you born?**
- 18. **Please provide your gender.**
 - Male
 - Female
 - Prefer not to answer
- 19. **How did you hear about this survey?**
 - Town of Hilton Head Island
 - Someone forwarded me the survey link
 - Traditional media outlets
 - Social media posts
 - Other (please specify)

10.2 COMMUNITY ENGAGEMENT SURVEY

Engagement Session Survey

As committed members of the Hilton Head Island community, we would like to hear your thoughts about the future vision for Hilton Head Island. This survey has 23 questions, and should take approximately 10-15 minutes to complete. Thank you for your input. We would like to collect some general information about you. This will enable us to filter and aggregate responses, to fully understand different perspectives about the future of Hilton Head Island.

Profile Information

HHI - DATA ENTRY - Community Engagement Workshops

- 1. **Please provide your gender**
 - Male
 - Female
 - Prefer not to answer
- 2. **Which categories describe you? (select all that apply)**

Asian / Pacific Islander	White / Caucasian
Black / African American	Multi-Racial
Hispanic / Latino	Prefer not to answer
Native American / American Indian	Other (please specify)
Native Islander	
- 3. **What is your age grouping?**

10 - 20 years	51 - 60 years
21 - 30 years	61 - 70 years
31 - 40 years	71 - 80 years
41 - 50 years	Over 81 years
- 4. **What year was your first experience of Hilton Head Island?**

2010 - 2017	1980 - 1989	1950 - 1959	Before 1930
2000 - 2009	1970 - 1979	1940 - 1949	
1990 - 1999	1960 - 1969	1930 - 1939	

5. **What best describes you?**

- Full Time Island Resident
- Part Time Island Resident
- Daily Island Commuter
- Guest
- Other (please specify)

6. **Where best describes where you currently live?**

Hilton Head Plantation	Grassland Marshland	Chinaberry Ridge	Port Royal Tennis Village
Indigo Run Plantation	Mitchelville	Creekside on Jarvis	Reggies Way
Spanish Wells	Jarvis	Crosswinds	Seagrass Landing
Palmetto Hall	Jonesville	Evian	Shearwater
Port Royal Plantation	Squire Pope	Folly Field	Shelter Cove
Palmetto Dunes	Stoney	Forest Beach	Spanish Point
Long Cove	Ashton Cove	Graham Lane Plantation	Sylby Tub
Shipyard	Barony Woods	Jarvis Creek Club	Tide Pointe
Wexford	Beach City	Leamington	Timbercrest
Sea Pines	Bermuda Pointe	Middleton Place	Victoria Square
Baygall	Brighton Bay	Oakview	Wells East
Big Hill	Broad Creek Landing	Old House Creek	Wild Horse Court
Chaplin	Cedar Wells	Paddocks at Jarvis Creek	Woodlake Villas
Gardner	Cedar Woods	Peregrine Point	Yacht Cove
	Central Park	Point Comfort	Other (please specify)

7. **In which broad category of topics do you identify yourself as most interested?**

- Community and Social Issues
- Environmental Issues
- Economic and Industry Issues

The Hilton Head Island - Our Future Think Tank identified two major themes and several issues that define different possible futures for various dimensions of the future fabric and feel of the community. The two primary themes centred around Hilton Head Island’s ability to build upon the Island’s Cultural Character and Social Fabric as well as focusing on the Development Trajectory of the Island. We would like to explore your views about what reflects the best future balance and priorities for Hilton Head Island.

8. **SOCIAL FABRIC** - The population of Hilton Head Island is aging. In terms of future population mix and demographics, how would you like Hilton Head Island to be in 2040? Please select your preference on the following continuum; from ‘An ideal active-aging and healthy retirement community’, to a ‘More diverse, mixed-age community attractive to families and younger professionals’.

9. **NATURE of TOURISM** - Hilton Head Island has a reputation as a 'world class' tourist destination, attracting over 2.5 million visitors per year. In terms of future tourism, how would you like Hilton Head Island to be in 2040? Please select your preference on the following continuum; from 'Year-round tourism industry which attracts a wide variety of tourists', to 'More selective tourism appealing to the right type of tourist'.
10. **RESIDENTIAL FABRIC** - Hilton Head Island is regarded as an 'exclusive' and prestigious residential location, with a high percentage of the population living within gated communities. How would you like Hilton Head Island to be in 2040? Please select your preference on the following continuum; from 'Strongly retain the exclusive and select residential focus' to 'More diverse residential and neighborhood options'.
11. **WORKFORCE PATTERN** - Today, many people commute to work on Hilton Head Island each day. In terms of employment and work locations, how would you like Hilton Head Island to be in 2040? Please select your preference on the following continuum; from a 'Continued strong reliance on commuter workforce' to 'Many more people who can live and work on the Island'.

#HHIOURFUTURE

In OUR FUTURE
I hope to see....

