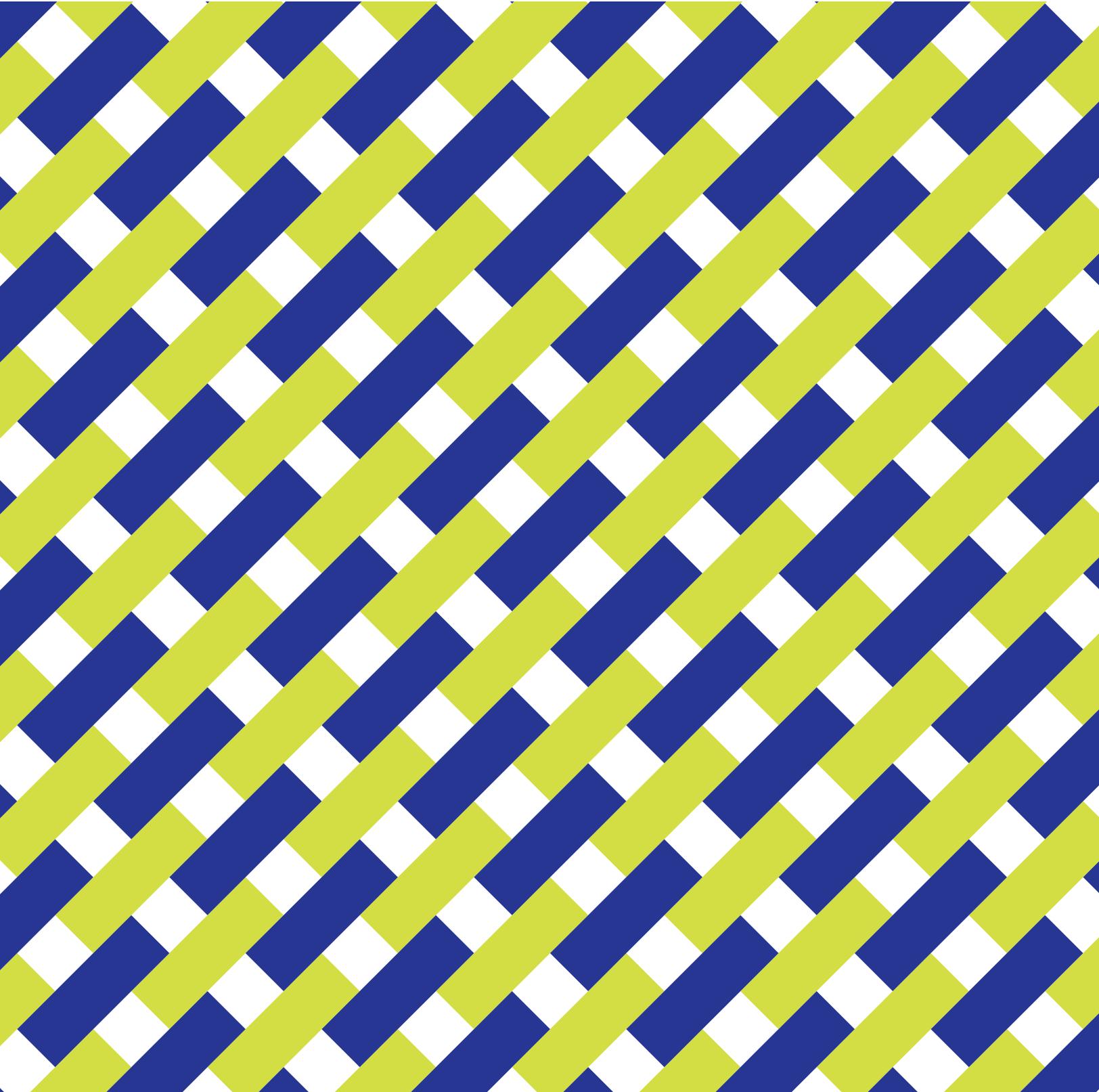


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Phase 2 Feasibility Study for a Performing Arts Venue

Executive Summary

Completed for the Roswell Arts Fund

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executive summary

The City of Roswell is home to the Roswell Cultural Arts Center (CAC), a 600-seat municipal auditorium operated by the City of Roswell Department of Recreation + Parks. For the last 25 years, the Georgia Ensemble Theatre (GET), a professional theatre company, has been a resident tenant in the building, along with the Roswell Historical Society. Additionally, a number of community groups utilize the facility for recitals and performances, and the Department of Recreation + Parks activates it with programs of its own. Currently, the CAC is Roswell's hub for the performing arts; but, it has very limited availability and lacks some of the amenities, features, and attributes of a high-quality, world-class performing arts venue.

Believing that there is an appetite for a high-quality facility and programming in the market, the Roswell Arts Fund released a Request for Proposals for a Performing Arts Venue Feasibility study in early 2017. DLR Group/Westlake Reed Leskosky and Arts Consulting Group were retained to complete the work. While the Phase 1 report provided the Roswell Arts Fund with valuable information, leadership believed that there was more work that needed to be done to assess the feasibility of a performing arts facilities project. As such, a Request for Proposals was released in late 2017 for a second phase of work.

Webb Management Services is a management consulting practice for the development and operation of arts and cultural facilities. The firm has been retained by the Roswell Arts Fund, a nonprofit organization dedicated to advancing the creative and performing arts throughout Roswell, to complete Phase 2 of the feasibility study. The subsequent report considers the case for a new facility in terms of four key issues:

- * **The Market:** Who is living in and visiting Roswell? What does that tell us about market propensity to support the arts and culture?
- * **User Demand:** What is the demand for arts and cultural space on the part of potential facility users?
- * **Facility Supply:** What is the supply of arts and cultural facilities in and around Roswell? Are there gaps in that inventory that a new facility might fill?
- * **Benefits + Impacts:** Where does the City of Roswell and the greater community want to be in the future? How does investing in the arts help to advance those goals?

To answer these questions, Webb Management interviewed a cross-section of cultural, political, and community leaders; toured local cultural facilities; studied the size and characteristics of the market area; developed and evaluated detailed inventories of existing performing arts and meeting and event facilities; estimated user demand for performance space; and, reviewed long-term planning documents in order to understand how, and where, a performing arts facilities project might align with community goals.

Forces + Trends

The feasibility study begins with a review of the broader forces and trends impacting today's cultural sector. Across the country, we are observing declines in traditional performing arts audiences, increasing competition for private sector philanthropy, and increasing fragility on the part of nonprofit arts organizations due to a lack of productivity gains. At the same time, data and research also indicate increases in active arts participation, growth in the area of arts education, and improving arguments for the value of the arts. The result is that arts and cultural facilities have begun to embrace broader definitions of culture and increasingly aim to operate as community living rooms rather than palaces for the arts.

Market Analysis

Understanding the market is an important part of any feasibility study. To define the market for a performing arts facility in Roswell, we combined anecdotal information with our experience working in similar communities and metropolitan areas nationwide. This allowed us to define the market as the City of Roswell, the 15-mile radius surrounding the Roswell City Hall, and the North Atlanta Metro, defined as northern Fulton County (described by the Greater North Fulton Chamber of Commerce as the area north of Highway 285) and Cherokee, Cobb, Forsyth, and Gwinnett Counties. We then collected demographic data from Environics Analytics, a market research resource that expands and extrapolates Census data using a variety of inputs. Finally, we assessed visitor data from D.K. Shifflet, a travel research and consulting company, for the Atlanta Metro Region. This suggested the following:

- * There are high levels of educational attainment and household income in all market segments, indicating propensity to support the traditional performing arts (ballet, opera, symphonic music, and theatre).
- * Diversity in age and race suggests opportunities for non-traditional, hands-on, and participatory arts and cultural programming, including festivals/events, classes, and workshops.
- * The non-resident market is comprised of leisure and business travelers. Typically, leisure travelers are either visiting Roswell's historic sites or are in town to attend a wedding. Regional data suggests that visitors are educated and affluent, again indicating propensity to support traditional arts programs.
- * One-quarter of visitors travel for culture and 19% travel for libation/culinary purposes. With Canton Street, multiple breweries, and a distillery in the works, this suggests that a new performance venue in Roswell could contribute to the city's tourism profile.
- * Arts + Economic Prosperity 5 suggests that the arts play an important role in Fulton County's economy, bringing in \$619 million in arts and culture expenditures. This data suggest that most attendees are Fulton County residents. While there are fewer non-resident attendees, they tend to spend almost \$15 more per person on arts and culture-related expenditures (excluding the cost of admission) than resident attendees.

Existing Facilities

In order to understand the existing supply of performing arts facilities and programs in the market, we developed inventories of indoor and outdoor spaces that are used four or more times a year for live performances. In addition, we also created a meeting and events facilities inventory, intended to help us understand how a performing arts facility might also be used to accommodate meetings and events. This suggested the following about local and regional facilities:

- * Local and regional indoor performance facilities are primarily used for producing performing arts and academic/educational programming. They are also rented by outside cultural organizations, schools/colleges, private entities, and promoters. Few indoor facilities, particularly in Roswell, present activity. Amongst those that do, music is the most commonly presented activity type, suggesting opportunities for alternative forms of presented entertainment (theatre, dance, film, family shows, comedy, a lecture series, etc.).
- * Most of the inventoried indoor facilities have capacities between 250 and 600, medium quality ratings, and low to no availability. This suggests that there are gaps for a high-quality performance facility in the market. This is particularly true in Roswell, where only one facility has a quality rating above 2.5, nearly every facility has low or no availability, and just one space, the Cultural Arts Center, is a true performance space.
- * Outdoor performance facilities are activated through presented music (typically headlining and popular music acts). They cover a range of capacities and tend to be well-equipped, but ultimately have medium quality ratings. In addition, the inventory highlights that all of the outdoor facilities are traditional amphitheaters, suggesting an opportunity for a high-quality, non-traditional outdoor venue that can be used throughout the year for performances and events.
- * The meetings and events facility inventory suggests that most meeting and event facilities in and around Roswell have reception capacities between 250 and 400 and quality ratings between 2.5 and 3.5. Facility matrices suggest that there are two gaps in the market: one for a high-quality facility that can accommodate between 500 and 800 for a reception event and one for a high-quality facility that can accommodate between 300 and 590 for a seated event.

User Demand + Potential Partners

Key to making an argument of support for new arts and cultural facilities in a community is understanding the need, or demand, for space on the part of potential users. To assess demand, we reviewed the Roswell Cultural Arts Center's utilization; interviewed a variety of community leaders, arts leaders, and promoters; estimated audience attendance; and identified potential partners. This allowed us to conclude the following:

- * Currently, the Cultural Arts Center is operating at capacity, limiting community use of the space and the growth of the organizations using it. In addition, some organizations are

unhappy with the facility, citing its lack of amenities and iffy acoustics as inhibiting the quality of their work.

- * Anecdotal research suggests that there is demand for additional space. The ideal facility would have between 350 and 750 seats, rehearsal space and practice studios, backstage amenities and storage, excellent acoustics, some instruments, and, perhaps, teaching and education space.
- * There is an opportunity to attract touring product to Roswell, specifically for presenting jazz, culturally-specific, Broadway, rock, and soul/blues/gospel acts.
- * There is broad community support for, and interest in, high-quality arts and cultural programs and facilities in the city. Additionally, attendance estimations suggest that a 500-seat facility activated with jazz; classical music; Latin, Spanish, or Salsa Music; and/or other types of music, theater, or dance could be quite busy throughout the year.
- * Two partner types currently exist for this project: marketing and programming. These partnerships, particularly those with possible programming partners, will need to be developed over time as the project progresses. Further, it is likely that additional partnership opportunities will appear as the project gets underway.

Community Benefits + Impacts

The final piece of the Feasibility study considers how investing in arts and culture can help the Roswell Arts Fund and City of Roswell advance goals for the future. Anecdotally, it was suggested that new facilities could contribute to quality of life, diversify the economy, draw tourists, and build the Roswell brand.

In addition, multiple city and community planning documents have outlined goals for arts and culture in Roswell. These have ranged from simply providing additional programs and opportunities for residents to be engaged in arts and culture in the community to the creation of additional venues of all shapes, sizes, and capabilities. Overall, the community's goals for art and culture are driven by a much broader set of aims. These include increased quality of life, diversifying the economy, increasing cultural tourism, and building community identity.

Conclusions + Recommendations

This research allowed us to conclude the following:

The Market: The local and regional market segments are well-educated and affluent, the two best indicators of propensity to support the performing arts. In addition, diversity in age and race suggests opportunities for non-traditional, hands-on, and participatory arts and cultural programming. While there is limited data available on visitors specifically to Roswell, regional data suggests that the non-resident market is educated and affluent, further indicating an opportunity for traditional performing arts. These visitors also like to travel for libation/culinary experiences and for

culture. This is important to note, as nonresident arts attendees typically have higher rates of event-related spending than resident attendees, as noted in Arts + Economic Prosperity 5.

Existing Facilities: The facility inventories suggest that there are a few gaps in the market that a new performing arts facility could fill. First, there is an opportunity for a high-quality performance facility across capacity ranges. This is particularly true in Roswell, where only one facility has a quality rating above 2.5, nearly every facility has low or no availability, and just one space, the Cultural Arts Center, is a true performance space. Then, there is an opportunity for a high-quality outdoor space, specifically a nontraditional space that could be used year-round for performances and events. Finally, there is an opportunity for a unique meeting and event facility that can accommodate groups of 300 to 590, seated.

User Demand + Potential Partners: The Roswell Cultural Arts Center is operating at capacity, suggesting that a new facility may alleviate some demand, enabling the CAC to better accommodate current users. In addition, some users are unsatisfied with the facility's availability, amenities, and acoustics.

When it comes to demand for space, anecdotal research suggests that six potential users have demand for a music-driven facility with a capacity between 350 and 750 seats. Other amenities would include rehearsal and storage space, small practice rooms, excellent acoustics, some instruments, and sufficient backstage space. In addition to potential users, conversations with regional promoters, presenters, and musicians suggest that a Roswell facility could attract touring product. Additional research indicates opportunities to present jazz, culturally-specific, Broadway, rock, and soul/blues/gospel acts.

Currently, two partner types exist for this project: marketing partners and programming partners. Marketing partners are those that can help market a new facility and its events calendar, while programming partners are those that could help activate it.

Benefits + Impacts: The City of Roswell has been planning for the arts and culture for quite some time. This project is in line with goals established through those efforts, including those related to the provision of additional programs for residents and the development of new facilities. At the same time, a facilities project could help the City achieve other goals related to economic and community development, growing cultural tourism, and increased quality of life.

Based on these findings, Webb Management Services provided the Roswell Arts Fund with the following recommendations:

Develop a facility for music, music education, meetings, and events. This should be a state-of-the-art, regionally distinct facility for live music. It should have a main performance space with a capacity of 400 to 600 and a smaller, more informal space for groups of 100, seated. The larger hall could have tiered seating, with some flexibility on the ground floor for a cabaret-style event, a dance floor, or other seating arrangements. Acoustics and technical amenities should be state-of-the-art so that the facility can accommodate both live performances and meetings and events. Ancillary spaces should include private teaching studios and classrooms, storage space, a green room, and a

bar/café. Programming might include regular performances by an in-house band or ensemble; locally, regionally, and nationally touring acts; and outside rentals.

Create a year-round, seasonal venue for outdoor entertainment, ideally in partnership with other communities. This facility should be located in a pastoral setting (for example, along the Chattahoochee River). It should have an indoor capacity of 800 to 1,200 with the ability to open up onto an outdoor lawn. It should have state-of-the-art acoustics and technical amenities appropriate for a range of music and special events. Programming should be music oriented, although the facility might also host touring dance and popular entertainment. This project might be considered by the City of Roswell's Department of Recreation + Parks, which has plans to develop performance and event space along the river as part of its 2016 Roswell River Parks Master Plan. A regional partnership might also make sense given the scale of the project and its potential impact on a wider area.

Fix the Cultural Arts Center. The Cultural Arts Center is a busy building that is home to a regionally known performing arts organization. It has a great location, plenty of parking, and is well-maintained.

First and foremost, in planning for the CAC's future, we would recommend that the Roswell Historical Society be placed into a facility of its own, whether it is one of Roswell's historic homes or a special wing in the public library. This will allow the organization to continue to grow and provide it with the resources needed to best take care of its archive. Then, in line with the work completed in previous studies, we would recommend pursuing an update of the Cultural Arts Center. This should at least include an acoustical treatment; updates to sound, lighting, and projection equipment; an automatic curtain; and some backstage improvements.

We believe that this building is an important community asset that can serve the arts in Roswell as a place for active and emerging arts groups. As such, we would recommend that an update of the facility also include a small, informal performance space, a rehearsal room, gallery space, and, potentially, a scene shop.

Next Steps

Assuming that the Roswell Arts Fund is in agreement with these recommendations, we would suggest that the organization move forward with business planning for one or more of the above recommendations. This would suggest how the recommended facility (or facilities) might be owned, operated, and sustained over time. This work may be joined with physical planning, which could include the development of a space program, site evaluation, and/or order-of-magnitude capital cost estimates. Following the completion of this work, the Roswell Arts Fund may choose to undertake a fundraising feasibility study, which would assess the magnitude of a capital campaign for a new performance facility in Roswell.

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