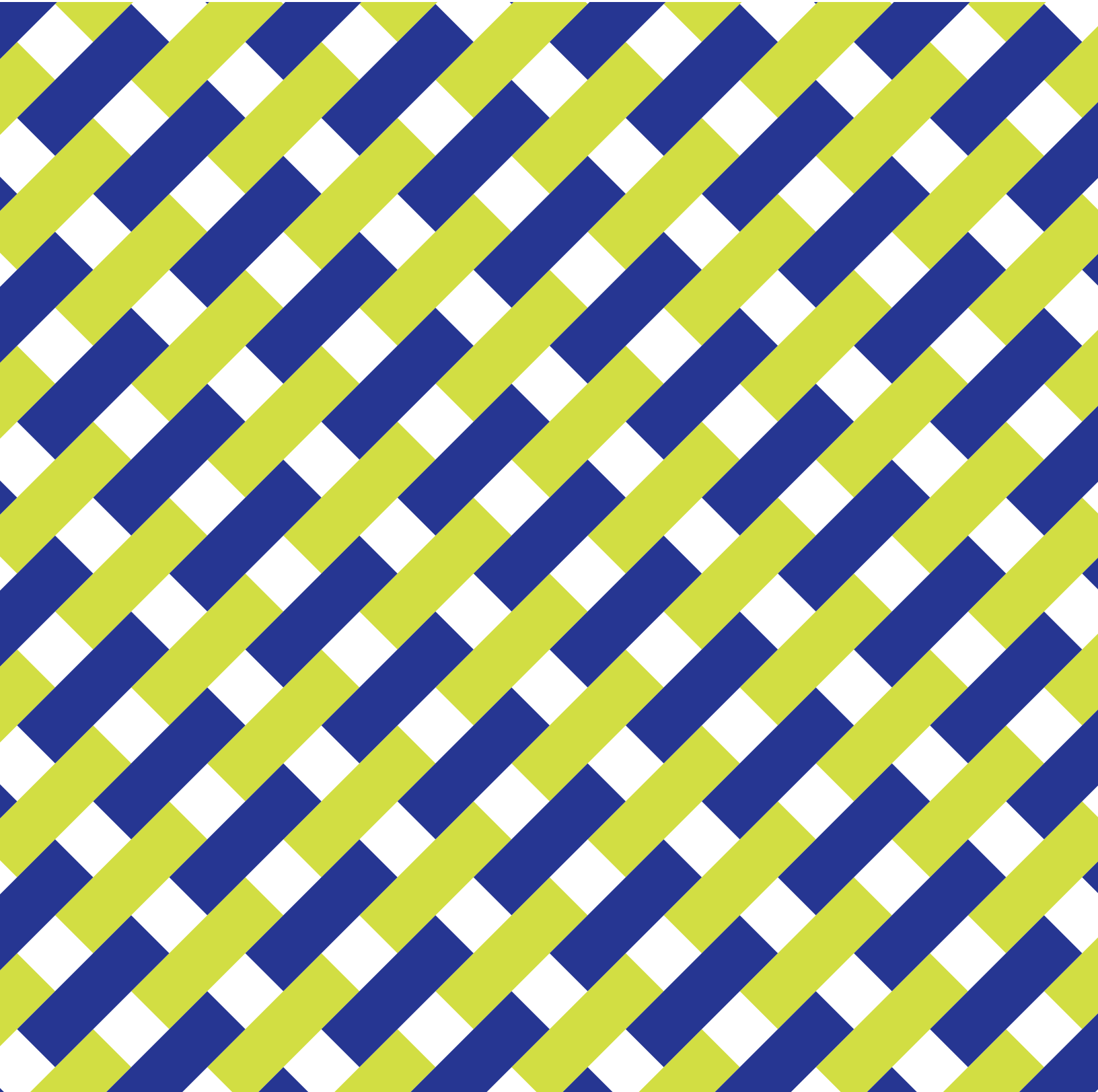


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April 2018

Phase 2 Feasibility Study for a Performing Arts Venue

Completed for the Roswell Arts Fund

contact:

Duncan Webb or Christina Kruse
Webb Management Services, Inc.
350 5th Avenue, Suite 4005
New York, NY 10118
t. (212) 929-5040
duncan@webbmgmt.org
christina@webbmgmt.org

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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.

phase 2 feasibility study

1. Introduction + Brief

Webb Management Services is a management consulting practice for the development and operation of arts and cultural facilities. The firm was established in 1997 and has since completed more than 400 projects for public and private sector clients across the country. Specific services include feasibility studies, business plans, and strategic plans. Previous projects in Georgia include The Arts at Fort McClellan Needs Assessment (Aniston), a Feasibility Study + Business Plan for the Miller Theater (Augusta), and a Cultural Master Plan for the City of Decatur.

In Roswell, Webb Management Services 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 a feasibility study for a performing arts venue in the city. This work 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, we 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 reports in order to understand how, and where, a performing arts facilities project might align with community goals.

The consulting team would like to use this opportunity to thank everyone that has contributed to the study, especially Rochelle Mucha, Lawrence Catchpole, and Heidi Speckhart with the Roswell Arts Fund.

A full list of study participants can be found as Appendix A.

2. Project Context

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. They found that there is an opportunity for a performance facility in Roswell. The analysis was based on the following conclusions:

- * There is strong community support for a new arts center. Residents are particularly interested in a facility that is convenient to get to and that enhances community pride.
- * The Cultural Arts Center will be inadequate for the community's cultural needs in the future.
- * The keys to a new facility's success will include its location and its positioning within the broader market, which includes a mix of both well-established performing arts venues and new facilities that are just coming on-line.

The resulting concept envisioned a 500-seat theater with a large public lobby, performer support spaces, a catering kitchen, and service and administrative space. Potential sites included the space next to the Cultural Arts Center, the Antique Mall at Webb Street, Roswell Square at the intersection of Atlanta Street and Mill Street, the Green at Alpharetta, and the Green at Plum.

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. This report is the result of that RFP.

3. Forces + Trends in the Sector

Today's arts and cultural sector is quite different from the one of our parents' or grandparents' generations. New technologies, changing tastes, and a growing desire to actively participate in creation has impacted how, when, and where we experience the arts. In planning for the future of the arts and culture in Roswell, it is important to understand the forces and trends at play in the field and how they might impact audiences. Following is a review of some of the broader forces and trends impacting the arts in the United States today.

3.1 Arts Audiences

The National Endowment for the Arts regularly releases the Survey of Public Participation in the Arts (SPPA), which assesses arts participation on the part of the country's adult population. Following are some basic facts about arts audiences based on highlights from the 2012 SPPA (the next iteration of

the study is expected to be released in the coming year), which can be downloaded here:
<http://arts.gov/publications/additional-materials-related-to-2012-sppa>

- * About one-third of adults attend live performance or visit museums or galleries each year. Over the last 20 years, participation within traditional arts disciplines—ballet, opera, symphonic music, and theatre—has remained relatively flat. More specifically, a decline in levels of participation (percentages of adults attending various types of events) has been mitigated only by increases in the total adult population.
- * Other parts of the SPPA suggest that attendance at traditional performing arts programs in more formal venues has largely been replaced by participation in a broader set of cultural and entertainment programs, including attendance at outdoor arts festivals, films, and electronic media platforms.
- * Most notably, participation in the traditional performing and visual arts amongst adults under the age of 40 has been on the decline for over 20 years.
- * Participation also varies tremendously by demographic characteristics. Educational attainment is by far the best predictor of arts attendance. The propensity to attend arts events among those who have completed college is exponentially greater than for those who have finished only high school. With each advanced level of education, there is an increased probability of arts attendance. Age also matters, but not nearly as much education—older adults tend to have higher rates of participation than younger adults, but only to a point.

3.2 Trends in Participation: Ethnically-Specific + Immigrant Populations

The City of Roswell has a majority White (Non-Hispanic) population; but, there are pockets of diversity, particularly in the surrounding region. For that reason, it is important to understand arts participation trends on the part of ethnically-specific and immigrant populations. Two sources provide insight on this topic: 1/ *Art-based Social Inclusion: An Investigation of Existing Assets and Innovative Strategies to Engage Immigrant Communities in Philadelphia* (William Penn Foundation, 2010), and 2/ *Beyond Attendance: A Multi-modal Understanding of Arts Participation* (Survey of Public Participation in the Arts (SPPA), National Endowment for the Arts (NEA,) 2011). Highlights from these works are as follows:

- * In Philadelphia, it was found that the average immigrant tends to participate in more creative activities annually (roughly 3.2) than the average US-born resident (roughly 2.8). Further, analysis of the NEA's SPPA suggests that Hispanic populations have higher rates of attendance at informal arts events (craft fairs and festivals, outdoor arts festivals, visits to historic sites and parks) than White (Non-Hispanic) populations. In connecting these two points, the research also indicates that immigrant populations are often highly engaged in art forms connected to their cultural identity. Participation in these art forms, however, tends to take place outside of formalized cultural institutions, in places like churches and community centers. Arts organizations often engage diverse communities in these familiar places, create relationships, and then draw them to more formal facilities.

- * Attendance at Latin, Spanish, or salsa music events mark the highest rates of attendance for self-identified Hispanics (17.4%), followed by art museums or galleries, art or craft fairs and festivals, outdoor performing arts festivals, and historic locations (all at approximately 14%).
- * Hispanic populations are 30% more likely than White (Non-Hispanic) populations to view or listen to arts recordings or live broadcasts. A similar pattern is seen in African American and American Indian populations.
- * In Philadelphia, it was found that the separation between immigrant populations and cultural institutions was due to the fact that the institutions were out of touch with their communities. While immigrant populations can change with great rapidity, the cultural institutions were seldom aware of the immigrant communities living within their neighborhoods.

These are important points as we consider participation in the arts in Roswell.

3.3 Trends in Arts Consumption + Patterns of Participation

Next, we consider some more recent trends impacting consumption of the arts and how audiences are choosing to participate in them.

Less Time and Less Planning: We are all busy and less likely to make a significant investment of our precious time into any activity, especially when we are asked to make that commitment well in advance of the event. This has led to a decline in subscription ticketing, as individuals are less willing to commit to an event early and more likely to keep their options open until the last moment. This also means that there are more consumers now who are willing to pay more later—the perceived premium of flexibility and the “on-demand” lifestyle.

The Demand for More Stimulation: All consumers, and particularly younger ones, are acclimated to multi-sensory engagement—we are watching, hearing, and reading simultaneously. This means that we have higher satisfaction thresholds and expectations for immediate rewards from an experience.

The Demand for Convenience: Audiences are seeking convenience. There is less tolerance for the event with built-in hardships, whether that means an uncomfortable seat, poor concessions service, or bad traffic on the way home. This suggests a low threshold for opting out of an event and pushes facilities and presenters towards a higher level of customer service. As an example, in October 2017, the National Center for Arts Research published *At What Cost? How Distance Influences Arts Attendance*. The study found that, as commute times increase, arts participation becomes radically more local.

The Importance of Interpretation-rich Experiences: The quality of an experience for audiences is dramatically improved by properly preparing them for that experience with information and context; then, more importantly, by providing them with the opportunity to process and share their experience with others. We must accept that audiences are less willing to accept someone else’s interpretation of an experience, preferring to develop and provide their own interpretation, whether it is through a Tweet, a Snap, a live stream, or something other.

The Diffusion of Cultural Tastes: Because of advances in information and communication technologies, people are now interested in a much broader array of programs. While at one time a person may have been a fan of music and painting from the Romantic period, today they might like Beyoncé, Bob Dylan, graphic novels, e-sports, pre-Columbian folk art, *and* Mozart's choral works.

The Paradox of Choice: Consumers today are faced with an extraordinary range of choices—whether that relates to food, cars, or culture. With our hyperactive, consumption-based economy, we are constantly bombarded with those choices and exhortations to buy. For many, there are simply too many choices being thrown at them, causing them to shut down and make no choice at all. This has left us hungry for filters and enablers, people and services that help us get past the paralysis brought on by too many choices. Word of mouth is the strongest version of this—a piece of one-on-one advice from a credible source—but, people are looking for other filters and influencers (curators, so to speak), who can help them make decisions about what to see, buy, or do.

Risk Versus Reward: Because of the cost (time and money) of attending or participating in an arts or cultural event, audiences are generally less willing to take risks and more willing to pay large sums for a guaranteed “home run” experience. This is consistent with a pervasive trend towards “trading up” and the rise of VIP culture, where there is an attempt to create the illusion of exclusivity, status, and prestige. The challenge is, the more everything becomes accessible, the more some people want to be separate—which suggests demand for value-added, premium arts experiences.

The Social Experience: Research suggests that audiences are drawn to the arts today by the opportunity for a social experience, as opposed to the more traditional attraction of intellectual stimulation. This is good news in that it provides live arts and cultural events with a clear competitive advantage: the shared social experience is not available to those at home, regardless of the quality of their technology. The challenge is that presenters and facilities must deliver much more than what is on the stage, creating an environment in which the social elements of the experience are fully enjoyed.

The Role of Media: Traditional media plays a reduced role in driving arts participation. Conversely, there is a proliferation of personal communication technologies and online word of mouth tools (Facebook, Instagram, trade newsletters, and so on). These tools are critically important as a means for consumers to spread word of mouth in a viral way. They are even more important for cultural suppliers to build a community of friends and supporters in a world where consumer loyalty is largely a thing of the past.

Everyone's an Artist: There has been a rise in self-directed, home-based, living arts participation that includes activities like gardening, writing, crafting, photography, film production, cooking, and decorating. Similarly, consumers are demanding more intense, “hands-on” arts experiences. This is evidenced by higher rates of personal and ‘amateur’ participation in community theatre groups, choirs, dance and movement classes, art and music classes, and more.

3.4 Nonprofit Arts Organizations

Along with change in the nature of demand for arts activities, there have been significant changes occurring in their supply, particularly when it comes to the health and sustainability of nonprofit arts organizations. Specifically:

Baumol and Bowen: William J. Baumol and William G. Bowen published “The Economic Dilemma of the Performing Arts” in 1965. In it, they posited that the lack of productivity gains in the creation of art (it takes the same number of musicians to perform Beethoven’s Symphony No. 9 in 2018 as it did when it was first performed in 1824), plus the inevitability of cost increases, would essentially force all organizations to raise more contributed income every year. Though there have been marginal improvements in the administration of buildings and organizations, there is ample evidence of this cost squeeze and increasing pressure on all arts organizations to raise more money to sustain operations. However, even if an organization matches its prior year revenue targets and buys only what it bought the year before, the annual funding requirement will continue to increase, year after year after year.

Supply Issues: According to figures from the Urban Institute’s National Center for Charitable Statistics, there were 118,000 arts nonprofit organizations registered in the United States in 2016, as compared to 82,000 in 1996. This 44% increase in arts nonprofits has led to ever increasing competition for public and private financial support.

The Political Environment: With new threats to eliminate the National Endowment for the Arts and the National Endowment for the Humanities, it is safe to say that we are now operating in a political environment in which direct support of the arts is controversial. While 2017 data from Grantmakers in the Arts indicates that total direct expenditures on the arts by local and state governments has been increasing, it is impossible to predict how that might change over the next four years.

Private Sector Funding: On the private side, there is a fully developed philanthropic sector, led by skilled marketers, technologists, and communicators, that is raising the bar for arts fundraisers and bringing new competition from sectors like healthcare and the environment. In addition, the new generation of funders is much more pro-active and engaged in their causes, expecting to be given the ability to direct the organization and the use of their funds in a much more personal manner.

3.5 Children and the Arts

Changes in the Federal education policy has afforded arts education an opportunity to become a more prominent component of a school’s curriculum. Through the 2016 Every Student Succeeds Act (ESSA), emphasis on a “well-rounded” education has prompted state education departments to rethink how the arts compliment the previous “common core” standards of the No Child Left Behind Act. To that end, there has been an emerging acknowledgement of the arts as a vital and transformative subject of the 21st Century classroom. This has been successfully articulated in the STEM to STEAM movement championed by the Rhode Island School of Design.

STEAM (Science, Technology, Engineering, Arts, and Math) is a movement that continues to be integrated into institutions and corporations in the United States. It expands the traditional areas of

innovation (Science, Technology, Engineering, and Math) to include Arts and Design. This movement is based on the belief that Arts and Design will transform the 21st century economy as science and technology did in the 20th century. This sentiment is echoed in the ESSA legislation, where a STEAM curriculum is eligible for a number of Federal grant programs that previously were reserved for the sciences, math, and English.

Through a concerted research effort over the past two decades, there is a mounting body of evidence that touts the benefits of arts education. The following are a collection of takeaways from these research efforts.

- * **The arts boost literacy and English Language Arts skills.** Drama instruction, for example, increases reading readiness and word fluency in early grades and continues to improve reading comprehension and writing skills throughout middle and high school. When the arts are integrated with literacy instruction, all students benefit, especially English Language Learners and students from low-income backgrounds.
- * **The arts advance achievement in math.** Arts-integrated math instruction facilitates a mastery of computation and estimation skills and challenging concepts like fractions.
- * **The arts improve school culture.** When schools integrate the arts across curriculums, disciplinary referrals decrease while effectiveness of instruction and teachers' ability to meet the needs of all students increase.
- * **The arts build collaboration and communication skills.** Art making allows students to experience what it feels like to be active members of a community and to work as a team to determine and achieve common goals.
- * **The arts strengthen problem solving ability.** Students who study the arts score higher than their peers on tests measuring the ability to analyze information and solve complex problems and are more likely to approach problems with patience and persistence.
- * **Students involved in the arts have increased capacity for leadership.** Students who participate in the arts develop leadership skills, including decision-making, strategy building, planning, and the ability to reflect.
- * **The arts strengthen the ability to persevere.** Through arts study, students improve in their ability to turn barriers into opportunities, overcome difficulty in completing complex tasks, and sustain attention. In a longitudinal study of 25,000 secondary school students, those with higher involvement in the arts scored better on measures of persistence than their peers with lower arts involvement.
- * **The arts facilitate cross-cultural understanding.** Arts experiences foster pro-social behaviors and social tolerance that help prepare students for life in an increasingly global and culturally diverse world.
- * **The arts build communities and support civic engagement.** Students who have had an arts-rich education volunteer more often and exhibit greater civic engagement than other students.

In addition, there has been recognition of the role of the arts in helping at-risk youth. In 2012, the NEA commissioned *Arts and Achievement in At-Risk Youth*. The study revealed that students who participate in the arts are:

- * Four times more likely to participate in math and science fairs;

- * Three times more likely to have good attendance in school;
- * Four times more likely to be recognized for academic excellence;
- * Three times more likely to be elected to class office; and
- * Average nearly 100 points higher on their SAT scores than students who take only one-half year or less of arts programming.

The report also revealed interesting results pertaining to work and professional experience:

- * 50% of students who had high arts involvement obtained gainful employment vs. 40% with low arts involvement;
- * 44% of students who had high arts involvement earned Associate's Degrees vs. 27% with low arts involvement;
- * 37% of students who had high arts involvement earned bachelor's degrees vs. 17% with low arts involvement;
- * 72% of business leaders say creativity is their highest priority when hiring employees; and,
- * 56% of employers and 79% of superintendents agree that a college degree in the arts is the most significant indicator of creativity in a prospective job candidate.

3.6 Responding to a Changing Environment

How should communities respond to these changes in the sector?

From Friday Night Lights to Community Living Rooms: The old image of a theater, museum, or gallery as a place where fancy people wearing formal attire can attend a performance or exhibition opening is gone. The new image is that of a community living room—a place that is always open and always active—with informal programming and an atmosphere that is buzzing and welcoming.

From Palaces to Districts: There is also a shift away from buildings that might be termed palaces of the arts—huge, fancy buildings in which multiple components are housed under one roof (like the Kennedy Center in Washington, DC)—to cultural districts, an area in which multiple smaller facilities are developed within a walkable radius. This is a positive trend for a number of reasons: Cultural districts can be developed over a period of time with a combination of new facilities and adaptive re-use of existing structures. The cost is generally lower, and these sets of facilities tend to be more inclusive and authentic than large, new buildings. They also tend to be better at motivating commercial development, as they are relatively porous and accommodating of other building projects.

Facilitating Active Participation: Facilities and organizations must support a culture of more active participation in the arts, including engagement of audiences before, during, and after events. Even more importantly, they must provide more opportunities for everyone in the community to express their own creativity, whether that means joining a choir, learning to paint, or volunteering to build sets for the local community theater.

Cost Structure: The future of facilities that serve the nonprofit sector depends on their ability to provide ongoing affordable access to nonprofit users, as well as arrangements that motivate efficient use of space and the maximization of revenues for both user and facility. Facility management

organizations must be lean and nimble in their staffing and embracing of technologies that drive operating efficiencies and economies.

Diversity, Equity, and Access: Over the last four years, the cultural sector has started to think more critically and intentionally about issues related to diversity, equity, and access. This has resulted in efforts to diversify organization leadership at the board and staff levels so that they are reflective of the communities they serve. It has also resulted in decentralized programming, with cultural organizations taking events and programs into neighborhoods not traditionally served by the arts.

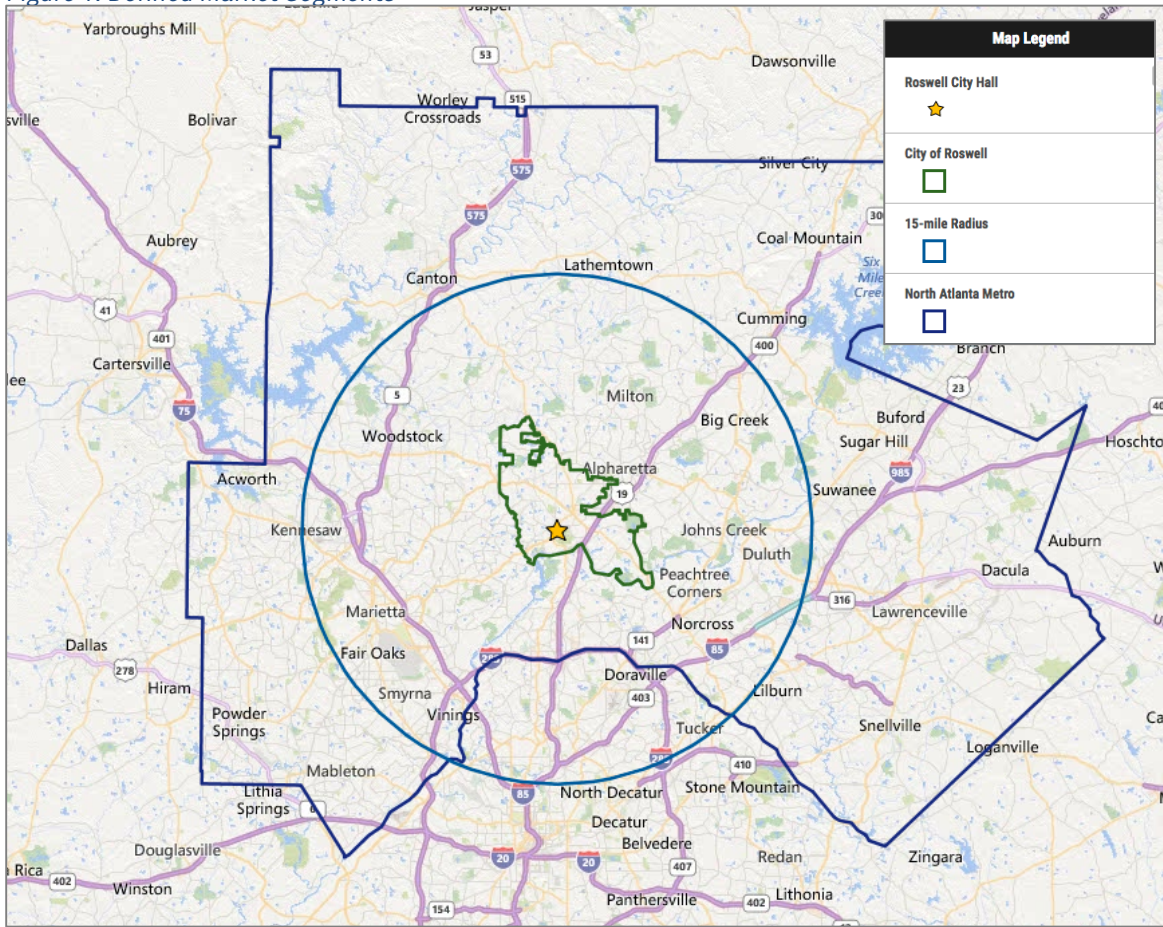
Community Engagement: Fundamentally, the cultural sector must become deeply engaged and connected to the life of its communities. Arts and culture cannot be seen as something special or exclusive, but rather something fundamental to the life of the community, offering benefits that are understood and embraced by all, whether that means driving economic development or enhancing quality of life.

4. Market Analysis

Defining a market, or potential audiences, can be a complicated issue for arts facilities. As a starting point, the market for a new facility in Roswell is the population of the City of Roswell. But, the city does not exist in a closed system—it is part of a much larger region with residents and visitors that come and go from far and wide. While those who live closest to the proposed facility are likely to be more involved with programming, new facilities have the potential to draw audiences, renters, and program participants from beyond the local community.

To determine 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 for a new facility as the City of Roswell, the 15-mile radius surrounding the Roswell City Hall, and the North Atlanta Metro, as shown in the map below (Figure 1). The North Atlanta Metro is 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. Demographic data from Environics Segmentation + Market Solutions, a market research resource that expands and extrapolates Census data using a variety of inputs, was then collected. Lastly, local and regional tourism data was examined in order to assess the current size of the non-resident population and the potential to attract visitors for cultural programs and events. All market data and related charts are included in Appendix B.

Figure 1: Defined Market Segments



4.1 The Local + Regional Markets

Demographic data, along with input from interviews, suggests the following about the market:

It is Growing: The population is growing across all three market segments. In Roswell, the population grew by 11% between 2000 and 2010, from 79,912 residents to 88,348. Between 2010 and 2023, it is projected that the population will have grown an additional 14% to reach a total population of 101,161.

Figure 3

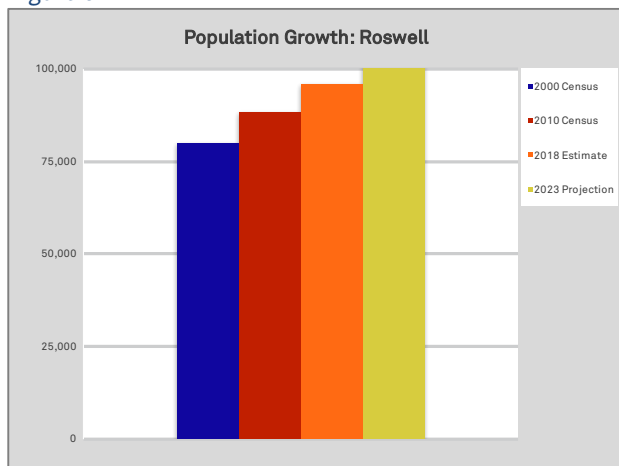
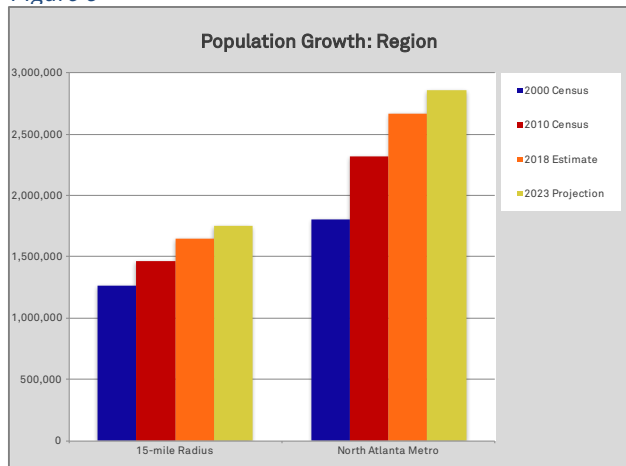


Figure 3



Regionally, the population is growing at even faster rates. In the 15-mile radius, the population grew from 1.3 million in 2000 to 1.5 million in 2010, a change of 16%. Between 2010 and 2023, it is projected that it will have grown an additional 19% to reach 1.8 million people. Growth has followed a similar pattern in the North Atlanta Metro, where the population grew from 1.8 million in 2000 to 2.3 million in 2010, a change of 29%. By 2023, it is projected that the population will reach 2.9 million, an additional change of 22%.

It is Well-educated: Locally and regionally, there are very high levels of educational attainment. In Roswell, 36% of the population has a Bachelor’s Degree and 19% has a Graduate or Professional Degree. Regionally, 32% of the 15-mile radius and 28% of the North Atlanta Metro have Bachelor’s Degrees, while an additional 19% and 15% have Graduate or Professional Degrees, respectively. Educational attainment in these market segments far outpace national numbers, where 19% of the population has a Bachelor’s Degree and 11% has Graduate or Professional Degrees.

It is Affluent: All three market segments have very high levels of household income. This is particularly true in Roswell where 28% of the population has a household income of \$150,000 or more and an additional 18% have a household income of \$100,000 to \$149,999. Nationally, just 13% and 15% of the population falls into these income brackets, respectively.

Median household income (MHI) is also quite high. In Roswell, MHI was \$72,131 in 2000. By 2023, it is projected to reach \$101,700. MHI is growing in the 15-mile radius and North Atlanta Metro as well, although at a somewhat slower pace. In 2000, MHI was \$61,889 in the 15-mile radius and \$62,355 in the North Atlanta Metro. It is projected that, by 2023, MHI will have reached \$87,213 in the 15-mile radius and \$84,435 in the North Atlanta Metro.

Figure 4

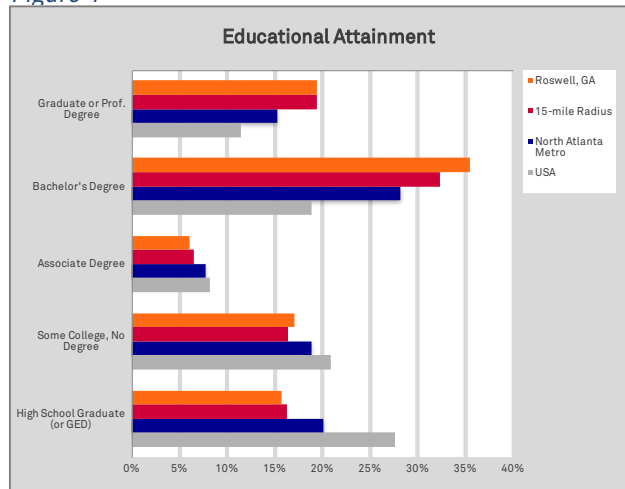


Figure 5

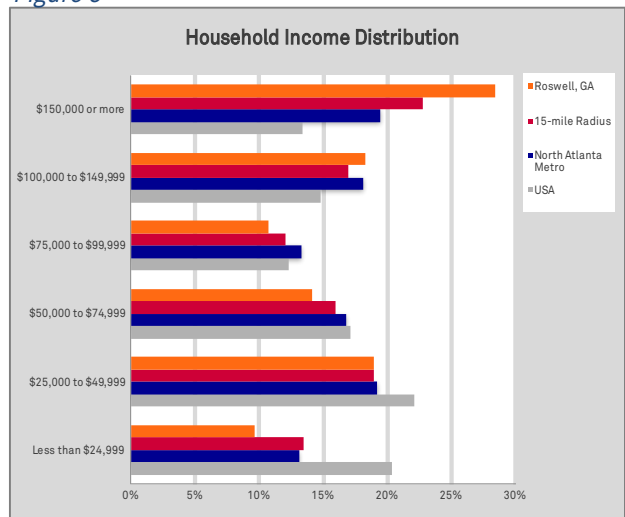
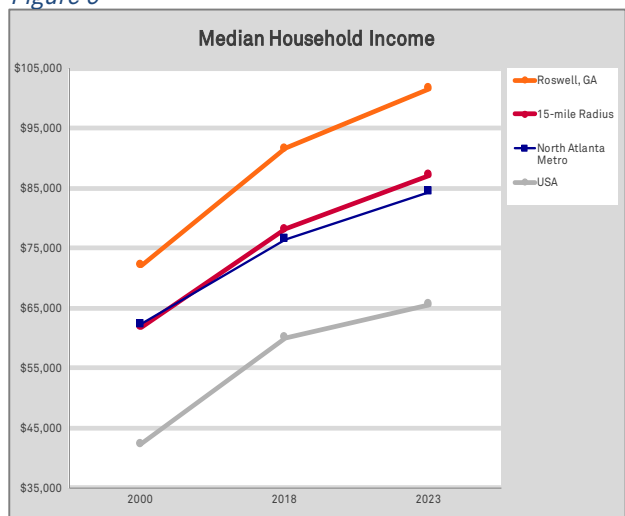


Figure 6



It is Diverse in Age: When it comes to age, each market segment is very diverse. There are, however, slight nuances that distinguish one market from another. Roswell, for example, skews slightly older: 14% of the population is aged 55 to 64 and 14% is age 65 or older. In the 15-mile radius, the population is largely comprised of Millennials and young professionals: 15% of the population is aged 25 to 34 and 15% is aged 35 to 44. The North Atlanta Metro market skews youngest: 25% of the population is aged 17 and under, suggesting the presence of families.

It is Diverse in Race and Ethnicity: In addition to being diverse in age, the market is racially and ethnically diverse. In the North Atlanta Metro, 21% of the population identifies as Black/African American, 15% identifies as Hispanic/Latina/o/x, and 10% identifies as Asian. In the 15-mile radius, 16% of the population identifies as Black/African American, 16% identifies as Hispanic/Latina/o/x, and 11% identifies as Asian. Of all three market segments, Roswell is the least diverse: 16% of the population identifies as Hispanic/Latina/o/x, 12% identifies as Black/African American, and 4% identifies as Asian.

This racial diversity translates into some linguistic diversity. Although English is the predominate language spoken at home in all three market segments, pockets of the population speak Spanish, an Indo-European language, or an Asian Pacific Islander Language.

Figure 7

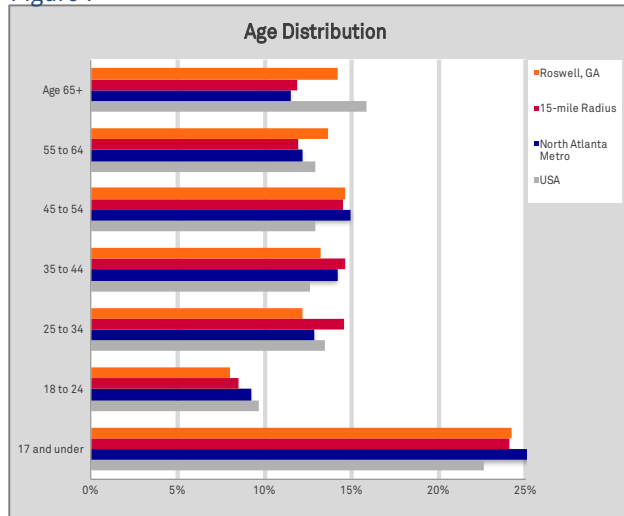


Figure 8

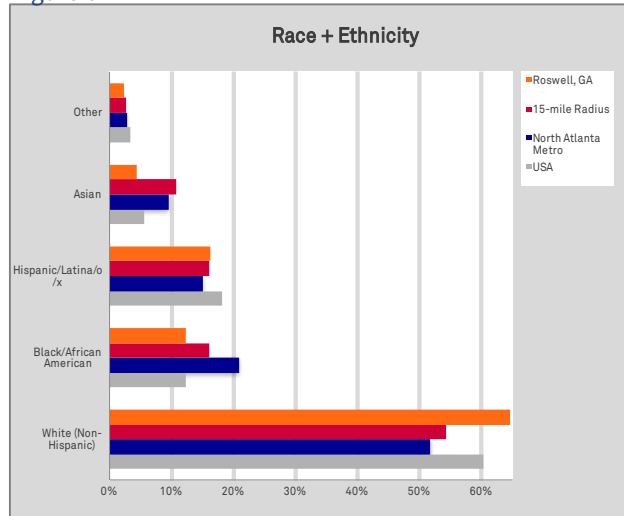
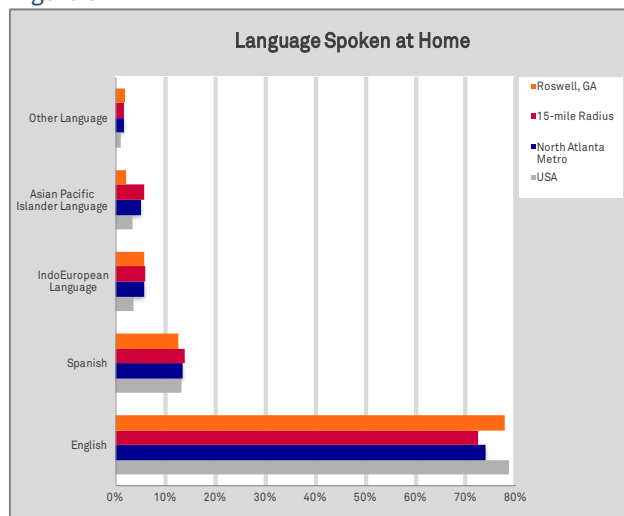


Figure 9



4.2 The Non-resident Market

There is limited Roswell-specific tourism data available. However, anecdotal research suggests that visitors travel from across the country and internationally. Many are staying in Roswell because of its proximity to convention, meeting, and event facilities while others are traveling to visit historic sites. Weddings are a primary driver of tourism in Roswell, which has more than 35 facilities for wedding receptions and ceremonies.

In 2016, D.K. Shifflet, a travel research and consulting company, released its Georgia Tourism Region Visitor Profile for the Atlanta Metro Region. That document indicates the following about tourism in the Atlanta Metro area:

- * Tourism in the Atlanta Metro is growing. In 2015, there were 45.9 million visitors to the Atlanta Metro, accounting for 49% of all visitors to the State of Georgia. In 2016, this number grew to 47.6 million visitors.
- * Seventy-one percent of visitors travel to the Atlanta Metro from outside of the state and 29% travel from within the state. The majority of in-state visitors are traveling from within Atlanta (19%). Out-of-state visitors are traveling from Birmingham, AL (7%) and Greenville-Spartanburg, SC/Asheville, NC/Anderson, SC (4%).
- * Nearly three-quarters of all visitors are traveling for leisure (73%). Of these, 19% are traveling for vacation. The remainder are traveling to visit a friend/relative.
- * One-quarter (25%) of Atlanta Metro visitors travel for culture. Of those, 7% visit historic sites, 7% see a movie, and 6% attend concerts, theatre, dance, etc. Nineteen percent of visitors are traveling for libation and culinary purposes. Of those, 19% are traveling for a culinary/dining experience and 1% are traveling to partake in winery/distillery/brewery tours. This is great news for Roswell, given the reputation of Canton Street and its growing libations scene.
- * The average visitor party size is 1.74 persons. Few visitors (12%) travel with kids.
- * A visitor's average length of stay is 2.27 days and 3.30 nights. Nearly all visitors (83%) utilize a car as their primary mode of transit and many (29%) travel to the Atlanta Metro from 101 to 250 miles away.
- * The average person spends \$128.50 per day. Those funds are largely spent on transportation (\$43.90 spent per day) and lodging (\$57.80 spent per day). On average, visitors spend \$9.90 on entertainment.
- * Visitors have an average age of 45.4 and an average household income of \$85,906. The majority of visitors are employed (67%), married (63%), and have no children in the household (59%).

4.3 Arts + Economic Prosperity 5

During the Summer of 2017, Americans for the Arts (AFTA) released Arts + Economic Prosperity 5, a detailed economic impacts assessment of the nonprofit arts and culture industry in 341 communities and regions across the United States. Appendix C shows the results of AFTA's study on Fulton County.

During fiscal year 2015, there were \$619 million in total arts and culture industry expenditures in the county. Of that, \$383 million came from arts and cultural organizations and \$236 million came from audience expenditures. This spending helped support over 19,000 jobs, resulted in \$490.6 million in household income to residents, and generated more than \$56 million for local and state governments.

The study also found that resident attendees make up the majority of those attending arts and culture events in Fulton County: there were 5.9 million resident attendees to arts and cultural events in 2015 compared to 2.7 million nonresidents. Nonresident attendees, however, spend a fair amount more than their resident counterparts. In FY 2015, nonresident attendees spent \$37.28 in event-related spending (excluding the cost of admission), while resident attendees spent \$22.66 (excluding the cost of admission).

4.4 Market Analysis Conclusions

This research suggests the following about the market for the arts in and around Roswell:

- * 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, they 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.

5. Existing Facilities

In order to understand the existing supply of performing arts facilities and programs in the market, we have 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. All inventories are included as Appendix D.

5.1 Performance Facilities Inventory

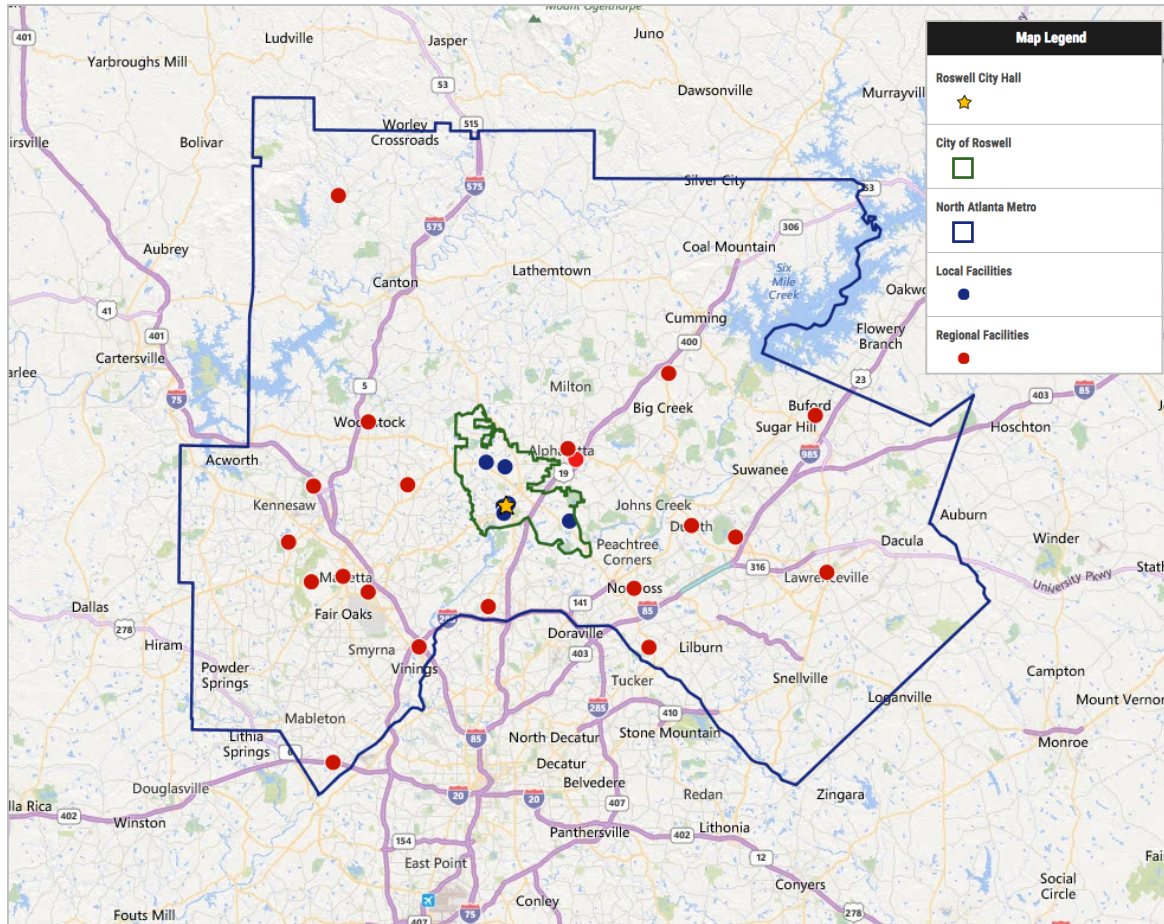
The Performance Facilities Inventory considers the physical features and types of activities hosted in 31 local and regional facilities. In addition, the overall quality of each facility has been rated using eight variables:

1. Facility Condition
2. Staff and Support
3. Theatrical Functionality
4. Acoustics
5. Customer Amenities
6. User Amenities
7. Atmosphere + Character
8. Suitability for Users

Variables are rated on a weighted scale of 1 to 4, with 4 being the best possible score. The 'facility condition' and 'staff and support' categories carry the most weight. Some of the inventoried facilities were visited by the consulting team while other ratings are self-reported by facility managers or based on anecdotal information. Because of that, this exercise is somewhat subjective, but provides a good basis for comparison.

The inventoried facilities range in capacity from 100 to 2,750 seats. Nine of the facilities are in Roswell (referred to as 'local' facilities) and 22 are beyond the borders of Roswell, but within the North Atlanta Metro (referred to as 'regional' facilities). To be included in the inventory, the facility must be used for live performances four or more times a year. A map of all facilities is included below (Figure 10).

Figure 10: Local + Regional Performance Facilities



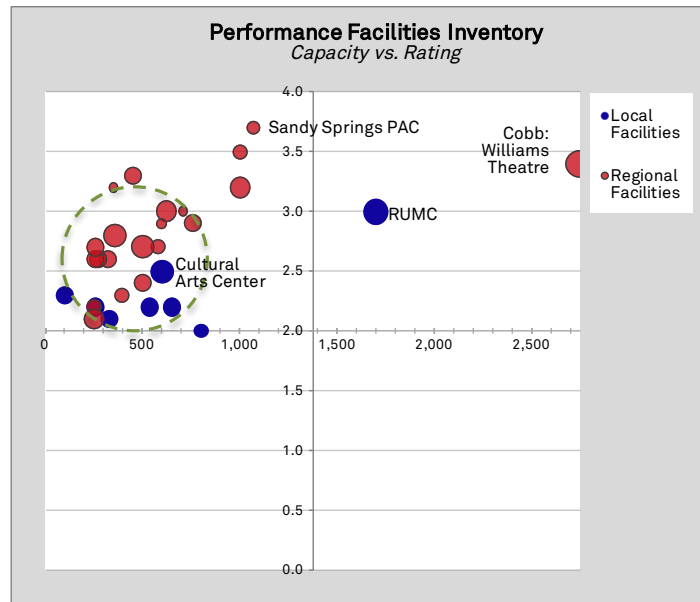
Facility Programming + Activity: The first table in the appendix (Appendix D, Table 1), organized by seating capacity, shows presenting (when facilities buy touring shows), producing (when the art is created by the building operator), and rental activity (in which case the work comes from another group that assumes the risk in using the facility). Three facilities in Roswell, and nine in the region, present performing arts activities. Music is the most commonly presented activity type, followed by headlining/popular acts. Very few facilities present theatre, dance, film, family shows, comedy, guest speakers, or culturally specific entertainment. This is particularly true in Roswell. When it comes to producing, nearly all of the inventoried facilities (23 of 31) produce performing arts activities; 19 offer academic or educational programs. Most facilities are available for rent by outside users, whether they are cultural organizations, schools/colleges, private entities, or promoters/presenters.

Facility Features + Amenities: The second table in the appendix (Appendix D, Table 2) shows facility features and amenities. In Roswell, two facilities have flexible seating, four have kitchen facilities, and eight have rehearsal/program space. The Cultural Arts Center and Blessed Trinity Performing Arts High School are the only local facilities with wingspace and an orchestra pit. Blessed Trinity is the only local facility have a fly system. Regionally, facilities tend to have more features: 12 have rehearsal/program space, eight have sizeable wingspace, five have kitchen facilities, four have an orchestra pit, and three have fly space.

Across the inventory, facilities are well-equipped, having lighting, sound, and film/projection equipment. Regionally, many facilities provide ticketing services, serve alcohol, and/or have food service/concessions. In Roswell, three facility allows alcohol, three have food service/concessions, and two have ticketing services.

Facility Capacity + Quality: The appended tables show each facility’s capacity and our measure of quality, as previously described. This information allows us to visually present the inventory with a series of matrices. Each matrix shows the quality rating on the vertical axis and the seating capacity on the horizontal axis. The size of each circle is an indication of how many different types of programs the facility supports (the larger the circle, the more types of activities are supported).

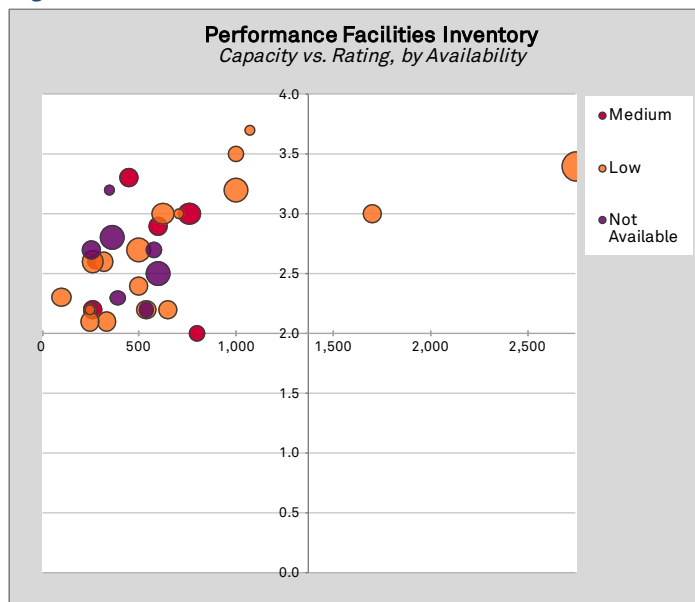
Figure 11



The first matrix (Figure 11) compares the quality and capacity of local facilities (blue dots) to the quality and capacity of regional facilities (red dots). It suggests that most facilities have between 250 and 600 seats and medium quality ratings, as indicated by the dashed circle. Compared to regional facilities, indoor performance spaces in Roswell have low quality ratings. In fact, Roswell United Methodist Church has the highest rating of all local facilities (3.0). Regionally, the soon-to-be open Sandy Springs Performing Arts Center and the Cobb Energy Center’s Williams Theatre have the highest ratings (3.4 and 3.7, respectively).

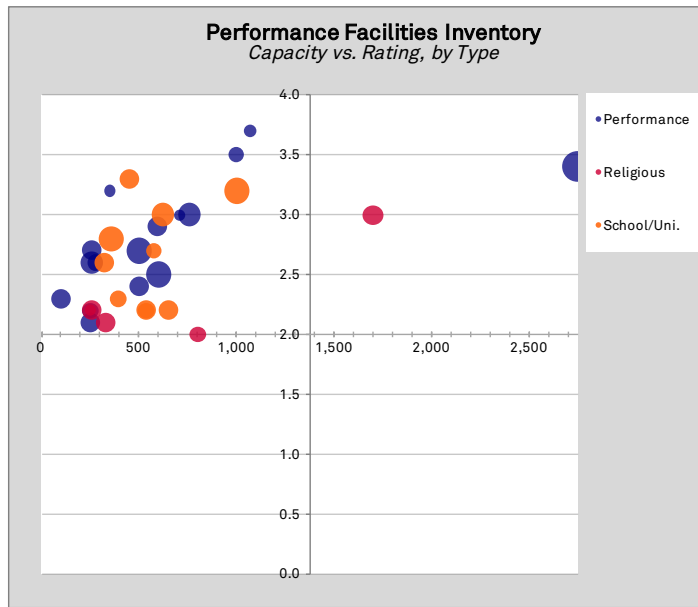
In the second matrix (Figure 12), the facilities are shaded according to their availability. Availability is based on the ease with which an outside user can book a space on a prime night of the week (Thursday, Friday, or Saturday) and is determined through interviews with facility managers/users or online research. Of the 31 inventoried facilities, none have high availability. Rather, seven are not available for outside use, 17 have low availability, and 7 have medium availability. Of the facilities with medium availability, just two are in Roswell: the Roswell Presbyterian Church and the Unitarian Universalist Metro Atlanta North.

Figure 12



In the third matrix (Figure 13), the color of the circle represents the type of space the facility is, comparing performance spaces to facilities in churches or schools/universities. (Note that only Roswell churches were included in the inventory.) Sixteen of the inventoried facilities are performance spaces. These include the Cultural Arts Center, the Williams Theatre at the Cobb Energy Center, and the Sandy Springs Performing Arts Center. Ten of the inventoried facilities are in schools or universities and five are associated with a religion.

Figure 13



Of the facilities that have capacities of 1,000 seats or more, three are performance spaces, one is a school, and one is a church. Each of these facilities has a medium to high quality rating. Church facilities tend to have lower quality ratings, while performance and school/university facilities have ratings that range from 2.0 to 3.3.

Returning to our original matrix (here shown as Figure 14 below), this research suggests that there are gaps for a high-quality performance facility in the market, as indicated by the dashed circles. This is particularly true in Roswell (Figure 15), 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.

Figure 14

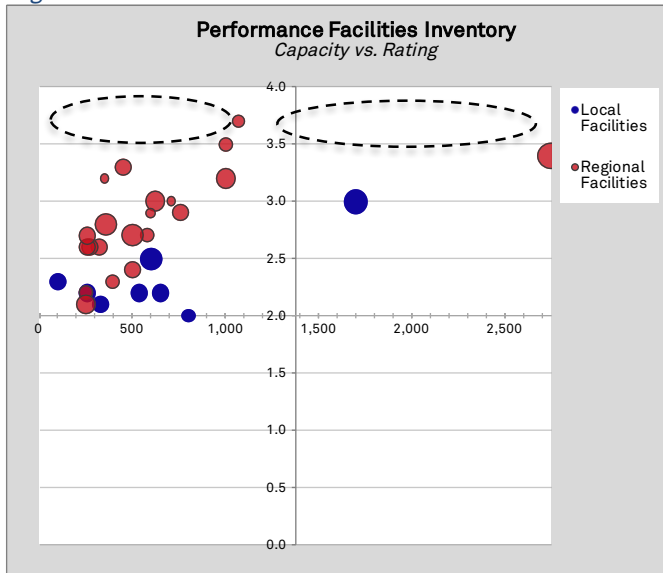
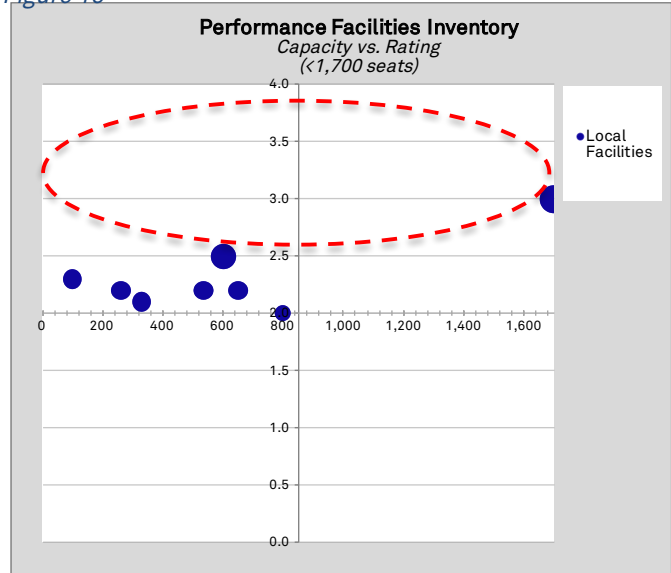


Figure 15



5.2 Outdoor Facilities Inventory

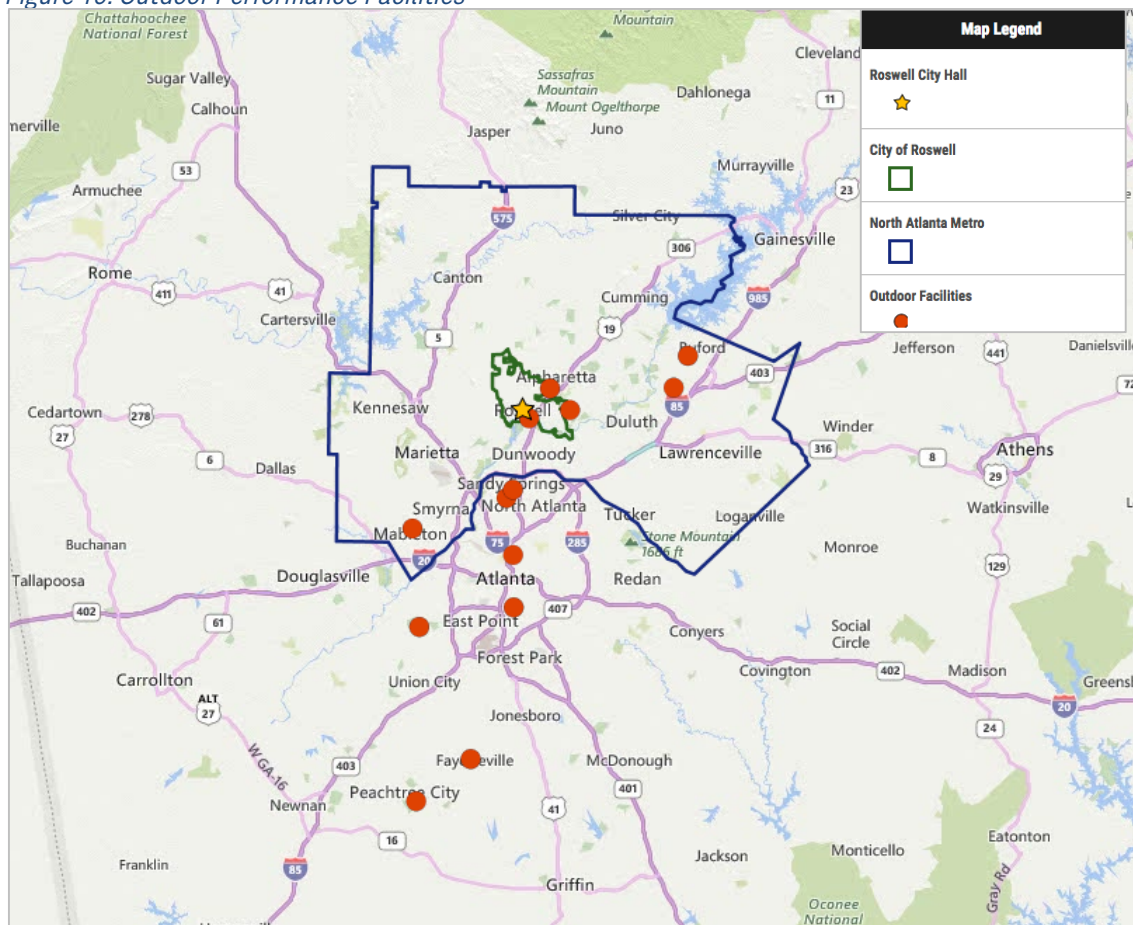
The Outdoor Facilities Inventory considers the programming, features, and amenities of 13 outdoor facilities. These are permanent structures (as opposed to temporary stages) that are used for outdoor programming at least four times in a year. As with the Performance Facilities Inventory, each outdoor facility has been rated according to eight variables:

1. Facility Condition
2. Staff and Support
3. Live Music Functionality
4. Acoustics
5. Customer Amenities
6. User Amenities
7. Atmosphere + Character
8. Suitability for Users

Here again, variables are rated on a weighted scale of 1 to 4, with 4 being the best possible score, and the 'facility condition' and 'staff and support' categories carrying the most weight.

The inventoried facilities range in capacity from 1,000 to 19,000 seats. For the purposes of this exercise, we have included facilities located both within and beyond the North Atlanta Metro. A map of these facilities is included below (Figure 16). Six facilities are located within our defined North

Figure 16: Outdoor Performance Facilities



Atlanta Metro and seven are located beyond its borders in Atlanta and further south.

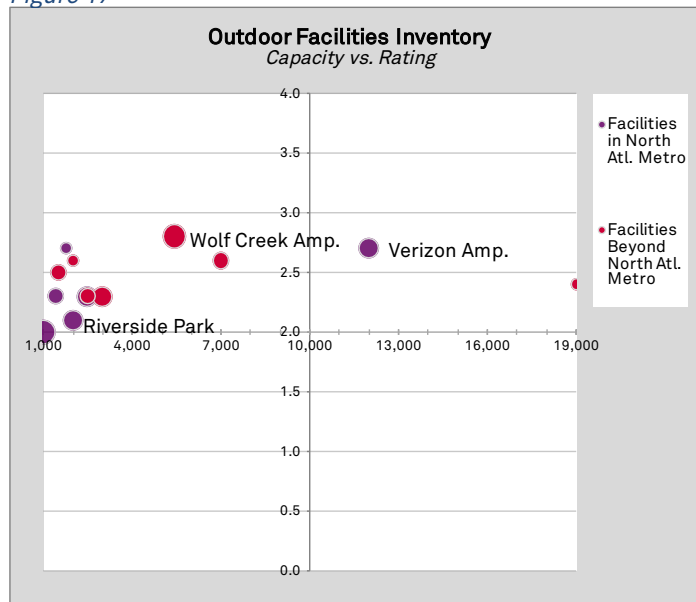
Facility Programming + Activity: The third table in the appendix (Appendix D, Table 3) suggests that nearly all of the inventoried outdoor facilities (10 out of 13) are used for presenting headlining acts and popular music. Eight present non-headlining/popular music, two present film, and one presents theatre. None of the inventoried facilities produce performing arts or educational programs, although four are used for festivals. Rental activity is also somewhat limited: six facilities are rented by cultural organizations and/or for private events, and two are rented by promoters.

Facility Features + Amenities: Table 4 in Appendix D indicates that half of the inventoried outdoor facilities have covered seating (three in the North Atlanta Metro and four outside of it), 11 have lawn seating, and 8 have table seating. None of the facilities have fly space, although most have sizeable wingspace.

Outdoor facilities tend to be well-equipped, particularly when it comes to lighting and sound equipment. Just one, however, has film/projection equipment. Eleven of the inventoried facilities serve alcohol, nine have dedicated parking, and ten have food stands, tents, or trucks. Three facilities in the North Atlanta Metro offer ticketing services. In the southern part of the metro, five facilities provide these services.

Facility Capacity + Quality: Once again, we have created a matrix comparing the qualities and capacities of each inventoried facility (Figure 17). This suggests that Metro Atlanta’s outdoor facilities are of medium quality. It also suggests that many are quite small—nine of the 13 facilities have capacities between 1,000 and 3,000. As such, this matrix indicates that there is an opportunity for a high-quality outdoor venue across capacity ranges.

Figure 17



Beyond that, however, the inventory highlights that all of the facilities are, more or less, traditional amphitheaters. This implies that there is another

opportunity in the market: one for a high-quality, non-traditional outdoor venue that can be used throughout the year for performances and events.

5.3 Meeting + Event Facilities Inventory

The Meeting + Event Facilities Inventory assesses the physical attributes and event types supported by 24 local and regional meeting and event facilities with seated or standing capacities of 250 or more. (As a note, it does not include performing arts facilities, like the CAC, that may occasionally

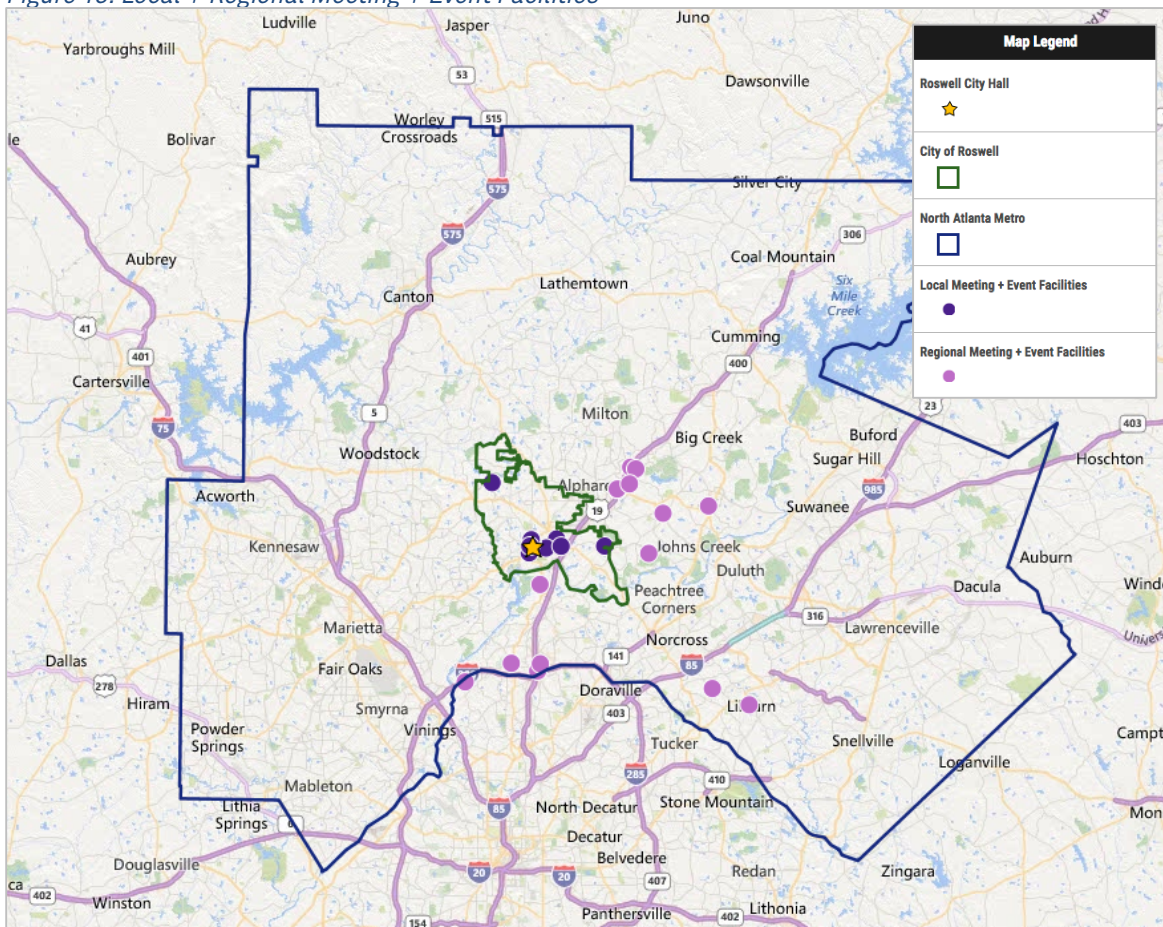
accommodate meetings and events.) Unlike the Indoor and Outdoor Performance Facilities Inventories, the meeting and event facilities have been rated according to six variables:

1. Facility Condition
2. Staff and Support
3. Event Functionality
4. User Amenities
5. Atmosphere + Character
6. Suitability for Users

Here again, variables are rated on a weighted scale of 1 to 4, with 4 being the best possible score. The ‘facility condition’, ‘staff and support’, and ‘event functionality’ categories carry the most weight.

The inventoried facilities range in capacity from 250 to 800 seats for a theatre/conference-style set-up and 250 to 1,000 for a standing reception. Nine of the inventoried facilities are in Roswell (referred to as ‘local’ facilities) and 15 are located in the North Atlanta Metro (referred to as ‘regional’ facilities). A map of all facilities is included below (Figure 18).

Figure 18: Local + Regional Meeting + Event Facilities



Event Types Supported + Facility Attributes: Table 5 in Appendix D indicates that none of the inventoried meeting and event facilities are used for national conferences. Ten facilities, however, are used for local/regional conferences—three in Roswell and seven in the region. All of the inventoried facilities are used for private events and all but two are used for community events.

In Roswell, four of the inventoried venues are unique or historic and two are golf clubs. Regionally, three venues are unique or historic, and all three of them are golf clubs.

Nearly half of the inventoried local facilities have multiple event or meeting rooms, sound and projection equipment, and internet/Wi-Fi. Two facilities have lighting equipment and a full stage available and three have a dance floor. Regionally, meeting and event facilities are somewhat better equipped, although most lack a dance floor and/or full-stage. Across the inventory, catering is primarily handled on-site. Three local facilities and six regional facilities allow outside catering and one facility in each market segment has a commercial kitchen that is available for use. None of the inventoried facilities have an available warming kitchen.

Facility Capacity + Quality: In Figure 19, each meeting and event facility has been plotted according to its reception (standing) capacity and quality rating. Whereas, in the previous matrices, the size of the circles corresponded with the number of activities each facility accommodated, here they correlate with the number of attributes each facility has. Thus, a small circle is an indication of a facility with few attributes.

The matrix suggests that most meeting and event facilities have reception capacities between 250 and 400, as indicated by the dashed circle in Figure 20. They also tend to be high in quality—22 have quality ratings between 2.5 and 3.5.

In Figure 20, the facilities have been plotted according to their type. Fourteen are designated event spaces and 10 are hotels. Event facilities tend to be smaller in size, vary more in quality, and have minimal attributes. Hotel spaces, on the other hand, cover a range of capacities. All but two have a quality rating between 3.0 and 3.5 and they typically have more attributes than event spaces.

Figure 19

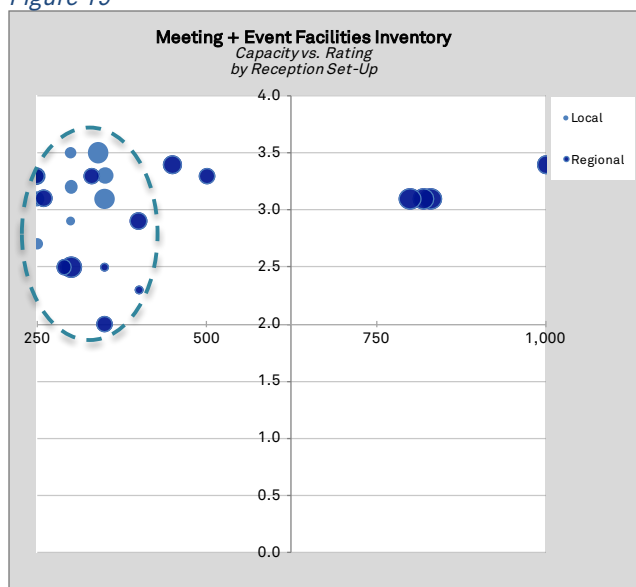
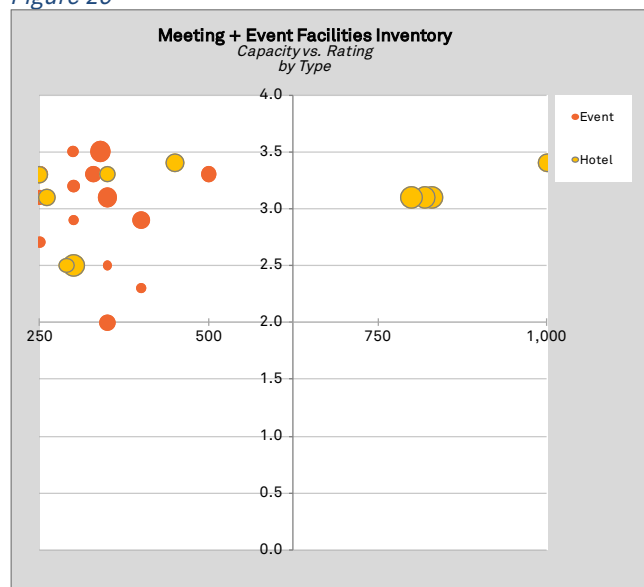
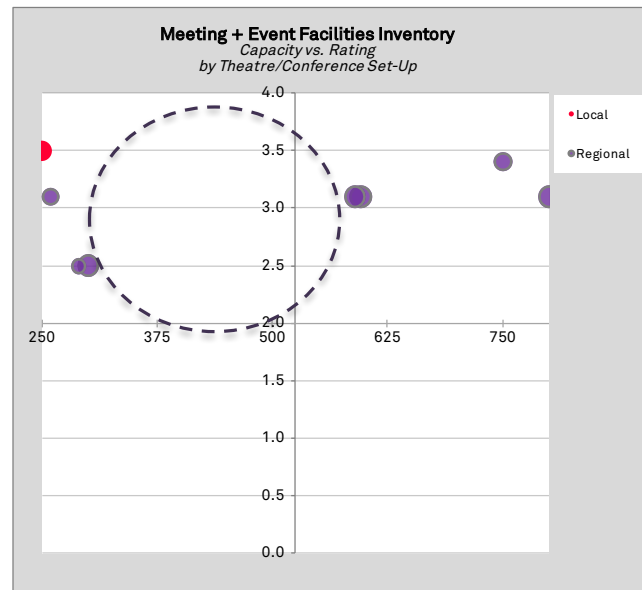


Figure 20



Building on this analysis, the inventoried meeting and event facilities have been plotted according to their theatre/conference capacities (Figure 21). (Not all facilities have a theatre/conference set-up option or capacity of 250 or more; thus, this matrix is less crowded than the two prior.) Just one local event space, Roswell Historic Cottage, has a seated capacity of 250. The remaining facilities with theatre/conference capacities of 250 seats or more are hotels and are all located within the North Atlanta Metro.

Figure 21



Noticeably, this creates a significant gap in the matrix: four facilities have the ability to seat between 250 and 300 for an event and four have the ability to seat between 590 and 800, leaving space for a high-quality meetings and events facility that can accommodate between 300 and 590 for a seated event, as indicated by the dashed circle.

5.4 Existing Facilities Conclusions

This research allows us to make the following conclusions about the opportunity for a new facility in Roswell:

- * 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 amphitheatres. This suggests 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. Event facilities tend to be smaller in size than hotel spaces. They also vary more in quality and have fewer attributes. 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.

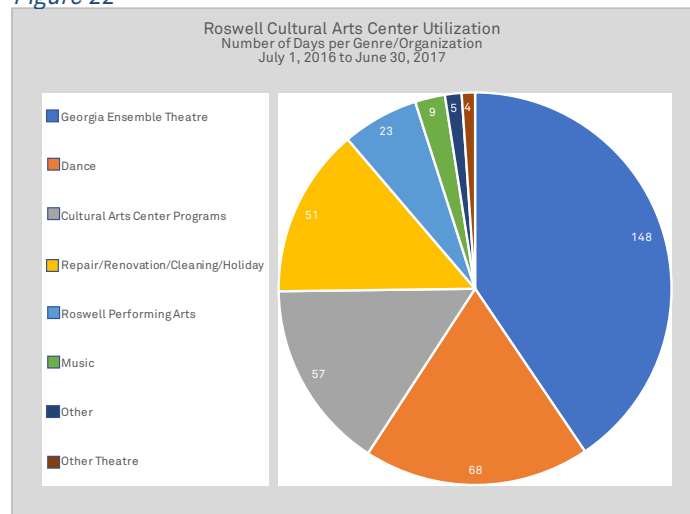
6. User Demand + Potential Partners

Understanding the nature of demand for a performing arts facility is an important part of assessing feasibility. This chapter will review the Roswell Cultural Arts Center’s current utilization, identify the needs of possible users of a new facility, assess the potential to attract touring product, and suggest potential partners for moving a facilities project forward.

6.1 Roswell Cultural Arts Center Utilization

As stated previously, Roswell Cultural Arts Center is Roswell’s hub for performing arts activity. It is a busy space shared by two full-time resident tenants (Georgia Ensemble Theatre/GET and the Roswell Historical Society) and multiple community and regional organizations. From July 1, 2016 to June 30, 2017, the CAC was used a total of 365 days. That means that there was activity every day of that year ranging from theatre productions and dance recitals to pageants and music concerts. GET had the most days of use with 148 days. Dance performances by groups like Tolbert-Yilmaz School of Dance, Roswell Dance Theatre, and Atlanta Dance Theatre followed with a combined 68 days of use. Cultural Arts Center Programs, which are programs presented by the Department of Recreation + Parks, were in the CAC a total of 57 days.

Figure 22



Overall, the CAC is a fine facility—it’s well maintained, has plenty of parking, and it is located within walking distance of Canton Street, Roswell’s historic restaurant and retail corridor. However, it does not currently serve any of its users particularly well. Frustrations expressed by interviewees included:

- * **It has extremely limited availability.** The CAC is busy every day of the year. This has prevented a number of groups that would like to use the facility more frequently from doing so. It has also kept GET from growing its season or extending successful runs of productions.

- * **It is running out of space.** Both GET and the Roswell Historical Society have grown over the years. The organizations are now at a point where their programs and materials coalesce in the CAC, which has created tension between the groups, hampered additional growth, and prevented Roswell's Department of Recreation + Parks from utilizing the facility effectively. The portion of the facility that was intended to be used as a gallery space, for example, is now used by GET as a rehearsal space and holds the Historical Society's archives.
- * **It is lacking important amenities.** The CAC has very limited backstage amenities, including dressing rooms, storage, and greenroom space. For their last production of the Nutcracker, Tolbert-Yilmaz School of Dance rented two RVs and a tent to operate as dressing rooms and accommodate ancillary events.
- * **There are acoustical issues.** The facility has some acoustical issues that make it a less desirable facility for music ensembles and music aficionados.

The CAC has made efforts to address many of these issues over the years, with some success. In 2003, the architecture firm Lord, Aeck + Sargent completed a conceptual plan for possibly expanding the Cultural Arts Center. AMS Planning + Research was then retained in 2008 to project the operating impacts of such a project. Both plans were presented to the City of Roswell in 2008 but never initiated.

In 2011, a Long-Range Strategic Plan for the CAC was released. It identified the following as its primary goals:

- * "Maintain the highest quality cultural arts center facility that meets and exceeds the needs of patrons, performers, and artists.
- * Make the CAC widely known and respected locally and regionally as a high-quality facility and as a destination for high-quality arts programming.
- * Provide high quality and diverse arts programming that excites, inspires, and unites the community.
- * Provide the leadership and expertise required to operate the facility at its highest capacity, thus generating revenues and contributing to the economic vitality of the community.
- * Establish the CAC as the hub of the arts in Roswell and its surroundings by maintaining an innovative and inclusive approach to keeping the arts accessible to all and by providing welcoming, top-quality service and an exciting environment that attracts patrons."

While some of the tasks associated with each of these goals have been completed, there is still work to be done. This suggests that there may be an opportunity to revisit the plan to enhance and improve the CAC through physical and operational adjustments. However, it also suggests an opportunity for an additional facility in the market, particularly a purpose-built facility that can alleviate demand from the CAC so that the facility might better accommodate users.

6.2 Potential Users + Uses of a New Facility

It is possible that a new facility in Roswell would pull some activity from the CAC. This could be a good thing, as it would open up dates on the CAC's calendar for community use and would enable the

Department of Recreation + Parks to activate the facility with more programming of its own, which it has expressed interest in doing.

In addition to serving current users of the CAC, the interview process revealed additional demand for space. Potential users are as follows:

- * **Georgia Philharmonic:** The Georgia Philharmonic is a nonprofit, community orchestra. At one time, the organization was housed in the CAC, but now utilizes Lassiter Concert Hall in Marietta. If a new facility were to be developed in Roswell, the Philharmonic's ideal space would have 500 to 750 seats, variable acoustics, space to rehearse, a smaller performance space, and good parking. The organization estimates that it could use such a space 10 days each year.
- * **Joe Gransden Big Band:** The Joe Gransden Big Band, led by Joe Gransden, is a 16-piece orchestra that is based in Atlanta. The group currently performs four concerts a year at the CAC, but would have interest in performing in a 500 to 700-seat facility with a dance floor, good backstage area, green room, and a quality piano. A presented act, the band's use of a new facility would depend on how often they were presented by the facility's operator.

In 2017, Mr. Gransden and his team launched a big band jazz camp, Joe's Jazz Camp. They are considering a second location and think Roswell could be a great fit. This would require that the new facility have some ancillary facilities like rehearsal and small practice rooms.

- * **Atlanta Wind Symphony:** The Atlanta Wind Symphony is a 75-member community ensemble. The group rehearses at Milton High School in Milton but struggles to find performance space. The Symphony's ideal facility would have a 350 to 650-seat performance space, rehearsal space, a grand piano, and percussion instruments. Such a facility could be used weekly for rehearsals and at least once a year for concerts.
- * **Fulton County Schools:** A member of the music faculty at a Roswell high school indicated that Fulton County Schools may also have demand for a facility. The ideal space would have a capacity of 350. Activities would include collage events that involve music groups from different high schools and large cluster concerts.
- * **Regional Universities:** Georgia State University and Kennesaw State University each have top-notch jazz departments. Anecdotal research suggests that the faculty within these departments would have demand for performance space—either for themselves or for their students.
- * **Local Music Teachers + Music Schools:** Anecdotal research suggests that there are a number of home-based music teachers and schools in Roswell and the region. This suggests that there may be demand for private teaching and small recital space.

In short, this indicates that there is demand in the market for a new, high-quality facility, particularly one developed for music. The ideal capacity for such a space ranges from 350 to 750 seats.

Preferred facility amenities and features include excellent acoustics, storage space, rehearsal space and small practice rooms, percussion instruments and a piano, and sufficient backstage space.

6.3 The Opportunity for Touring Product

Conversations with regional promoters, presenters, and musicians suggest that a facility in Roswell could attract touring entertainment. Interviewees did caution, however, that, with new facilities planned or coming on-line in Sandy Springs, Peachtree Corners, Alpharetta, and Atlanta, competition in the market for product and audiences is growing. In effort to understand what the opportunity for touring entertainment in Roswell might be, we took a closer look at our indoor and outdoor performance facility inventories, breaking down each facility’s presented music activity by genre, as seen in the table below (Table 1; presented comedy was also included). In the column labeled ‘Presenting Activity (No. of Shows)’, the numbers represent the number of times an act of a particular genre was presented in the 2017-2018 season. As an example, of the nine acts presented at Wolf Creek Amphitheatre, three were jazz, three were soul/blues/gospel, two were headliner/popular music, and one was culturally-specific.

Table 1

Roswell, GA Regional Touring Activity			Presenting Activity (No. of Shows)													
Type	Facility	Primary Activity	Capacity	Rating	Headliner/Popular Music	Contemporary/Electronic/DJ	Folk/Country/Bluegrass/Singer-songwriter	Culturally-specific	Rock	Jazz	Broadway	Classical	Soul/Blues/Gospel	Tribute Bands	Christian	Comedy
Outdoor	Lakewood Amphitheatre	Headliners	19,000	2.4	13											
Outdoor	Verizon Amphitheatre	Headliners	12,000	2.7	18											
Outdoor	Chastain Park Amphitheatre	Headliners	7,000	2.6	9					1						
Outdoor	Wolf Creek Amphitheatre	Mix	5,420	2.8	2		1			3			3			
Outdoor	Piedmont Park*	Mix	3,000	2.3	1		1		1							
Indoor	Cobb Energy Center: John A. Williams Theatre	Comedy	2,750	3.4			1	1					2		1	4
Outdoor	Frederick Brown Jr. Amphitheatre	Headliners	2,500	2.3	4			3						2		
Outdoor	Mable House Barnes Amphitheatre	Mix	2,487	2.3	1								2			1
Outdoor	Riverside Park^	Mix	2,000	2.1			3	2					1			
Outdoor	Centennial Olympic Park: Southern Company Amphitheater (in-development)*	Mix	2,000	2.6	1	1	1		1				1	1		
Outdoor	The Bowl at Sugar Hill	Headliners	1,750	2.7	5											
Indoor	Roswell United Methodist Church: Main Sanctuary^	Mix	1,700	3.0								2			1	
Outdoor	Zac Brown's Southern Ground Amphitheatre	Mix	1,500	2.5	1			2					2	3		
Outdoor	Mark Burkhalter Park Amphitheatre	Mix	1,400	2.3				1				1		2		
Outdoor	Suwanee Town Center Amphitheatre	Mix	1,000	2.0		1	1			1						
Indoor	Variety Playhouse (potential project in-development)	Contemporary/Electronic/DJ	1,000	3.5	6	14	3		10	1			3	4	1	2
Indoor	Kennesaw State University: Bailey Performing Arts Center-Morgan Concert Hall	Classical	624	3.0						1		7	1			
Indoor	Roswell Cultural Arts Center	Mix	600	2.5		1				1			1			
Indoor	Strand Theatre	Mix	500	2.7			3		1	1				3		1
Indoor	Reinhardt University: Falany Performing Arts Center- Flint Hall	Classical	360	2.8			2	1		3		4		1		
Indoor	Roswell United Methodist Church: Fellowship Hall^	Classical	330	2.1								1				
Indoor	Buford Community Center- Sylvia Beard Theatre	Folk/Country/Bluegrass/Singer-songwriter	274	2.6			5		2	4				3		1
Indoor	Red Clay Music Foundry	Folk/Country/Bluegrass/Singer-songwriter	260	2.6	6	5	52	2	4	3			7	6	1	
Indoor	Aurora Theatre Gwinnett	Comedy	257	2.7												12
Indoor	Lionheart Theatre Company^	Folk/Country/Bluegrass/Singer-songwriter	250	2.1			1									

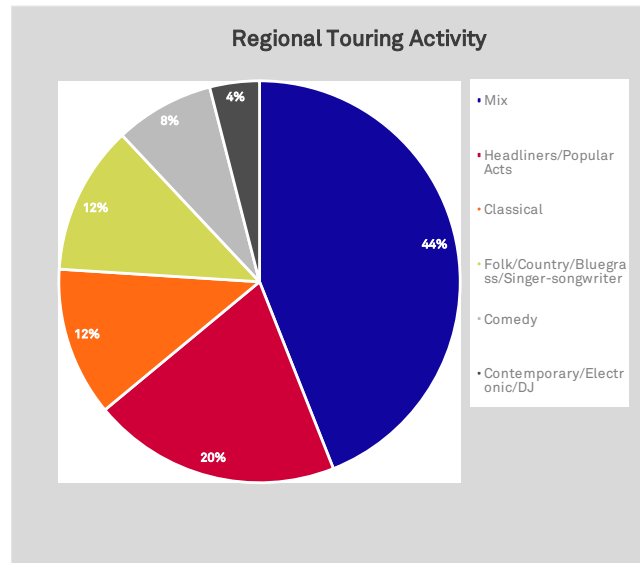
*Total park capacity for concerts is 80,000. Plans to build permanent amphitheatre.

^Some capacities and/or characteristics estimated.

67 21 72 7 26 21 0 15 23 25 4 21

Combined, 25 indoor and outdoor facilities accommodate presented touring activity. Folk/country/bluegrass/singer-songwriter acts are presented the most, although nearly all of that activity takes place at the Red Clay Music Foundry. Then, there are headliner/popular music acts. That activity is spread across facilities, with the Lakewood and Verizon Amphitheaters presenting it with the most frequency. Contemporary/electronic/DJ, rock, jazz, classical, tribute bands, and comedy acts are presented with medium frequency. Broadway, Christian, and culturally-specific acts are presented the least.

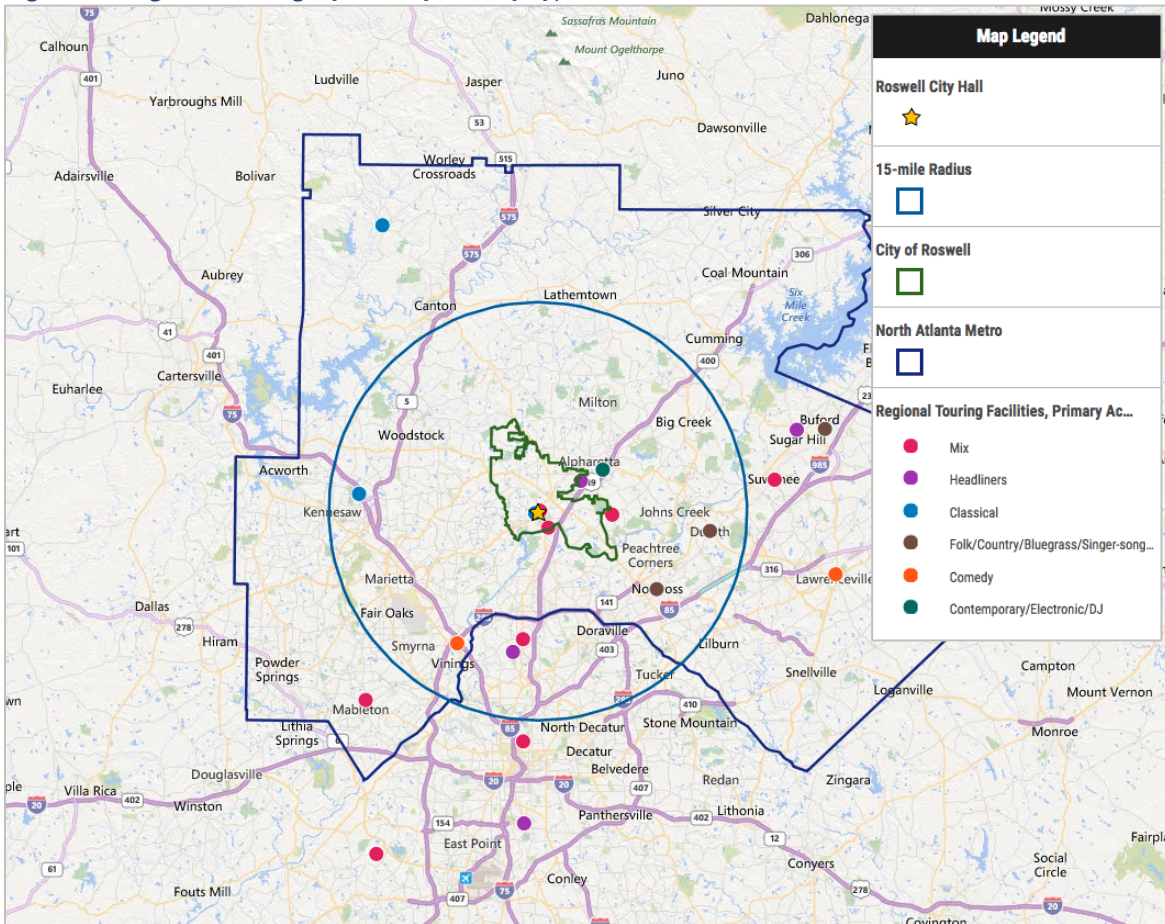
Figure 23



In addition to breaking down the types of activities each facility presents, we also assigned each space a “primary activity” type. This represents the activity, or genre of music, the facility presents most frequently. In cases where genres were presented with equal frequency, the facility’s primary activity was labeled ‘mix’. Typically, facilities with mixed activity types present fewer events in a season and/or have a mission to serve the public-at-large. Thus, they are presenting a diverse set of acts so as to reach as many people in the community as possible. In total, 11 facilities have ‘mix’ as their primary activity type. This represents nearly half (44%) of the regional facilities with presented touring product. Headliner/popular music acts are the primary activity type in five facilities. Notably, none of the regional presenting facilities have culturally-specific, rock, jazz, Broadway, soul/blues/gospel, tribute bands, or Christian acts as primary activity types.

Mapping the inventoried facilities by their primary activity type (Figure 24) shows where these facilities are in proximity to Roswell. This suggests that, in Roswell proper, three facilities primarily present a mix of activities and one, Roswell United Methodist Church’s Fellowship Hall, primarily presents classical acts. This facility, however, is used just once or twice a year for presented entertainment. Beyond Roswell, but within 15-miles of the Roswell City Hall, two facilities are used to present headliners/popular acts, two are used to present folk/country/bluegrass/singer-songwriter acts, one is used for classical acts, and one is used for comedy. The circle representing contemporary/electronic/DJ is a planned facility that has yet to be developed.

Figure 24: Regional Touring, by Primary Activity Type



Combined, this research suggests that there are gaps in the presenting market that a facility in Roswell could fill. Based on the inventory, pie chart, and map, primary opportunities appear to be in presenting jazz, culturally-specific, Broadway, rock, and soul/blues/gospel acts.

6.4 Community Demand + Estimating Attendance

In 2015, the City of Roswell completed a Cultural Master Plan, **Imagine Roswell Arts + Culture 2030**. Community engagement, which included public meetings and a survey, revealed the following about demand for a performing arts facility and programs:

- * Residents would like access to more arts and culture events in Roswell, particularly those that are community-oriented. Live concerts, theatre, and festivals were indicated as art forms residents would like to see more often.
- * When asked in the survey to rate the importance of a major performing arts center, more than half of all respondents (55%) indicated that it was either 'very important' or 'moderately important'.
- * Roswell residents are active participants in the arts, but tend to leave the City to participate.

- * There is a desire for higher quality arts offerings, additional arts education programs, and more public art.
- * Residents are interested in offerings that reflect Roswell’s cultural diversity.

In short, these findings suggest that there is strong interest in increased arts programming in Roswell. Anecdotal research suggests the same. But, realistically, what portion of the community can we expect a new facility to attract?

Using market data and national data from the Survey of Public Arts Participation, it is possible to make assumptions about market share for activities at a facility in Roswell. The table below (Table 2) compares educational attainment in Roswell (Market Educational Attainment) to National Participation Rates for each level of educational attainment, by discipline, as indicated in the SPPA. The genres used were selected based on gaps in the market for touring product. This suggests that, if a 500-seat facility wanted to capture 50% of the Potential Total Annual Attendance for each discipline, selling two-thirds capacity (350 seats) for each event, it would need to produce or present 95 jazz concerts; 92 classical music concerts; 70 Latin, Spanish, or Salsa music concerts; and 47 events featuring other types of music, theater, or dance (SPPA defines ‘other music, theater, or dance’ as rock concerts, hip-hop shows, or other art forms that respondents were not asked about in the SPPA). This is a reasonable amount of activity for a performing arts facility. To reiterate, however, these numbers are assumptions.

Table 2

Estimating Attendance at New Facilities in Roswell			Jazz		Classical Music		Latin, Spanish, or Salsa Music		Other Types of Music, Theater, or Dance (4)	
	Market Educational Attainment	Market Area Population	National Participation Rate (2)	Roswell Market Attenders	National Participation Rate (2)	Roswell Market Attenders	National Participation Rate (2)	Roswell Market Attenders	National Participation Rate (2)	Roswell Market Attenders
City Population 2018 (1)		96,977								
Educational Attainment in Roswell (1)										
Less than High School degree	6.0%	5,819	1.7%	98.92	2.0%	116	13.9%	809	3.3%	192
High School Graduate or GED	16.0%	15,516	16.8%	2,607	10.6%	1,645	20.0%	3,103	20.8%	542
Some College, no degree	17.0%	16,486	29.6%	4,880	24.4%	4,023	31.0%	5,111	31.4%	1,532
Associates or Bachelors degree	42.0%	40,730	29.7%	12,097	33.5%	13,645	22.1%	9,001	26.9%	3,254
Graduate or Professional degree	19.0%	18,426	22.1%	4,072	29.6%	5,454	13.0%	2,395	17.7%	721
	100%	96,977		23,755		24,882		20,419		6,241
Average Frequency of Attendance (2)				2.8		2.6		2.4		5.3
Potential Total Annual Attendance				66,512.65		64,694.13		49,006.75		33,079.02
Number of Events Selling 350 seats (3)				95		92		70		47

1. 2018 Roswell Market Data, Envionics Analytics
 2. National Participation Rate and Average Frequency of Attendance are based on data in the NEA Research Report #58: A Decade of Arts Engagement: Findings from the Survey of Public Arts Participation in the Arts, 2002-2012. For ‘Other Types of Music, Theater, or Dance’, estimates for frequency of attendance are from the Live Analytics report, "U.S. Live Event Attendance Study" (2014).
 3. The number of seats is based on the assumption that there is a 500-seat facility that sells 2/3 capacity per event.
 4. ‘Other music, theater, or dance’ includes rock concerts, hip-hop shows, or other art forms that respondents were not asked about in the SPPA.

6.5 Potential Partners

Performing arts facilities projects lend themselves to a variety of partners. At this time, we see the potential for two partner types for this project: marketing and programming. Marketing partners are those that can help market a new facility and its events calendar. These might include Visit Roswell, the City’s tourism agency, and the Historic Roswell Business Association, which promotes the growth, development, and economic prosperity of Roswell. Programming partners are those that could help activate a new facility. These might include the jazz or music departments at Georgia

State and/or Kennesaw State, Georgia Presenters (a statewide booking consortium), or other presenters/programmers working in the region.

6.6 Conclusions on User Demand + Potential Partners

This analysis suggests that there is demand for a performance space in Roswell, particularly one that is oriented towards music.

- * 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.

7. Benefits + Impacts

Investing in arts and culture can have significant impact on a community, strengthening sense of place, contributing to quality of life, and catalyzing economic, neighborhood, and community development. Interviewees suggested that a performing arts facility in Roswell could benefit the community in the following ways:

- * **It would contribute to quality of life.** Quality of life in Roswell is already quite high—there are amazing restaurants, beautiful historic assets, a well-regarded professional theatre company, and a 900-acre park system that was recently awarded a Gold Medal for Excellence in Parks and Recreation Management from the National Recreation and Parks Association. Multiple interviewees believe that a high-quality performing arts facility in their own backyard would complement these amenities, giving them greater access to arts and culture.

- * **It would diversify the economy.** Roswell is home to 5,600 businesses, 80% of which have 10 employees or fewer. An arts facility could help bring diversity to the local economy, contributing to initiatives focused on corporate recruitment and workforce retention.
- * **It would draw tourists and build the Roswell brand.** Canton Street and its many restaurants attract visitors to Roswell from far and wide. As real estate along the strip has become more and more expensive, a number of Canton Street’s small retail establishments have either closed or relocated. In order for Canton Street to maintain its vibrancy, many interviewees believe there must be something more to do in the community, particularly in the evenings, than just eat.

7.1 City + Community Planning Documents

A review of city and community planning documents suggests that advancing arts and culture in Roswell has long been a priority for the community. The **Imagine Roswell 2035 Comprehensive Plan**, for example, identified the celebration of Roswell’s history, culture, heritage, and character as one of five strategic goals. It also identified a number of needs and opportunities for the community, many of which could be served by the development of additional cultural space:

Opportunities

- * The continued promotion and provision of community activities for all residents.
- * The expansion of art throughout the city.
- * Maintaining and enhancing the city’s small town feel while providing access to big city amenities.
- * The creation of a strong community identity.

Needs

- * The creation of additional performing arts spaces or programs within the city.
- * The establishment of new businesses with a diversity of land uses that would contribute to the tax base.
- * Increased options for higher ed learning including those that are informal and not college/university driven.

Further, the City’s 2012 **Strategic Economic Development Plan** featured enhancing quality of life, promoting live-work-play investments, and building and diversifying the City’s cultural, heritage, and entertainment opportunities as three of its guiding principles. In its assessment of existing and potential industry clusters, the report found that “creating a more diverse and integrated entertainment and recreation industry cluster is consistent with both the stated and implied vision established” within multiple City planning documents (page 8-21). It also found that, while athletic and passive recreation/entertainment venues are well supported in Roswell (particularly for outdoor events), entertainment components are less comprehensive. As such, it was recommended that the City undertake a feasibility and market study to assess the potential expansion of the CAC.

Given that the Department of Recreation and Parks is one of Roswell’s primary arts providers, it is of little surprise that the **Recreation, Parks, Historic + Cultural Affairs Needs Assessment + 5-year Master Plan Recommendations (2017-2021)** also includes plans for arts and culture in the community. Three key goals established as part of the plan are the continued implementation and support of the cultural and fine arts, including the implementation of the Community Cultural Master

Plan and Public Art Master Plan, installation of permanent public art, and additional space for art, music, and film classes; the allocation of additional resources to expand the offering of festivals and special events to celebrate Roswell's diverse heritage; and the expansion of programming east of GA 400, which bisects the city.

While each of these documents speak to Roswell's goals for the arts, culture, and broader community, the City's Cultural Master Plan, **Imagine Roswell Arts + Culture 2030**, is the primary source for understanding needs and opportunities in the sector. The plan envisions Roswell as, "a vibrant community that celebrates the arts, culture, and history as integral to the quality of life. Roswell embraces imaginative and innovative public art through the city. Weaving contemporary arts and culture with its rich past, Roswell creates an all-embracing sense of place" (page 51).

To achieve that vision, the plan recommended eight goals, two of which directly relate to the development of new facilities in Roswell:

- ✱ **Diversify the range of arts and cultural programming offered in the community.** Recommended strategies to achieve this goal include providing and facilitating a range of more sophisticated and contemporary programming; providing programs and events that better engage underserved populations and celebrate cultural diversity; and providing more programming in East Roswell.
- ✱ **Develop arts and cultural facilities in Roswell.** Recommended strategies to achieve this goal include making recommended improvements to the CAC; exploring the long-term development of a new performing arts center; improving performance and festival venues along the riverfront; and developing smaller, flexible performance and exhibition venues in diverse locations in the city.

Finally, community engagement conducted as part of the creation of the Master Plan indicated interest in a large, high-profile venue for performing arts, as well as smaller and informal venues, flexible spaces, artist live-work spaces, a history center, and commercial venues like clubs, bars, and cafes.

7.2 Benefits + Impacts Conclusions

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.

8. Conclusions + Recommendations

This research suggests that there is an opportunity to develop a performance facility in Roswell based on 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. In addition, some users are unsatisfied with the facility's availability, amenities, and acoustics. While there has been some effort to improve the CAC over the years, research suggests that there may be an opportunity to revisit plans to enhance the facility. Research also suggests that a new facility may help alleviate some of the CAC's demand, helping it better accommodate current users.

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.

8.1 Recommendations

Based on the previous conclusions, we recommend the following for the Roswell Arts Fund and City of Roswell.

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.

Example: Shalin Liu Performance Center | Rockport, MA

Shalin Liu Performance Center opened in 2010 and features a 300-seat concert hall. Other facilities include a reception hall (standing capacity of 230) and a small meeting space (seated capacity of 20 to 30). Programming includes music of all genres, theatre, community concerts, the Rockport Chamber Music Festival, and HD Broadcasts from the Met, the National Theatre, and the Bolshoi Ballet. Education programs are offered for children and adults.



Example: SF Jazz Center | San Francisco, CA

The SF Jazz Center opened in 2013 as a home for SFJazz, San Francisco's nonprofit, jazz presenting organization. The facility features the Miner Auditorium, a 1,200-square-foot scalable venue with capacities that range from 350 to 700 seats; the Henderson Lab, a glass-encased flex space that can accommodate 80 to 100 seated guests; two large lobbies; a restaurant and lounge; and education space. All facilities are used for performances, conferences, meetings, events, and more.



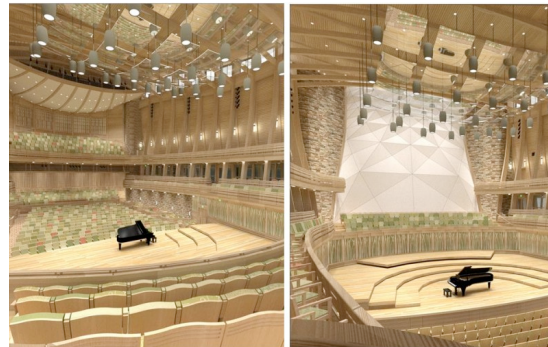
The Center is activated with presented acts and performances by SFJAZZ Collective, the facility's resident ensemble. The Center also runs a Resident Artistic Director program, which invites forward-thinking musicians to program the facility. Education programs include classes and workshops in areas like jazz appreciation and digital music production for

children and adults, kid and family programs, and participation in jazz performance ensembles for advanced students.

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.

Example: Indian Hill Music Center | Groton, NH

Indian Hill Music Center is planned to open in 2020. As the home of Indian Hill Music, a nonprofit that includes a community music school, professional orchestra, professional concert series, and community outreach programs, the venue will feature a 1,000-seat concert hall, 300-seat recital hall, education space, and open, outdoor gathering space. The concert hall will have adjustable acoustics, a flexible stage, and the ability to open on to the lawn, seating an additional 1,300 audience members.



Example: Seiji Ozawa Hall | Tanglewood, MA

Seiji Ozawa Hall was completed in 1994 at a cost of \$8.7 million. The Center, and the 526 acres on which it sits, is owned and operated by the Boston Symphony Orchestra. The Hall seats 1,180 and accommodates orchestral performances, chamber concerts, rehearsals, recitals, and recording sessions. A key element of the design is the back wall, which opens to the outdoors, enabling an additional 2,000 people to enjoy concerts on the lawn. The facility also houses a music library and performers' pavilion.



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 by Lord, Aeck + Sargent in 2003 and the 2011 Long-Range Strategic Plan, 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.

Example: Arvada Center for the Arts + Humanities | Arvada, CO

The Arvada Center for the Arts + Humanities opened in 1976. It is one of the largest multidisciplinary arts centers in the country, featuring a 526-seat proscenium theater, 226-seat black box, an amphitheater, gallery space, a museum, and meeting and event facilities.

Over the last 25 years, the Center has undergone multiple expansion projects. In 1992, the black box theater, rehearsal space, exhibition and storage space, and additional meeting and event space was added to the facility, essentially doubling its square footage. A second expansion in 2006 included the addition of a new scene shop, more rehearsal and gallery space, and back-of-house improvements. A third phase of work is set to kick-off this year.



Today, the Arvada Center attracts 300,000 visitors annually and offers more than 600 courses to children and adults. Performing arts programming includes a mix of locally produced theatre and some music. The facility is independently operated but receives support from the City of Arvada and the Scientific + Cultural Facilities District, a special tax district in the Denver metro area that supports arts, culture, and science organizations.

8.2 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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