

# **TOWN CENTER CIVIC & CULTURAL ARTS DISTRICT STUDY**

**Needs Assessment Presentation  
November 29, 2005**

# Needs Assessment for Arts Facilities

**The case for new facilities and a district is based on:**

- **Audiences: Is there capacity and propensity in the market area to provide audiences for proposed facilities?**
- **Other facilities: What are the existing and planned facilities serving audiences, arts organizations, presenters and higher education institutions? How well are they serving their needs?**
- **Uses and Users: Who is using these venues and for what? What do they feel is needed? Are significant performance opportunities missing from the community?**
- **Benefits and Impacts: What is the “value-added” of new performance facilities and programs? Will new facilities help the community achieve broader goals?**

# Methodology

To consider these questions, we've:

- Met with community arts organizations, area presenters, and civic and community leaders.
- Spoken with Town staff and elected officials.
- Toured existing local and regional facilities.
- Analyzed the size and characteristics of the market area and trends for the future.
- Considered comparable markets, and the role of facilities and programs in their communities.

# National Participation

National trends can be used to establish participation indicators to help assess propensity and capacity for attendance.

- On average, 32% of adults attended at least one performing arts event in the previous 12 months.<sup>1</sup>

	Attended/ Visited/ Read	Watched or Listened to on TV/Radio/ Recordings/Inteme
<b>PERFORMING ARTS</b>	31.7%	51.8%
Music	18.8	47.9
Plays	22.3	21.0
Dance	8.7	13.7
<b>VISUAL ARTS</b>	41.9	26.3
<b>HISTORIC SITES</b>	31.6	NA
<b>LITERATURE</b>	46.7	18.2
<b>ANY ARTS ACTIVITY</b>	65.1%	56.0%

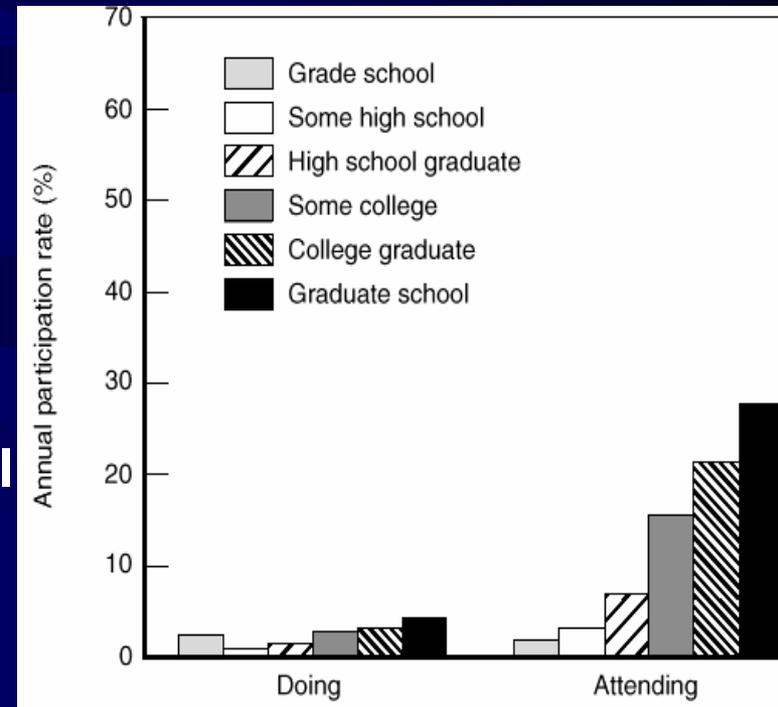
Source: 2002 Survey of Public Participation in the Arts.

1. NEA's Survey of Public Participation in the Arts, 2002

# Predicting Participation

## Market Propensity: Key Indicators

- **Educational Attainment:** arts attendance more than quadruples with college education.
- **Sex:** women attend more often than men in every discipline except jazz.
- **Median Household Income:** attendance increases with higher income, but not to extent of education.
- **Age:** traditional arts audience is getting older, coinciding with general aging of population.
- **Race:** affects *kinds* of arts attendance more than rate of attendance.



# Trends in Participation

Table 7.

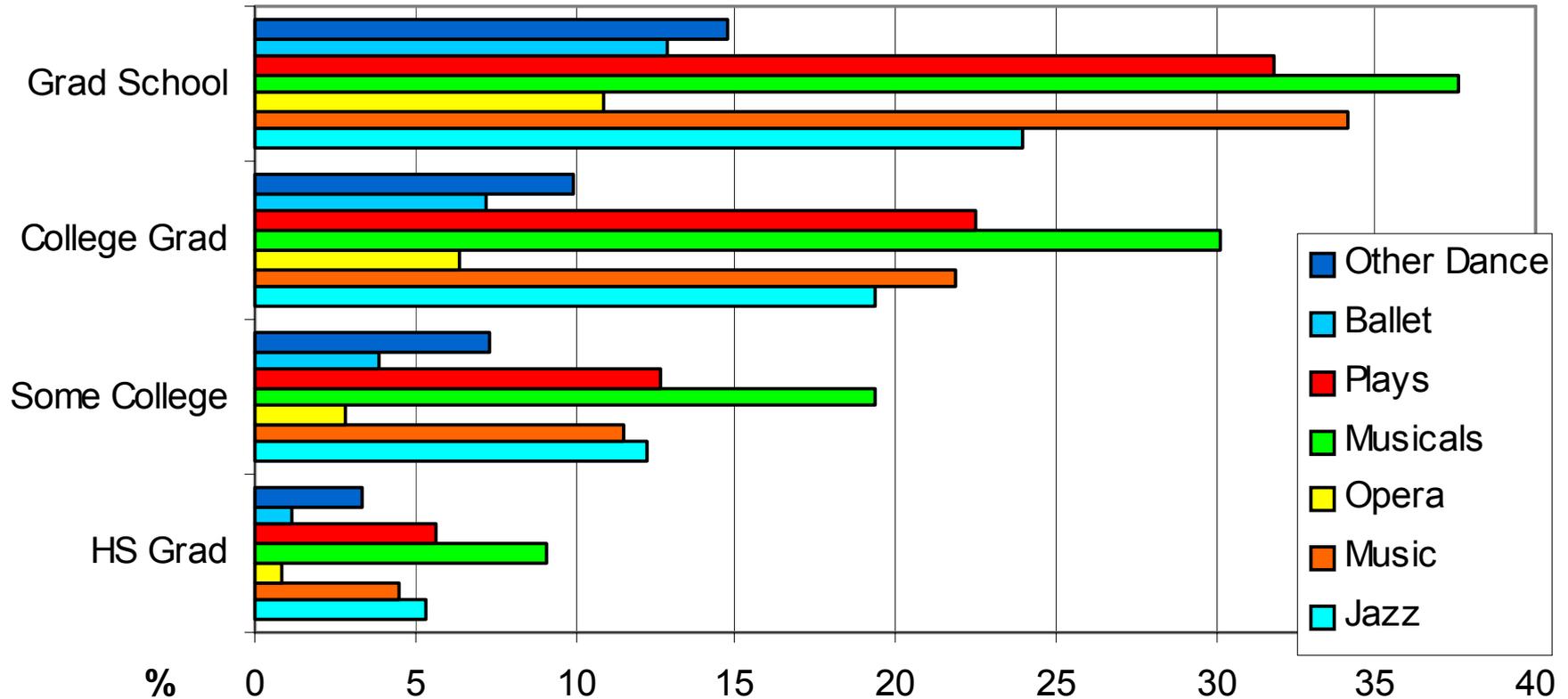
AVERAGE NUMBER OF ATTENDANCES AND TOTAL NUMBER OF ATTENDANCES: 1992 AND 2002

	1992			2002		
	Audience in millions	Average number of attendances per attender	Total number of attendances in millions	Audience in millions	Average number of attendances per attender	Total number of attendances in millions
<b>PERFORMING ARTS</b>						
<i>MUSIC</i>						
Jazz*	19.7	2.9	57.1	22.2	3.1	68.8
Classical music*	23.2	2.6	60.3	23.8	3.1	72.8
Opera*	6.1	1.7	10.4	6.6	2.0	13.3
<i>PLAYS</i>						
Musical plays*	32.3	2.3	74.5	35.1	2.3	79.3
Non-musical plays*	25.1	2.4	60.2	25.2	2.3	58.7
<i>DANCE</i>						
Ballet*	8.7	1.7	14.8	8.0	1.7	13.5
Other dance <sup>1</sup>	13.2	3.0	39.6	12.1	2.0	24.6

Participation in the arts is rising, but as a product of increasing populations, not because a wider variety of people are attending.

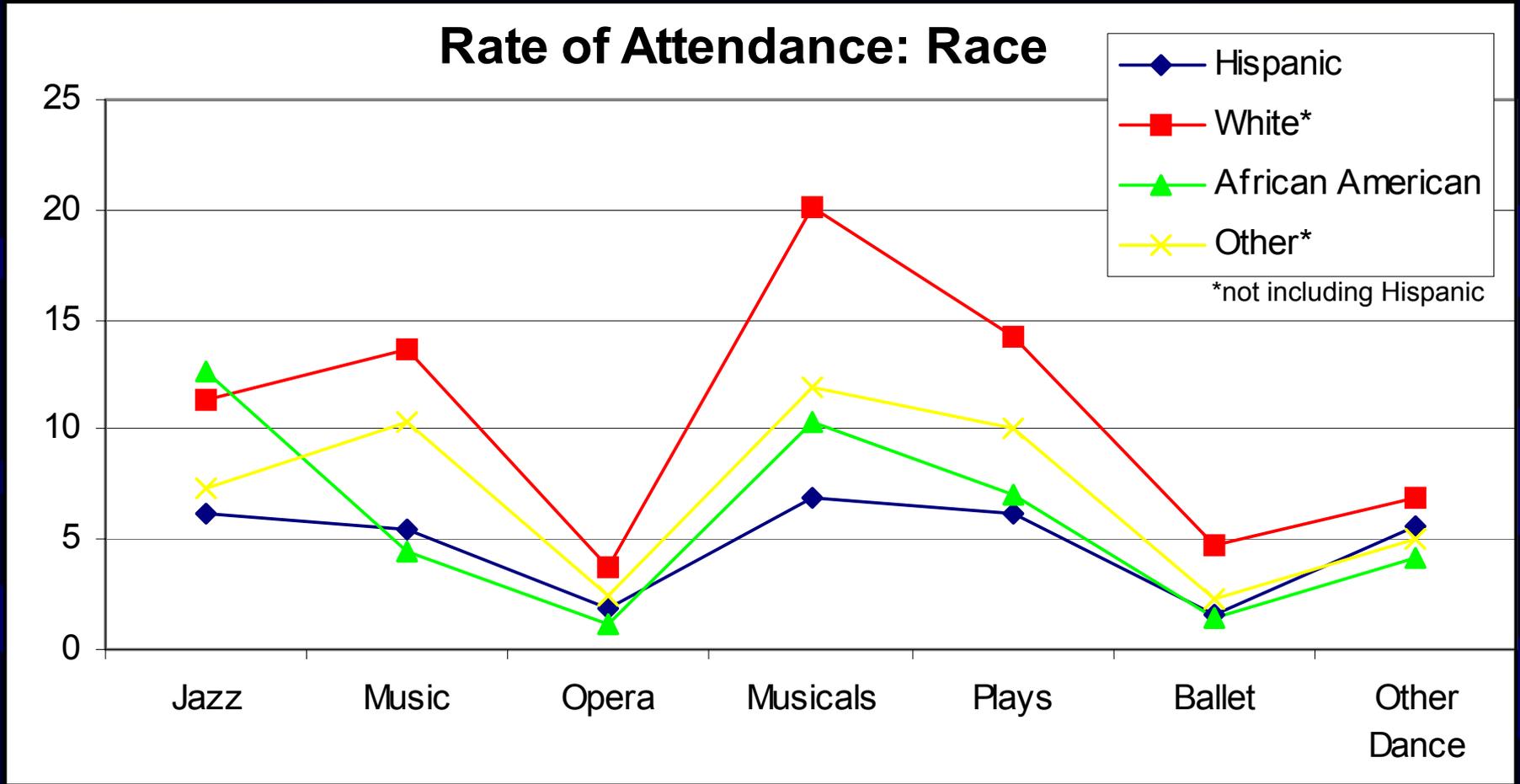
# Trends in Participation

## Rate of Participation: Education



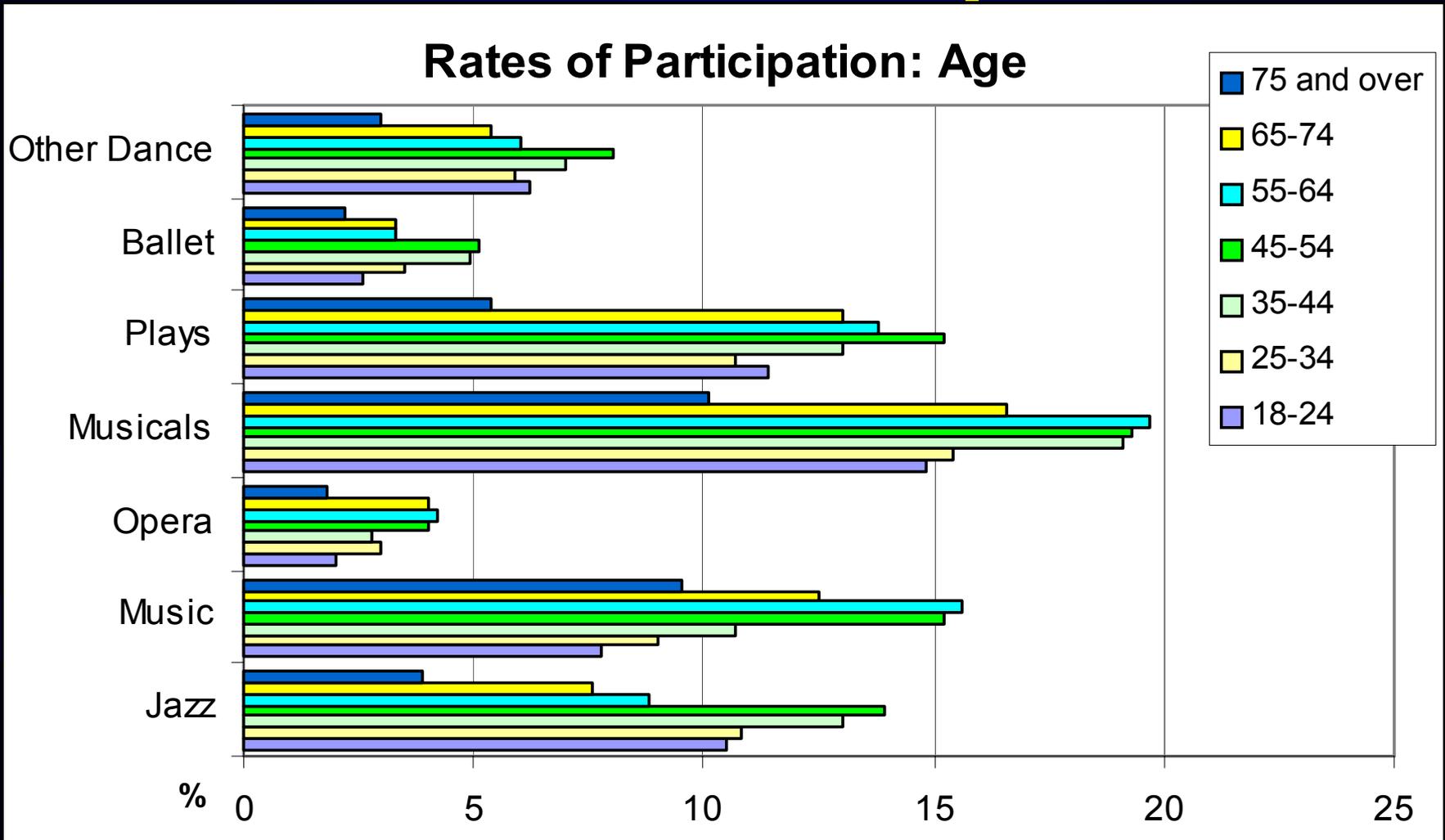
Source: NEA SPPA 2002

# Trends in Participation



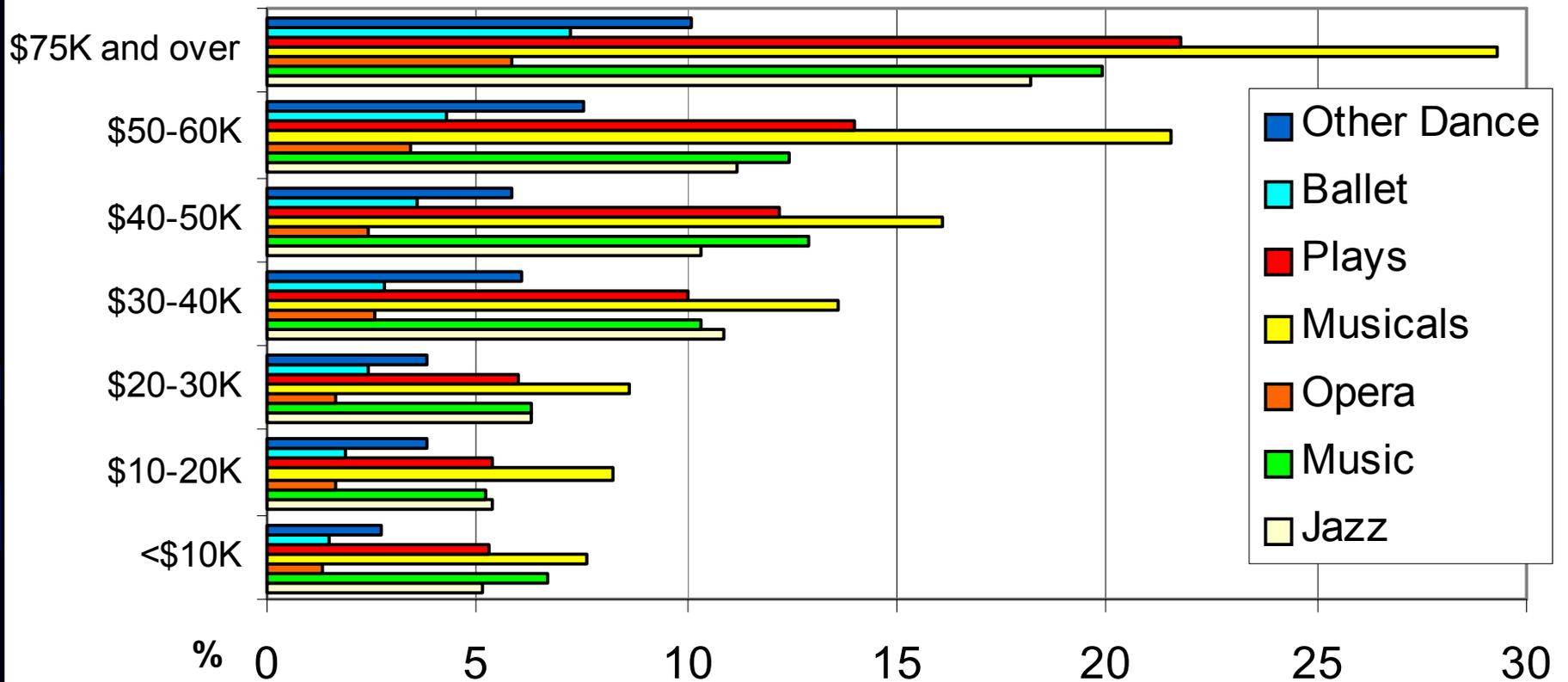
Source: NEA SPPA 2002

# Trends in Participation



# Trends in Participation

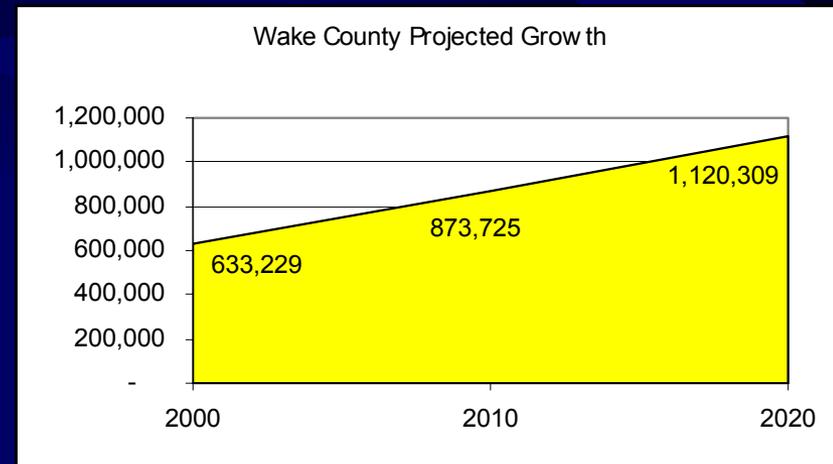
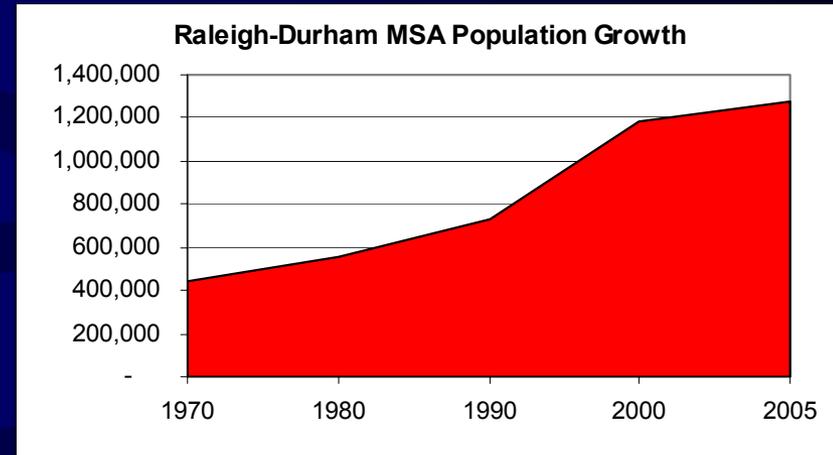
## Rate of Participation: Income



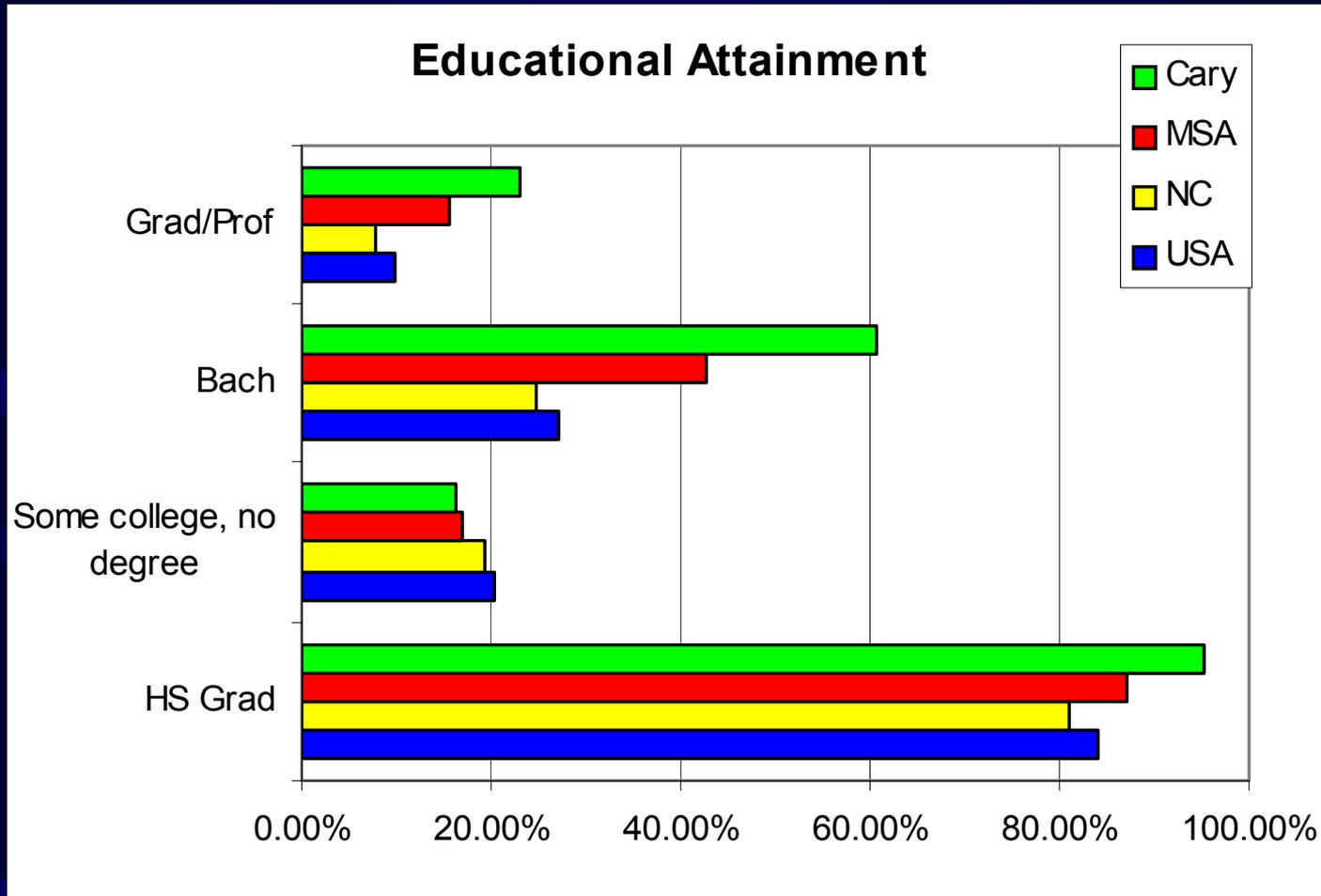
Source: NEA SPPA 2002

# Market Definition & Growth

- Market Area, 2005:
  - Town of Cary: 110,000
  - Wake County: 650,000
  - MSA: 1.3 million
- Cary voted #34 on CNN/Money Magazine's "Best Places to Live" list & won "Best Place to Live on the East Coast" in 2004.
- "Quality" and "Controlled" growth is very important, especially because of rapid population expansion
- The Hispanic population has jumped from 1.6% percent in 1990 to 4.3% in 2000.



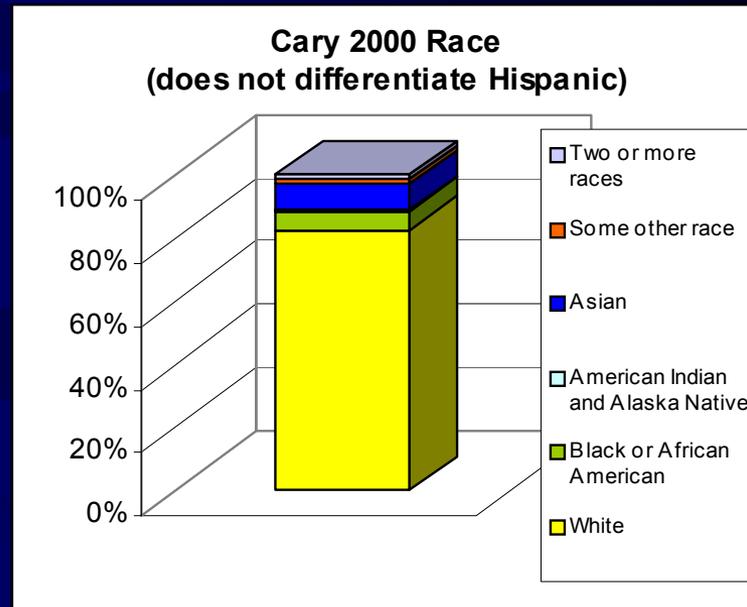
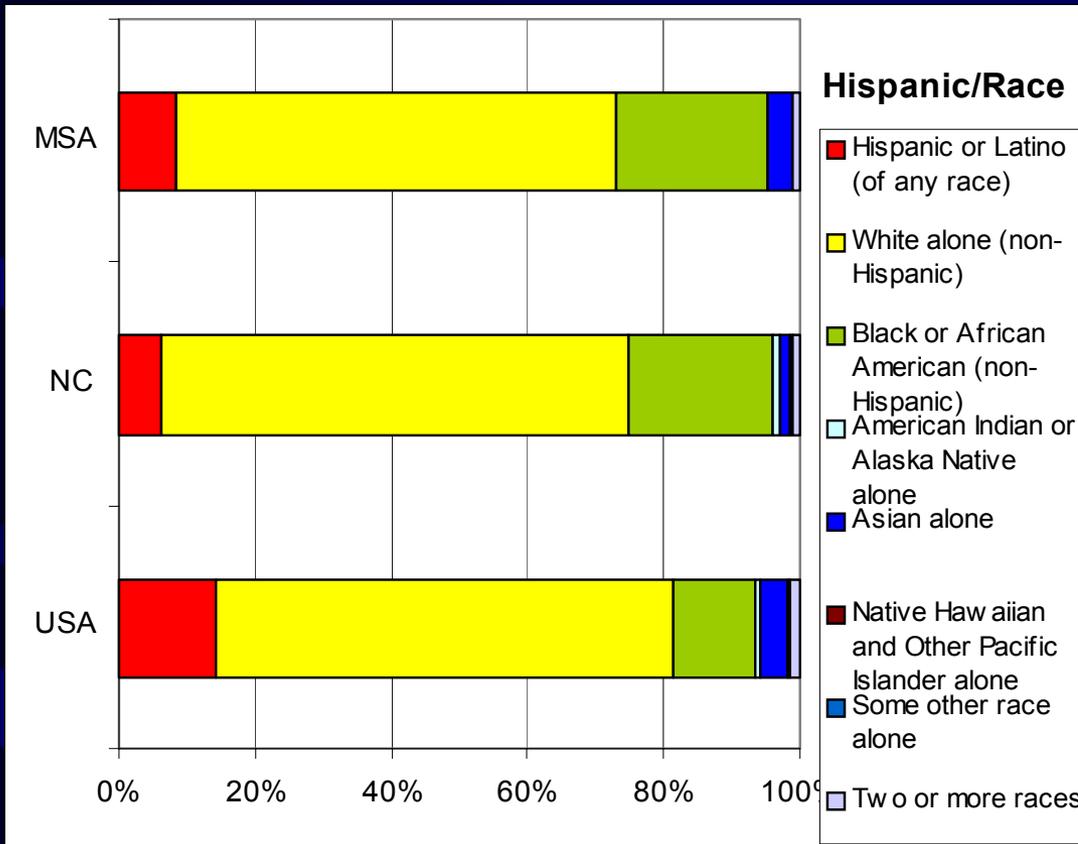
# Market Characteristics



All MSA, NC and USA figures 2004, all Cary figures 2000  
(most recent available)

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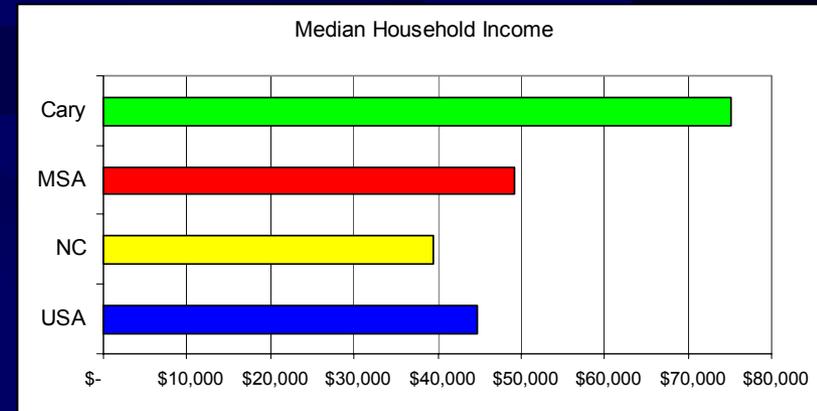
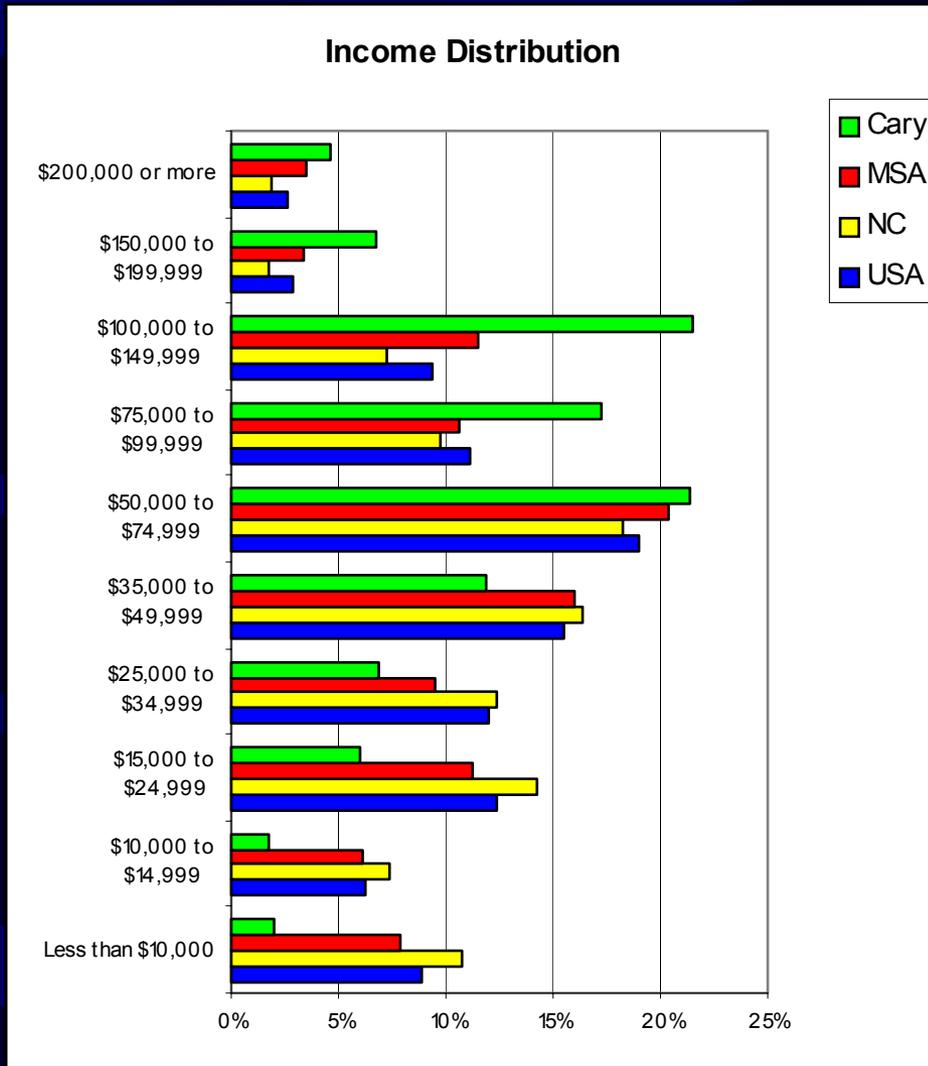
## Ethnicity



All MSA, NC and USA figures 2004, all Cary figures 2000 (most recent available)

# Market Characteristics

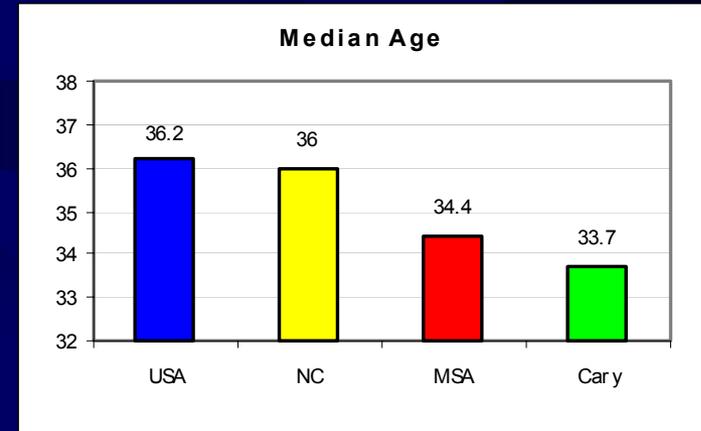
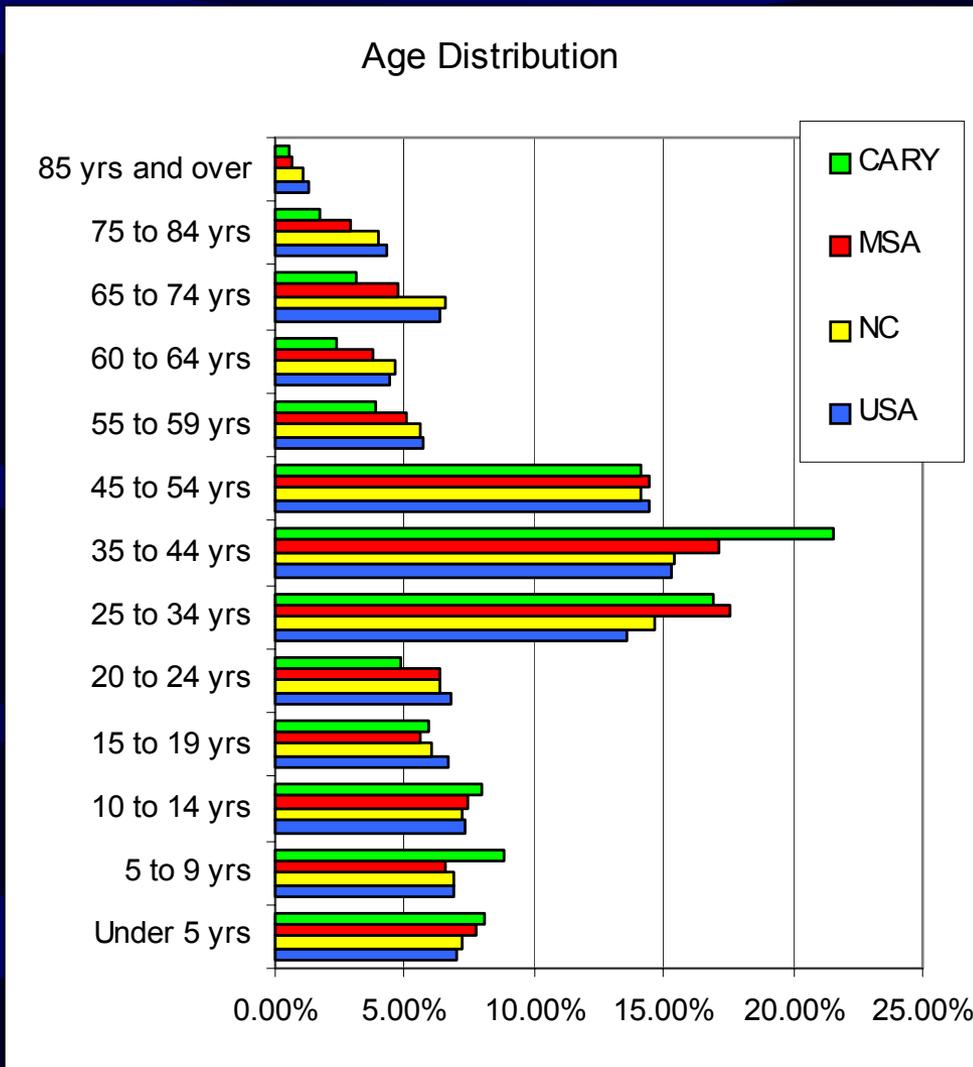
## Income



All MSA, NC and USA figures 2004, all Cary figures 2000  
(most recent available)

# Market Characteristics

## Age



All MSA, NC and USA figures 2004, all Cary figures 2000  
(most recent available)

# Market Characteristics

## Tourism

### Hotel Occupancy Tax

Tax Revenues (2004)	\$	2,130,076.00
Tax Rate		6%
Total Room Revenues	\$	35,501,266.67
Average Room Rate	\$	69.17
Total Room Nights		513,246.59
Total Rooms		1,973
Nights per Room		260

Source: Greater Raleigh Convention and Visitors Bureau

# Local Programs/Facilities - Page Walker

- Important and well-used anchor for Town Hall campus.
- Local Arts & History Center has become heavily used program space with limited capacity for exhibition of contemporary visual arts & museum collection display.
- Almost 800 program hours in fiscal 2005. Down slightly with construction. Will grow in 2006.
- One third of usable space for classes/meetings.
- Opportunity to remove program space, allowing for needed expansion of exhibit and archive areas.
- Focus on connections to history and historic district, also through school partnerships.

# Local Programs/Facilities- Jordan Hall

- 4 classrooms/studios in 4,000 sf
- 590 classes in FY 2005, with 4,000 registrants and another 10% on waiting list.
- Very aggressively programmed, and very popular.
- Additional 4,000 ceramic studio hours.
- Clear opportunity for more rooms to support growth of existing programs and new programs.
- Doesn't separate children, adults and seniors.

# Local Programs/Facilities – Herb Young

- **Gymnasium in Herb Young Community Center is home of Marvelous Music Series.**
- **Mostly traditional music and choirs, with some popular events.**
- **From 3 concerts and total attendance of 650 in FY2001 to 4 concerts and total attendance of 1,300 in FY2005.**
- **Limiting acoustics, limited comfort/amenities and lack of support space. Costly temporary set-ups.**
- **Two additional meeting rooms often used for rehearsals - less than ideal. Rehearsals now moved to other spaces with Council meetings in Herb Young.**

# **Local Programs/Facilities – Applause at Cary Elementary**

- **Successful and growing program based at old Cary Elementary.**
- **From 482 participants in FY2004 to estimated 600 in FY 2006. Attendance from 2,293 to 3,390 in same years.**
- **Constrained by size and quality of facilities.**
- **Severe need for scene shop and dance studios**
- **Could use 6 classrooms instead of current 3.**

# Local Programs/Facilities – Festivals

- **Lazy Daze – draws 50,000 for fine arts, crafts and entertainment.**
- **19-25 performers on temporary stages covering “arts district area.”**
- **Well-known and respected nationally.**
- **Challenge is relationships with downtown merchants.**
- **“Spring Daze,” started 10 years ago in local park, has more of an orientation to local artists.**

# Local Programs/Facilities – Koka Booth

- 7,000-capacity amphitheater opened in 2001 and operated by SMG on behalf of the Town.
- Cost to sustain (including capital projects) down from \$600K in FY2004 to \$480K budgeted for 2006.
- Summer home for NC Symphony, other rentals and a series of presented programs booked through House of Blues Concerts.
- 2005 attendance of 30,000 at seven presented national acts. Ten such acts budgeted for 2006. Total attendance was 108,000 in 2005.
- It is an expensive facility from the perspective of users.
- Additional opportunity for co-presenting with Symphony.
- Important venue for ethnic and other festivals, as well as film presentations.
- Positive relationship with SMG and is gaining confidence as co-presenter.

# Local Facilities - Libraries

- **West Regional Library is to open in Cary in June 2006.**
- **Academy St. Library is to be re-purposed as a branch library.**
- **A branch library means:**
  - **Services not as broad and deep as regional library.**
  - **Focus on homework support for Grades 4-8.**
  - **A more popular reading collection.**
  - **A collection of 60,000 volumes as compared to regional goal of 200,000 volumes.**
  - **Will continue children's programs, but more at regional library.**
  - **No plans for PC lab, video or equipment loans.**

# Local Facilities- Churches

- **First Baptist**
  - Does not rent to arts groups
  - Cannot see need for larger performance venue; would rather build on to their own space
- **First Methodist**
  - Current facilities used rent-free by Scouts and others.
  - Possibility of occasional need for larger space for speakers, concerts; has not used larger space to date
  - Have approached the Town with ideas and plans to develop the site on which Waldo Rood house now standing. Plans include a new building with fellowship hall, gymnasium and multi-purpose room.
  - Likely to continue informal rent-free access to community organizations, though less probable for local arts groups.

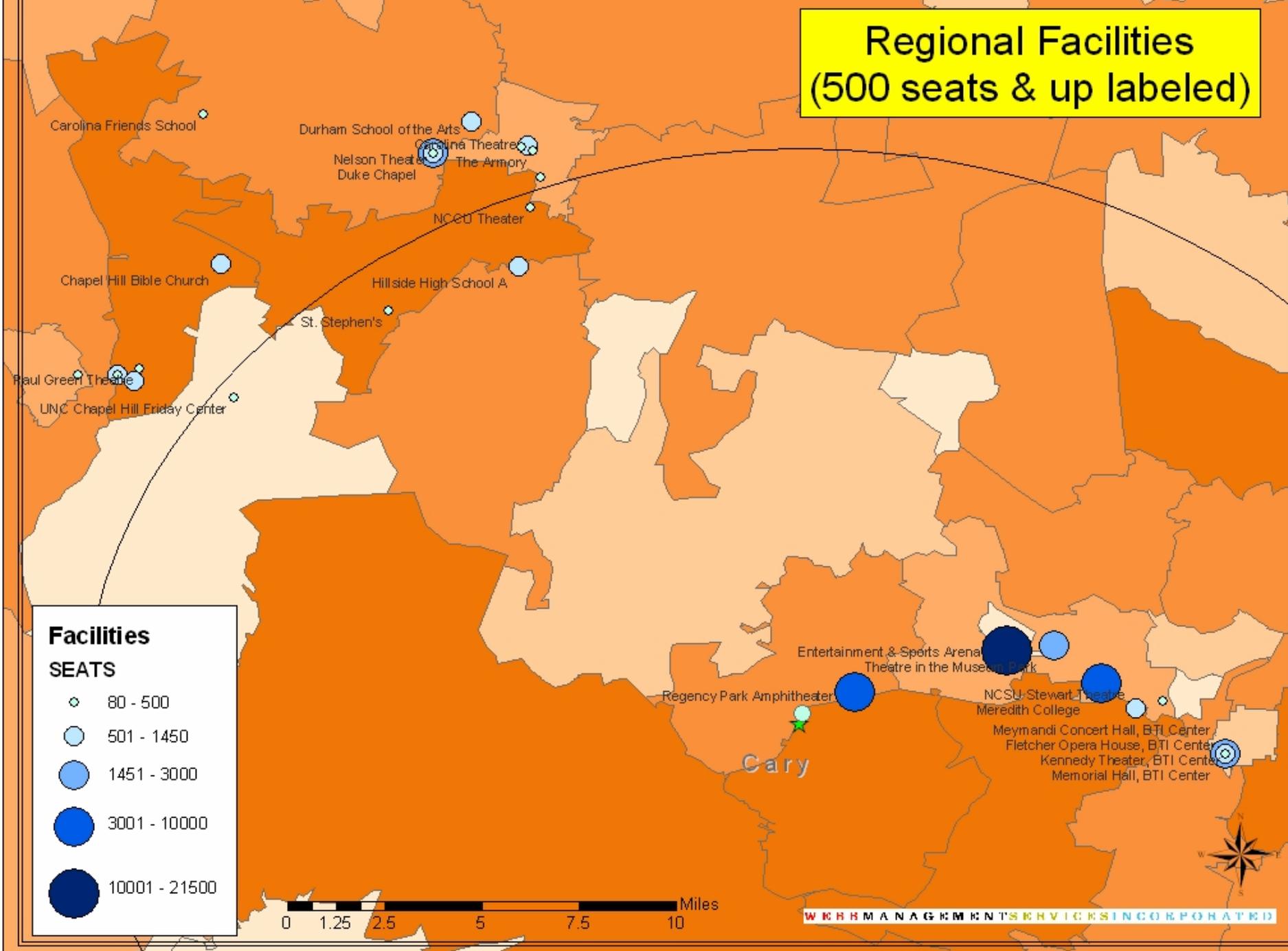
# Local Facilities - Summary

Name	Components	Quality	Future
Page Walker	1/3 useable space for classes/meetings	Good	Should refocus on exhibit, museum & archive programs
Jordan Hall	4 classrooms/studios in 4000 sf	Fair	Programs already exceed space requirements
Herb Young	500-seat gymnasium, 2 meeting rooms	Poor	Heavily used for unintended purposes

# Regional Facilities Summary

Name	Location	Seats	Type	Condition
Cary Elementary	Cary	200	Multi-purpose Space	Poor
HYCC	Cary	500	gymnasium	Poor
Regency Park Amphitheater	Cary	7,000	outdoor spectacle & concerts	Excellent
Name	Location	Seats	Type	Condition
North Carolina State University University Theatre Studio	Raleigh	80	multi-function theatre	Good
Person Recital Hall, UNC	Chapel Hill	120	recital room	Good
Carolina Friends School Center for Performing Arts	Durham	150	multi-function theatre	Good
Kennedy Theater, Progress Energy Center	Raleigh	170	black box theater	Good
Durham Arts Council	Durham	200	dance studios, blackbox theater	Good
North Carolina State University Thompson Theatre Main T	Raleigh	220	multi-function theatre	Good
The Armory	Durham	250	multi-function theatre	Good
NCCU Theater	Durham	316	multi-function theatre	Poor
St. Stephen's Episcopal Church	Durham	325	w orship/concert hall	Good
Nelson Theater	Durham	335	studio theater	Fair
The ArtsCenter	Carrboro	335	community arts space	Good
Hayti Heritage Center	Durham	350	music concerts, reception hall	Excellent
UNC - Chapel Hill Friday Center	Chapel Hill	425	multi-function theatre	Good
Griffiths Hall	Durham	450	cinema, lecture hall	Good
Paul Green Theatre	Chapel Hill	500	professional theater	Good
Bryan Center	Durham	600	theater, lecture hall	Good
Fletcher Opera House	Raleigh	600	music theater performance hall	Excellent
Reynolds Theatre	Durham	609	multi-function theatre	Good
Hill Hall Auditorium	Chapel Hill	700	recital, concert hall, theater	Good
Baldw in Auditorium	Durham	800	lecture hall, large assemblies	Good
Durham School of the Arts	Durham	800	school auditorium	Good
Hillside High School Aud.	Durham	800	school auditorium	Excellent
North Carolina State University Stew art Theatre	Raleigh	800	w orking theater	Good
Carolina Theatre	Durham	1,000	theater, cinema	Good
Chapel Hill Bible Church	Chapel Hill	1,100	w orship/concert hall	Good
Page Auditorium	Durham	1,200	concert hall, theatre, auditorium	Fair
Memorial Hall UNC	Chapel Hill	1,450	concert hall, theatre, auditorium	Excellent
Duke Chapel	Durham	1,600	w orship/concert hall	Excellent
Meymandi Concert Hall	Raleigh	1,700	concert hall	Excellent
Memorial Auditorium	Raleigh	2,277	theater	Excellent
Joseph M. Bryan Jr Theatre in the Museum Park	Raleigh	3,000	amphitheater	Good
Meredith College	Raleigh	10,000	college quad	Good
Walnut Creek Pavilion	Raleigh	20,000	outdoor spectacle venue	Excellent
Entertainment & Sports Arena	Raleigh	21,500	large sports arena	Excellent

# Regional Facilities (500 seats & up labeled)



# Regional Facilities Issues

- There is a gap in the regional inventory for a high-quality, mid-size hall.
- Depends on the idea that Raleigh/Cary is distinct from Chapel Hill/Durham for a set of users and audiences.

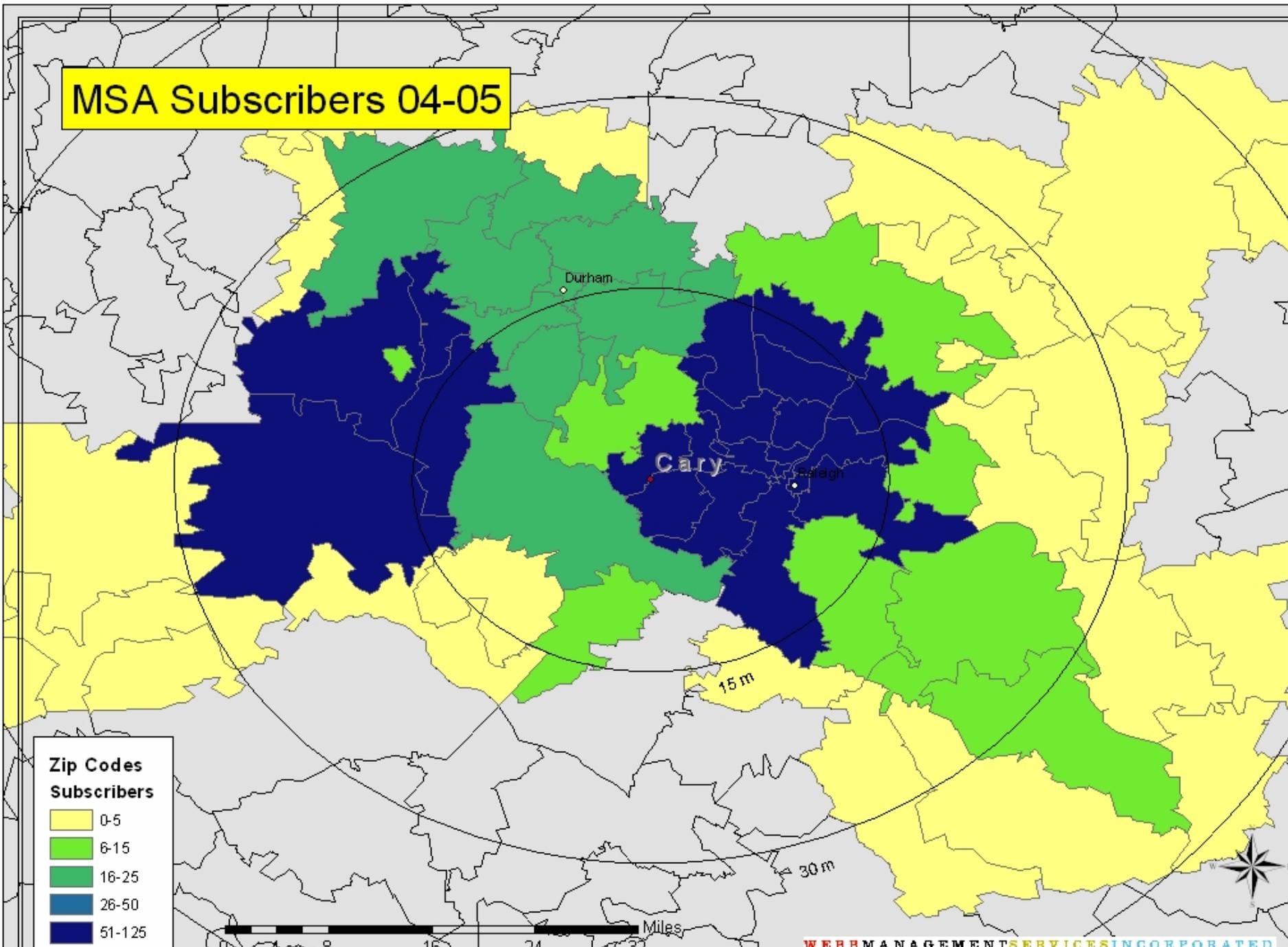
# User Demand

- **Town of Cary program demand**
- **Local and regional arts organization demand**
- **Presenter/promoter demand**

# Uses & Users

Potential Users	Discipline	Desired Theater Capacity	Perf Days	Prep Days	Total	Current Event Days
Concert Singers of Cary	Vocal Music	1000-1200	9	40	49	12
Cary Community Choir	Vocal Music	600	1	3	4	1
Cary Cultural Arts	Variety					
Sixstring Café and Music Hall	Music	200+	4+			250+
Philharmonic Association	Youth Music	n/a	2	80	82	7
Hum Sub	Indian Dance	700-1000	2	4	6	2
Cary Players	Theater	300-1000	21-35	100-175	131-210	21
Diamante	Hispanic Programming	50-500	3	3	6	3
Cary Ballet	Dance					
Ujima Group	Variety					
MLK Task Force	Variety					
Cary Town Band	Music					

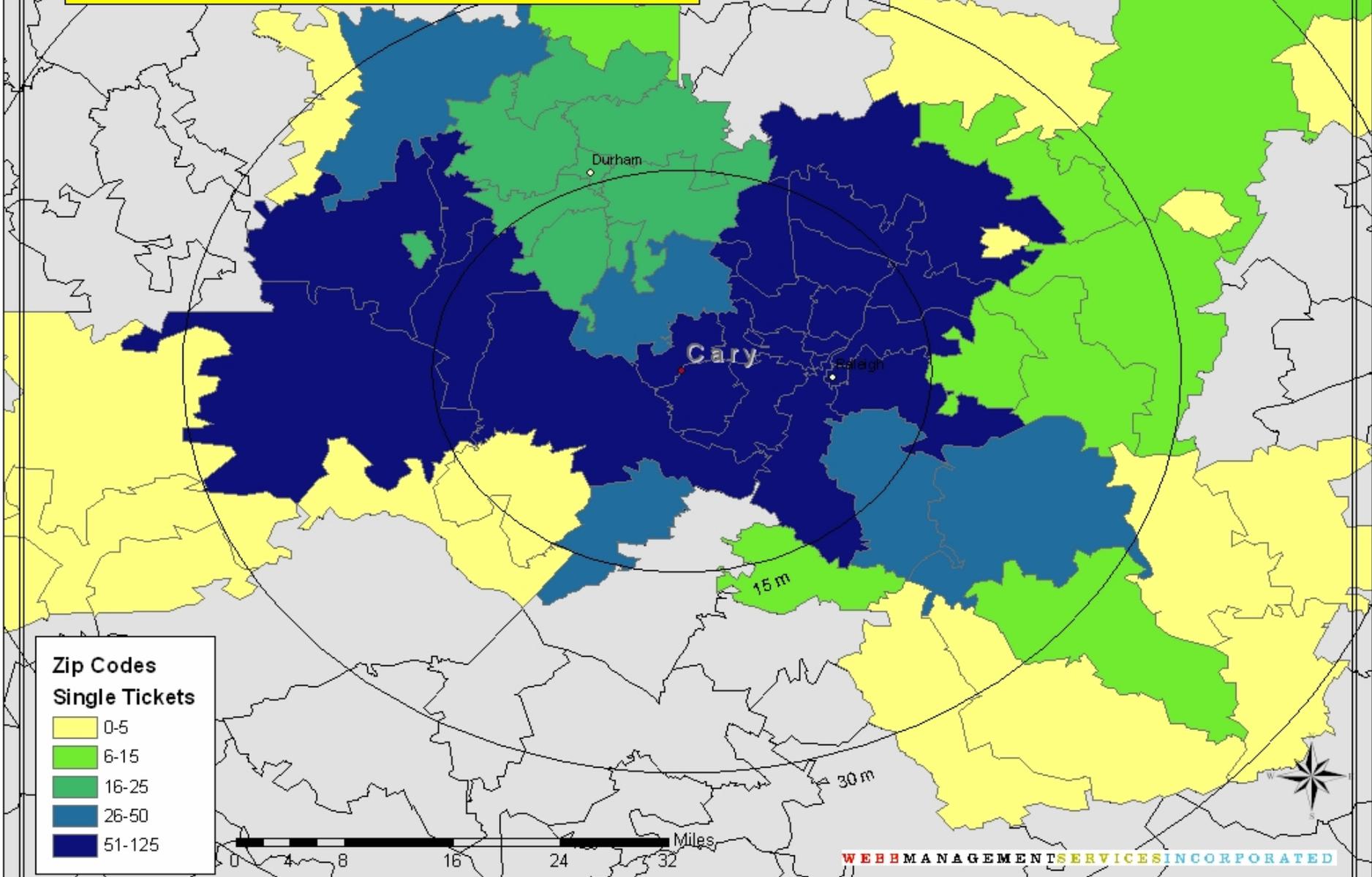
# MSA Subscribers 04-05



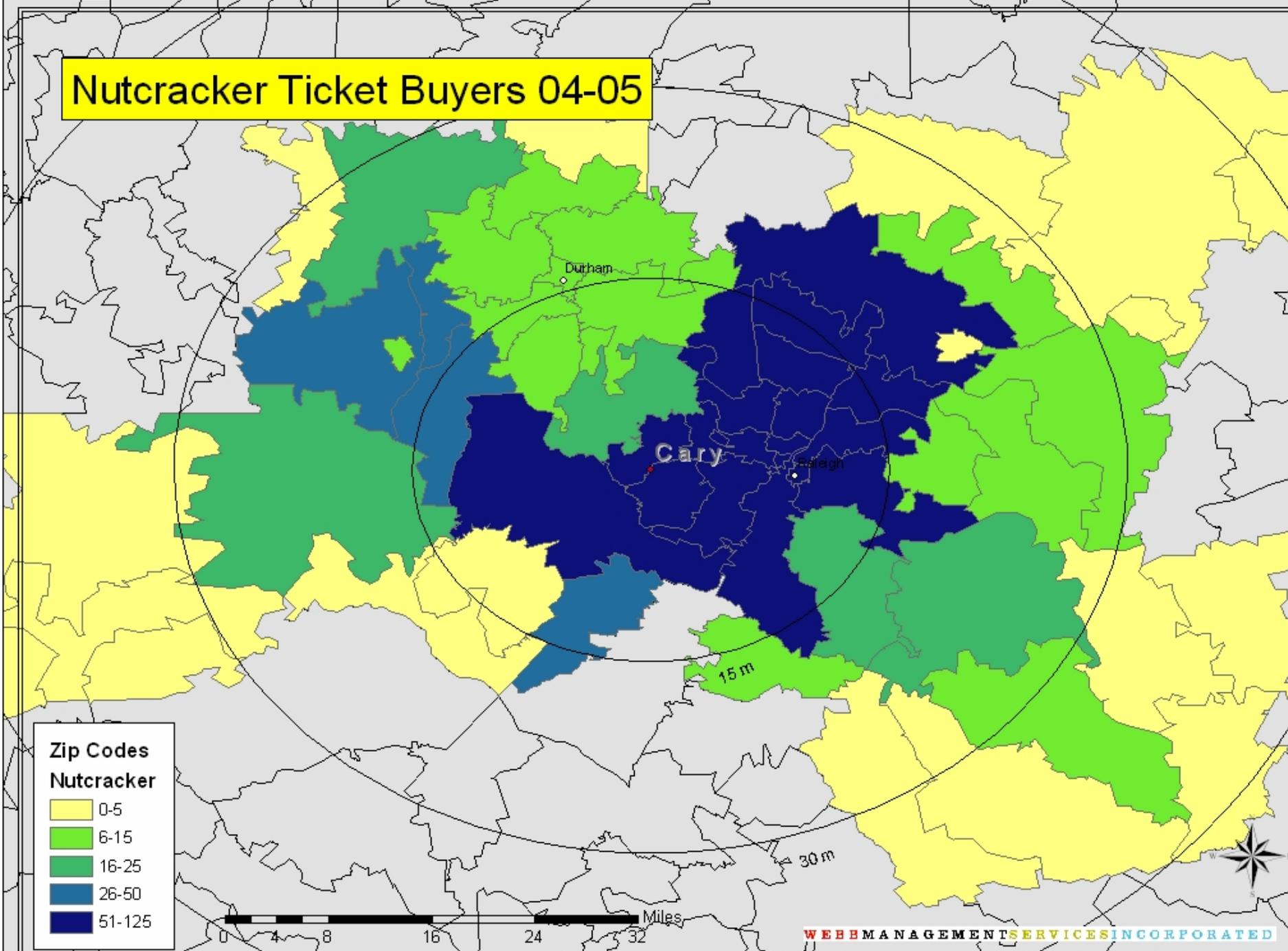
### Zip Codes Subscribers

- 0-5
- 6-15
- 16-25
- 26-50
- 51-125

# MSA Single Ticket Buyers 04-05



# Nutcracker Ticket Buyers 04-05



**Zip Codes  
Nutcracker**

0-5
6-15
16-25
26-50
51-125

# Uses & Users - Presenting

## Arts and Entertainment Presenting in the Triangle

Duke – Very active in a range of facilities with different sponsors

UNC Chapel Hill – Carolina Union PA Series

NC State – Center Stage Series and concerts for students

Progress Energy Center – Broadway and very little else

Alltel Pavilion – Clear Channel rock and pop outdoors

Carolina Theater Durham – Some lower-risk programs and film

The Arts Center in Carrboro – active and somewhat ambitious

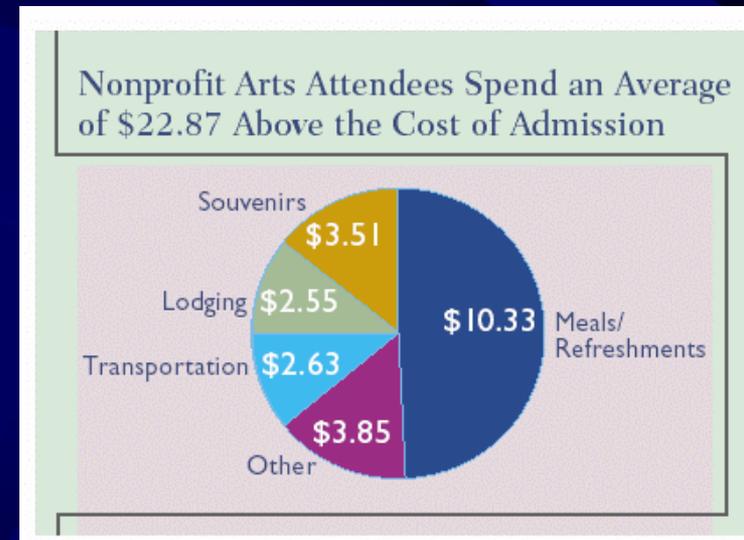
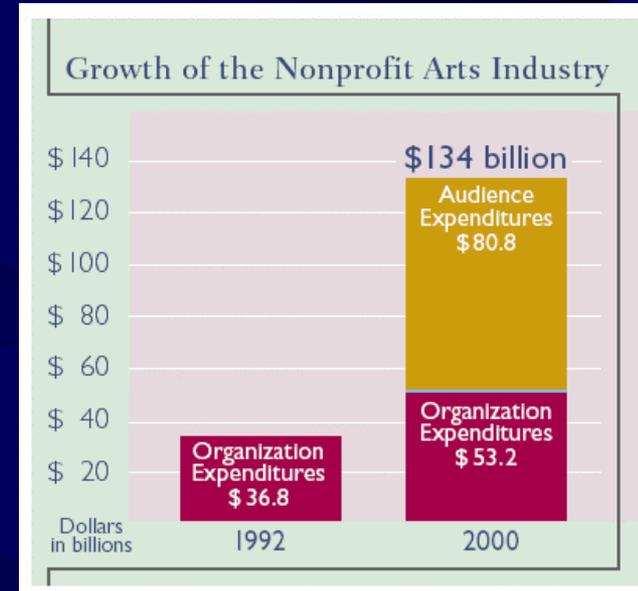
NCMA – Outdoor summer concert series

# Benefits & Impacts

- **What is the role of the arts in the future of Cary?**
- **What is the role of the downtown in the future of Cary?**

# Benefits & Impacts

- **Direct impacts**
  - New operations and new spending by arts patrons
- **Indirect Impacts**
  - Attract young professionals who want to live and work near cultural programs and activities, enhancing the workforce and productivity of existing businesses and industries.
  - Provide opportunities for new and expanding businesses near cultural activities, enhancing retail and commercial activity and improving attractiveness to other new businesses and industries.



# Benefits & Impacts

- **Community Development**
  - *Cultivating demand over building supply* – building individual appreciation as the foundation for public community benefits, including increased activity and ancillary economic impact.
- **Cultural Tourism**
  - *Presence of high quality arts activities is an important part of an area's marketing appeal to cultural tourists* – will diversify penetration of the tourist market and further develop Cary's potential as a year-round destination.
- **Education**
  - *Quality of primary education important to attract prospective residents as well as businesses and workers*
    - growing national trend toward collaborative partnerships to provide increased opportunities with limited resources.

# Conclusions

1. Propensity and capacity in the market for more activity
2. Local facilities lacking
3. Extensive regional facility inventory, with gaps
4. Some community arts organization demand
5. Some market capacity for additional touring activity
6. Town of Cary program demand
7. A range of potential impacts and benefits
8. Call for range of facilities serving different constituents, including residents, youth and visitors
9. Competing for audiences, programs and funding depends on a strong case, unique attributes and a high probability of success