



# Market & Feasibility Advisors

**Final Report**  
**Performing Arts Center**  
**Market & Feasibility Study**

Submitted to:  
**North Beach, MD**

Submitted by:  
**Market & Feasibility Advisors**

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MFA Project Number: 603

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## Introduction and Findings

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Market & Feasibility Advisors (MFA) was engaged to complete a feasibility study for the development of a performing arts center (PAC) in North Beach, Maryland.

There is sufficient demand by local residents and a strong flow of potential performances to support a performing arts facility in North Beach. MFA estimates the capital cost of such a facility, minus land cost, at \$4 to \$7 million, not including some annual subsidy for the performing arts center operations. Although the demand for the facility is strong, MFA does not believe that North Beach could support the development cost of this regional facility by itself.

While North Beach is idyllically located on Chesapeake Bay with easy accessibility from Washington DC, Baltimore and Annapolis, it is a small land locked community without a large tax base. Direct tax revenue would come through property and lodging taxes. Currently there is no hotel in North Beach and because the community is land locked there is only minor growth potential in the property tax revenue. Other than county or state support, the most obvious opportunity to fund this development would be revenue raised through a room tax on a new hotel in North Beach.

Even though the PAC would be a regional facility reaching beyond North Beach, our sense is that it is very unlikely that surrounding communities would contribute to building a PAC in North Beach.

Considering these facts -- sufficient demand but limited financial resources -- MFA examined two questions:

- Does North Beach need a full-fledged performing arts center; is there a less expensive alternative?
- And, what sources of financing are there?

### Building Size and Cost

The resident theater group Twin Beaches Players now performs in a gym configured as a theater. The gym has few windows and they are up high on the walls and covered during theatrical productions. A new large windowless box-like building, with minimal embellishment, would be a step up from the current gym facility. It could be developed at minimal cost; an initial cost estimate is \$1.75 to \$2.25 million. The building could be designed with a large flat-floored room with pull-out risers or ones that could be assembled. The space with could be rented to other users when not in use as a theater.

### Funding Sources

Currently, a hotel is proposed for the bay front adjacent to the PAC site in the center of North Beach. This hotel would generate new lodging tax revenue for North Beach that could be used as a funding source for the PAC.

The current plan calls for 68 rooms. Assuming a 65-percent occupancy, an average room rate of \$100, and a lodging tax of 4.5%, this would bring in about \$72,500 in room tax annually. Preliminary estimates show that this could be translated into over a million in bond proceeds. If the room count is doubled or tripled, the proceeds would grow proportionality. This financing plan is one we expect the market could support and may actually make the hotel more financially feasible than planning for only 68 rooms – large enough to be known in the Baltimore/DC/Annapolis markets yet small enough to stay profitable through the off-season.

### Economic Impact

PACs offer a variety of spaces for cultural entertainment, but usually target only the resident market. PACs can keep entertainment spending local, but true economic impact is when it draws spending from outside the local resident market.

In comparison, beachfront or waterfront hotels provide pure economic impact; they bring in a constant flow by drawing guests from out-of-town who spend their money locally to the benefit of local jobs, support for local shops and restaurants, and an increased tax revenue

To draw people outside the peak summer season, beachfront hotels add ballrooms, meeting rooms and expo spaces, targeting some of their programming targeting to the local market, but mainly programming toward guests from out-of-town who must buy a room and spend the night to attend an event -- hence the term Hotel & Conference Center.

PACs can also draw people from outside the immediate area and drive room sales (and economic impact) with special events. One special event format -- the Chautauqua idea -- came up in MFA's public meeting, along with film, music, and theater festivals.

## Conclusions

To maximize the impact of a performing arts center, it would be best to bring the economic impact of a hotel and conference center and the entertainment value of the PAC to locals together. The PAC and the hotel could be developed as a public-private joint venture that coordinates the use of the entertainment spaces with the hotel. This would allow the hotel to be built with more rooms. It could have higher occupancy that will create more lodging tax revenue and the increased number of visitors would benefit the local economy, particular retail and restaurants.

To support this, the PAC should be built as simple but versatile box-like design, well-suited and proportioned for theater but with the flexibility to be used for non-theatrical events as well.

Consider adding several cinemas

- They can be used for commercial movies through much of the year, art films and film festivals, and as presentation spaces during Chautauqua events as well. Overall, this may be profitable.

Put the uses in a design that can monetize/maximize the value of the waterfront/bay view

- The water view frontage of the proposed site for this facility is its most valuable feature – but only if used for an activity that benefits from the view. We suggest that the hotel planned for the site to the south extend over the street to this portion of the site currently proposed for a performing arts center. Performing arts centers are typically windowless and would not directly benefit from the view. While event rooms, placed on the side of the site with the views, would create some economic benefit when they are rented we suggest that putting that valuable view asset in the hands of the hotel would be better. Hotel rooms with a view sell for a higher rate and therefore generate more tax that would support the development of the PAC. The higher the room rate, the higher the hotel tax capture, the higher tax rates create higher tax support for the PAC.

Mandate street-front retail on as many sides of the PAC/hotel development as reasonable

- North Beach has a great street-level ambiance along many streets. This should be enhanced with the new development. Mandate putting street level retail along all sides of the development out of the floodplain and where it makes commercial sense.

In summary, we suggest two possible directions for the development of a PAC:

1. Build a simple less expensive flat-floored PAC building off the waterfront, but located in the downtown area. The move would be necessitated by the sale or lease of the city-owned waterfront site currently designated for the PAC. We don't expect that North Beach, as a small community with a limited tax base can afford to build a PAC but the sale or lease of the site may significantly contribute to the construction cost.

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2. Convene a public-private venture that mixes PAC, hotel and retail uses together to build a magnet development for North Beach (now missing) that can offset the development cost of the PAC, offer more entertainment facilities to the community and foster economic development by drawing visitor attracting events.

### **Mixed-Use Developments with Theaters and Cinemas**

There are a dozen mixed-use public-private developments theater and/or cinema developments that have been built across the U.S. and more are planned. MFA consultants were involved in a successful one in downtown Evanston, Illinois. Ones are proposed or currently in development include developments in Washington, DC; Grand Rapids, Michigan; Milwaukee, Wisconsin; and Santa Clarita, California.

### **Findings**

A stand-alone PAC at the proposed site in North Beach is infeasible for North Beach. We have included an operating statement for such a facility in this report. If the client would like to further explore the idea of a public/private joint venture with the hotel development, MFA would be happy to prepare a potential operating statement under this consulting scope.

## North Beach, MD Market Demographics

MFA analyzed the demographic composition of the North Beach market in order to characterize the demand for the proposed performing arts center.

For purposes of this analysis, MFA established three market areas to determine demand for various types of activities and events related to a performing arts center. The trade area is composed of two markets, as defined below. The map on the next page illustrates the location of each of the market areas.

In addition to the local markets MFA analyzed North Beach's tourism market an important source of demand since North Beach is an established destination for leisure and entertainment just outside of two metro areas, Washington DC and Baltimore. The tourism market is analyzed in a separate chapter.

1. **Primary Market** 0-15 minute drive time the from project site,
2. **Secondary Market** 15-30 minute drive time from the project site,
3. **Tertiary Market** 30-45 minute drive time from the project site

This segmentation allows for better demand projections for the proposed performing arts center.

### Primary Market: 15-Minute Drive Time

#### Population

Between 2016 and 2021 the total population within the primary market is projected to grow by 0.8% annually. Similar to the population the number of households is also projected to grow by 0.8% between 2016 and 2021. The following table summarizes the key demographics for the primary market area. The median age in 2016 is 39.5 years compared to U.S. median age of 38.

Indicator	2010	2016	2021	CAGR <sup>1</sup> 2016-2021
Population	16,967	18,012	18,726	0.78%
Households	6,305	6,696	6,962	0.78%
Families	4,568	4,819	4,990	0.70%
Average Household Size	2.69	2.69	2.69	
Median Age	38.6	39.5	40.8	

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

The primary market population is growing slower compared to the State of Maryland and the U.S as a whole. All indicators show roughly the same growth rates in comparison. Median household income growth is above the state and national level numbers.

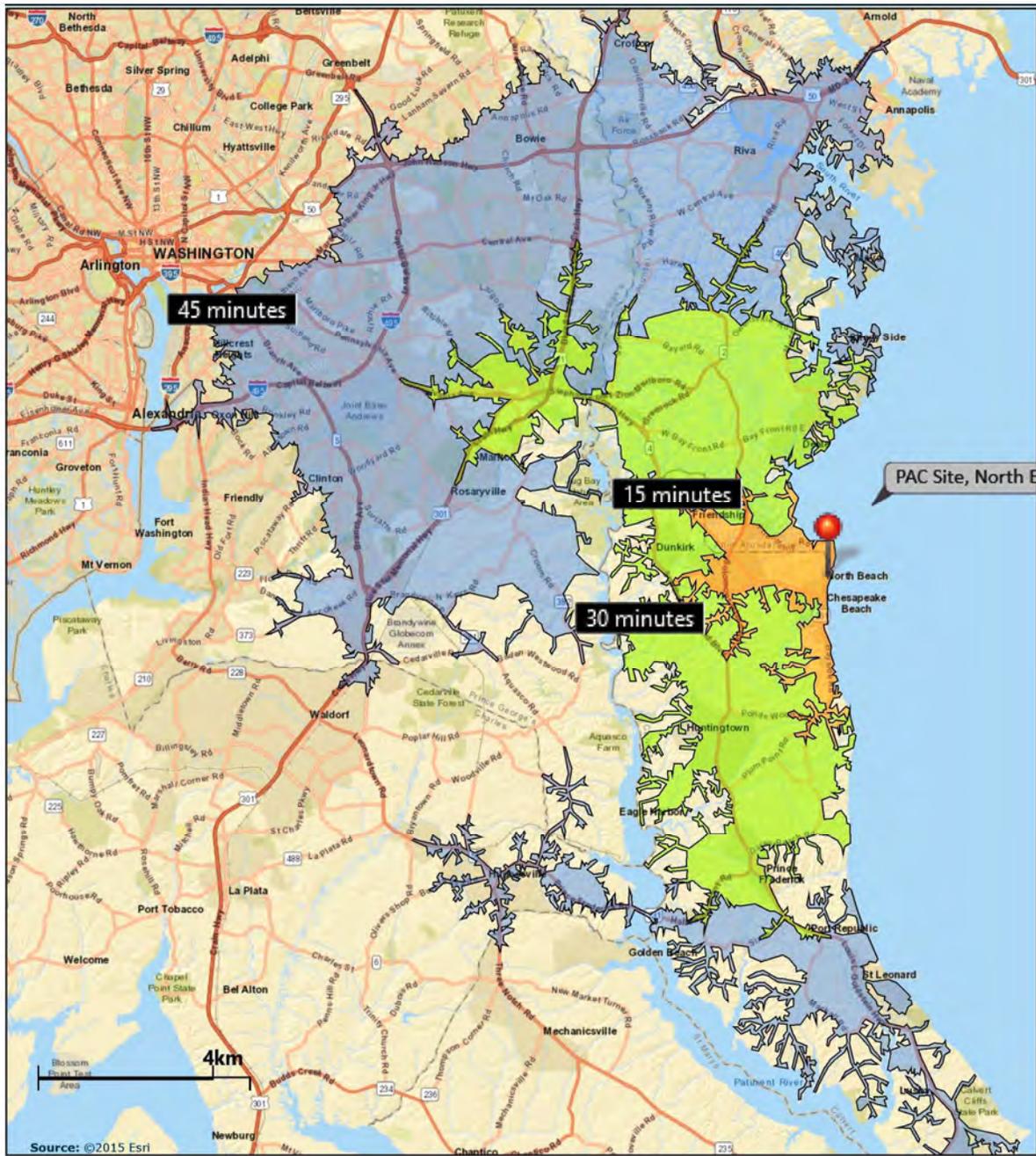
Indicator	15 Minute Market	Maryland	U.S.
Population	0.78%	0.84%	0.84%
Households	0.78%	0.75%	0.79%
Families	0.70%	0.68%	0.72%
Owner HHs	0.80%	0.77%	0.73%
Median Household Income	2.13%	1.96%	1.89%

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

<sup>1</sup> CAGR Compound Annual Growth Rate

# North Beach, MD - Performing Arts Center

15, 30 & 45-Minute Drive Time Markets



The following table shows the changes in the distribution of the population by age groups

Age Group	2010	2016	2021
0 - 4	1,081	1,035	1,025
5 - 9	1,220	1,203	1,107
10 - 14	1,273	1,300	1,283
15 - 19	1,197	1,145	1,186
20 - 24	923	991	843
25 - 34	2,008	2,296	2,356
35 - 44	2,484	2,329	2,612
45 - 54	3,103	2,972	2,562
55 - 64	2,156	2,593	2,861
65 - 74	945	1,454	1,931
75 - 84	428	527	760
85+	149	169	202
<b>Total</b>	<b>16,967</b>	<b>18,012</b>	<b>18,726</b>

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

### Ethnicity and Education

Persons of Hispanic origin represent 3.9% of the 2016 population in the primary market, compared to 17.6% of the U.S. population. This percentage is estimated to increase to 5.1% by 2021.

Ethnicity	2010		2016		2021	
	Number	Percent	Number	Percent	Number	Percent
White Alone	14,277	84.2%	15,036	83.5%	15,466	82.6%
Black Alone	1,832	10.8%	1,898	10.5%	1,947	10.4%
American Indian Alone	78	0.5%	86	0.5%	94	0.5%
Asian Alone	216	1.3%	276	1.5%	337	1.8%
Pacific Islander Alone	5	0.0%	8	0.0%	11	0.1%
Some Other Race Alone	102	0.6%	152	0.8%	203	1.1%
Two or More Races	456	2.7%	556	3.1%	667	3.6%
<b>Total</b>	<b>16,967</b>		<b>18,012</b>		<b>18,726</b>	
Hispanic Origin (Any Race)	462	2.7%	707	3.9%	960	5.1%

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

Education/Market	Local Market
Total	12,339
Less than 9th Grade	1.8%
9th - 12th Grade, No Diploma	5.5%
High School Graduate	29.4%
GED/Alternative Credential	3.7%
Some College, No Degree	24.2%
Associate Degree	6.9%
Bachelor's Degree	16.2%
Graduate/Professional Degree	12.3%

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021, MFA*

The table above shows that the primary market population is well educated -- roughly 35% carry an Associate degree or a higher level of education.

## Household Income and Spending

The distribution of households by income (shown below) indicates that the vast majority of households are in or above the \$50,000 income bracket. The number of low and middle income households is estimated to decline over the next five years, the number of high income households is estimated to increase over the same period of time, accounting for half of all households in the market area. The numbers in the table do not account for inflation or increased cost of living. The table shows the distribution of households in the market area into three main income brackets.

<b>Table 6. Household Income – Summary, Primary Market</b>			
Income Brackets	Households by Income		Disposable Income
	2016	2021	2016
<\$15,000 - \$49,999	22.5%	21.3%	31.5%
\$50,000 - \$99,999	32.4%	28.5%	44.9%
\$100,000>	45.1%	50.2%	23.6%

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

Roughly 69% of all households have a disposable income of \$50,000 or more. Median disposable household income in 2016 is estimated at \$64,229; average disposable household income is at \$78,663.

<b>Table 7. Median and Average Household Income – Summary, Primary Market</b>		
Year	2016	2021
<b>Median Household Income</b>	\$90,204	\$100,237
<b>Average Household Income</b>	\$104,826	\$114,133
<b>Per Capita Income</b>	\$38,684	\$42,103
<b>Median Disposable Income</b>	\$64,229	
<b>Average Disposable Income</b>	\$78,663	

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

- Current median household income is \$90,204 in this market area segment, compared to \$54,149 for all U.S. households. Median household income is projected to be \$100,237 in five years, compared to \$59,476 for all U.S. households
- Current average household income is \$104,826 in this market area segment, compared to \$77,008 for all U.S. households. Average household income is projected to be \$114,133 in five years, compared to \$84,021 for all U.S. households
- Current per capita income is \$38,684 in this market area segment, compared to the U.S. per capita income of \$29,472. The per capita income is projected to be \$42,103 in five years, compared to \$32,025 for all U.S. households

The following table gives household budget spending by category, thus showing the market potential for some main retail categories. The Spending Potential Index (SPI) compares the likelihood of a household spending money in a certain category to the national average of 100.

<b>Table 8. Household Spending – Summary, Primary Market</b>				
<b>Item</b>	<b>Average Spent per HH</b>	<b>Total HH Spending</b>	<b>Percent of Total</b>	<b>SPI</b>
<b>Total Expenditures</b>	<b>\$88,397.93</b>	<b>\$591,912,567</b>	<b>100.0%</b>	<b>134</b>
Food	\$10,373.40	\$69,460,265	11.7%	128
Food at Home	\$6,312.18	\$42,266,365	7.1%	127
Food Away from Home	\$4,061.22	\$27,193,900	4.6%	131
Alcoholic Beverages	\$685.66	\$4,591,201	0.8%	134
Housing	\$27,191.08	\$182,071,467	30.8%	133
Shelter	\$20,960.58	\$140,352,015	23.7%	135
Utilities, Fuel and Public Services	\$6,230.50	\$41,719,452	7.0%	128
Household Operations	\$2,380.49	\$15,939,730	2.7%	139
Housekeeping Supplies	\$910.97	\$6,099,865	1.0%	130
Household Furnishings and Equipment	\$2,405.58	\$16,107,764	2.7%	136
Apparel and Services	\$2,656.95	\$17,790,956	3.0%	132
Transportation	\$10,412.11	\$69,719,518	11.8%	129
Travel	\$2,698.20	\$18,067,140	3.1%	145
Health Care	\$7,006.61	\$46,916,240	7.9%	132
<b>Entertainment and Recreation</b>	<b>\$3,912.98</b>	<b>\$26,201,305</b>	<b>4.4%</b>	<b>134</b>
Personal Care Products & Services	\$983.49	\$6,585,420	1.1%	134
Education	\$2,005.64	\$13,429,753	2.3%	142
Miscellaneous	\$1,442.30	\$9,657,505	1.5%	134
Support Payments/Cash Contribution/Gifts in Kind	\$3,160.72	\$21,164,199	3.6%	136
Life/Other Insurance	\$585.45	\$3,920,164	0.7%	141
Pensions and Social Security	\$9,586.33	\$64,190,075	10.8%	141

*Source: 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics, MFA*

In all categories shown, spending is above the national average. A reason could be that the household income in the primary market area is higher than the national average, but also that the cost of living is higher than in other parts of the country.

## Recreational Activities

The following two tables show participation potential for selected activities and attractions that are easily accessible in the primary market area, and household spending categories that relate to the performing arts center.

<b>Table 9. Market Participation Potential, Primary Market</b>			
<b>Activity</b>	<b>Participants</b>	<b>Percent</b>	<b>MPI</b>
Went to art gallery in last 12 months	1,131	8.2%	110
Attended dance performance in last 12 months	678	4.9%	110
Went to museum in last 12 months	2,090	15.2%	124
Attended rock music performance in last 12 months	1,626	11.8%	124
Attended classical music/opera performance/12 months	588	4.3%	102
Attended country music performance in last 12 months	939	6.8%	121
Went to live theater in last 12 months	2,139	15.5%	120
Attended a movie in last 6 months	8,997	65.4%	110

*Source: GfK MRI, ESRI, MFA*

An MPI (Market Potential Index), shown in the table above, measures the relative likelihood of adults or households to exhibit certain consumer behaviors or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average. These estimates are based on national propensities to use various products and services, and are applied to local demographic composition.

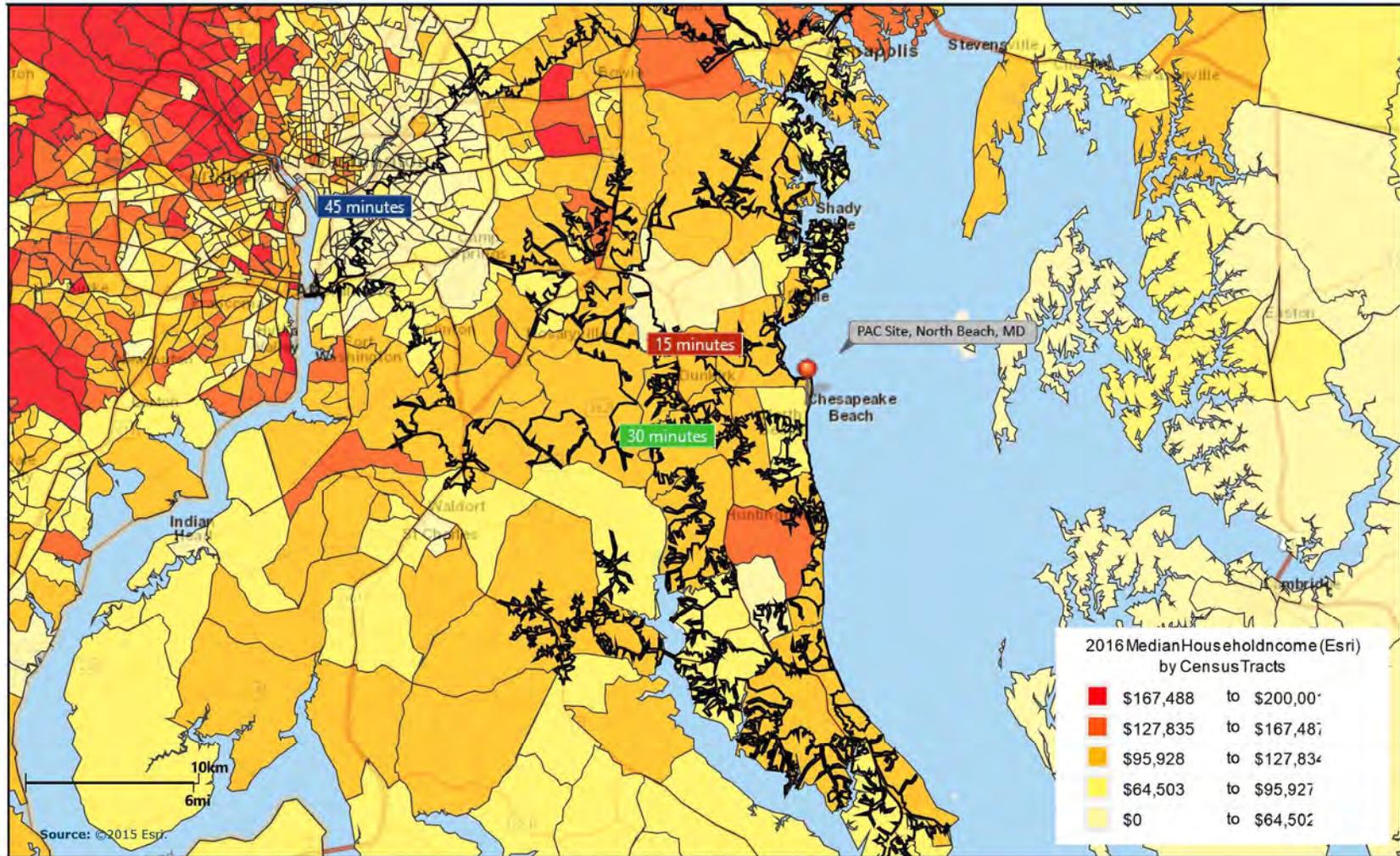
The Spending Potential Index, shown in the table below, compares the likelihood of a household spending money in a certain category to the national average of 100.

<b>Table 10. Market Volume/Potential of Household Spending, Primary Market</b>			
<b>Items</b>	<b>Spending Potential Index (SPI)</b>	<b>Average Amount Spent</b>	<b>Annual Total</b>
<b>Entertainment/Recreation Fees and Admissions</b>	<b>150</b>	<b>\$866.01</b>	<b>\$5,798,804</b>
Admission to Movies, Theater, Opera, Ballet	148	\$78.11	\$522,994
Admission to Sporting Events, excluding trips	140	\$92.82	\$621,499
Fees for Participant Sports, excluding trips	147	\$78.33	\$524,471
Fees for Recreational Lessons	154	\$137.49	\$920,619
Membership Fees for Social/Recreation/Civic Clubs	157	\$193.42	\$1,295,143
<i>Source: 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics, MFA</i>			

The map on the following page shows the median household income by census tracts for all three market areas (primary, secondary and tertiary). This could be helpful in any fundraising efforts for the performing arts center.

## North Beach, MD, Performing Arts Center

2016 Median Household Income (Esri) by Census Tracts



## Secondary Market: 15-30 Minute Drive Time

### Population

Between 2016 and 2021 the total population of the secondary market is projected to grow by 1.2% annually. Similar to the population, the number of households is also projected to grow by 1.2% between 2016 and 2021. The following table summarizes the key demographics for the local market area. The median age is 41.6 years compared to the U.S. median age of 38.

Indicator	2010	2016	2021	CAGR 2016-2021
Population	61,957	67,359	71,618	1.23%
Households	21,835	23,586	25,015	1.18%
Families	16,336	17,592	18,619	1.14%
Average Household Size	2.77	2.79	2.80	
Median Age	40.7	41.6	42.4	

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

Indicator	15 – 30 Minute Market	Maryland	U.S.
Population	1.23%	0.84%	0.84%
Households	1.18%	0.75%	0.79%
Families	1.14%	0.68%	0.72%
Owner HHs	1.14%	0.77%	0.73%
Median Household Income	1.49%	1.96%	1.89%

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

The secondary market population is growing at a higher rate compared to both the State of Maryland and the U.S as a whole. All other indicators show the same in comparison, with the exception of Median Household Income which is below both the state and national rates.

The following table shows the changes in the distribution of the population by age groups.

Age Group	2010	2016	2021
0 - 4	3,235	3,265	3,412
5 - 9	4,116	3,963	3,805
10 - 14	4,649	4,829	4,513
15 - 19	4,746	4,604	4,653
20 - 24	3,367	3,953	3,606
25 - 34	6,093	7,730	8,884
35 - 44	9,251	8,409	9,276
45 - 54	11,698	11,338	10,237
55 - 64	8,069	10,062	11,231
65 - 74	4,174	5,944	7,608
75 - 84	1,909	2,397	3,353
85+	649	865	1,039
<b>Total</b>	<b>61,957</b>	<b>67,359</b>	<b>71,618</b>

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

## Ethnicity and Education

In 2016, persons of Hispanic origin represented 3.7% of the secondary market's population, compared to 17.6% of the U.S. population. By 2021, the secondary market is estimated to increase to 4.8%.

Race	2010		2016		2021	
	Number	Percent	Number	Percent	Number	Percent
White Alone	39,301	63.4%	41,066	61.0%	42,181	58.9%
Black Alone	19,592	31.6%	22,271	33.1%	24,433	34.1%
American Indian Alone	214	0.3%	236	0.4%	255	0.4%
Asian Alone	873	1.4%	1,182	1.8%	1,467	2.0%
Pacific Islander Alone	27	0.0%	42	0.1%	53	0.1%
Some Other Race Alone	466	0.8%	674	1.0%	915	1.3%
Two or More Races	1,484	2.4%	1,889	2.8%	2,313	3.2%
<b>Total</b>	<b>61,957</b>		<b>67,359</b>		<b>71,618</b>	
Hispanic Origin (Any Race)	1,670	2.7%	2,504	3.7%	3,445	4.8%

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021, MFA*

Education/Market	Secondary Market
Total	46,744
Less than 9th Grade	1.7%
9th - 12th Grade, No Diploma	5.6%
High School Graduate	26.7%
GED/Alternative Credential	2.6%
Some College, No Degree	21.7%
Associate Degree	7.6%
Bachelor's Degree	19.5%
Graduate/Professional Degree	14.7%

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

The table above shows that the secondary market population is well educated -- roughly 42% carry an Associate Degree or higher level of education.

## Household Income and Spending

The distribution of households by income shows that the vast majority of households in the secondary market are in or above the \$50,000 income bracket. The number of low and middle income households is estimated to decline over the next five years, while the number of high income households is estimated to increase over the same period of time, accounting for 60% of all households in the secondary market area. These numbers do not account for inflation or increased cost of living. The following table shows the distribution of households in the market area into three main income brackets.

Income Brackets	Households by Income		Disposable Income
	2016	2021	2016
<\$15,000 - \$49,999	19.0%	16.6%	26.1%
\$50,000 - \$99,999	27.7%	23.7%	41.5%
\$100,000>	53.4%	59.5%	32.4%

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

Roughly 74% of all households in the secondary market area have disposable incomes of \$50,000 or more. Median disposable household income in 2016 is estimated at \$74,622; average disposable household income is \$89,434.

<b>Table 17. Median and Average Household Income – Summary, Secondary Market</b>		
<b>Year</b>	<b>2016</b>	<b>2021</b>
<b>Median Household Income</b>	\$104,339	\$112,367
<b>Average Household Income</b>	\$121,441	\$132,677
<b>Per Capita Income</b>	\$43,578	\$47,340
<b>Median Disposable Income</b>	\$74,622	
<b>Average Disposable Income</b>	\$89,434	

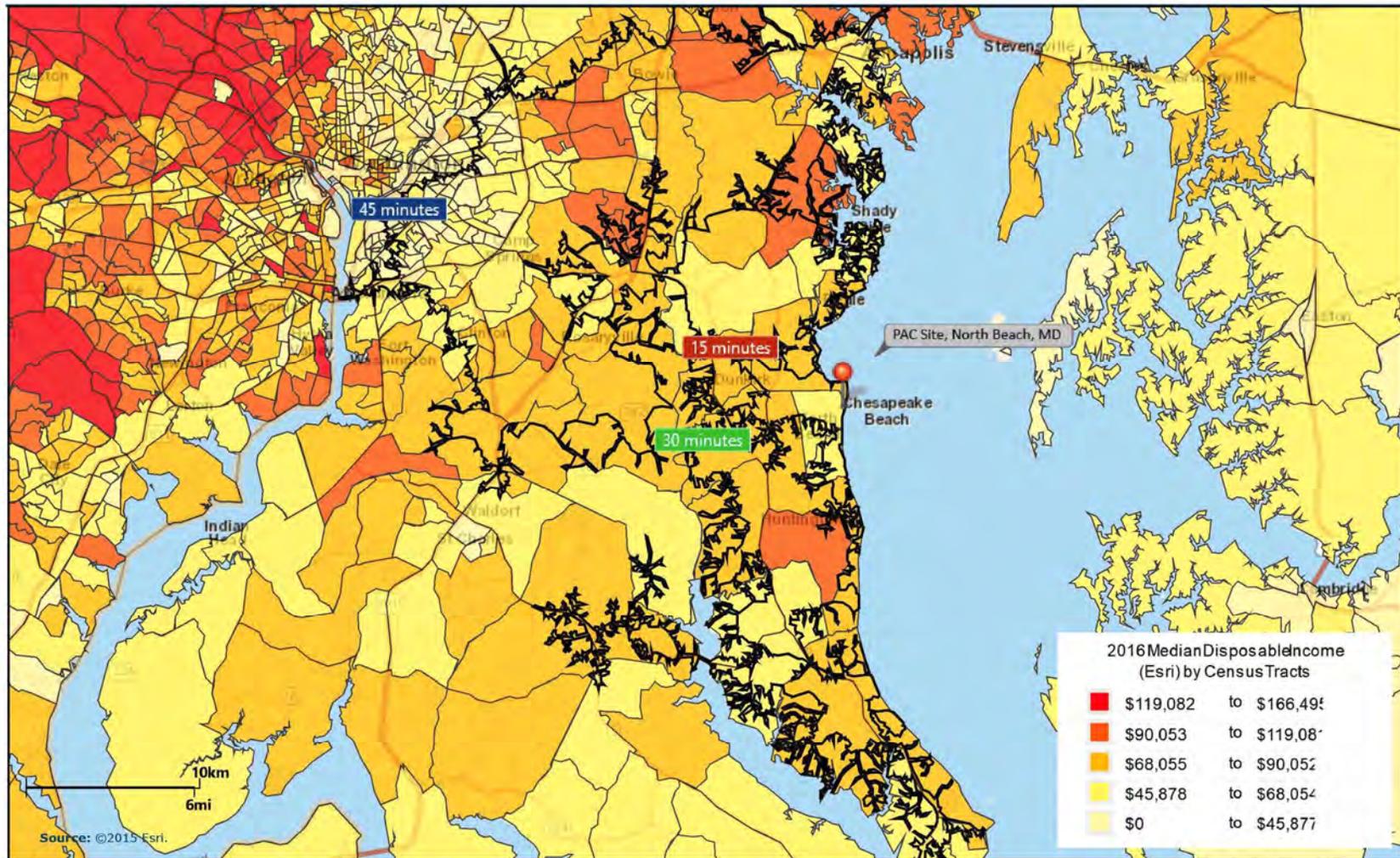
*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021, MFA*

- Current median household income is \$104,339 in the secondary market area, compared to \$54,149 for all U.S. households. Median household income is projected to be \$112,367 in five years, compared to \$59,476 for all U.S. households
- Current average household income is \$121,441, compared to \$77,008 for all U.S. households. Average household income is projected to be \$132,677 in five years, compared to \$84,021 for all U.S. households
- Current per capita income is \$43,578, compared to the U.S. per capita income of \$29,472. The per capita income is projected to be \$47,340 in five years, compared to \$32,025 for all U.S. households

The map on the following page shows the median disposable household income by census tracts for all three market areas (primary, secondary and tertiary). This could be helpful in any fundraising efforts for the performing arts center.

## North Beach, MD, Performing Arts Center

2016 Median Disposable Income (Esri) by Census Tracts



The following table gives household budget spending in categories showing the market potential for some main retail categories. The Spending Potential Index (SPI) compares the likelihood of a household spending money in a certain category to the national average of 100.

<b>Table 18. Household Spending – Summary, Secondary Market</b>				
<b>Item</b>	<b>Average Spent per HH</b>	<b>Total HH Spending</b>	<b>Percent of Total</b>	<b>SPI</b>
<b>Total Expenditures</b>	<b>\$101,559.56</b>	<b>\$2,395,383,700</b>	<b>100.0%</b>	<b>153</b>
Food	\$11,803.30	\$278,392,749	11.6%	146
Food at Home	\$7,156.18	\$168,785,711	7.0%	144
Food Away from Home	\$4,647.12	\$109,607,038	4.6%	150
Alcoholic Beverages	\$802.96	\$18,938,678	0.8%	157
Housing	\$31,345.66	\$739,318,849	30.9%	153
Shelter	\$24,278.96	\$572,643,472	23.9%	156
Utilities, Fuel and Public Services	\$7,066.71	\$166,675,376	7.0%	145
Household Operations	\$2,761.35	\$65,129,233	2.7%	161
Housekeeping Supplies	\$1,033.03	\$24,364,945	1.0%	147
Household Furnishings and Equipment	\$2,754.05	\$64,956,924	2.7%	156
Apparel and Services	\$3,082.77	\$72,710,240	3.0%	153
Transportation	\$11,785.55	\$277,974,047	11.6%	146
Travel	\$3,164.80	\$74,644,859	3.1%	170
Health Care	\$7,933.71	\$187,124,566	7.8%	150
<b>Entertainment and Recreation</b>	<b>\$4,489.16</b>	<b>\$105,881,423</b>	<b>4.4%</b>	<b>154</b>
Personal Care Products & Services	\$1,127.90	\$26,602,728	1.1%	154
Education	\$2,482.60	\$58,554,522	2.4%	176
Miscellaneous	\$1,578.85	\$37,238,823	1.5%	151
Support Payments/Cash Contribution/Gifts in Kind	\$3,584.67	\$84,548,006	3.5%	155
Life/Other Insurance	\$686.30	\$16,187,066	0.7%	166
Pensions and Social Security	\$11,142.88	\$262,816,041	11.0%	164

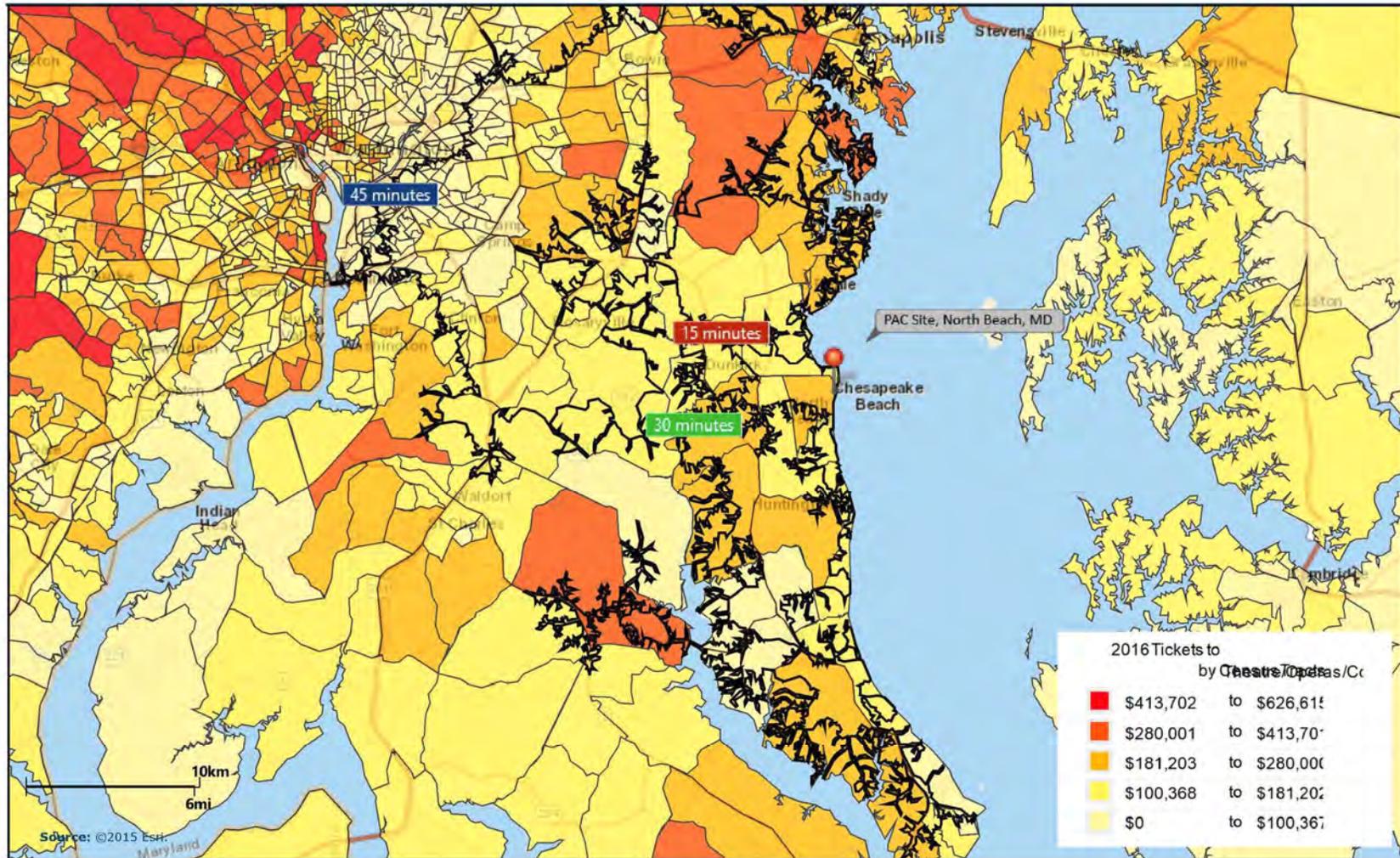
*Source: 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics, MFA*

In all categories in the secondary market, spending is significantly above the national average. As in the primary market, this can be attributed to the higher household income and the higher cost of living.

The map on the following page shows the household spending by census tracts for Theater, Opera and Concert tickets in all three market areas (primary, secondary and tertiary). This could be helpful to support targeted marketing and advertisement campaigns for the performing arts center.

## North Beach, MD, Performing Arts Center

2016 Tickets to Theatre/Operas/Concerts by Census Tracts



## Recreational Activities

The following two tables show participation potential for selected activities and attractions that are easily accessible in the secondary market area, and household spending categories that relate to the performing arts center.

Activity	Participants	Percent	MPI
Went to art gallery in last 12 months	4,609	8.8%	118
Attended dance performance in last 12 months	2,768	5.3%	118
Went to museum in last 12 months	8,952	17.1%	139
Attended rock music performance in last 12 months	6,421	12.3%	129
Attended classical music/opera performance/12 months	2,596	5.0%	118
Attended country music performance in last 12 months	3,386	6.5%	114
Went to live theater in last 12 months	8,888	17.0%	131
Attended a movie in last 6 months	35,013	66.8%	112

*Source: GfK MRI, ESRI, MFA*

An MPI (Market Potential Index) measures the relative likelihood of the adults or households to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average. These estimates are based on national propensities to use various products and services, and are applied to local demographic composition.

Items	Spending Potential Index (SPI)	Average Amount Spent	Annual Total
<b>Entertainment/Recreation Fees and Admissions</b>	<b>179</b>	<b>\$1,032.95</b>	<b>\$24,363,091</b>
Admission to Movies, Theater, Opera, Ballet	179	\$94.35	\$2,225,380
Admission to Sporting Events, excluding trips	161	\$106.78	\$2,518,527
Fees for Participant Sports, excluding trips	172	\$91.84	\$2,166,103
Fees for Recreational Lessons	177	\$158.36	\$3,734,978
Membership Fees for Social/Recreation/Civic Clubs	191	\$234.78	\$5,537,633

*Source: 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics, MFA*

The Spending Potential Index compares the likelihood of a household spending money in a certain category to the national average of 100.

## Tertiary Market: 30-45 Minute Drive Time Market

### Population

Between 2016 and 2021 the total population of the tertiary market is projected to grow by more than 1% annually. Similar to the population, the number of households is also projected to grow by 1% annually between 2016 and 2021. The following table summarizes the key demographics for the local market area. The median age in 2016 is 38.4 years compared to the U.S. median age of 38.

Indicator	2010	2016	2021	CAGR 2016-2021
Population	524,042	550,169	583,138	1.17%
Households	196,334	203,996	215,015	1.06%
Families	132,450	136,457	143,070	0.95%
Average Household Size	2.65	2.68	2.69	
Median Age	37.4	38.4	39.1	

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

Indicator	30-45 Minute Market	Maryland	U.S.
Population	1.17%	0.84%	0.84%
Households	1.06%	0.75%	0.79%
Families	0.95%	0.68%	0.72%
Owner HHs	1.06%	0.77%	0.73%
Median Household Income	1.83%	1.96%	1.89%

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

The tertiary market population is growing at a higher rate compared to the State of Maryland and the U.S as a whole. All other indicators show the same in comparison with the exception of the Median Household Income - this growth rate is below the State and National level numbers.

The following table shows the changes in the distribution of the population by age groups

Age Group	2010	2016	2021
0 - 4	34,580	33,665	35,097
5 - 9	34,408	35,762	35,248
10 - 14	36,620	36,829	37,969
15 - 19	38,522	35,064	35,324
20 - 24	33,499	35,583	32,642
25 - 34	67,315	74,133	81,866
35 - 44	74,618	71,441	78,428
45 - 54	82,656	79,755	76,070
55 - 64	63,531	72,095	77,801
65 - 74	34,787	46,994	56,692
75 - 84	17,151	21,191	27,003
85+	6,357	7,657	8,996
<b>Total</b>	<b>524,042</b>	<b>550,169</b>	<b>583,138</b>

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

## Ethnicity and Education

Persons of Hispanic origin in the tertiary market represent 7.1% of the population in 2016 compared to 17.6% of the U.S. population. This percentage is estimated to increase to 8.8% by 2021.

Ethnicity	2010		2016		2021	
	Number	Percent	Number	Percent	Number	Percent
White Alone	127,257	24.3%	129,799	23.6%	132,616	22.7%
Black Alone	359,157	68.5%	372,594	67.7%	391,700	67.2%
American Indian Alone	1,721	0.3%	1,830	0.3%	1,988	0.3%
Asian Alone	9,257	1.8%	11,438	2.1%	13,617	2.3%
Pacific Islander Alone	218	0.0%	279	0.1%	335	0.1%
Some Other Race Alone	13,690	2.6%	18,635	3.4%	24,126	4.1%
Two or More Races	12,743	2.4%	15,593	2.8%	18,756	3.2%
<b>Total</b>	<b>524,042</b>		<b>550,169</b>		<b>583,138</b>	
Hispanic Origin (Any Race)	28,548	5.4%	39,099	7.1%	51,301	8.8%

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

Education/Market	Tertiary Market
Total	373,267
Less than 9th Grade	2.8%
9th - 12th Grade, No Diploma	5.7%
High School Graduate	25.3%
GED/Alternative Credential	3.1%
Some College, No Degree	23.7%
Associate Degree	6.6%
Bachelor's Degree	19.2%
Graduate/Professional Degree	13.5%

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021, MFA*

The table above shows that the tertiary market population is well educated -- roughly 40% carry an Associate Degree or a higher level of education.

## Household Income and Spending

The distribution of households by income shows that the majority of households -- more than two-thirds -- are in or above the \$50,000 income bracket. The number of low and middle income households is estimated to decline over the next five years, while the number of high income households is estimated to increase over the same period of time, accounting for 42% of all households in the market area by 2021. These numbers do not account for inflation or increased cost of living. The following table shows the distribution of households in the market area into three main income brackets.

Income Brackets	Households by Income		Disposable Income
	2016	2021	2016
<\$15,000 - \$49,999	29.7%	29.0%	39.1%
\$50,000 - \$99,999	32.4%	28.6%	39.8%
\$100,000>	37.9%	42.3%	21.0%

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

Roughly 60% of all households have a disposable income of more than \$50,000. Median disposable household income in 2016 is estimated at \$57,759; average disposable household income is estimated at \$72,676.

Year	2016	2021
<b>Median Household Income</b>	\$78,060	\$85,456
<b>Average Household Income</b>	\$97,010	\$104,865
<b>Per Capita Income</b>	\$36,253	\$38,940
<b>Median Disposable Income</b>	\$57,759	
<b>Average Disposable Income</b>	\$72,676	

*Source: U.S. Bureau of the Census, 2010 Census, ESRI BIS forecasts for 2016 and 2021*

- Current median household income \$78,060 in the tertiary market area, compared to \$54,149 for all U.S. households. Median household income is projected to be \$85,456 in five years, compared to \$59,476 for all U.S. households
- Current average household income is \$97,010, compared to \$77,008 for all U.S. households. Average household income is projected to be \$104,865 in five years, compared to \$84,021 for all U.S. households
- Current per capita income is \$36,253, compared to the U.S. per capita income of \$29,472. The per capita income is projected to be \$38,940 in five years, compared to \$32,025 for all U.S. households

The following table shows household budget spending in categories with the market potential for some main retail categories. The Spending Potential Index (SPI) compares the likelihood of a household spending money in a certain category to the national average of 100.

<b>Table 28. Household Spending - Summary, Tertiary Market</b>				
<b>Item</b>	<b>Average Spent per HH</b>	<b>Total HH Spending</b>	<b>Percent of Total</b>	<b>SPI</b>
<b>Total Expenditures</b>	<b>\$82,706.09</b>	<b>\$16,871,711,909</b>	<b>100.0%</b>	<b>125</b>
Food	\$9,930.22	\$2,025,725,579	12.0%	123
Food at Home	\$6,082.42	\$1,240,789,151	7.4%	122
Food Away from Home	\$3,847.80	\$784,936,428	4.7%	124
Alcoholic Beverages	\$652.23	\$133,052,736	0.8%	127
Housing	\$26,134.39	\$5,331,311,266	31.6%	128
Shelter	\$20,195.13	\$4,119,726,309	24.4%	130
Utilities, Fuel and Public Services	\$5,939.26	\$1,211,584,957	7.2%	122
Household Operations	\$2,170.10	\$442,691,333	2.6%	126
Housekeeping Supplies	\$854.19	\$174,250,501	1.0%	122
Household Furnishings and Equipment	\$2,195.56	\$447,885,356	2.7%	124
Apparel and Services	\$2,549.59	\$520,105,810	3.1%	127
Transportation	\$9,779.35	\$1,994,948,043	11.8%	121
Travel	\$2,376.93	\$484,884,368	2.9%	128
Health Care	\$6,347.01	\$1,294,765,458	7.7%	120
<b>Entertainment and Recreation</b>	<b>\$3,596.09</b>	<b>\$733,587,635</b>	<b>4.3%</b>	<b>123</b>
Personal Care Products & Services	\$910.05	\$185,647,182	1.1%	124
Education	\$1,946.92	\$397,163,020	2.4%	138
Miscellaneous	\$1,332.00	\$271,720,055	1.6%	123
Support Payments/Cash Contribution/Gifts in Kind	\$2,798.53	\$570,889,296	3.4%	121
Life/Other Insurance	\$513.21	\$104,692,761	0.6%	124
Pensions and Social Security	\$8,619.74	\$1,758,391,509	10.4%	127
<i>Source: 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics, MFA</i>				

In all categories, the spending in the tertiary market is above the national average. As in the primary and secondary markets, this can be attributed to the higher household income and the higher cost of living.

## Recreational Activities

The following two tables show participation potential for selected activities and attractions that are easily accessible in the tertiary market area, and household spending categories that relate to the performing arts center.

Activity	Participants	Percent	MPI
Went to art gallery in last 12 months	33,725	8.0%	107
Attended dance performance in last 12 months	22,337	5.3%	118
Went to museum in last 12 months	58,393	13.8%	113
Attended rock music performance in last 12 months	39,842	9.4%	99
Attended classical music/opera performance/12 months	18,150	4.3%	103
Attended country music performance in last 12 months	21,534	5.1%	90
Went to live theater in last 12 months	62,782	14.9%	114
Attended a movie in last 6 months	271,275	64.2%	108

*Source: GfK MRI, ESRI, MFA*

An MPI (Market Potential Index) measures the relative likelihood of adults or households to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average. These estimates are based on national propensities to use various products and services, and are applied to local demographic composition.

The Spending Potential Index compares the likelihood of a household spending money in a certain category to the national average of 100. The tertiary market area is closer to the national average in its propensity to spend money for recreational activities, which can be attributed to more opportunities and higher income.

Items	Spending Potential Index (SPI)	Average Amount Spent	Annual Total
<b>Entertainment/Recreation Fees and Admissions</b>	134	\$775.47	\$158,191,781
Admission to Movies, Theater, Opera, Ballet	135	\$71.27	\$14,538,530
Admission to Sporting Events, excluding trips	129	\$85.94	\$17,530,556
Fees for Participant Sports, excluding trips	131	\$69.99	\$14,277,638
Fees for Recreational Lessons	132	\$118.33	\$24,139,832
Membership Fees for Social/Recreation/Civic Clubs	138	\$169.68	\$34,614,373

*Source: 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics, MFA*

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## Maryland Tourism

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### Maryland Tourism Summary 2015

In 2015, Maryland had 40.47 million person trips<sup>2</sup> of which 48% were overnight trips and 52% were day trips. The average number of nights spent in Maryland on an overnight trip was 3.3 and the average travel party size was 3.0 persons.

- Travelers on overnight trips to Maryland were more likely to travel in their own cars and less likely to arrive by plane than the national average.
- The top states of origin for day trips were
  1. Maryland 34%
  2. Virginia 18%
  3. Pennsylvania 17%
  4. New Jersey 5%
  5. New York 4%
- The top states of origin for overnight trips were
  1. Maryland 18%
  2. Pennsylvania 16%
  3. Virginia 12%
  4. New York 8%
  5. New Jersey 7%
- The top designated market area (DMA)<sup>3</sup> of origin for day trips were
  1. Washington DC 33%
  2. Baltimore 17%
  3. Philadelphia 10%
  4. Harrisburg-Lancaster-Leb-York 8%
  5. New York, NY/NJ/PA/CT 7%
- The top DMA of origin for overnight trips were
  1. Washington DC 16%
  2. New York, NY/NJ/PA/CT 11%
  3. Philadelphia 10%
  4. Baltimore 9%
  5. Harrisburg-Lancaster-Leb-York 4%
- The top five activities engaged in by travelers on overnight trips to Maryland were
  1. Shopping 39%
  2. Fine dining 23%
  3. Visiting a beach/waterfront 20%
  4. Swimming 17%
  5. Visiting a landmark/historic site 16%

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<sup>2</sup> A “person-trip” is defined as one person on a trip away from home overnight in paid accommodations or on a day or overnight trip to places 50 miles or more (one-way) away from home

<sup>3</sup> Designated market area (DMA), or television market area, or simply market is a region where the population can receive the same (or similar) television and radio station offerings; may also include other types of media such as newspapers and Internet content.

- Total direct visitor/travel spending in Maryland was \$16.8 billion in 2015, representing an annual increase from 2014 of 3.5 percent in current dollars

Lodging accounted for 19% of all visitor spending, food and beverage for 22%, retail for 13%, transportation for 32%, and recreation for 13%. This translates into the following per person per day expenditures:

<b>Table 31. Visitors - Per Person Per Day Expenditures</b>		
<b>Expenditure</b>	<b>Dollar Amount</b>	<b>Percent</b>
Lodging	\$78.04	18.8%
Food and beverage	\$91.74	22.1%
Retail	\$55.63	13.4%
Transportation	\$133.25	32.1%
Recreation/Sightseeing/Entertainment	\$55.63	13.4%

*Source: U.S. Travel Association, U.S. Department of Commerce, International Trade Administration, U.S. Office of Tourism Industries, Longwoods International*

### Overnight Visitor Origin by States

The majority of overnight visitors are from Maryland itself, followed by the two neighboring States of Pennsylvania and Virginia.

<b>Table 32. Overnight Visitor Origin by States</b>		
<b>State</b>	<b>Percent</b>	<b>Number</b>
Maryland	18%	3,508,200
Pennsylvania	16%	3,118,400
Virginia	12%	2,338,800
New York	8%	1,559,200
New Jersey	7%	1,364,300

*Source: U.S. Travel Association, U.S. Department of Commerce, International Trade Administration, U.S. Office of Tourism Industries, Longwoods International*

A somewhat similar trend is apparent when looking at the overnight visitor origin by designated market area (DMA)<sup>4</sup>. DMAs are similar to metropolitan statistical areas (MSA) although they are usually larger and MSAs boundaries are defined by jurisdictions not by the reach of media broadcasts.

<b>Table 33. Overnight Visitor DMA</b>		
<b>DMA</b>	<b>Percent</b>	<b>Number</b>
Washington DC	16%	3,118,400
New York, NY/NJ/PA/CT	11%	2,143,900
Philadelphia	10%	1,949,000
Baltimore	9%	1,754,100
Harrisburg-Lancaster-Leb-York	4%	779,600

*Source: U.S. Travel Association, U.S. Department of Commerce, International Trade Administration, U.S. Office of Tourism Industries, Longwoods International*

The following two tables list the activities that overnight and day visitors to Maryland participate in or experience while visiting. Activities related to the subject project are highlighted

<b>Table 34. Overnight Visitor Activities and Participation</b>		
<b>Activity</b>	<b>Percent of Overnight Visitors</b>	<b>Number</b>
Shopping	39%	7,601,100
Fine dining	23%	4,482,700
Beach/Waterfront	20%	3,898,000
Swimming	17%	3,313,300
Landmark/Historic site	16%	3,118,400
Museum	15%	2,923,500
National/State Park	13%	2,533,700
Bar/Disco/Nightclub	12%	2,338,800
Theme park	8%	1,559,200
Zoo	8%	1,559,200
Business Meeting	8%	1,559,200
Casino	7%	1,364,300
Theater	7%	1,364,300
Art Gallery	7%	1,364,300
Fair/Exhibition/Festival	6%	1,169,400
Fishing	6%	1,169,400
Boating/Sailing	6%	1,169,400
Dance	6%	1,169,400
Pro/College sports event	6%	1,169,400
Convention/Conference	5%	974,500
Hiking/Backpacking	5%	974,500
Spa	5%	974,500
Biking	5%	974,500
Brewery	4%	779,600
Rock/Pop concert	4%	779,600
Winery	4%	779,600
Golf	4%	779,600
Camping	4%	779,600
Participate in kids sports event	2%	389,800
Participate adult sports event	3%	584,700
Birding	3%	584,700
Trade show	3%	584,700
Watch Amateur/Youth Sports	3%	584,700
Mountain climbing	2%	389,800
Hunting	2%	389,800
Tennis	2%	389,800
Symphony	2%	389,800
Skiing/Snowboarding	2%	389,800
Rafting	2%	389,800
Opera	2%	389,800
Rodeo	2%	389,800
Motorcycle touring	2%	389,800

*Source: US Travel Association, U.S. Department of Commerce, International Trade Administration, U.S. Office of Tourism Industries, Longwoods International*

<b>Table 35. Day Visitor Activities and Participation</b>		
<b>Activity</b>	<b>Percent of Day Visitors</b>	<b>Number</b>
Shopping	26%	5,454,800
Fine dining	15%	3,147,000
Museum	12%	2,517,600
Landmark/Historic Site	12%	2,517,600
Beach/waterfront	10%	2,098,000
National/State Park	7%	1,468,600
Casino	6%	1,258,800
Swimming	6%	1,258,800
Zoo	6%	1,258,800
Fair/Exhibition/Festival	5%	1,049,000
Bar/disco/nightclub	5%	1,049,000
Theme park	4%	839,200
Business Meeting	4%	839,200
Theater	4%	839,200
Art Gallery	4%	839,200
Pro/college sports event	4%	839,200
Fishing	3%	629,400
Boating/sailing	3%	629,400
Convention/Conference	3%	629,400
Hiking/backpacking	3%	629,400
Spa	3%	629,400
Dance	2%	419,600
Participated in kids sports event	2%	419,600
Rock/Pop Concert	2%	419,600
Golf	2%	419,600
Winery	2%	419,600
Camping	2%	419,600
Watch Amateur/Youth Sports	2%	419,600
Biking	2%	419,600
Brewery	2%	419,600

*Source: US Travel Association, U.S. Department of Commerce, International Trade Administration, and U.S. Office of Tourism Industries, Longwoods International*

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## **Visitor Household Composition and Age Distribution**

### *Day Visitors*

Most day visitors (40%) to Maryland are between 25 and 44 years old; 32% are between 45 and 54 years old, 15% are 65 years and older, and 12% are between 18 and 24 years old.

### *Overnight Visitors*

Most overnight visitors (40%) to Maryland are between 25 and 44 years old; 32% are between 45 and 54 years old, 12% are 65 years and older and 15% are between 18 and 24 years old.

## **Visitor Household Income Distribution**

### *Day Visitors*

Low income households (under \$50,000 annual income) account for 40% of day visitors, while 35% of day visitors are middle income households with annual incomes between \$50,000 and \$100,000, and 26% are high income households with \$100,000+ annual income.

### *Overnight Visitors*

Low income households (under \$50,000 annual income) account for 38% of overnight visitors, 36% are middle class households with annual incomes between \$50,000 and \$100,000, and 26% are high income households with \$100,000+ annual income.

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## Demand Projections

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Estimating the demand potential from the projects market area is central to this analysis. This following approach is based on national trends provided by the National Endowment of the Arts (NEA) which then are applied to the market population

### Evaluation of Potential Audience

To estimate the potential number of audience/visitors for the proposed performing arts center, MFA completed a detailed demographic analysis and identified trends utilizing the data presented above, as well as:

- Propensity to attend various types of out-of-home entertainment
- Projections of above demographics and visitor characteristics in order to determine sustainability of market over time

MFA also assessed the potential audience for audience/visitors for the proposed performing arts center by utilizing accepted entertainment research metrics and indices such as the Survey of Public Participation in the Arts from the National Endowment for the Arts (NEA) and the National Arts Index (NAI) by Americans for the Arts, as well as lifestyle data bases for activities relevant to attending entertainment and cultural events. Other national and regional indices were applied to population and visitor data to further refine characteristics such as participation, frequency, and desirability of program types.

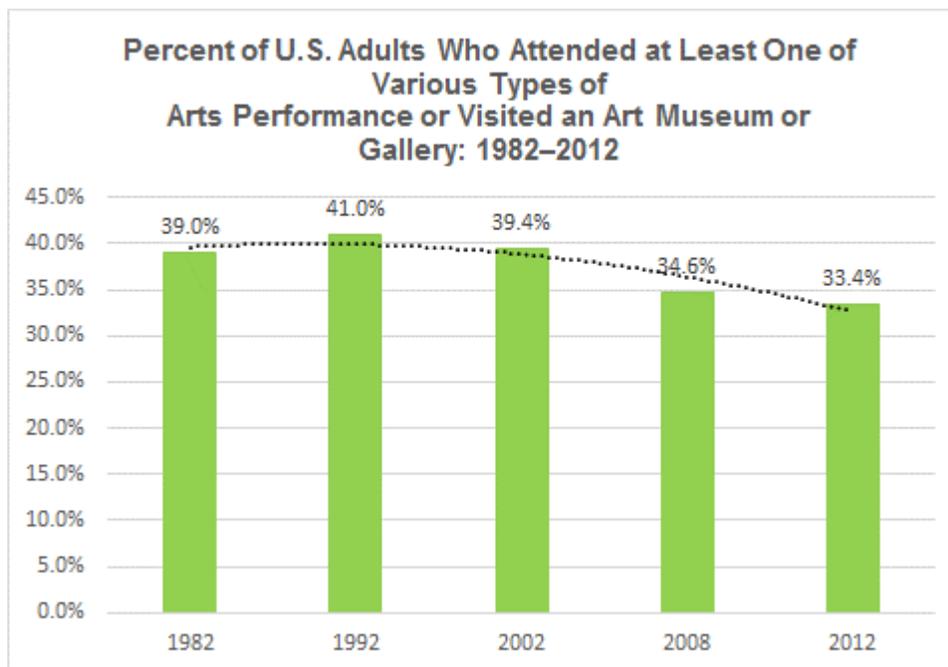
### Arts Attendance Summary

Key trends from the National Endowment for the Arts' Survey of Public Participation in the Arts (SPPA) 2012 reveal:

- Slightly more than 50 percent of all American adults attended a live visual or performing arts event in 2012.
- Since 2002, adult attendance rates have declined for a core set of arts activities tracked consistently by the National Endowment for the Arts (NEA).
- Thirty-three percent of adults attended one of those selected activities in 2012, compared with 39 percent a decade earlier.
- The declines were steepest for non-Hispanic whites, adults from 35 to 54 years of age, and higher educated adults (at least "some" college education).
- The overall drop in arts attendance from 2008 to 2012 was less severe than from 2002 to 2008.
- African-Americans and Hispanics, for example, showed no declines from 2008 to 2012.
- Older Americans emerge as the only demographic group to have evidenced increases in attending live visual and performing arts activities over the last decade.

## National Trends in Performing Arts

Between 2008 and 2012, national rates of attendance at visual and performing arts activities dropped slightly, remaining below 2002 levels. In 2012, one in three U.S. adults (about 78 million) visited an art museum or gallery or attended at least one of various types of performing arts events.



Source NEA, MFA

Category	Percent
Movies	59%
Visual Arts	39%
Performing Arts	37%

Source NEA, MFA

A closer look at individual types of arts activity shows that theater attendance (musical and non-musical play-going) declined significantly since 2008. So did the share of adults visiting art museums or galleries or attending crafts fairs or visual arts festivals. Notably, non-white and Hispanic groups upheld their arts attendance rates, and even showed increases for some activities. And, more adults, from a variety of demographic groups, went to the movies in 2012 than in 2008.

Category/Year	2002	2008	2012
Classical Music	11.6%	9.3%	8.8%
Jazz	10.8%	7.8%	8.1%
Dance Other than Ballet	6.3%	5.2%	5.6%
Latin, Spanish, or Salsa Music	NA	4.9%	5.1%
Ballet	3.9%	2.9%	2.8%
Opera	3.2%	2.1%	2.1%

Source NEA, MFA

Since 2008, attendance rates have declined for both of the following theatrical events:

- Musical plays (15.2 percent of adults nationwide, or 35.7 million, attended at least one event in the 2012 survey year), a decline from 2008, as shown in the table below
- Non-musical plays (8.3 percent, or 19.5 million adults nationwide, attended at least one event in the 2012 survey year), also a decline shown in the table below

Category/Year	2002	2008	2012	Change 2008 -2012
Musical Play	17.1%	16.7%	15.2%	-1.5%
Non-Musical Play	12.3%	9.4%	8.3%	-1.1%

*Source NEA, MFA*

### Attending Arts Events Motivations and Barriers

The most common barriers for adults who were interested in a specific event but did not go were:

- For nearly 60 percent of people with children under age six, the lack of time was the greatest single barrier to attendance. This finding might inspire arts providers to develop more family-friendly program options.
- Some noted that the location was too difficult to get to. This was especially a problem for retirees, older adults, and adults with physical disabilities.
- For 22 percent of those who wanted to attend but chose not to, the reason was not having someone to go with.

Motivations include:

- Top reasons to attend the arts (performances and exhibits) include socializing with friends or family members (73 percent); learning new things (64 percent); and supporting the community (51 percent).
- Despite similar household incomes and education, people who call themselves middle class were more likely to attend the arts than those who identified themselves as working class.
- Life stages — pursuing higher education, marriage, child-rearing, and retirement — are often more predictive than age alone as factors in attending the arts. For example, parents with young children under age six more often cited socializing with family or friends, learning new things and celebrating their cultural heritage when they attended performances accompanied by their children.

### Visual and Performing Arts Attendance

Adults are included if they participated in at least one of the following activities in the preceding 12 months:

- **39 percent of adults attended a visual arts event or activity**

Types of attendance included:

- 24 percent of adults toured a park, monument, building, or neighborhood for historic or design purposes
- 22 percent attended a visual arts festival or a crafts fair, and
- 21 percent visited an art museum or gallery

- **37 percent of adults attended a live performing arts event**

Event types included:

- 21 percent of adults attended a musical or non-musical play
- 17 percent attended a classical music, jazz, or Latin, Spanish, or salsa music event/performance
- 7 percent of adults attended a dance event/performance, and
- 2 percent of adults went to the opera

<b>Table 39. Demographic Distribution and Percentage of U.S. Adults Attending at Least One Benchmark Activity in the Past 12 Months: 2012</b>				
<b>Indicator</b>	<b>In Millions</b>	<b>In Percent</b>	<b>Distribution of Attendees</b>	<b>Rate of Attendance</b>
<b>All Adults</b>	<b>235.0</b>	<b>100.0%</b>		<b>33.4%</b>
<b>By Age Group</b>				
18–24	30.4	13.0%	11.7%	30.2%
25–34	41.0	17.4%	17.1%	32.6%
35–44	39.6	16.9%	16.3%	32.4%
45–54	43.7	18.6%	19.2%	34.4%
55–64	38.3	16.3%	18.6%	38.0%
65–74	23.8	10.1%	11.1%	36.6%
75+	18.1	7.7%	6.0%	25.9%
<b>By Education Level</b>				
Grade school	9.9	4.2%	0.8%	6.5%
Some high school	19.0	8.1%	2.2%	9.1%
High school graduate	70.9	30.2%	18.0%	19.9%
Some college	68.7	29.2%	29.6%	33.8%
College graduate	43.0	18.3%	29.7%	54.0%
Graduate School	23.5	10.0%	19.7%	65.6%
<b>By Household Income</b>				
Less than \$20K	40.9	17.4%	8.5%	16.3%
\$20K to \$50K	76.0	32.3%	24.1%	24.9%
\$50K to \$75K	43.9	18.7%	20.4%	36.4%
\$75K to \$100K	27.6	11.7%	14.8%	41.5%
\$100K to \$150K	27.1	11.5%	16.9%	48.8%
\$150K and over Total	19.6	8.3%	15.4%	62.3%
<b>By Ethnicity</b>				
Hispanic	35	14.9%	9.4%	21.1%
White	155.7	66.3%	75.4%	37.9%
African American	26.8	11.4%	8.5%	25.0%
Other Total	17.5	7.4%	6.6%	29.8%
<b>By Gender</b>				
Male	113.1	48.1%	43.9%	30.4%
Female	121.9	51.9%	56.1%	36.1%
<i>Source NEA, MFA</i>				

## Demand Potential – Local Market

By applying the “rate of attendance” by age group from the previous table to the market areas’ age group distribution, we can estimate the market potential for a performing arts center. The following table shows the market potential for local and regional markets.

<b>Table 40. Summary PAC Attendance Market Potential</b>			
<b>Age Group/Market Area</b>	<b>0-15 Minutes</b>	<b>15-30 Minutes</b>	<b>30-45 Minutes</b>
18–24	1,425	5,652	49,042
25–34	2,296	7,730	74,133
35–44	2,329	8,409	71,441
45–54	2,972	11,338	79,755
55–64	2,593	10,062	72,095
65+	2,150	9,206	75,842
<b>Total</b>	<b>112,519</b>	<b>165,479</b>	<b>422,308</b>

*Source ESRI BIS forecasts for 2016 and 2021, NEA, MFA*

The table above defines the *market size/potential*, not the *likely attendance* for a Performing Arts Center in North Beach. The individuals in these tables already go to many performing arts venues including ones in Washington DC or Baltimore, for example, as well as local performance spaces including high school venues throughout the market area and even to the casino performance spaces in the region.

To further refine the attendance estimates for a proposed performing arts center, MFA applied market share estimates based on location, distance, access and competition to each of the three market area potentials (see table below).

<b>Table 41. North Beach PAC Attendance Market Share Estimates</b>			
<b>Market Share</b>	<b>35%</b>	<b>25%</b>	<b>10%</b>
<b>Age Group/Market Area</b>	<b>0-15 Minutes</b>	<b>15-30 Minutes</b>	<b>30-45 Minutes</b>
18–24	499	1,413	4,904
25–34	804	1,933	7,413
35–44	815	2,102	7,144
45–54	1,040	2,835	7,976
55–64	908	2,516	7,210
65+	753	2,302	7,584
<b>Total</b>	<b>4,818</b>	<b>13,100</b>	<b>42,231</b>

*Source: ESRI BIS forecasts for 2016 and 2021, NEA, MFA*

It is likely that some attendees will visit the performing arts center more than once during the year; the number of annual visits depends on age and distance. Older age groups are more likely to visit a performing arts center, and the population living in close proximity to the center is also more likely to visit several times during a year. Based on this approach, MFA estimates the universe for visitation/attendance as shown in the following table.

<b>Table 42. Visits per Year/Total Annual Attendance Estimates</b>						
<b>Age Group</b>	<b>Visits per Year</b>	<b>0-15 Minutes</b>	<b>Visits per Year</b>	<b>15-30 Minutes</b>	<b>Visits per Year</b>	<b>30-45 Minutes</b>
18-24	3	1,496	2	2,826	1	4,904
25-34	3	2,411	2	3,865	1	7,413
35-44	4	3,261	3	6,307	1	7,144
45-54	5	5,201	5	14,173	1	7,976
55-64	6	5,445	5	12,578	2	14,419
65+	6	4,515	6	13,809	2	15,168
<b>Total</b>		<b>22,329</b>		<b>53,557</b>		<b>57,025</b>
<b>Total Estimate Potential Annual Attendance/Visitors</b>						<b>132,910</b>
<i>Source: Arkansas Department of Parks and Tourism, U.S. Travel Association, NEA, MFA</i>						

Based on this approach, MFA estimates that the performing arts center could receive 133,000 annual visitors. Factors that could influence this number include choice/type of events, the costs to purchase the experience, and time to attend on the night of the performance.

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## The Future of Performing Arts

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This section examines the future trends in performing arts and the implications for the proposed performing arts center.

### STEEP Analysis

The following bullet points summarize the STEEP (**S**ociological, **T**echnological, **E**conomic, **E**nvironmental and **P**olitical) factors affecting, or expected to affect, the performing arts sector. A STEEP analysis is a tool to evaluate various external factors that impact an industry sector, business or organization. The STEEP model encourages a step back to look at the big picture. It is a tool to enhance thinking about the wider issues that have an impact on the industry, business, or service area as a whole, resulting in the following general trends:

#### Sociological

- Patterns of employment -- part-time work, short-term contracts, and self-employment -- have long been characteristics of the performing arts and are becoming more pronounced.
- The already high proportions of micro-enterprises that populate this industry continue to increase.
- The human need to gather together for social experience continues, along with live performances, although technology, such as television and the ever-growing presence of computer-based technologies, mimics the sense of “being there”.
- Much of the U.S. population growth is and will be in minority groups that do not necessarily embrace mainstream or high culture.

#### Technological

- Digitalization of content in combination with transmission through the Internet enhances possibilities for promotion and marketing among micro-enterprises.
- Fragmentation in content and ease of its distribution may favor small venues.
- Technology’s capabilities to capture live performance and reproduce it for transmission in HD and 3D may popularize some types of “high culture” – although this may not lead to live ticket sales.
- Live Metropolitan Opera presentations shown in more than 1,000 cinemas is an example.
- Digital presentations and transmissions are in the hands of large media groups that will manage to enforce their interests.
- Our growing expectation of “experiences on-demand” -- seeing what we want when we want to -- which technology offers us, is a threat to all live experience production

#### Economic

- Dependence of live performing arts on public funding, private sponsorship, and public service broadcasters is especially in jeopardy in these times.
- Interestingly, the expected funding drop from the corporate sector has not occurred.
- A tendency for public funding and private sponsorship to be directed towards more established and prestigious activities, i.e. towards ‘high culture’ or to community projects with allies in economic development.
- In the U.S., there is still regional culture. High culture is not well supported in many metro areas and states.

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- Public service broadcasters in many countries have become more commercial. “High culture” radio and TV outlets are in decline.
  - Despite the high channel count, there is very little live performance on cable or the internet.

#### **Environmental**

- At present, there are no distinctive or important environmental issues in the performing arts.
- Recycling and renewable energy in an operational context can be strong marketing tools.

#### **Political**

- Political environment - In many countries, strong political and social forces protect traditional culture, as well as an ethos of public support for the arts. This is currently lacking in the US
- These impulses are curbed, to some extent, by economic and financial pressures.
- Current political movements have no interest in supporting many of the performing arts and wish to limit content in pop culture. These interests achieve influence only when in power.
- Compared to other leading economies, support for traditional culture is weaker in the U.S., as our traditional culture is an amalgam of many cultures – often with parallel traditions -- and is less well defined.

### **Funding of Performing Arts**

Funding prospects for the live performing arts are not good. The general implication is that the performing arts sector needs to look more to its customers, the private sector, or non-traditional sources of public funding (e.g. funding allocated for economic development projects rather than cultural projects) to increase its overall funding levels. This trend is already visible in the way that major financial companies and other companies frequently sponsor ‘high culture’ events or theaters.

Such a trend is even more pronounced in the U.S., where commercial and private sponsors are the financial supporters of public broadcasting. Public funding is likely to become less important as a source of financial support.

The middle tier of non-profit arts organizations faces the biggest challenges -- in particular, opera companies, symphony orchestras, dance companies, and theater groups serving small and medium-sized cities. The realities of aging audiences, escalating costs, and static or even declining funding will force these organizations to rethink their primary missions, the audiences they want to reach, and their organizational structures. More will decide to focus on their immediate community, using local talent to keep costs down while targeting programming aimed at encouraging participation by local audiences. These organizations do, however, have the advantage that they are often viewed by their communities as important civic assets. Thus, they may be able to generate sufficient public and private funding to sustain their operations.

Predictions about future demand, which are based on the above-mentioned rationale regarding the segmentation of performing arts organizations, assume that current prominent trends will continue. Policy intervention could increase future demand for the arts and thus affect the balance between the different segments. In this context, much will depend on how policymakers try to exploit the role that the audiovisual sector and cultural employment could play in employment generation and in developing a community of values.

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## Funding Options for North Beach

The funding can be separated into two distinct groups: public funding and private funding.

- Public funding may include taxes, municipal bonds, grants, public-private partnerships and special authority bonds.
- Private funding may include cash donations and contributions, naming rights, concessionaire and/or restaurant rights, sponsorships, lease agreements, parking fees, advertising, fundraising, and gift shop revenues.

## Public Funding Options

### Public Grants

The state of Maryland offers a couple of public grants that can be used as development funding for arts, culture, and educational facilities that benefit the communities in which they are located. Qualifying for these grants requires North Beach to achieve a designation as an **Arts & Entertainment (A&E) District** or a **Maryland Main Street and Heritage Area**.

### Maryland's Arts & Entertainment (A&E) Districts

Grants and funds are designated to help to develop and promote community involvement, tourism, and revitalization through tax-related incentives that attract artists, arts organizations, and other creative enterprises. Currently there are 24 A&E Districts in Maryland. Those closest to North Beach are:

- Annapolis A&E District (<http://www.annapolisarts.org/>)
- Historic Stevensville A&E District (<http://stevensvilleartsandentertainment.org/>)
- Leonardtown A&E District (<http://www.stmarysartscouncil.com/arts--entertainment-district.html>)
- Denton A&E District (<http://www.downtowndenton.com/ae.html>)
- Hyattsville Gateway Arts District (<http://mygatewayarts.org/>)

### Main Street Maryland Program

Main Street Maryland (<http://dhcd.maryland.gov/Communities/Pages/programs/MainStreet.aspx>) is a downtown revitalization program created in 1998 by the Maryland Department of Housing and Community Development. The program strengthens the economic potential of traditional main streets and neighborhoods by helping communities to improve the economies, appearance, and image of their traditional downtown business districts.

According to the program's website, there are 23 Main Street communities across Maryland. However, the most recent designation of a community as a Main Street Maryland community was in 2008.

### Other Public Funding Options

- Tax Increment Financing (TIF)
- Municipal Bonds

**Tax Increment Financing (TIF)** is a public financing method used as a subsidy for redevelopment, infrastructure, and other community-improvement projects.

In Maryland, tax increment financing is a public financing method that uses future gains in tax revenues to finance current improvements.

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The increase in the property tax revenue generated by new commercial development in a specific area -- the TIF district -- pays for bonds issued to finance site improvements, infrastructure, and other project costs located on public property. In a TIF district, the local government "freezes" the existing property tax base and uses the property tax revenue from this base as it would normally use such funds. The local government apportions the property tax revenue on the incremental valuation to a special account for certain purposes including paying debt service on the bonds and potentially paying for additional public expenditures within the TIF district.

The TIF district ceases to exist upon the retirement of the bonds, and, after that time, all property tax revenue may be appropriated by normal means.

If considered, the TIF method this should be done together with the County. To our knowledge, there is currently no TIF district in Calvert County.

**Bonds** are a way for a municipality to generate money needed for the construction of a new or renovation of a sports facility.

A bond is defined as: "an interest-bearing certificate issued by a government or corporation promising to pay interest and to repay a sum of money (the principal) at a specified date in the future."

Bonds sold by a government are referred to as municipal bonds. The two most common types of municipal bonds are general obligation bonds and non-guaranteed bonds.

### **Economic Development Purposes Grants**

These grants are for economic development initiatives and projects that create or retain jobs, generate increased economic activity, and improve the economic and social viability and vitality of local communities and are available on a federal and/or state level.

Eligible applicants include for-profit businesses, not-for-profit corporations, business improvement districts, local development corporations, public benefit corporations (including industrial development agencies), economic development organizations, research and academic institutions, incubators, technology parks, municipalities, counties, regional planning councils, *tourist attractions*, and *community facilities*.

Funds may be used for:

- Acquisition or leasing of land, buildings, machinery and/or equipment
- Acquisition of existing business and/or assets
- Demolition and environmental remediation
- New construction, renovation or leasehold improvements
- Acquisition of furniture and fixtures
- Planning and feasibility studies
- Site and infrastructure development
- Inventory
- Training
- Soft costs
- Working capital
- Marketing and advertising

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## Federal Grants and Funds

A lot of the following grant programs have been boosted between 2009 and 2012 as a vehicle for the federal government to inject money in to the economy to counter the effects of the recession. Since 2012 a lot of these programs have been scaled back significantly and with the new federal administration, it is very uncertain that any of the grants programs could still be available in the future.

### National Endowment for the Arts (NEA)

(<https://www.arts.gov/>)

NEA is the independent federal agency that funds and supports a wide variety of arts and educational programs and institutions: “Through partnerships with state arts agencies, local leaders, other federal agencies, and the philanthropic sector, the NEA supports arts learning, affirms and celebrates America’s rich and diverse cultural heritage, and extends its work to promote equal access to the arts in every community across America.”

### Federal Community Development Block Grant (CDBG)

The, program, according to the Department of Urban Housing and Development (HUD) website, is “a flexible program that provides communities with resources to address a wide range of unique community development needs.” CDBG grants are disbursed annually. HUD determines the amount of each grant, based on a number of community-based factors such as population growth and poverty.

### Examples

#### New Orleans African-American Museum (NOAAM)/Expansion of Tremé Facility, New Orleans, LA

NOAAM has presented art and cultural exhibitions in the Tremé neighborhood since its founding in 2000. With \$3 million in CDBG funds, the museum will perform maintenance on the building’s antique architecture that has suffered from storm damage, including repairing the outdoor stairway to the second story of the servant quarters. Additionally, the museum will perform necessary updates, including the installation of an elevator.

CDBG Funds Received: \$3 million

#### Esperanza, Philadelphia, PA

CDBG funding contributed to the mixed-use development and educational arts facility at 5th Street and Hunting Park Avenue.

CDBG Funds Received: \$100,000

#### Vox Populi, Philadelphia, PA

CDBG funding for the creation of a multi-disciplinary performance venue and additional artist studios.

CDBG Funds Received: \$30,000 (Creative Industry Workforce Grants funded by CDBG Grants)

### Transportation Enhancement Program

The U.S. Department of Transportation operates the Transportation Enhancement program, which helps fund local transportation-related cultural projects. Under the **Moving Ahead for Progress in the 21<sup>st</sup> Century (MAP 21)** program, the following activities are eligible for funding under the Transportation Alternatives (TA) program established by MAP-21:

- Pedestrian and Bicycle Facilities
- Safe Routes for Non-Drivers
- Conversion of Abandoned Railway Corridors to Trails
- Scenic Turnouts and Overlooks
- Outdoor Advertising Management
- Historic Preservation and Rehab of Historic Transportation Facilities

- Vegetation Management
- Archaeological Activities
- Stormwater Mitigation
- Wildlife Management

According to the program, incidental costs of incorporating art into facilities and including an artist on a design team are still eligible expenses.

### **National Endowment for the Humanities**

The National Endowment for the Humanities (NEH) offers assistance for a range of arts-related programs, especially activities related to scholarship and public programs in arts history, criticism, and theory. However comparable to the NEA, the program has seen cuts to its funding source.

### **Examples of Grants in Maryland**

#### **Pearls on a String: Artist and Patron in the Islamic World,**

Walters Art Museum, Baltimore, 2013

Implementation of a traveling exhibition, a catalog, and programs that present the arts of Islamic cultures from the point of view of patrons and artists from various historical periods across the Islamic world.

Award: \$300,000

#### **Reinstallation of American Art at the Baltimore Museum of Art**

Baltimore Museum of Art, Baltimore, 2012

Reinstallation of the galleries of American fine and decorative art.

Award: \$126,500

### **U.S. Department of Agriculture Rural Development**

The U.S. Department of Agriculture's Rural Development division administers community facilities grant and loan programs designed to develop essential community facilities for public use in rural areas. Loans, guarantees, and grants are available for cultural and educational facilities in municipalities, counties, and special-purpose districts, as well as to nonprofit corporations and tribal governments. The locality must have a population of less than 20,000 according to the last decennial census. Essential cultural and education facilities include:

- All-Purpose Buildings/College Campuses
- Colleges
- Educational Camps for Physically and Mentally Impaired
- Libraries
- Museums
- Outdoor Theaters
- Public Schools
- School Maintenance and Equipment Service Centers
- Vocational Schools
- Community Centers (as part of the Community Support Buildings and Improvements category)

### **Various Federal Agencies**

There are several federal agencies that have a variety of art related economic development, community development and business support programs. For example:

- Economic Development Administration and PWEDA Grants
- HUD Sustainable Communities Regional Planning Grants
- HUD Community Challenge and Transportation Planning Grants

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A few examples of awarded grant are as follows

**Keshet Dance Company of Albuquerque, New Mexico, 2012**

This grant will help the company purchase a facility to house the Keshet Ideas and Innovation Center (KIIC), which is intended to nurture businesses associated with New Mexico's growing cultural and arts industries. The grantee estimates that it will create 100 jobs.

Funding: \$1 million

Source: [http://www.eda.gov/news/pressreleases/2012/09/12/albuquerque\\_nm.htm](http://www.eda.gov/news/pressreleases/2012/09/12/albuquerque_nm.htm)

**City of Portland, ME, 2012**

Funding will support the construction of infrastructure necessary for the development of Thompson's Point, a blighted former industrial site in Portland, into a mixed-use center for performing arts, professional sports, offices, and regional transportation.

Funding: \$1.52 million

Source: [http://www.eda.gov/grants\\_archive\\_2012.htm](http://www.eda.gov/grants_archive_2012.htm)

**Southeast Florida Regional Partnership, 2011**

This partnership includes the South Florida Cultural Consortium, an alliance of the local arts agencies of Broward, Palm Beach, Miami-Dade, Martin, and Monroe counties. The Southeast Florida Regional Partnership, HUD, the NEA, and the Cultural Consortium recognize the role of the arts in creating sustainable communities.

Funding: \$4.25 million

Sources: <http://sfrpc.com/Regional%20Partnership.htm>

**Township of Springfield, NJ, 2013:**

Together New Jersey funded Springfield through the Local Demonstration Project Program. The project will be done in conjunction with the Township's downtown redevelopment plan process. It will seek to improve bus route 3 and stop locations, increase the footprint of the downtown, address environmental issues (such as the presence of flood prone areas), and work to integrate additional aspects of the arts into the downtown.

Source: [http://www.nj.com/suburbannews/index.ssf/2013/07/springfield\\_one\\_of\\_three\\_munic.html](http://www.nj.com/suburbannews/index.ssf/2013/07/springfield_one_of_three_munic.html)

**Burlington, VT, 2010**

This Community Challenge Planning Grant facilitated the City of Burlington's development of strategies for the downtown and waterfront areas, including a district master plan. This master plan specifically identifies the preservation of cultural and natural assets as a major goal.

Core partners included City Arts, Chittenden County Metro Planning Org, and State Econ Dev Office

Funding: \$268,750

Source: [http://portal.hud.gov/hudportal/documents/huddoc?id=FY10\\_ComChallPlanGrantSum.pdf](http://portal.hud.gov/hudportal/documents/huddoc?id=FY10_ComChallPlanGrantSum.pdf)

**Private Funding Options**

The first step in developing significant private funding is to form a private non-profit fundraising organization for the money raised; e.g. a booster club, a "Friends of (insert name) Performing Arts Center," and/or a 401(c)3 that can receive tax-exempt contributions. The booster organization can be the vehicle for fund raising, engaging corporate sponsors and individual donors.

**Sponsorship**

One of the more lucrative fundraising opportunities is corporate or individual sponsorship, usually associated with naming rights of the facility. The fundraising committee should determine the municipality's policy with regard to naming rights before initiating the fundraising drive and should identify naming opportunities (building, stage, etc.).

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## **Public/Private Partnership**

A public/private partnership strategy can be complicated because it requires contract negotiations and other legal processes, but with declining tax revenues, municipalities are becoming increasingly dependent on them.

This type of partnership comes in two forms:

### ***By Use***

This is the partnership frequently seen between a municipality and an institution or private non-profit organization. By reaching out to a local community with available land but constrained funding, the two parties enter into an understanding. The institution or private non-profit organization builds an improved/expanded facility on public land, offering additional capacity for the municipality that provided the land enabling the municipality is able to use it often, pay no or reduced fees, and get scheduling preference. Such partnerships are becoming increasingly popular. They can be a win/win for both entities in meeting their needs for expanded facilities of higher quality than neither could achieve on their own.

### ***By Profit***

Under this scenario, a for-profit, private organization enters into an agreement, for example, with North Beach whereby the for-profit would develop a hotel, retail and multiuse facility (for performing arts, conferences, trade shows, etc.) on public land with facilitated permitting, public services, and tax incentives. The organization may gift a portion of the facility (e.g. the performing arts center) outright to the municipality and retain control of a for-profit facility, or it may operate the overall facility for profit but give the municipality use at reduced rates.

A few possible complications can arise with this type of arrangement. First, North Beach, as the public owner, cannot simply enter into this agreement with a private entity without going through an RFP process. Second, in the case of this project location in the town center and partially in a flood plain, it carries some limitations to possible facilities and uses. Third, North Beach would lose much of its control over the site and facilities. However, the financial cost and operational risks of developing a multiuse facility would be carried by the for-profit organization.

Typically the RFP process requires the municipality to advertise the opportunity, define the selection criteria, review all proposals, come to a selection decision among the bidders based on the best value for the community, and then negotiate contracts.

## **Donor in-Kind Goods and Services**

The donation of in-kind goods and services is another way to help fund a performing arts center. Early-on, the fundraising group should identify businesses in the community that could potentially perform in-kind services for the project. Such businesses could include companies that provide and/or perform:

- Stone, asphalt, and concrete
- Earthwork and landscaping

The best way to identify and approach, these companies is through networking with the Chamber of Commerce and various philanthropic groups within and around North Beach.

## **Other Private Funding Options**

### **Utility Leases**

Private utility companies might be willing to provide funding in return for the rights to develop private utilities on public land, such as cell towers, solar power arrays, and wind power equipment, based on long-term lease contracts. Of these funding opportunities, solar power sites currently appear to be the most in demand. However, with regards to the project site, only the solar option on top of any building on the site may come into play.

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### **Professional Fundraising**

A professional fundraiser can assist North Beach to identify potential corporate and individual sponsors and develop a successful campaign. Professional fundraisers receive remuneration in one of two ways: they work for a percentage of the funds raised or they work for a set fee.

For North Beach, a combination of grant funding (public and private), the fundraising efforts of a “booster” organization, and sponsorships appears to be the best options if it is decided to develop the performing arts center as a stand-alone facility.

The other option, as discussed previously, would be a public/private partnership with a for-profit organization, to maximize the economic and fiscal impact (direct tax revenue) of the public land and to create highest value for the community and its citizens.

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## Potential Events

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### Chautauqua

Chautauqua originated as an adult education movement, consisting of various traveling shows and local assemblies that flourished in the United States in the late 19th and early 20<sup>th</sup> centuries. Chautauqua provided popular education combined with entertainment in the form of lectures, concerts, and plays that were modeled after activities at the Chautauqua Institution of western New York. Chautauqua assemblies expanded and spread throughout rural America until the mid-1920s. The Chautauqua brought entertainment and culture for the whole community, with speakers, teachers, musicians, entertainers, and preachers.

By the turn of the century, other entertainment and educational opportunities, such as radio and movies, began to compete with Chautauqua lectures. With television and increased and easy mobility, people could now watch or travel to cultural events previously available only in urban areas, and the Chautauqua Movement lost popularity. In the 1960s, activists held teach-ins as part of their protests, which might be seen as a successor to the Chautauqua.

### Chautauqua Institution

The Chautauqua Institution is a 750-acre educational center that hosts more than 170,000 guests during a nine-week summer season. On any given day, 7,500 people stay on site either at the 152-room Athenaeum hotel or a variety of private accommodations. Each of the nine weeks has a theme that many of the events follow and expand upon. Events offered include theater performances, musical entertainment, lectures, literary arts, faith and religion programs, youth activities, classes, and recreations. A variety of ticket packages are offered, ranging from day passes costing \$89 to a full season pass costing between \$2,105 and \$4,285.

### Colorado Chautauqua

Founded in 1898, the Colorado Chautauqua offers year-round lodging and programming. The 26-acre property has 90 cottages, two lodges, a dining hall, a picnic shelter, a 125-seat community house, and a 1,326-seat auditorium. Events are held year round and include musical performances, film viewings, talks and lectures, theater and dance performances, and family focused events. Another big focus of the Colorado Chautauqua is sustainability as the program strives to be the country's most sustainably operated National Historic Landmark.

### Lakeside (Ohio) Chautauqua

Lakeside Chautauqua has been in operation since 1873. Visitors have a variety of locations to stay during the summer programming months, including multiple hotels, cottages, bed and breakfasts, houses, and campground spaces. There are 13 different locations for meeting and rental space that can hold from 50 to 2,600 guests. A ten-week summer session includes a variety of events and activities that focus on religion, education, arts, and recreation. Daily passes cost between \$20 and \$25, and season passes go for \$695 for adults.

### Chautauqua in Chagrin (Ohio)

Chagrin Foundation for Art & Culture hosts the Chautauqua program. The Chagrin Foundation for Art was established in 2007 to improve the quality of life and enhance the economic stability in the region. It offers a variety of events and programs year round, including orchestras, singers, dancers, bands, and speakers. To further their goals, Chagrin-in-Chagrin was established to bring recognized speakers to the area during the summer season. In 2014, Chagrin Arts became an independent member of the Chautauqua Trail and the host to its summer series that runs in June and July every year.

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The series hosts renowned speakers who have focused on topics such as presidential power, sustainable foods and practices in the area, and the making of a Steven Sondheim documentary. The two-month event also includes the Young Explorers Program which engages young participants in thought provoking activities.

### **Chautauqua-Wawasee**

Chautauqua-Wawasee is the newest member of the Chautauqua Network. The chapter is located in Oakwood Park in Syracuse, Indiana, where it has a hotel, restaurant, conference centers, a chapel, gazebos, playground, and access to swimming beaches and piers. In 2016, nine one-day events were run in conjunction with the Chautauqua Network. These events included Zumba classes, wine and chocolate tours, lake tours, concerts, races, a fine arts festival, and a lecture series on the danger of heroin and painkillers. In 2016 nine one day events were run in conjunction with the Chautauqua Network.

### **Florida Chautauqua**

The Florida Chautauqua Assembly was originally founded in 1885 but closed in 1920. In 1996 the Assembly was reopened in DeFuniak Springs and in 2013 moved into the Historical Lakeside Clinic and Hospital. Many of the Assembly's events raise money to help renovate and maintain the building. In addition to acting as Florida Chautauqua Assembly's headquarters, the building is also home to the Wallace Bruce History Research Library. The free-to-the-public research library focuses on DeFuniak Springs, Lakeside Hospital, and the Florida Chautauqua. The main event of the Florida chapter is the four-day Assembly which is an educational program for families featuring keynote speakers, educational sessions, lunch and evening dinner performances, and exhibits that relate to an annual theme. Other events hosted at the Florida chapter include running a Haunted House with the DeFuniak Springs Co-op and participating in a home tour event.

### **New Piasa Chautauqua**

New Piasa has been a private summer resort community since 1885. It is made up of more than 200 cottages and homes, many of which are occupied by descendants of the earliest owners. The location includes two tennis courts, a pool, an all-purpose court, and an auditorium. Organizations that operate at the facility include a church assembly, a theater group, a yacht club, and a recreation and sports club.

### **Pennsylvania Chautauqua**

Originally founded in 1892 in Mount Gretna, Pennsylvania, this location hosts a variety of Chautauqua events from May through August every year. The event series include book reviews, arts and crafts, worship services, musical recitals, lectures and presentations, art shows, theater, and nature walks. Presentations and classes range in price from free to join to \$50 per session.

### **Plains Chautauqua**

Located in Plains, Georgia, the home town of Jimmy Carter, Chautauqua event series have been held one weekend a year since 2008. The 2016 program focused on Presidents Franklin D Roosevelt and Jimmy Carter and first ladies Eleanor Roosevelt and Rosalynn Carter. Events included reenactments, walking tours, lectures, masses, and luncheons. Weekend passports allowing entry to all events cost \$150 per person.

### **Waxahachie (Texas) Chautauqua**

The Chautauqua Preservation Society operates out of the Chautauqua Auditorium located on the 22-acre Getzendaner Memorial Park. The 2,500-seat auditorium was built in 1902 when the original society was formed. The current society has operated in the renovated auditorium since 2000. The chapter hosts a free day-long event on the last Saturday of September that celebrates a chosen topic through history, science, and music. This year's topic was All About Water and included noted speakers such as the grandson of Jacques Cousteau.

<b>Table 43. Chautauqua Summary</b>		
<b>Society</b>	<b>Address</b>	<b>Chautauqua Events</b>
Chautauqua Institution	One Ames Ave, Chautauqua, NY	2017 Season: June 24-Aug 27
Chautauqua in Chagrin	88 N Main Street, Chagrin, OH 44022	2017: June and July Event Series
Lakeside Chautauqua	236 Walnut Ave, Lakeside, OH 43440	2016: Memorial Day - Sept 5th Event Series
Chautauqua-Wawasee	Oakwood Resort: 702 E. LakeView Road, Syracuse, IN	9 single day events listed for 2016 (March-October)
Colorado Chautauqua	900 Baseline Road, Boulder, CO 80302	Year Round
Florida Chautauqua	1290 Circle Drive, DeFuniak Springs, FL 32435	4 day Yearly Assembly in January, Day events throughout the year
New Piasa Chautauqua	12584 Fern Glen Valley Rd, Grafton, IL 62037	Summer cottage community
Pennsylvania Chautauqua	Chautauqua Drive, Mt. Gretna, PA 17064	May-August Event Series
Plains Chautauqua	PO Box 17 Plains, GA 31780	Event Series: One Weekend a year (Has been in May, August, October in 2016)
Waxahachie Chautauqua	400 South Grand Ave, Waxahachie, TX 75165	One Day Annual Assembly held in September

*Source: The Chautauqua Trail*

## Proposed Operating Statement

### Proforma Assumptions

<b>Table 44. Proposed 300-Seat PAC Programming</b>					
<b>Programming</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
<b>Performances &amp; Events per Year</b>					
Cinema	30	40	55	60	60
Performances	25	25	25	25	25
Concerts/Music	20	30	35	40	40
Children's Programs	20	30	30	30	30
Chautauqua	1	2	3	3	3
<b>Total</b>	<b>96</b>	<b>127</b>	<b>148</b>	<b>158</b>	<b>158</b>
<b>Average Show Attendance</b>					
Cinema	100	100	100	100	100
Performances	150	150	150	150	150
Concerts/Music	100	100	100	100	100
Children's Programs	125	125	125	125	125
Chautauqua	100	125	125	125	125
<b>Attendance</b>					
Cinema	3,000	4,000	5,500	6,000	6,000
Performances	3,750	3,750	3,750	3,750	3,750
Concerts/Music	2,000	3,000	3,500	4,000	4,000
Children's Programs	2,500	3,750	3,750	3,750	3,750
Chautauqua	100	250	375	375	375
<b>Total</b>	<b>11,350</b>	<b>14,750</b>	<b>16,875</b>	<b>17,875</b>	<b>17,875</b>
<b>Average Show &amp; Event Pricing</b>					
Cinema	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00
Performances	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00
Concerts/Music	\$15.00	\$15.00	\$15.00	\$15.00	\$15.00
Children's Programs	\$8.00	\$8.00	\$8.00	\$8.00	\$8.00
Chautauqua	\$150.00	\$200.00	\$250.00	\$250.00	\$250.00
<b>Annual Show &amp; Event Revenue</b>					
Cinema	\$21,000.00	\$28,000.00	\$38,500.00	\$42,000.00	\$42,000.00
Performances	\$75,000.00	\$75,000.00	\$75,000.00	\$75,000.00	\$75,000.00
Concerts/Music	\$30,000.00	\$45,000.00	\$52,500.00	\$60,000.00	\$60,000.00
Children's Programs	\$20,000.00	\$30,000.00	\$30,000.00	\$30,000.00	\$30,000.00
Chautauqua	\$15,000.00	\$50,000.00	\$93,750.00	\$93,750.00	\$93,750.00
<b>Total</b>	<b>\$161,000.00</b>	<b>\$228,000.00</b>	<b>\$289,750.00</b>	<b>\$300,750.00</b>	<b>\$300,750.00</b>
<b>Average Food &amp; Beverage Expenditures</b>					
Cinema	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00
Performances	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00
Concerts/Music	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00
Children's Programs	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00
Chautauqua	\$30.00	\$30.00	\$30.00	\$30.00	\$30.00
<b>Food &amp; Beverage Revenue</b>					
Cinema	\$15,000.00	\$20,000.00	\$27,500.00	\$30,000.00	\$30,000.00
Performances	\$26,250.00	\$26,250.00	\$26,250.00	\$26,250.00	\$26,250.00
Concerts/Music	\$20,000.00	\$30,000.00	\$35,000.00	\$40,000.00	\$40,000.00
Children's Programs	\$12,500.00	\$18,750.00	\$18,750.00	\$18,750.00	\$18,750.00
Chautauqua	\$15,000.00	\$50,000.00	\$93,750.00	\$93,750.00	\$93,750.00
<b>Total</b>	<b>\$88,750.00</b>	<b>\$145,000.00</b>	<b>\$201,250.00</b>	<b>\$208,750.00</b>	<b>\$208,750.00</b>

Source: MFA

<b>Table 45. Proposed Festival Programming</b>					
<b>Year of Operation</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
<b>Festival Events</b>	1.00	2.00	2.00	3.00	3.00
<b>Festival Days</b>	3.00	6.00	6.00	9.00	9.00
<b>Average Attendance</b>	2,000	3,000	4,000	5,000	5,000
<b>Total Attendance</b>	2,000	6,000	8,000	15,000	15,000
<b>Average Pricing</b>	\$30.00	\$30.00	\$32.00	\$34.00	\$36.00
<b>Festival Event Revenue</b>	\$60,000.00	\$180,000.00	\$256,000.00	\$510,000.00	\$540,000.00
<b>Average Food &amp; Beverage Expenditures</b>	\$16.00	\$17.00	\$18.00	\$19.00	\$20.00
<b>Food &amp; Beverage Revenue</b>	\$32,000.00	\$102,000.00	\$144,000.00	\$285,000.00	\$300,000.00

*Source: MFA*

<b>Table 46. Total Attendance and Revenues</b>					
<b>Year of Operation</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
<b>Total Attendance</b>	<b>13,350</b>	<b>20,750</b>	<b>24,875</b>	<b>32,875</b>	<b>32,875</b>
<b>Cinema</b>	30	40	55	60	60
<b>Performances</b>	25	25	25	25	25
<b>Music</b>	20	30	35	40	40
<b>Children's Programs</b>	20	30	30	30	30
<b>Chautauqua</b>	1	2	3	3	3
<b>Total All Programs</b>	<b>96</b>	<b>127</b>	<b>148</b>	<b>158</b>	<b>158</b>
<b>Non- Cinema Events</b>	77	109	115	131	131
<b>Performance Related Revenue</b>	\$185,000.00	\$330,000.00	\$413,500.00	\$675,000.00	\$705,000.00
<b>Event Related Revenue</b>	\$15,000.00	\$50,000.00	\$93,750.00	\$93,750.00	\$93,750.00
<b>Total Performance &amp; Event Revenue</b>	\$221,000.00	\$408,000.00	\$545,750.00	\$810,750.00	\$840,750.00
<b>Total Food &amp; Beverage Revenue</b>	\$120,750.00	\$247,000.00	\$345,250.00	\$493,750.00	\$508,750.00
<b>Potential Sponsorship Revenue</b>	\$25,000.00	\$25,000.00	\$50,000.00	\$50,000.00	\$50,000.00
<b>Total All Revenue</b>	<b>\$366,750.00</b>	<b>\$680,000.00</b>	<b>\$941,000.00</b>	<b>\$1,354,500.00</b>	<b>\$1,399,500.00</b>

*Source: MFA*

Additional Assumptions:

- Assumes a basic 300-seat box building
- Year 3 of operations is the year of stabilized operations
- Assumes that the facility is owned and operated by the town
- Inflation has not been applied

Preliminary Operating Statement for North Beach Performing Arts Center												
Key Categories	Assumptions	Pre-Opening	Year 1		Year 2		Year 3		Year 4		Year 5	
			Event Revenue	Food, Beverage and Merchandise Revenue	Event Revenue	Food, Beverage and Merchandise Revenue	Event Revenue	Food, Beverage and Merchandise Revenue	Event Revenue	Food, Beverage and Merchandise Revenue	Event Revenue	Food, Beverage and Merchandise Revenue
Inflation Index - assumes "0" for now	-	1.00		1.00		1.00		1.00		1.00		1.00
300-Seat Theater Total SF (Preliminary)	25,000											
<b>Revenue</b>			\$161,000	\$88,750	\$228,000	\$145,000	\$289,750	\$201,250	\$300,750	\$208,750	\$300,750	\$208,750
Festival Events			\$60,000	\$32,000	\$180,000	\$102,000	\$256,000	\$144,000	\$510,000	\$285,000	\$540,000	\$300,000
			\$221,000	\$120,751	\$408,000	\$247,001	\$545,750	\$345,251	\$810,750	\$493,751	\$840,750	\$508,751
Sponsorship				\$25,000		\$25,000		\$50,000		\$50,000		\$50,000
<b>Total All Revenue</b>				\$366,751		\$680,001		\$941,001		\$1,354,501		\$1,399,501
<b>Expenses by Category</b>												
Food, Beverage & Merchandise	63.0%			\$76,073		\$155,611		\$217,508		\$311,063		\$320,513
<b>F &amp; B Expense Subtotal</b>				\$76,073		\$155,611		\$217,508		\$311,063		\$320,513
<b>Payroll including Benefits</b>												
Executive Director	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
Assistant to Executive Director	\$40,000	\$0	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000
Office Staff Part Time	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
Event Staff (2) Part Time		\$0	\$27,648	\$36,576	\$33,120	\$45,504	\$45,504	\$45,504	\$45,504	\$45,504	\$45,504	\$45,504
Facilities Person (2)	\$30,000	\$0	\$30,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000	\$45,000
<b>Payroll Subtotal</b>		\$95,000	\$192,648	\$216,576	\$213,120	\$225,504	\$225,504	\$225,504	\$225,504	\$225,504	\$225,504	\$225,504
<b>Expense per Event</b>												
Cleaning	\$100		\$9,600	\$12,700	\$14,800	\$15,800	\$15,800	\$15,800	\$15,800	\$15,800	\$15,800	\$15,800
Cinema Fees (Percent of Revenue)	80%		\$16,800	\$22,400	\$30,800	\$33,600	\$33,600	\$33,600	\$33,600	\$33,600	\$33,600	\$33,600
Light & Sound (all events)	\$200		\$19,200	\$25,400	\$29,600	\$31,600	\$31,600	\$31,600	\$31,600	\$31,600	\$31,600	\$31,600
Stage Labor (Avg non-cinema events)	\$400		\$30,800	\$43,600	\$46,000	\$52,400	\$52,400	\$52,400	\$52,400	\$52,400	\$52,400	\$52,400
Presented Show Talent Expenses % of Performance Related Revenue	55%		\$101,750	\$181,500	\$227,425	\$371,250	\$387,750	\$387,750	\$387,750	\$387,750	\$387,750	\$387,750
<b>Expense per Event Subtotal</b>		\$0	\$178,150	\$285,600	\$348,625	\$504,650	\$521,150	\$521,150	\$521,150	\$521,150	\$521,150	\$521,150
<b>Undistributed Expenses</b>												
Administration & General (of Total Revenue)	5%	\$0	\$18,338	\$34,000	\$47,050	\$67,725	\$69,975	\$69,975	\$69,975	\$69,975	\$69,975	\$69,975
Marketing (of Total Revenue)	Pre Opening 30%	\$73,350	\$73,350	\$102,000	\$94,100	\$108,360	\$69,975	\$69,975	\$69,975	\$69,975	\$69,975	\$69,975
Utilities/Energy per SF	\$2.70		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Maintenance SF	\$3.00		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Insurance, Legal, Accounting	\$50,000	50%	\$25,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000
Replacement Reserve (of Total Revenue)	5%	7%	\$0	\$18,338	\$34,000	\$47,050	\$94,815	\$97,965	\$97,965	\$97,965	\$97,965	\$97,965
Taxes	0%		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Undistributed Expenses Subtotal</b>		\$98,350	\$160,025	\$220,000	\$238,200	\$320,900	\$287,915	\$287,915	\$287,915	\$287,915	\$287,915	\$287,915
<b>Total All Expenses</b>		\$193,350	\$606,896	\$877,787	\$1,017,453	\$1,362,117	\$1,355,082	\$1,355,082	\$1,355,082	\$1,355,082	\$1,355,082	\$1,355,082
<b>Net Profit (Loss)</b>		(\$193,350)	(\$240,145)	(\$197,786)	(\$76,452)	(\$7,616)	\$44,419	\$44,419	\$44,419	\$44,419	\$44,419	\$44,419

Source: MFA, Data and Interviews from/with Comparable Venues

## Appendix

### Comparable Venues

Table 47. Summary Comparable PACs				
Name	Location	Closest MSA	Distance (Miles)	# of Hotel Rooms within 5 Miles
North Beach PAC	North Beach, MD	Washington, DC/Baltimore	37/53	122
Highfield Theater	Falmouth, MA	Providence/Boston	68/70	1,132
Harbor Stage Company	Wellfleet, MA	Providence/Boston	107/103	383
Wellfleet Harbor Actors Theater	Wellfleet, MA	Providence/Boston	107/102	383
Cotuit Center for the Arts	Cotuit, MA	Providence/Boston	70/66	130
Payomet PAC	North Truro, MA	Providence/Boston	114/110	786
Theatre-By-the-Sea	Wakefield, RI	Providence/Hartford/New York	38/80/161	367
Access to Art Theater	Cape May, NY	Philadelphia/Baltimore/New York	73/139/147	640
LIBF of the Arts	Long Beach Township, NJ	Philadelphia/Baltimore/New York	69/162/105	66
Prince Theatre	Chestertown, MD	Washington, DC/Baltimore	77/69	198
Maryland PAC	Severna Park, MD	Washington, DC/Baltimore	35/20	169
Thalian Hall PAC	Wilmington, NC	Raleigh-Durham/Charlotte	130/200	4,242
New Bern Civic Theatre	New Bern, NC	Raleigh-Durham/Charlotte/Norfolk	115/261/162	895
Arts Center of Coastal Carolina	Hilton Head Island, SC	Savannah/Atlanta/Columbia	37/288/164	3,936
Tybee Post Theater	Tybee Island, GA	Savannah/Atlanta/Columbia	17/264/161	601
Tennessee Williams Fine Arts Center	Key West, FL	Miami	156	3,100*

Source: Individual Facilities, Smith Travel Research (STR), MFA

\*50 Hotels within 4 Miles

## 1. Falmouth – Highfield Theater

- Falmouth Theatre Guild
- Address: 58 Highfield Dr., Falmouth, MA 02540
- Phone: 508-548-0400
- Email: 2014falmouththeatreguild@gmail.com
- Website: <http://falmouththeatreguild.org>
- Pricing
  - Adult - \$20
  - Senior (62+) - \$18
  - Children under 18 - \$16
- Services: musical performances, operettas, plays
- Capacity: N/A
- Number of Shows/Year: approx. 4 shows/yr.
- Rental to Others, Pricing: N/A
- Physical Features: N/A
- Misc: non-profit community theater, annual party

Images:

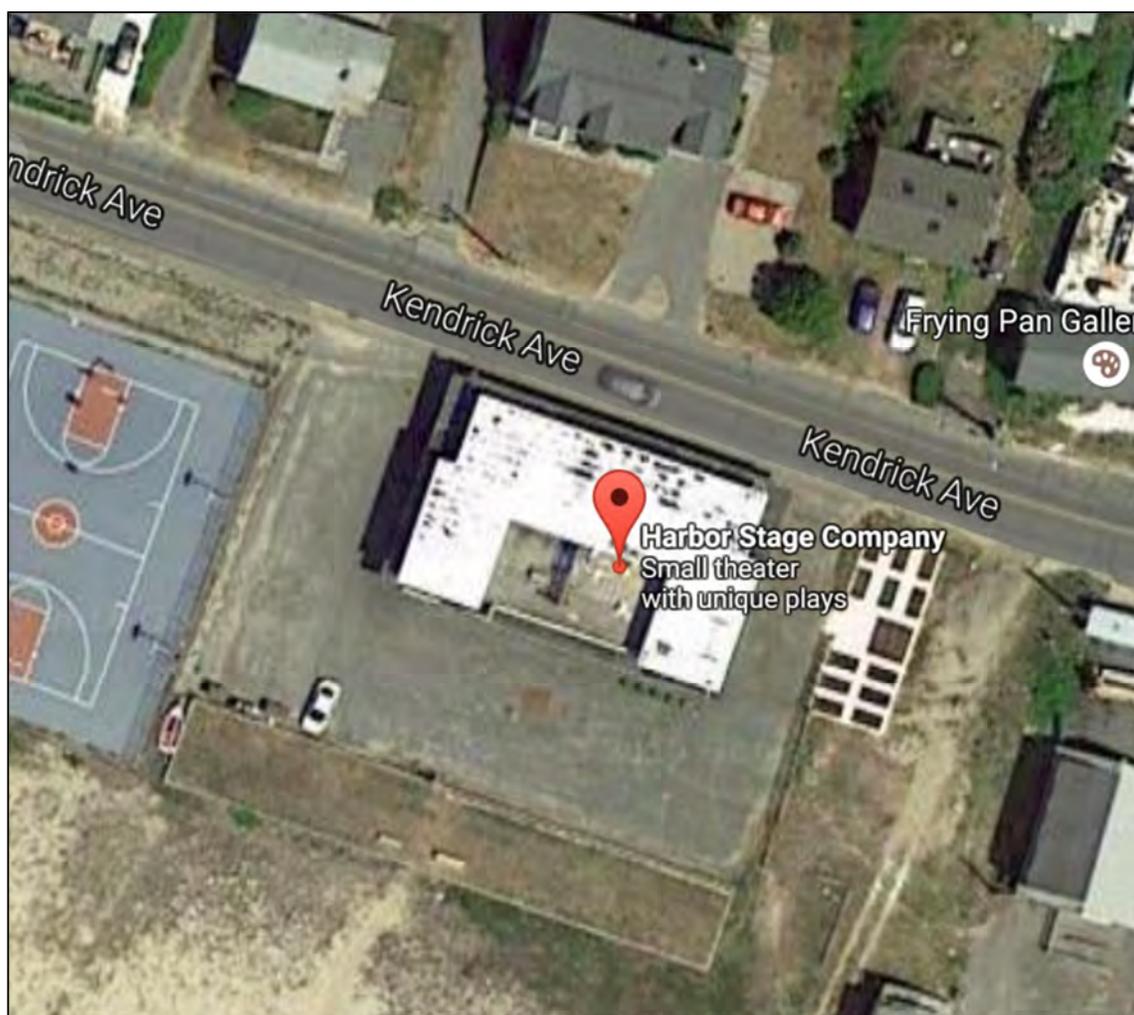




## 2. Wellfleet (Cape Cod National Sea Shore)

- Harbor Stage Company
- Address: 15 Kendrick Ave., Wellfleet, MA 02667
- Phone: 508-349-6800
- Email: info@harborstage.org
- Website: http://www.harborstage.org
- Pricing: N/A
- Services: play and stage productions
- Capacity: N/A
- Number of Shows/Year: approx. 3 shows/yr.
- Rental to Others, Pricing: N/A
- Physical Features: N/A
- Misc: incorporated non-profit

Images:

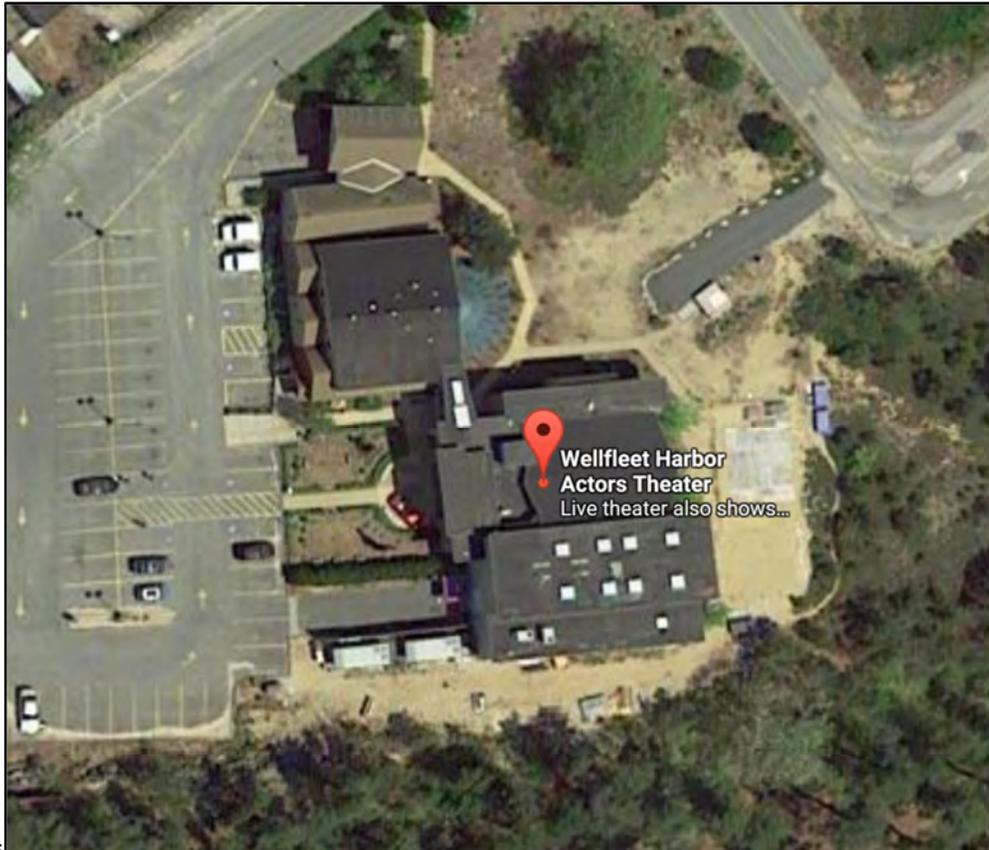




### 3. Wellfleet Harbor Actors Theater – Wellfleet

- Address: 2357 Old Route 6 Rd., Wellfleet, MA 02667
- Phone: 508-349-9428
- Website: <http://www.what.org>
- Pricing: ranges from \$12 - \$45 depending on seating
- Services: stage plays
- Capacity: 220 seats
- Number of Shows/Year: approx. 6 shows/yr.
- Rental to Others, Pricing: N/A
- Physical Features: loading door, dressing rooms, laundry room, fly system, trap doors
- Misc: WHAT Opera Guild

Images:





## Cotuit Center for the Arts

- Cotuit Center for the Arts, Cotuit
- Address: 4404 Rte. 28 (Falmouth Rd. ), Cotuit, MA 02635
- Phone: 508-428-0669
- Email: [info@cotuitcenterforthearts.org](mailto:info@cotuitcenterforthearts.org)
- Website: <http://www.cotuitcenterforthearts.org>
- Pricing: dinner + show package - \$75
- Services: dinner and a show, stage plays, concerts, films, Art School classes, special events, tours on the road
- Capacity: N/A
- Number of Shows/Year: approx. 6-7 main stage productions, approx. 12 black box productions/yr.
- Rental to Others, Pricing: Yes, \$350 plus staffing fees, bar service
- Physical Features: N/A

Images:







#### 4. Payomet Performing Arts Center, in Truro

- Address: 29 Old Dewline Rd., North Truro, MA 02652
- Phone: 508-487-5400
- Email: info@payomet.org
- Pricing
- General - \$30
- Preferred - \$40
- Pavilion - \$45
- VIP - \$55
- Services: music performances, stage plays, circus, films, classes, kids events, festivals
- Capacity: 350 seats
- Number of Shows/Year: 30-40 music concerts
- Rental to Others, Pricing: N/A
- Physical Features: tent, dance floor, stage
- Misc: non-profit performing arts organization

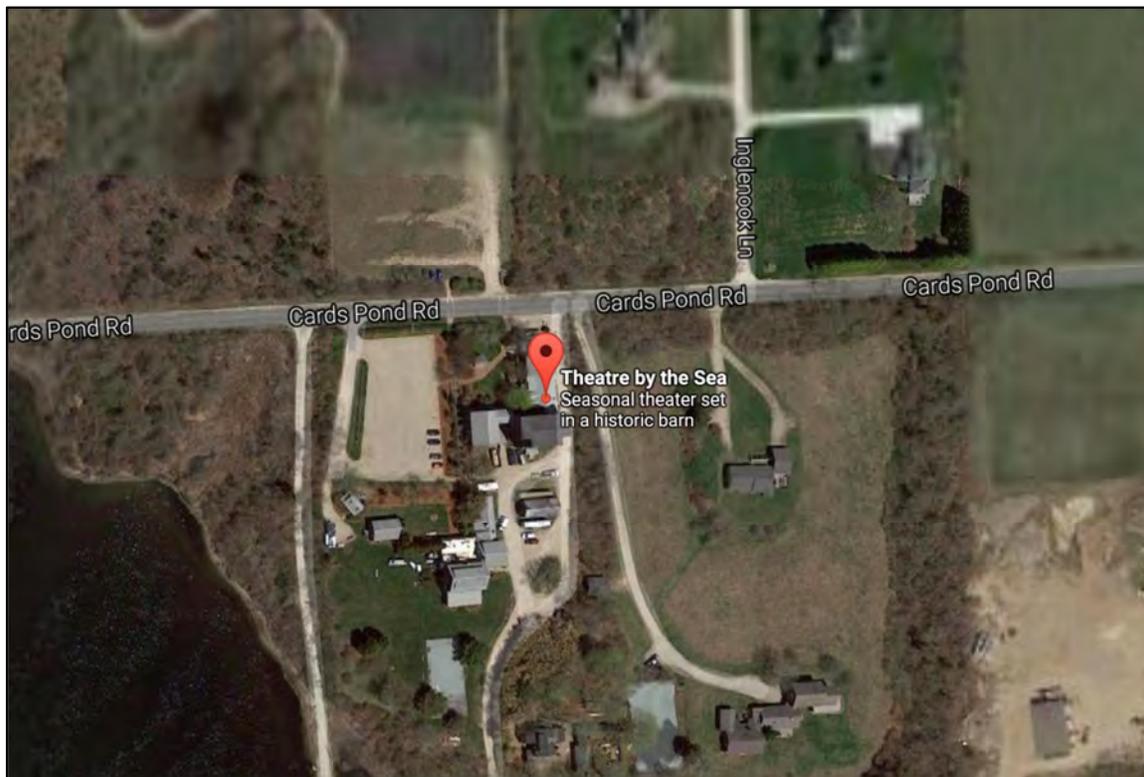
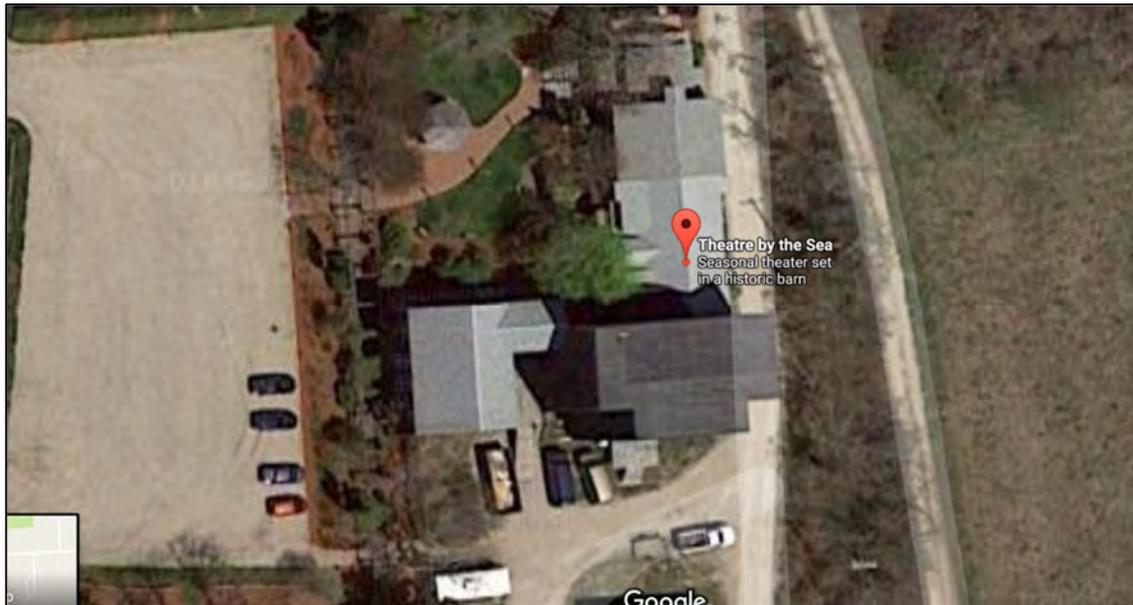
Images:



### 5. Wakefield, Theatre by the Sea

- Address: 364 Cards Pond Rd., Wakefield, RI 02879
- Phone: 401-782-8587
- Email: [boxoffice.tbts@gmail.com](mailto:boxoffice.tbts@gmail.com)
- Website: <http://www.theatrebythesea.com>
- Pricing
- Preview performance - \$46
- Premium - \$69
- Standard - \$59
- Value - \$49
- Services: musical performances
- Capacity: 486 seats
- Number of Shows/Year: approx. 4/yr.
- Rental to Others, Pricing: N/A
- Physical Features: orchestra pit, balcony seating, assisted seating

Images:





## 6. Cape May, Access to Art

- Address: 417 E. Pacific Ave., Cape May Court House, NJ 08210
- Phone: 609-465-3963
- Website: <http://www.visitnj.org/nj-performing-arts/access-to-art>
- Pricing: N/A
- Services: photo exhibitions, classical concerts
- Capacity: N/A
- Number of Shows/Year: N/A
- Rental to Others, Pricing: N/A
- Physical Features: N/A
- Misc: Annual Ballet Weekend

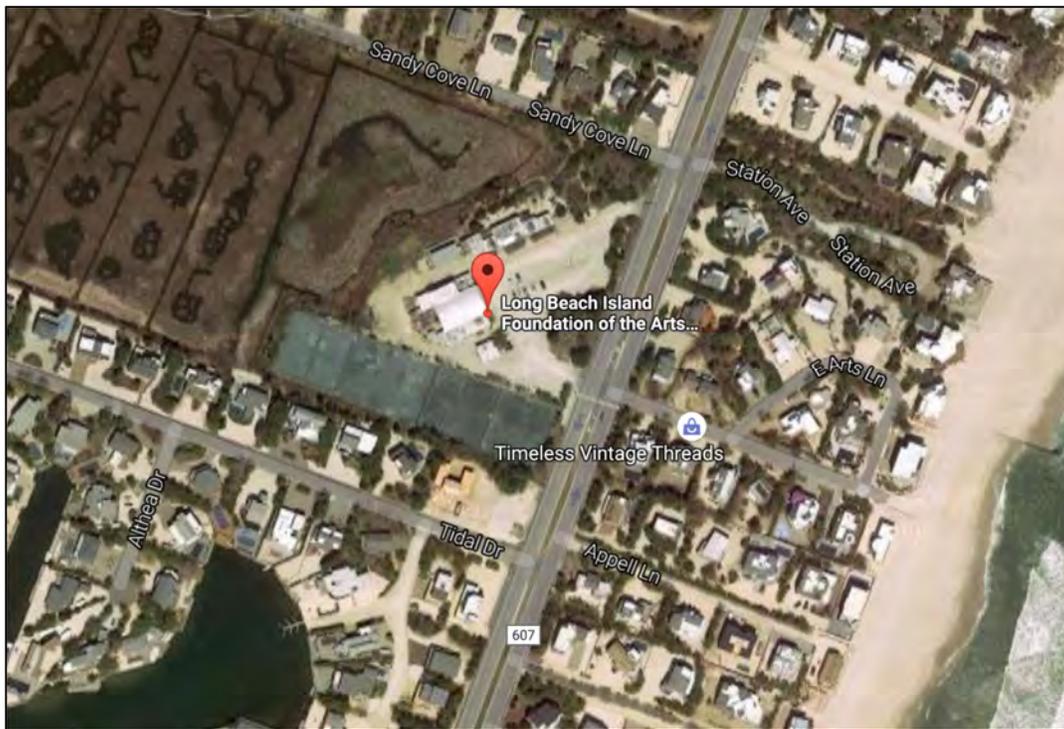
Images: N/A

## 7. Loveladies, Long Beach Island

- Long Beach Island Foundation of the Arts & Sciences
- Address: 120 Long Beach Blvd., Loveladies, NJ 08008
- Phone: 609-494-1241
- Email: [office@lbifoundation.org](mailto:office@lbifoundation.org)
- Website: <http://lbifoundation.org>
- Pricing: prices vary by class and event
- Services: classes, water classes, exhibits, arts and crafts, marine biology, nature study, children's theatre, films, weddings
- Capacity:
- Number of Shows/Year:
- Rental to Others, Pricing:
- Physical Features: main gallery, marine sciences building, print room, Blai Room, sculptor's loft, ceramic's studio, painter's loft, kitchen
- Misc: host for The Manhattan Short Film Festival

Images:







## 8. Chestertown, Garfield Center for the Arts at the Prince Theater

- Address: 210 High St., Chestertown, MD 21620-1518
- Phone: 410-810-2060
- Email: [boxoffice@garfieldcenter.org](mailto:boxoffice@garfieldcenter.org)
- Website: <http://www.garfieldcenter.org>
- Pricing: prices vary by performance
- Services: 8-10 plays throughout the year, youth choir, songwriters society, Indian dance educational program, summer camps
- Capacity: N/A
- Number of Shows/Year:
- Rental to Others, Pricing: Yes, need to call for rental rates
- Physical Features: N/A
- Misc: Harry Potter Festival Weekend, misc. monthly and annual events



Images:



## 9. Severna Park

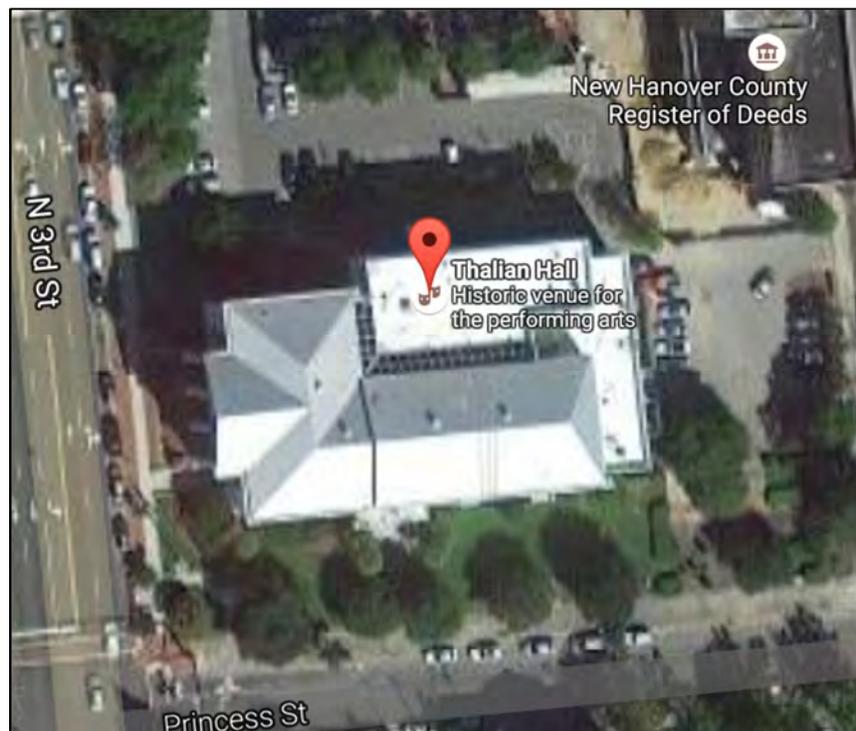
- Maryland Performing Arts Center
- Address: 836 Ritchie Hwy #10, Severna Park, MD 21146
- Phone: 410-421-8960
- Email: kelsey@marylandperformingartscenter.com
- Website: <http://www.marylandperformingartscenter.com>
- Services: classes in dance, theater, vocal training, student and adult conditioning, talent management
- Pricing: N/A
- Capacity: N/A
- Number of Shows/Year: N/A
- Rental to Others, Pricing: N/A
- Physical Features: N/A

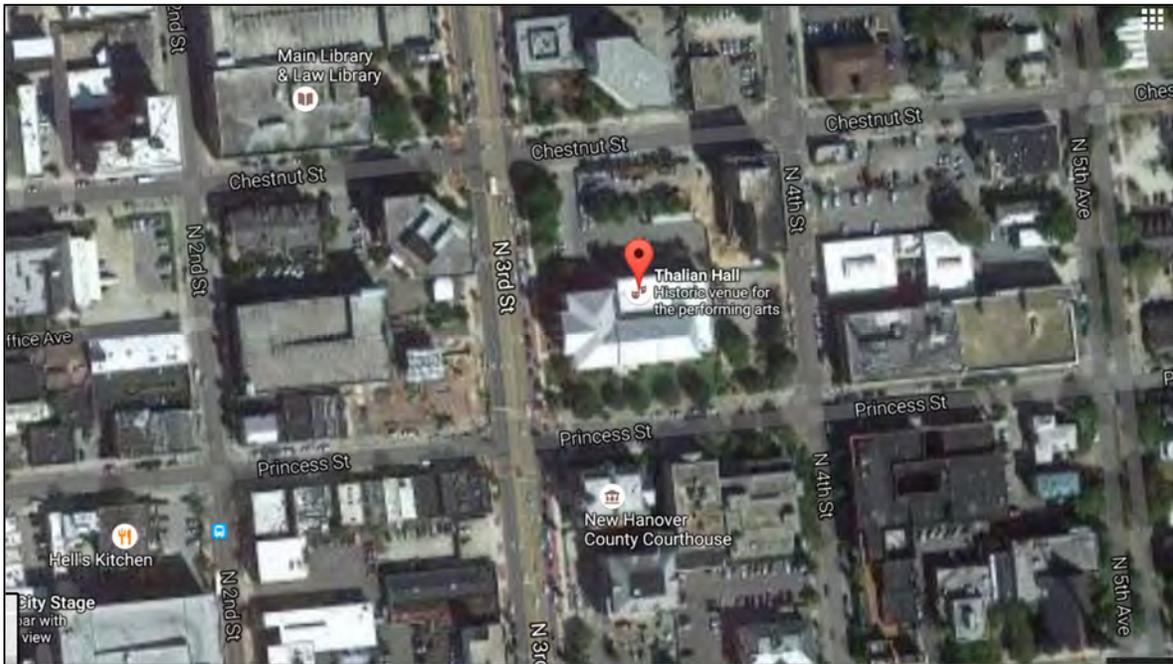
Images: N/A

## 10. Wilmington

- Thalian Hall Center for the Performing Arts
- Address: 310 Chestnut St., Wilmington, NC 28401
- Phone: 910-632-2285
- Website: <http://www.thalianhall.org>
- Services: ballet, theatre, musical performances, films, lectures, opera, charity events
- Pricing: varies by performance
- Capacity: 546 seats
- Number of Shows/Year: over 250/yr.
- Rental to Others, Pricing: Yes, pricing varies
- Physical Features: hydraulic orchestra pit lift

Images:



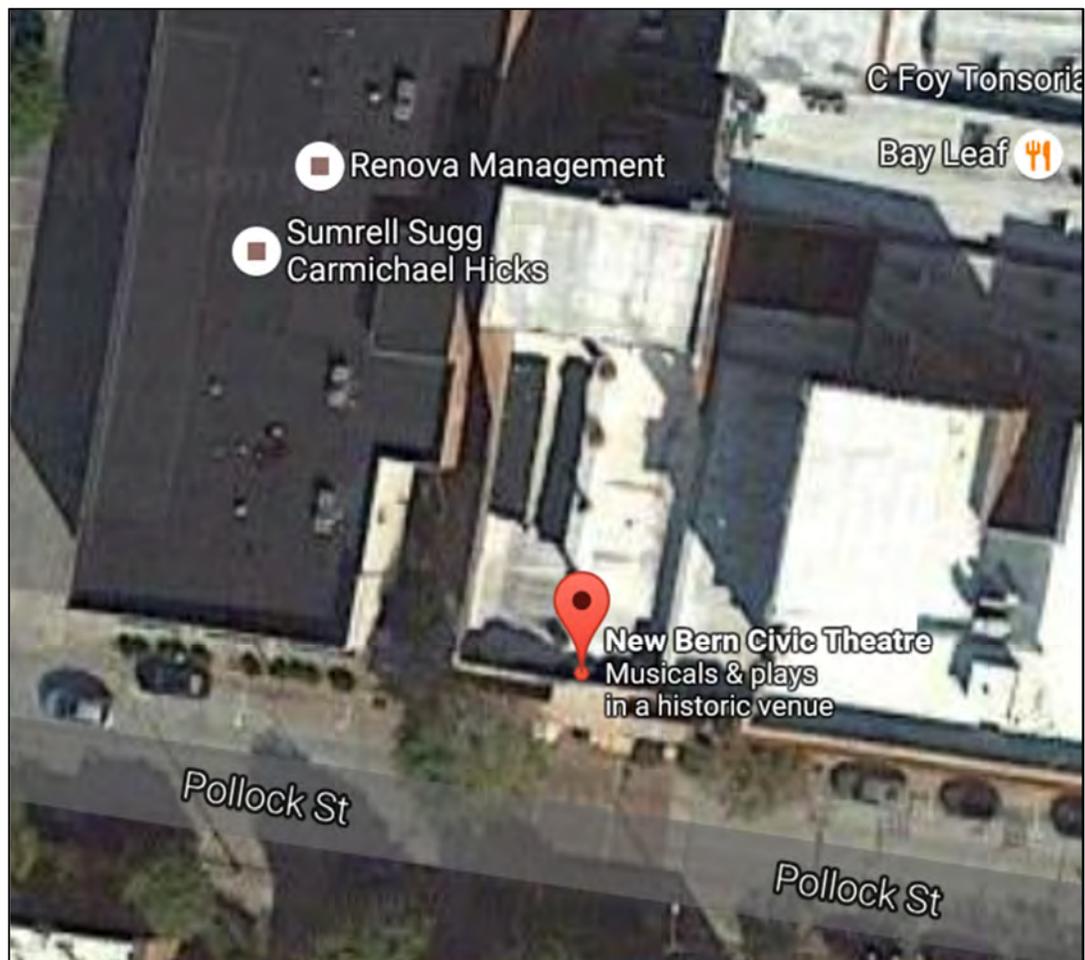


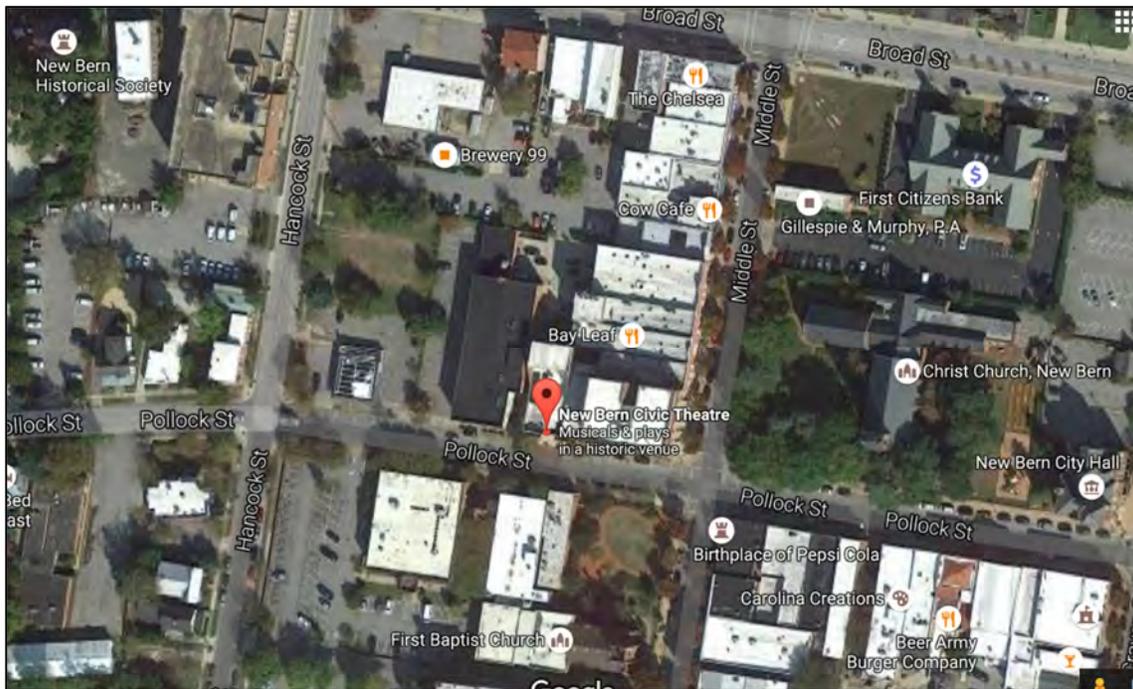


## 11. New Bern

- New Bern Civic Theatre
- Address: 414 Pollock St., New Bern, NC 28560
- Phone: 252-634-9057
- Website: <http://www.newberncivictheatre.org>
- Services: musicals, plays, youth programs in the performing arts
- Pricing: varies by performance
- Capacity: 300 seats
- Number of Shows/Year: approx. 9/yr.
- Rental to Others, Pricing: Yes, profit - \$600/day, non-profit - \$400/day
- Physical Features: N/A

Images:



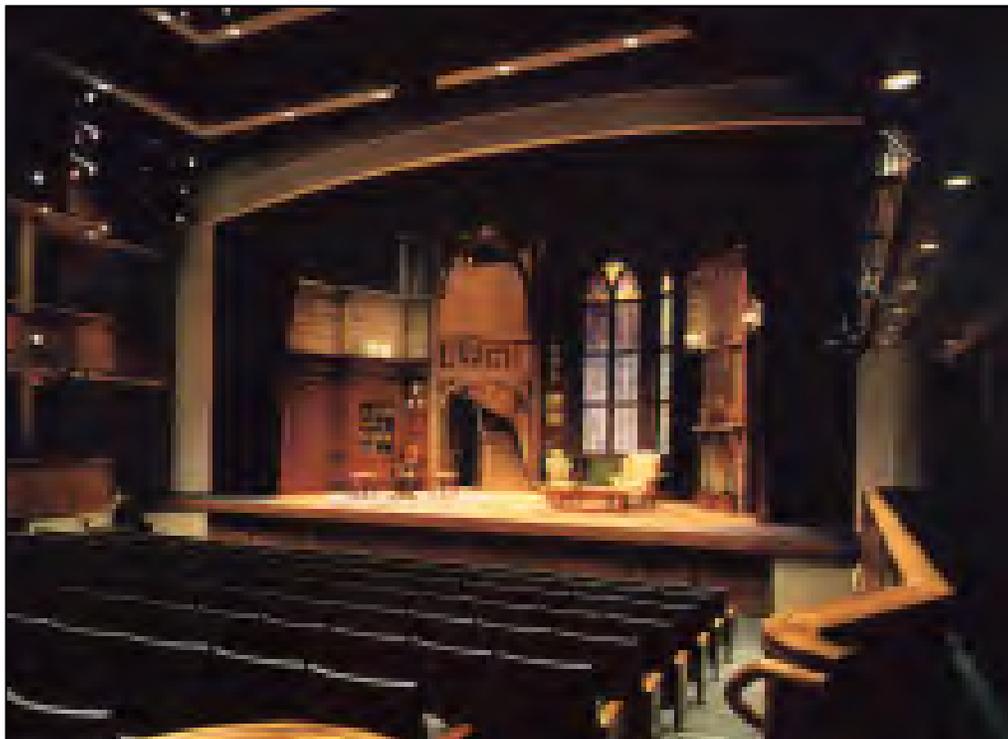
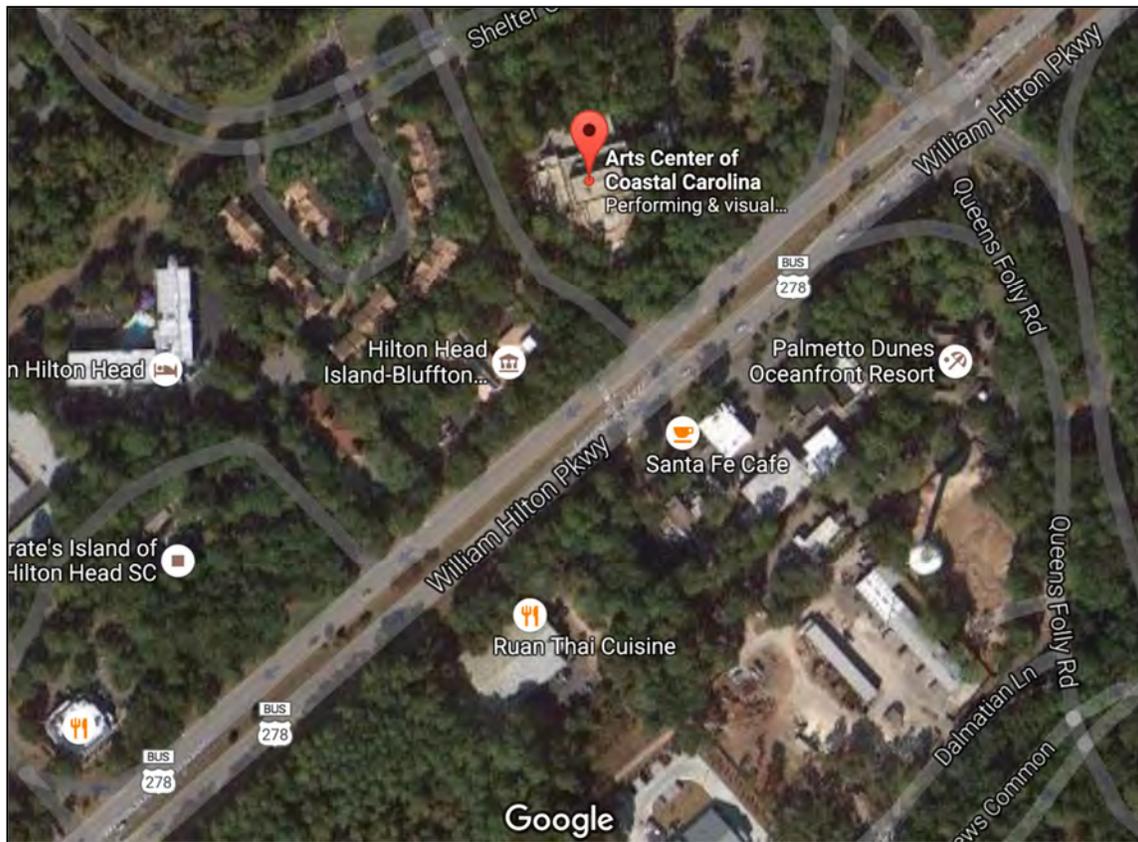


## 12. Hilton Head Island

- Arts Center of Coastal Carolina
- Address: 14 Shelter Cove Ln., Hilton Head Island, SC 29928
- Phone: 843-686-3945
- Website: <http://www.artshhi.com>
- Services: stage plays, musical performances, dance, music, comedy artists, visual art, galas, food and beverage, field trips, workshops
- Pricing: varies by performance
- Capacity: 349 seats
- Number of Shows/Year: approx. 5 major programs/yr.
- Rental to Others, Pricing: Yes, pricing varies
- Physical Features: theater, studio theater, Community Room, Heritage Classic Foundation Room, Disney Vacation Club Art Studio, Porte Cochere & outside grounds
- Misc: seasonal and special events

Images:



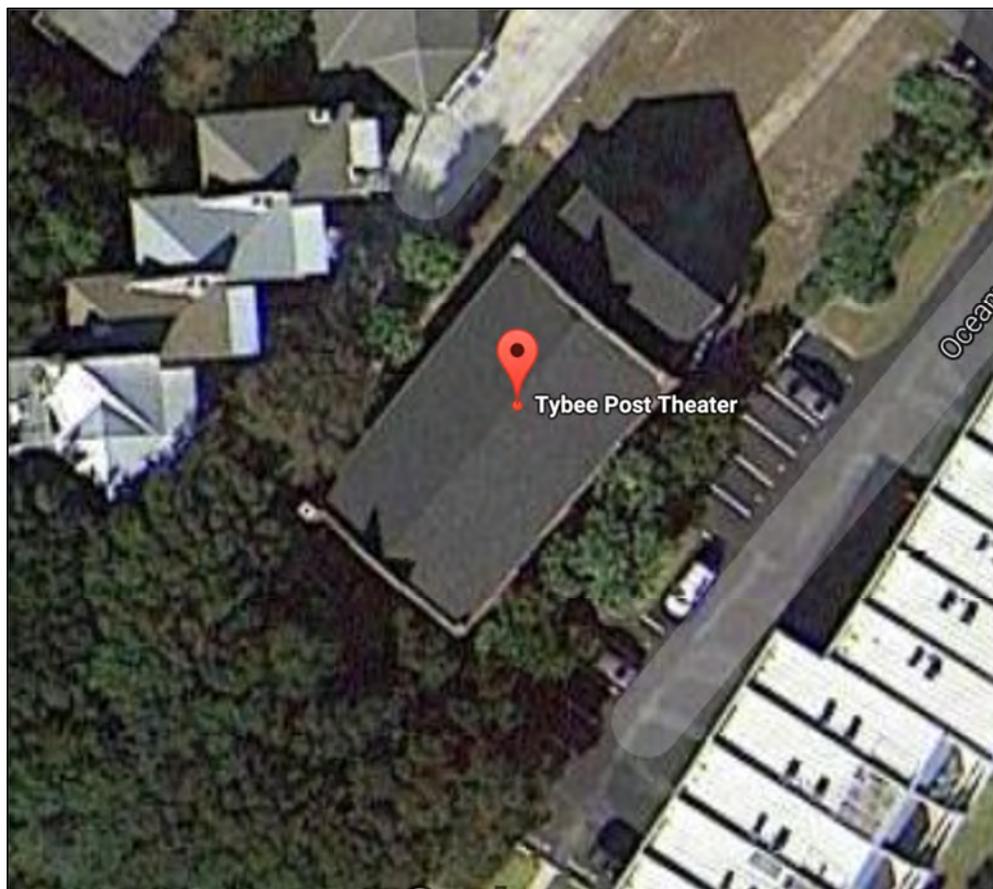


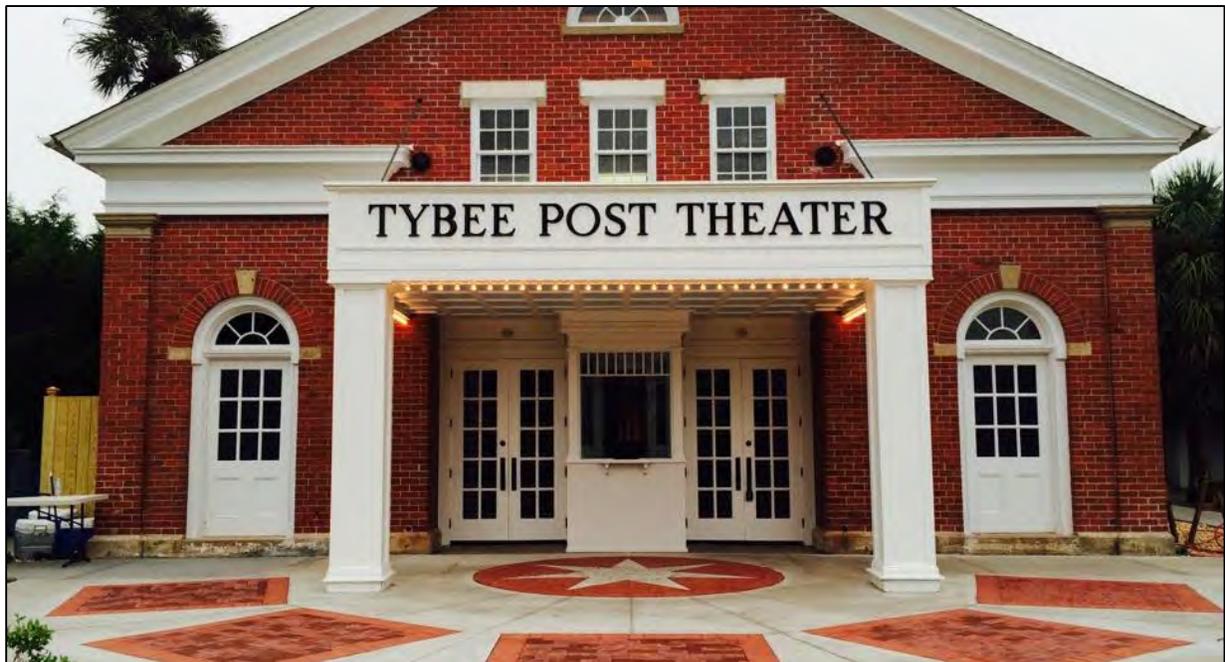
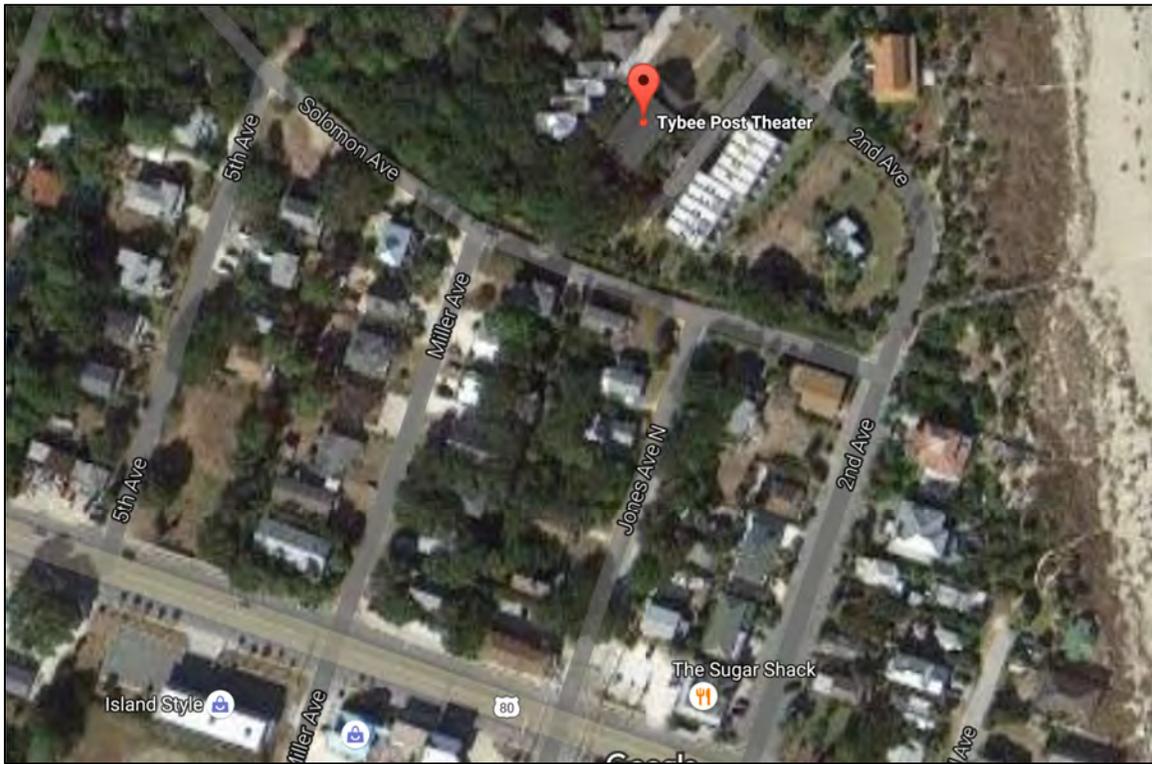


### 13. Tybee Island

- Tybee Post Theatre
- Address: 10 Van Horne Ave., Tybee Island, GA 31328
- Phone: 912-472-4790
- Website: <http://tybeeposttheater.org>
- Services: performing arts and movie venue, musical and comedy acts, misc. entertainments, weddings, corporate meetings
- Pricing: varies by performance
- Capacity: 206 seats
- Number of Shows/Year: N/A
- Rental to Others, Pricing: Yes, public event - \$1,000/day, private event - \$1,500/week day and \$2,000/weekend day
- Physical Features: concert hall, movie house, snake system
- Misc: built in 1930, closed mid-1960's, reopened Sept. 2015; silent film fest

Images:



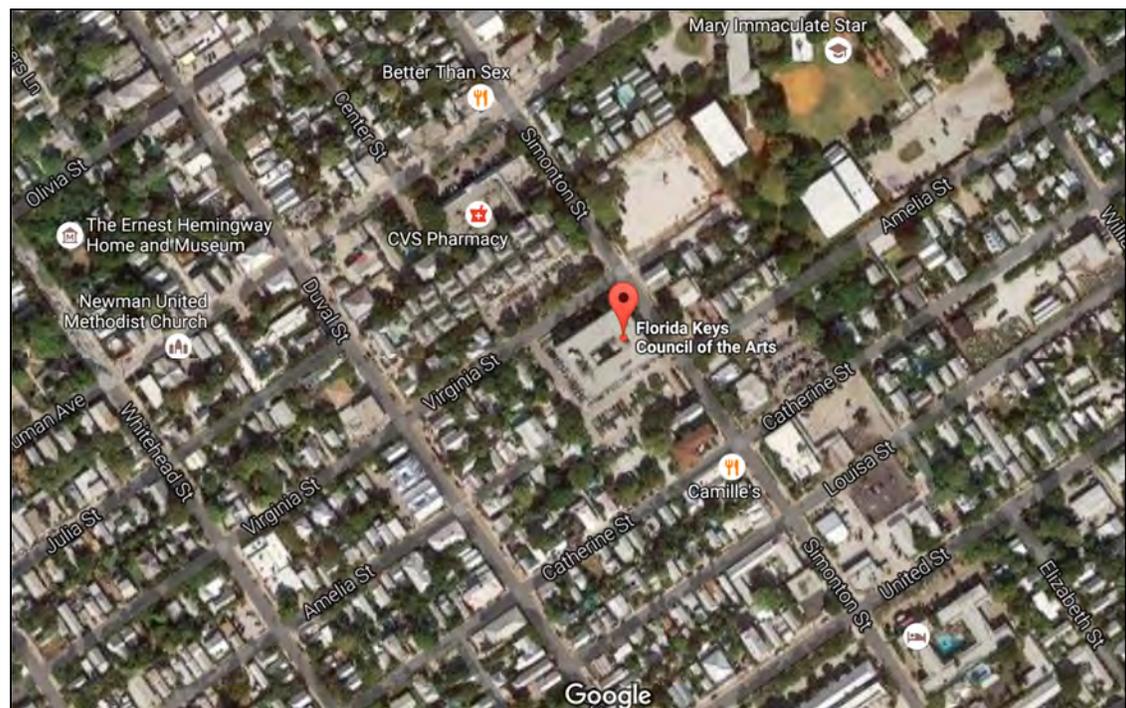
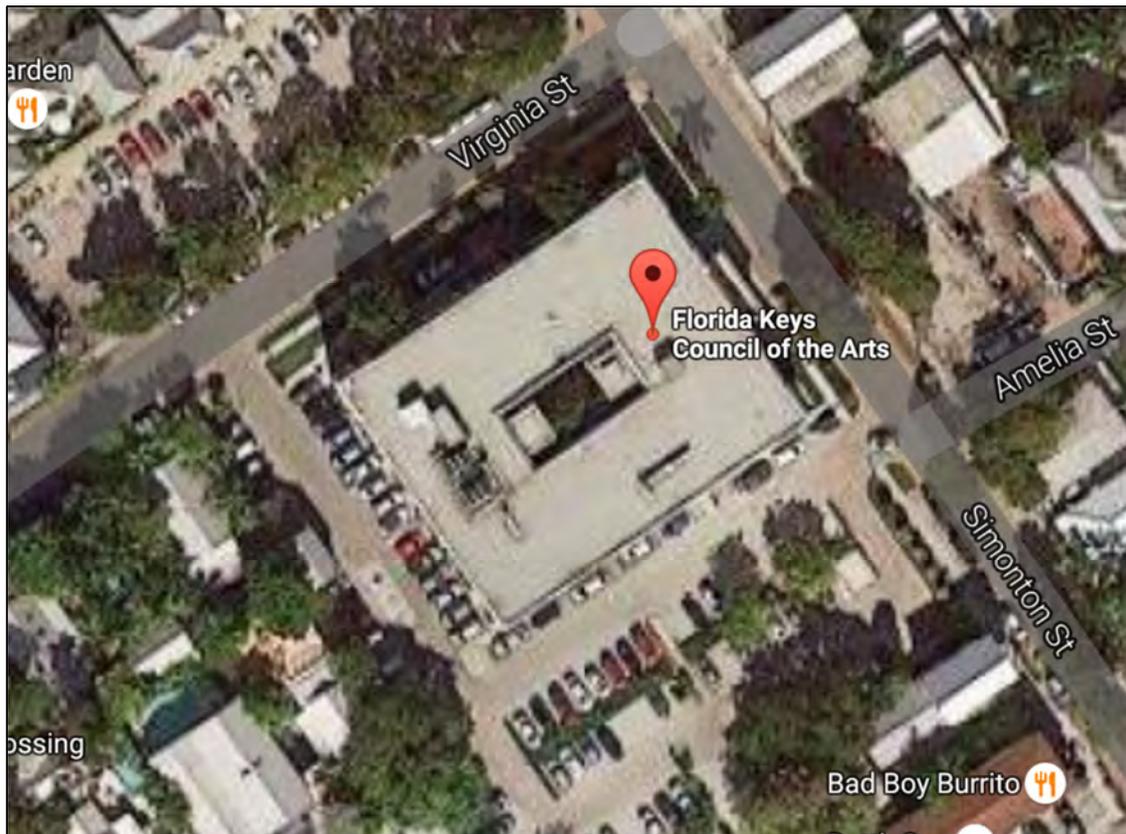




#### **14. Key West Council on the Arts (Tennessee Williams Fine Arts Center)**

- Address: 2932 Seidenberg Ave., Key West, FL 33040 1100 Simonton St, Key West, FL 33040
- Phone: 305-296-5973 305-295-4369
- Website: <https://www.keysarts.com>
- Services: public art, grants and awards, networking, visual arts, performing arts, literary and historical arts, rotating exhibits
- Pricing:
  - Individual membership - \$50
  - Contributor membership - \$100 (for 2)
  - Business partner - \$375
  - Supporter - \$500
  - Patron or Corporate Partner - \$1000
  - Benefactor or Corporate Sponsor - \$5,000
- Capacity: N/A
- Number of Shows/Year: N/A
- Rental to Others, Pricing: N/A
- Physical Features: various buildings all over the area
- Misc: non-profit local arts agency, makes grants, encourages art in education, publishes and distributes a weekly and quarterly Cultural Calendar

Images:





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## **General Limiting Conditions**

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Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible and they are believed to be reliable. This study is based on estimates, assumptions and other information developed by Market & Feasibility Advisors LLC from its independent research effort, general knowledge of the industry, and consultations with the Client and the Client's representatives. No responsibility is assumed for inaccuracies in reporting by the Client, the Client's agent, and representatives or any other data source used in preparing or presenting this study. No warranty or representation is made by Market & Feasibility Advisors LLC that any of the project values or results contained in this study will actually be achieved.

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