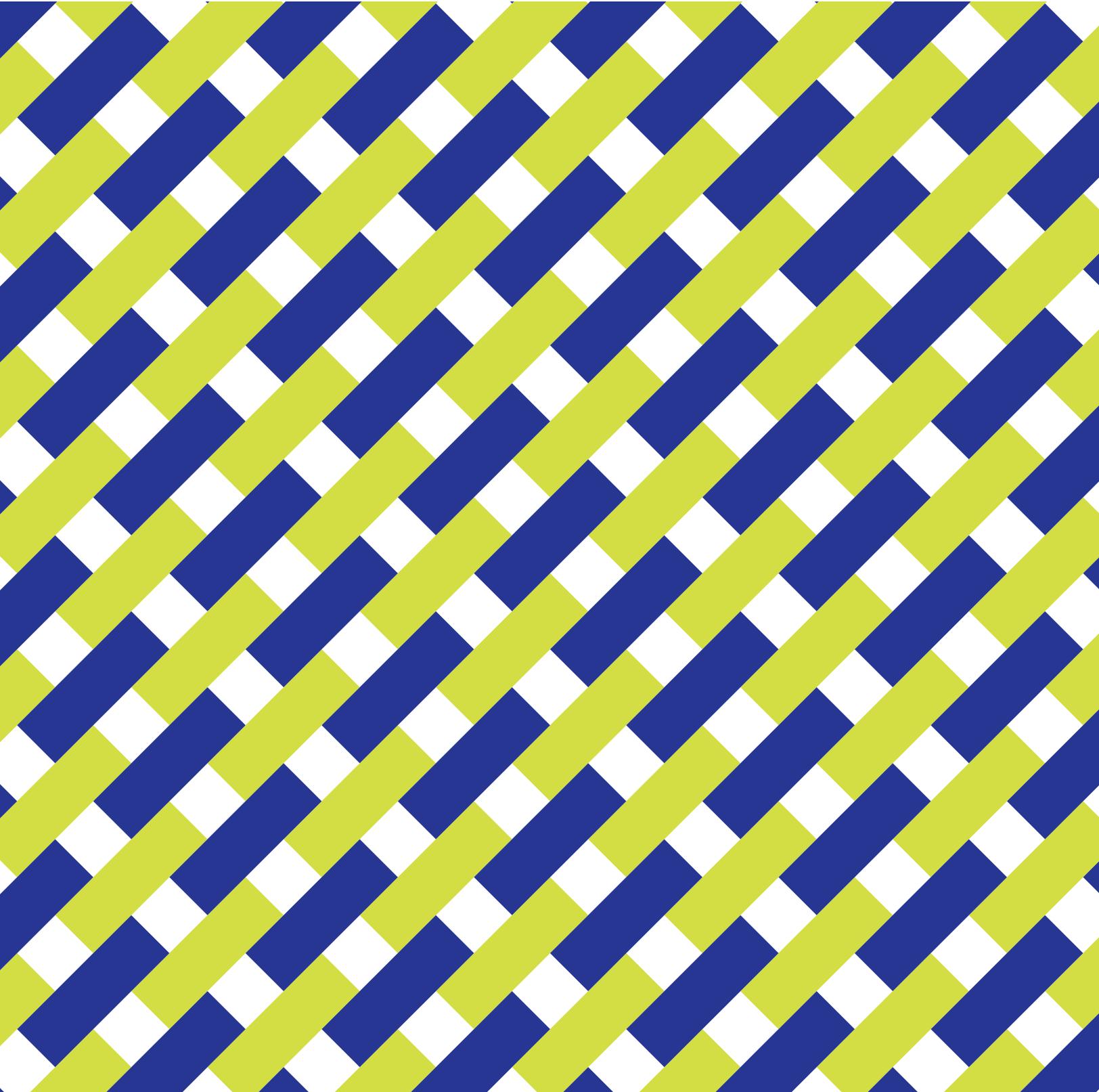


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May 2018

Performing Arts Center Feasibility Study

Completed for the Johns Creek Convention + Visitors Bureau

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executive summary

The City of Johns Creek was incorporated in 2006 and is known for its excellent schools and first-rate golf courses. In 2009, the Johns Creek Convention + Visitors Bureau (JCCVB) was established to promote tourism in the city, highlighting its outdoor recreation, proximity to Atlanta, and cultural diversity. The organization, however, has been challenged by the City's limited tourism product. As such, in 2017, the JCCVB's agreement with the City of Johns Creek was expanded to include tourism product development.

Despite its age, Johns Creek has a well-developed arts community. In 2017, a 16-member task force was formed (the Johns Creek Visual + Performing Arts Center Task Force) to recommend facilities that would serve the arts community's needs. The Task Force prepared an online survey that was distributed to 70 businesses and arts organizations. The survey was conducted from mid-May through mid-June 2017 and had a response rate of nearly 60%. Major findings were as follows:

- * "More than half (61.3%) of responding arts organizations use performance venues outside of the City of Johns Creek.
- * More than half (62.5%) of survey respondents rate their current performance venue as 'average' or 'below average.'
- * Eleven dance organizations paid \$310,500 in rental fees for rehearsal and performance space in 2016. More than 75% of those fees went to venue owners outside of the City of Johns Creek.
- * The majority of arts organizations are older than the City of Johns Creek.
- * Responding organizations indicated that they are 'extremely interested' or 'very interested' in using a new performance facility in Johns Creek, anticipating more than 250 performances during the first season of operation." (*A Report on the Cultural Arts Community in and near Johns Creek, Georgia. July 2017.*)

Based on these findings, the Task Force recommended the following: a concert hall designed for music and dance; a mid-sized theater for drama, musical theatre, and opera; a visual arts education and exhibition facility; a banquet/meeting facility with a commercial kitchen; and support spaces such as rehearsal rooms, classrooms, studios, dressing rooms, administrative offices, and so on.

In effort to move the project forward, the JCCVB would now like to understand the feasibility of an arts facility from a market perspective. In particular, the organization would like to know whether a new facility might fill in gaps in the community for entertainment and multi-use meeting/event space and stand as a regional tourism destination.

Webb Management Services is a management consulting practice for the development and operation of arts and cultural facilities. The firm has been retained by the JCCVB to complete a feasibility study for a performing arts center. The subsequent report considers the case for a new facility in terms of four key issues:

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

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

Forces + Trends

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

Market Analysis

Understanding the market is an important part of any feasibility study. To define the market for a performing arts facility in Johns Creek, we collected and mapped five years of ticket buyer and subscriber data for the Johns Creek Symphony Orchestra (JCSO). This suggested that the JCSO's current market lies primarily within Johns Creek and the 15 miles surrounding the Johns Creek CVB and allowed us to define the market for a performing arts facility as such. We then collected demographic data from Environics Analytics, a market research resource that expands and extrapolates Census data using a variety of inputs. Finally, we assessed visitor data from D.K. Shifflet, a travel research and consulting company, for the Atlanta Metro Region. This suggested the following:

- * There are very high levels of educational attainment and household income in Johns Creek and its 15-mile radius, indicating propensity to support the traditional performing arts (ballet, theatre, opera, symphonic music, etc.). In addition, the population is incredibly diverse—both in terms of age and race/ethnicity/language spoken at home. This suggests opportunities for hands-on and nontraditional programs, as well as programs that are culturally and/or linguistically specific.

- * The nonresident market in Johns Creek is almost entirely comprised of business travelers. For those working in tourism, the development of a performing arts facility represents an opportunity to expand the leisure tourism market.
- * Regional tourism data suggests that visitors are educated and affluent, indicating propensity to support traditional arts programs. Data also suggests that they participate in arts and culture when on the road, visiting historic sites, seeing movies, and attending live performances.
- * Arts + Economic Prosperity 5 suggests that the arts play an important role in Fulton County's economy, bringing in \$619 million in arts and culture expenditures. This data also suggest that most attendees are Fulton County residents. While there are fewer nonresident attendees, they spend almost \$15 more per person on arts and culture-related expenditures (excluding the cost of admission) than resident attendees.
- * The community input survey found that there is strong support for the arts and culture in the community. The majority of respondents believe that art and culture improve quality of life and increase community "feel." Respondents tend to participate in the arts three to six times a year and spend between \$100 and \$250 when attending an event. Overall, respondents would be willing to financially contribute to the building of a cultural arts center.

Existing Facilities

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

- * Local and regional indoor performance facilities are primarily used for producing performing arts and academic/educational programming. They are also rented by outside cultural organizations, schools/colleges, and private entities. Few indoor facilities, particularly in Johns Creek, present activity. Amongst those that do, music is the most commonly presented activity type, suggesting opportunities for alternative forms of presented entertainment (theatre, dance, film, family shows, comedy, a lecture series, and so on).
- * Most of the inventoried indoor facilities have capacities between 100 and 600, medium quality ratings, and low to no availability. This suggests that there are gaps for a high-quality performance facility in the market. This is particularly true in Johns Creek, where none of the facilities have a quality rating above 3.0, nearly every facility has low or no availability, and 16 of the 22 inventoried facilities are affiliated with a religion.
- * Outdoor performance facilities are activated through presented music (typically headlining and popular music acts). They cover a range of capacities and tend to be well-equipped, but ultimately have medium quality ratings. In addition, the inventory highlights that all of the

outdoor facilities are traditional amphitheaters. This suggests an opportunity for a high-quality, non-traditional outdoor venue that can be used throughout the year for performances and events.

- * The meetings and events facility inventory suggests that most meeting and event facilities in and around Johns Creek have reception capacities between 250 and 400 and quality ratings between 2.5 and 3.5. Event facilities tend to be smaller in size than hotel spaces. They also vary more in quality and have fewer attributes. The facility matrices suggest that there are gaps in the market for high-quality meeting and event space in Johns Creek across capacity ranges, but particularly for meeting and event spaces with seated capacities of 250 or more.

User Demand + Potential Partners

Key to building an argument of support for arts and cultural facilities in a community is understanding the need, or demand, for space on the part of potential users. To assess this, information was gathered from local artists, organizations, and community leaders and members in order to quantify and categorize demand for cultural facilities and programs in Johns Creek. This allowed us to conclude the following:

- * Twelve organizations have expressed interest in utilizing a new performing arts facility in Johns Creek. Most of these organizations have demand for space that can accommodate music or dance, although there is demand for a smaller theater space as well. Important facility features include excellent acoustics, rehearsal space, ADA accessibility, a large stage, sufficient wingspace and support spaces, a fly tower, the ability to sell alcohol, and lobby/box office space.
- * In total, users have 278 days of demand for performance space: 123 days for performances, 152 days for rehearsals/tech, and 3 days for 'other' events (fundraisers, meetings, etc.). Of that demand, 92 days are for a facility with 1,000 to 1,400 seats, 92 days are for a facility with 600 to 800 seats, and 94 days are for a facility with 200 to 500 seats.
- * The Georgia Ensemble Theatre has expressed interest in moving operations to Johns Creek. If this were to happen, demand for a 350 to 500-seat theater would increase by roughly 148 days.
- * The Johns Creek Arts Center has outgrown its current facility and is now developing new programs and initiatives at other facilities off-site. The organization is in need of a new facility that is at least 12,000-square-feet.
- * Anecdotal research suggests that there is strong demand for meeting, event, and private teaching space in Johns Creek. In addition, there is interest in a rentable kitchen facility that can be used for private events. For all facilities, it is important that there are fair and flexible operating policies that make each space as accessible as possible for users.
- * Conversations with regional promoters and presenters suggest that there is an opportunity for a facility in Johns Creek to present touring entertainment. Potential partners include the

Atlanta Professional Dance Academy, who could present internationally touring dance, and Georgia Presenters, a state-wide booking consortium. Additional touring product might include jazz, culturally-specific, rock, Broadway, soul/blues/gospel acts or tribute band acts.

Community Benefits + Impacts

The final piece of the study considers how investing in arts and culture can help the JCCVB and City of Johns Creek advance goals for the future. Individuals interviewed as part of the study suggested that new facilities could contribute to quality of life, create sense of place, diversify tourism and the economy, and keep money in the community.

Further, The City of Johns Creek has identified transportation, community identity, economic development, access to recreation and culture, and identity as a health and wellness destination as some of its main priorities for the future. At the community level, interest and desire has been expressed in facilities for arts, culture, and entertainment. Given this, an arts facility in Johns Creek does appear to be in line with community goals for the future, as it would help build identity in the community, diversify the economy, and contribute to corporate recruitment and retention.

Conclusions + Recommendations

This research allowed us to conclude the following:

The Market: High levels of educational attainment and household income in Johns Creek and its 15-mile radius indicate strong propensity to support traditional performing arts (ballet, theatre, opera, symphonic music, etc.). At the same time, diversity in age, race, ethnicity, and language spoken at home suggest opportunities for non-traditional, hands-on, and culturally specific programming. This might include weekend classes and programs for young families, festivals, and events.

While there is limited data available on who exactly visits Johns Creek, we know that most are traveling throughout the week for business, indicating an opportunity to grow the leisure market. Regional data suggests that nonresident visitors are educated and affluent, further indicating an opportunity for traditional performing arts events. These visitors like to travel for libation/culinary experiences and for culture.

Lastly, a community survey effort completed in 2017 suggests that there is broad community support for the arts.

Existing Facilities: The facility inventories suggest that there are a few gaps in the market that a new performing arts facility could fill. First, there is an opportunity for a high-quality, indoor performance facility across capacity ranges. This is particularly true in Johns Creek, where none of the facilities have a quality rating above 3.0, nearly every facility has low or no availability, and 16 of the 22 inventoried facilities are affiliated with a religion. Then, there is an opportunity for a high-quality outdoor space, specifically a nontraditional space that could be used year-round for performances and events. Finally, there is an opportunity for a unique meeting and event facility across capacity ranges, but particularly for a meeting and event space with a seated capacity of 250 or more.

User Demand + Potential Partners: An analysis of user demand suggests that a performing arts facility in Johns Creek could be activated by a mix of music, dance, theatre, and presented programs. In sum, 12 users have expressed 278 days of demand for performance space of all sizes. Six users have 94 days of demand for a facility with 200 to 500 seats, four users have 92 days of demand for a facility with 600 to 800 seats, and four users have 92 days of demand for a facility with 1,000 to 1,400 seats (note that Terra Winds and Fleetwood Dance have demand for two differently sized facilities and, as such, are counted twice). The ideal facility would have excellent acoustics, rehearsal space, ADA accessibility, a large stage, sufficient wingspace and support spaces, a fly tower, the ability to sell alcohol, and lobby/box office space.

Georgia Ensemble Theatre and the Johns Creek Arts Center have also expressed interest in new facilities. For Georgia Ensemble Theatre, the ideal space would have between 350 and 500 seats. The organization could activate such a space at least 148 days of the year, although that number would likely increase. The Johns Creek Arts Center, on the other hand, has demand for a 12,000-square-foot facility with gallery, teaching, and studio space. In addition to demand for performance and visual arts space, anecdotal research suggests that there is strong demand for meeting, event, kitchen, and private teaching space in Johns Creek.

Regional promoters and presenters believe that there is an opportunity to attract touring product to Johns Creek. This could include a combination of touring dance, theater, and jazz, culturally-specific, rock, Broadway, soul/blues/gospel acts or tribute band acts.

Benefits + Impacts: Over the last 12 years, the City of Johns Creek has identified a number of goals for the community, many of which are related to economic development, building community identity, and increasing access to recreational and cultural resources. Throughout planning processes, community engagement efforts have consistently revealed support for arts and cultural activities and spaces. A performance facility project in Johns Creek is in line with a number of community goals and could help propel other initiatives related to economic development, health and wellness, corporate recruitment, and workforce retention.

Based on these findings, Webb Management Services provided the JCCVB with the following recommendations:

Develop a community arts center. This should be a high-quality, state-of-the-art facility for the Johns Creek community. It should feature a 600 to 800-seat venue with a large stage and excellent acoustics for local music and dance organizations, some touring entertainment, and corporate meetings and events. It should have sufficient backstage space, some ability to fly sets, wide wings, storage, and a grand piano. In addition to this space, there should be a smaller, 150 to 350-seat multipurpose room. If Georgia Ensemble Theatre should commit to moving to Johns Creek, we would recommend that the community invest in making this space a working theater. Otherwise, it should have the functionality and flexibility to accommodate theatre activity, smaller music performances, rehearsals, and community meetings and events. The building may also include one or two additional rehearsal spaces that could double as education or meeting/event space.

In addition to performance space, we recommend including space for the Johns Creek Arts Center in the facility. This should include gallery and exhibition space, a digital arts lab, and other teaching and working spaces, as required by the Arts Center.

Finally, the facility should have a large kitchen. This space should be available for rent by the community. It should have flexible catering policies and be designed with the diversity of the Johns Creek community in mind. For example, the kitchen might include a kadai (the Indian version of wok) or other materials that are essential to preparing an Indian meal. Such a space could also be used for teaching hands-on culinary programs.

To be clear, all spaces in the facility (including lobby and gallery space) should have the ability to accommodate standing and/or seated meetings and events. Spaces like the 600 to 800-seat venue and multipurpose room, in particular, should be outfitted with technology and amenities (i.e. sound, projection, and lighting equipment; podiums; wireless mics; etc.) for corporate presentations and guest speakers. This facility could also serve as a temporary or satellite innovation center as part of the iHeart Johns Creek initiative.

Create a year-round, seasonal venue for outdoor entertainment, ideally in partnership with other communities. This facility should be located in a pastoral setting (for example, along the Chattahoochee River). It should have an indoor capacity of 800 to 1,200 with the ability to open up onto an outdoor lawn. It should have state-of-the-art acoustics and technical amenities appropriate for a range of touring music and special events. Programming should be music oriented, although the facility might also host touring dance and popular entertainment. Given the scale of the project and its potential impact on a wider area, a regional partnership for this facility might make sense. As with the previous recommendation, this facility should also have the functionality to accommodate meetings and events.

needs assessment report

1. Introduction + Brief

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

In Johns Creek, Webb Management Services has been retained by the Johns Creek Convention + Visitors Bureau (JCCVB), the official destination marketing organization for the City of Johns Creek, to complete a feasibility study for a performing arts center. This work considers the case for a new facility in terms of four key issues:

- * **The Market:** Who is living in and visiting Johns Creek? What does that tell us about market propensity to support the arts and culture?
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To answer these questions, we interviewed a cross-section of cultural, political, and community leaders; toured local and regional cultural facilities; studied the size and characteristics of the market area; developed and evaluated a detailed inventory of existing performing arts and meeting and event facilities; estimated user demand for performance space; and, reviewed long-term planning reports in order to understand how, and where, a performing arts facilities project might align with community goals.

The consulting team would like to use this opportunity to thank everyone that has contributed to the study, especially Shelby Marzen, Wayne Baughman, and the project steering committee.

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

2. Project Context

The City of Johns Creek was incorporated in 2006 and is known for its excellent schools and first-rate golf courses. In 2009, the Johns Creek Convention + Visitors Bureau was established to promote tourism in the city, highlighting its outdoor recreation, proximity to Atlanta, and cultural diversity. The organization, however, has been challenged by the City's limited tourism product. As such, in 2017, the JCCVB's agreement with the City of Johns Creek was expanded to include tourism product development.

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Based on these findings, the Task Force recommended the following: a concert hall designed for music and dance; a mid-sized theater for drama, musical theatre, and opera; a visual arts education and exhibition facility; a banquet/meeting facility with a commercial kitchen; and support spaces such as rehearsal rooms, classrooms, studios, dressing rooms, administrative offices, and so on.

In effort to move the project forward, the JCCVB would now like to understand the feasibility of an arts facility from a market perspective. In particular, the organization would like to know whether a new facility might fill in gaps in the community for entertainment and multi-use meeting/event space and stand as a regional tourism destination.

3. Forces + Trends in the Sector

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

3.1 Arts Audiences

The National Endowment for the Arts regularly releases the Survey of Public Participation in the Arts (SPPA), which assesses arts participation on the part of the country's adult population. Following are some basic facts about arts audiences based on highlights from the 2012 SPPA (the next iteration of the study is expected to be released in the coming year), which can be downloaded here:

<http://arts.gov/publications/additional-materials-related-to-2012-sppa>

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

3.2 Trends in Participation: Ethnically-Specific + Immigrant Populations

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

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

centers. Arts organizations often engage diverse communities in these familiar places, create relationships, and then draw them to more formal facilities.

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

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

3.3 Trends in Arts Consumption + Patterns of Participation

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

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

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

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

The Importance of Interpretation-rich Experiences: The quality of an experience for audiences is dramatically improved by properly preparing them for that experience with information and context; then, more importantly, by providing them with the opportunity to process and share their experience with others. We must accept that audiences are less willing to accept someone else’s interpretation

of an experience, preferring to develop and provide their own interpretation, whether it is through a Tweet, a Snap, a live stream, or something other.

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

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

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

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

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

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

3.4 Nonprofit Arts Organizations

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

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

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

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

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

3.5 Children and the Arts

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

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

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

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

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

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

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

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

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

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

3.6 Responding to a Changing Environment

How should communities respond to these changes in the sector?

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

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

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

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

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

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

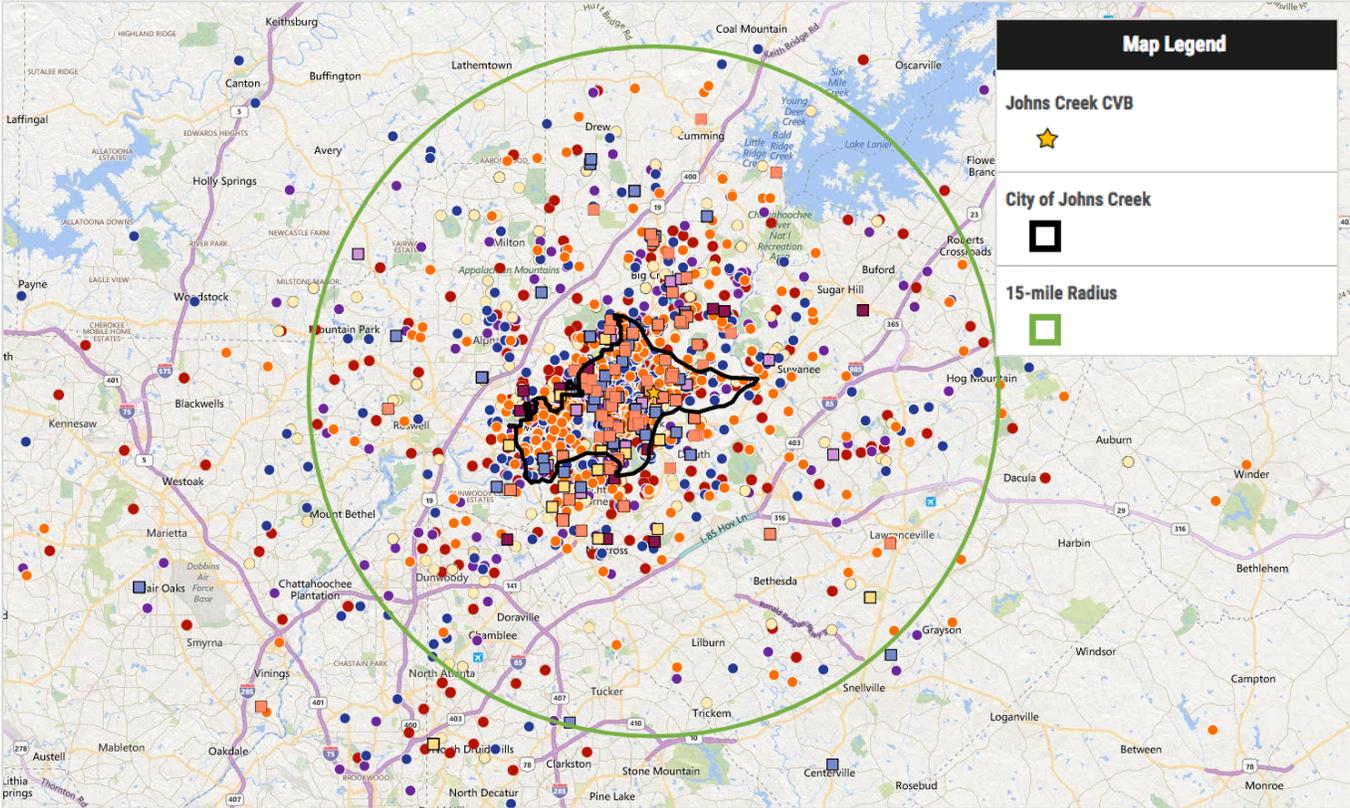
Community Engagement: Fundamentally, the cultural sector must become deeply engaged and connected to the life of its communities. Arts and culture cannot be seen as something special or exclusive, but rather something fundamental to the life of the community, offering benefits that are understood and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

4. Market Analysis

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

To determine the market for a performing arts facility in Johns Creek, we collected and mapped five years of ticket buyer and subscriber data for the Johns Creek Symphony Orchestra (JCSO). As the map below (Figure 1) illustrates, the JCSO's current market lies primarily within Johns Creek and the 15 miles surrounding the Johns Creek CVB.

Figure 1: JCSO Single Ticket Buyers + Subscribers



This is also shown in Table 1. Between 45% and 49% of ticket buyers for the JCSO’s last five seasons attended a performance from within the City of Johns Creek. Between 91% and 93% of all ticket buyers attended from within 15 miles of the Johns Creek CVB.

Table 1

Johns Creek Symphony Orchestra Single Ticketbuyers							Percent of Ticket Buyers/Market Segment by Year					
	Ticket Buyers/Market Segment by Year						Percent of Ticket Buyers/Market Segment by Year					
	2013-14	2014-15	2015-16	2016-17	2017-18*	Total	2013-14	2014-15	2015-16	2016-17	2017-18*	Total
Total Ticket Buyers	2,249	1,604	1,590	2,089	1,430	8,962	-	-	-	-	-	-
Johns Creek	1,054	715	712	991	696	4,168	47%	45%	45%	47%	49%	47%
15-mile Radius	2,085	1,454	1,455	1,941	1,324	8,259	93%	91%	92%	93%	93%	92%
Beyond 15-mile Radius	164	150	135	148	106	703	7%	9%	8%	7%	7%	8%
Johns Creek Symphony Orchestra Subscribers							Percent of Subscribers/Market Segment by Year					
	Subscribers/Market Segment by Year						Percent of Subscribers/Market Segment by Year					
	2013-14	2014-15	2015-16	2016-17	2017-18	Total	2013-14	2014-15	2015-16	2016-17	2017-18	Total
Total Subscribers	70	109	114	175	145	613	-	-	-	-	-	-
Johns Creek	32	58	60	89	77	316	46%	53%	53%	51%	53%	52%
15-mile Radius	61	101	109	168	142	581	87%	93%	96%	96%	98%	95%
Beyond 15-mile Radius	9	8	5	7	3	32	13%	7%	4%	4%	2%	5%

* 2017-18 does not include the full season of concerts

Based on this, we defined the market for a performing arts facility in Johns Creek as the City of Johns Creek and the 15-mile radius surrounding the Johns Creek CVB. Demographic data from Environics Segmentation + Market Solutions, a market research resource that expands and extrapolates Census data using a variety of inputs, was then collected. Lastly, local and regional tourism data was examined in order to assess the current size of the non-resident population and the potential to attract visitors for cultural programs and events. All market data and related charts are included in Appendix B.

4.1 The Local + Regional Markets

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

It is Growing: The population is growing in both market segments. In the 2010 Census, Johns Creek had a population of 76,728. For 2018, it is estimated at 87,761, a change of 15%. By 2023, it is projected that the population will grow an additional 7%, reaching a total population of 94,083.

Growth has occurred at a similar rate in the 15-mile radius. Between 2010 and 2018, it is estimated that the population has grown by 15%, from 1.2 million in 2010 to 1.4 million in 2018. Between 2018 and 2023, the population is projected to continue to grow, reaching a total population of 1.5 million (a change of 7%).

It is Well-educated. Educational attainment outpaces national numbers in Johns Creek and the 15-mile radius. In Johns Creek, 38% of the population has a Bachelor’s Degree and 27% has a Graduate or Professional Degree. Nationally, just 19% and 11% of the population falls into these categories. In the 15-mile radius, 30% of the population has a Bachelor’s Degree and 27% has a Graduate or Professional Degree.

Figure 2

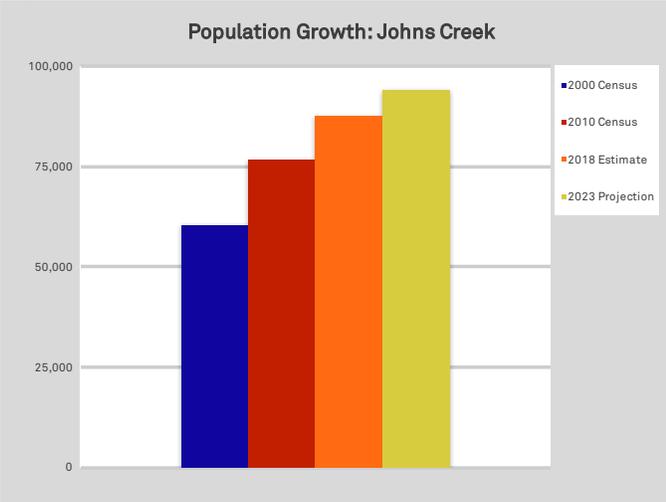


Figure 3

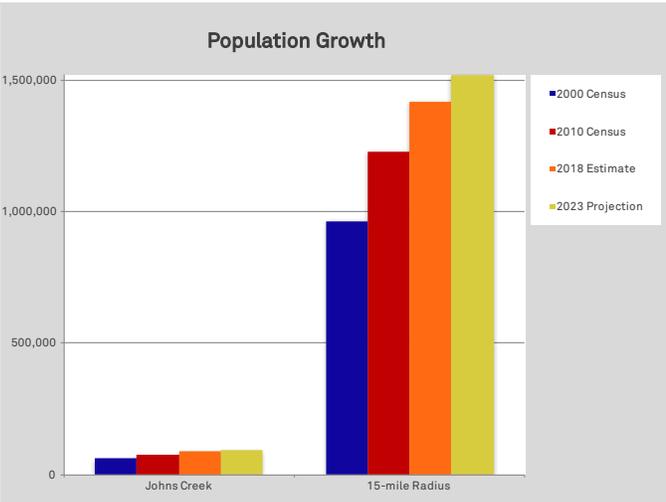
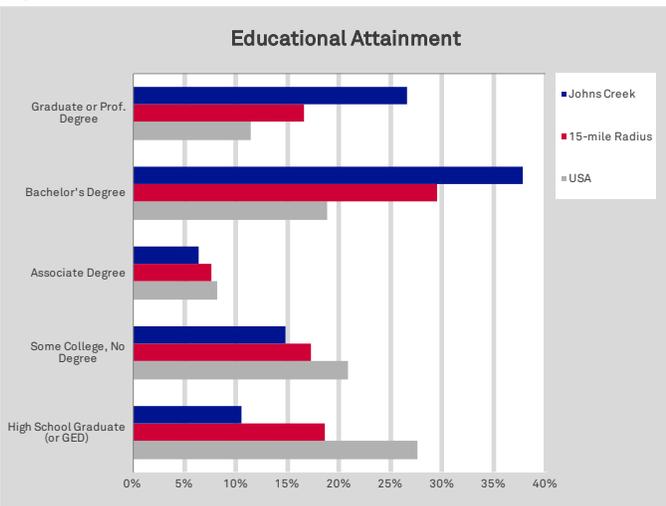


Figure 4



It is Affluent. Both market segments also outpace the nation in household income. In Johns Creek, 37% of the population has a household income of \$150,000 or more and 20% has a household income between \$100,000 and \$149,999. In the 15-mile radius, 21% of the population has a household income of \$150,000 or more and 18% has a household income between \$100,000 and \$149,999. Nationally, just 13% and 15% of the population falls into these income brackets, respectively.

Median household income (MHI) is highest in Johns Creek. In 2000, it was recorded at \$105,830. Today, it is estimated at \$117,142, a change of \$11,312. By 2023, it is projected to continue to grow, reaching \$127,480.

MHI in the 15-mile radius is considerably lower than in Johns Creek, but still greater than MHI nationally. In 2000, it was measured at \$65,038. For 2018, it is estimated at \$78,103 and, by 2023, it is projected to reach \$86,544.

Racially, Ethnically + Linguistically Diverse: The Johns Creek and 15-mile radius populations are incredibly diverse. Nationally, the ‘White (Non-Hispanic)’ demographic accounts for 60% of the total population. In Johns Creek, this number drops to 53% and, in the 15-mile radius, to 49%.

Thirty-percent of the population in Johns Creek identifies as ‘Asian’, compared to 14% in the 15-mile radius and 6% nationally. Primarily, this demographic is comprised of residents that identify as Indian (46%), Chinese (25%), or Korean (17%). By 2023, it is projected that the ‘Asian’ population in Johns Creek will reach 35%. Anecdotal research indicates that these populations are attracted to Johns Creek because of its excellent schools.

Figure 5

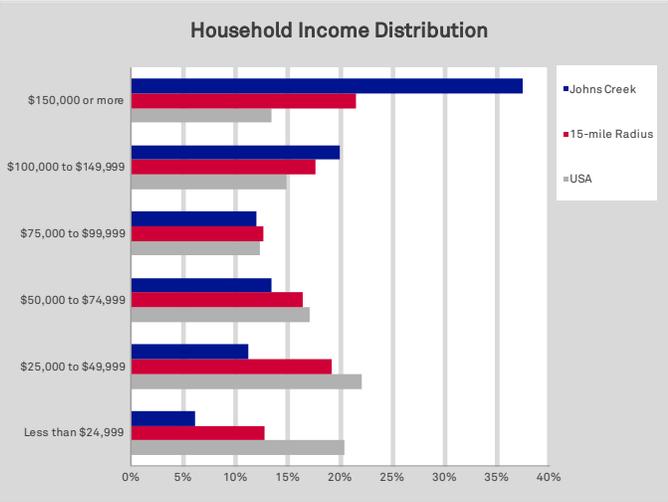


Figure 6

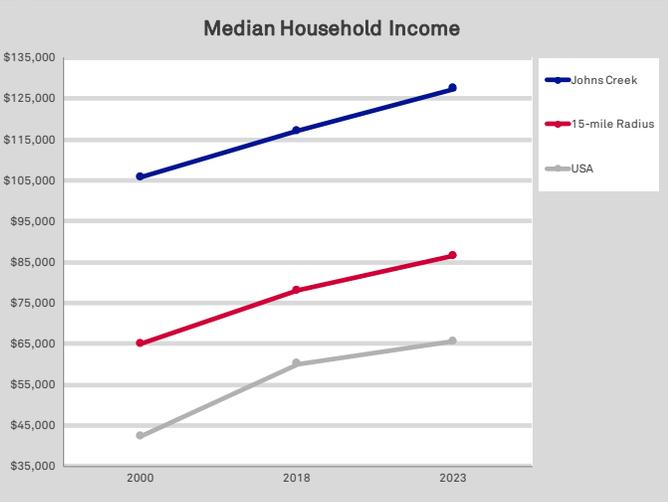
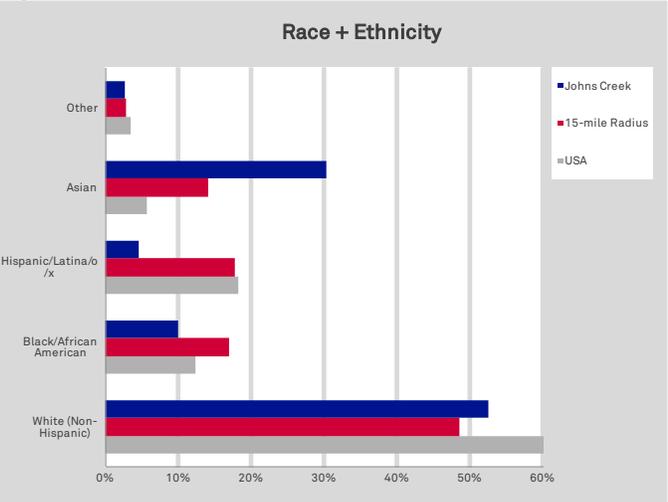


Figure 7



In the 15-mile radius, 17% of the population identifies as ‘Black/African American’, outpacing numbers in Johns Creek and the country. In addition, 28% of the population identifies as ‘Hispanic/Latina/o/x’.

While the majority of the population in both market segments speak English at home (albeit at lower rates than in the nation), there is significant linguistic diversity. In Johns Creek, 15% of the population speaks an Asian Pacific Islander Language and 11% speaks an Indo-European Language. In the 15-mile radius, 15% of the population speaks Spanish, 8% speaks an Asian Pacific Islander Language, and 7% speaks an Indo-European language.

This suggests opportunities for culturally and linguistically-specific programs.

Diverse in Age: Johns Creek and the 15-mile radius are also diverse in age, although the 15-mile radius does skew slightly younger. In Johns Creek, 18% of the population is between the ages of 45 to 54 and 15% is between the ages of 55 and 64. Nationally, 13% of the population falls into each of these categories.

In the 15-mile radius, 14% of the population is between the ages of 35 and 44. This is a higher percentage than in either Johns Creek or the nation.

In both market segments, roughly one-quarter of the population is age 17 and under, suggesting that there are a number of families in the market.

Figure 8

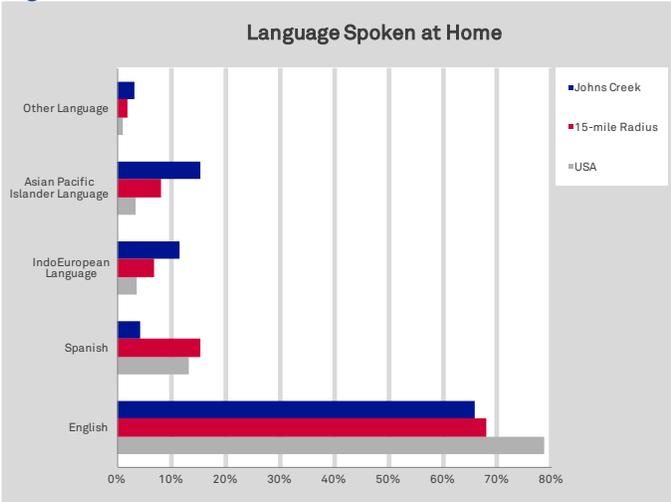
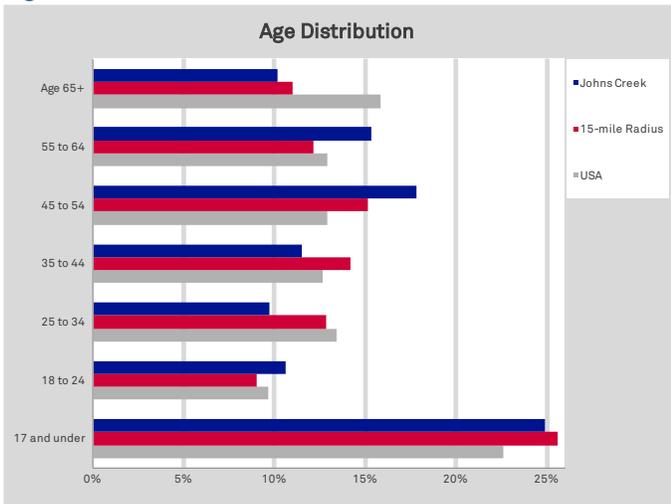
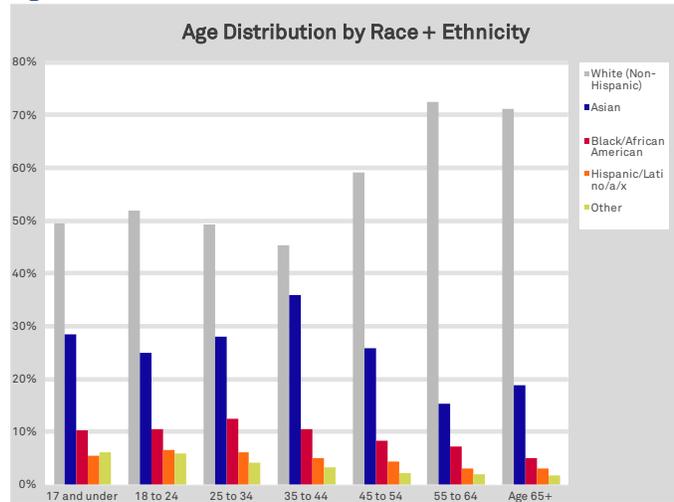


Figure 9



Looking at the distribution of age by race and ethnicity suggests that, while the White (Non-Hispanic) population makes up the majority of each age bracket, it represents nearly 60% or more of the 45 to 54, 55 to 64, and 65+ age brackets. The Asian population, on the other hand, represents between 26% and 36% of the 17 and under, 18 to 24, 25 to 34, 35 to 44, and 45 to 54 populations. This suggests that the 'White (Non-Hispanic) population is an older demographic likely to support traditional, Western arts and cultural activities while the Asian, Black or African, Hispanic/Latino/a/x, and Other populations skew younger, indicating opportunities for hands-on, participatory, and culturally-specific programs.

Figure 10



Source: Easy Analytic Software Inc.

4.2 The Nonresident Market

There is limited Johns Creek-specific tourism data available, although anecdotal research suggests that the sector is driven by business, weddings, and golf. When it comes to growing the Johns Creek’s tourism profile, hoteliers and representatives from Georgia Tourism suggest that the biggest obstacle is a lack of tourism product, particularly product that is attractive to leisure visitors. As such, for those working in the tourism industry, a performing arts facility project represents an important opportunity to grow and expand business, filling up hotel rooms on the weekends in addition to the work week.

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

- * Tourism in the Atlanta Metro is growing. In 2015, there were 45.9 million visitors to the Atlanta Metro area, accounting for 49% of all visitors to the State of Georgia. In 2016, this number grew to 47.6 million.
- * Seventy-one percent (71%) of visitors travel to the Atlanta Metro from outside of the state and 29% travel from within the state. The majority of in-state visitors are traveling from within Atlanta (19%). Out-of-state visitors are traveling from Birmingham, AL (7%) and Greenville-Spartanburg, SC/Asheville, NC/Anderson, SC (4%).
- * Nearly three-quarters of all visitors are traveling for leisure (73%). Of these, 19% are traveling for vacation. The remainder are traveling to visit a friend or relative.

- * One-quarter (25%) of Atlanta Metro visitors travel for culture. Of those, 7% visit historic sites, 7% see a movie, and 6% attend concerts, theatre, dance, etc. Nineteen percent (19%) of visitors are traveling for libation and culinary purposes. Of those, 19% are traveling for a culinary/dining experience and 1% are traveling to partake in winery/distillery/brewery tours.
- * The average visitor party size is 1.74 persons. Few visitors (12%) travel with kids.
- * A visitor's average length of stay is 2.27 days and 3.30 nights. Nearly all visitors (83%) utilize a car as their primary mode of transit and many (29%) travel to the Atlanta Metro from 101 to 250 miles away.
- * The average person spends \$128.50 per day. Those funds are largely spent on transportation (\$43.90 spent per day) and lodging (\$57.80 spent per day). On average, visitors spend \$9.90 on entertainment.
- * Visitors have an average age of 45.4 and an average household income of \$85,906. The majority of visitors are employed (67%), married (63%), and have no children in the household (59%).

4.3 Arts + Economic Prosperity 5

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

During fiscal year 2015, there were \$619 million in total arts and culture industry expenditures in the county. Of that, \$383 million came from arts and cultural organizations and \$236 million came from audience expenditures. This spending helped support over 19,000 jobs, resulted in \$490.6 million in household income to residents, and generated more than \$56 million for local and state governments. The study also found that resident attendees make up the majority of those attending arts and culture events in Fulton County: there were 5.9 million resident attendees to arts and cultural events in 2015 compared to 2.7 million nonresidents. Nonresident attendees, however, spend a fair amount more than their resident counterparts. In FY 2015, nonresident attendees spent \$37.28 in event-related spending (excluding the cost of admission), while resident attendees spent \$22.66 (excluding the cost of admission).

4.4 Johns Creek Visual + Performing Arts Center Task Force Community Survey

In addition to the arts community survey completed as part of the "Report on the Cultural Arts Community in and near Johns Creek, Georgia", the Task Force conducted a community survey. The survey was shared through the Cultural Arts Alliance at Johns Creek, social media, print and online news media, and neighborhood organizations and received 521 total responses (59% of respondents were Johns Creek residents, 41% were not).

The effort found that 98% of survey respondents believed that arts and culture improve quality of life and that 97% believed arts and culture increase community “feel.” It also found that 48% of survey respondents attended cultural arts events three to six times per year and that 34% attended once a month. For more than half of all respondents (51%), the average amount of money spent when attending an event (including tickets, dining out, transportation, lodging, etc.) was \$100 to \$249. When asked whether or not they would donate to support building a cultural arts center, 81% of respondents indicated that they would.

Overall, the survey suggested that there is strong community support for the development of an arts and cultural facility in Johns Creek.

4.5 Market Analysis Conclusions

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

- * There are very high levels of educational attainment and household income in Johns Creek and its 15-mile radius, indicating propensity to support the traditional performing arts (ballet, theatre, opera, symphonic music, etc.). In addition, the population is incredibly diverse—both in terms of age and race/ethnicity/language spoken at home. This suggests opportunities for hands-on and nontraditional programs, as well as programs that are culturally and/or linguistically specific.
- * The nonresident market in Johns Creek is almost entirely comprised of business travelers. For those working in tourism, the development of a performing arts facility represents an opportunity to expand the leisure tourism market.
- * Regional tourism data suggests that visitors are educated and affluent, indicating propensity to support traditional arts programs. Data also suggests that they participate in arts and culture when on the road, visiting historic sites, seeing movies, and attending live performances.
- * Arts + Economic Prosperity 5 suggests that the arts play an important role in Fulton County’s economy, bringing in \$619 million in arts and culture expenditures. This data also suggest that most attendees are Fulton County residents. While there are fewer nonresident attendees, they spend almost \$15 more per person on arts and culture-related expenditures (excluding the cost of admission) than resident attendees.
- * The community input survey found that there is strong support for the arts and culture in the community. The majority of respondents believe that art and culture improve quality of life and increase community “feel.” Respondents tend to participate in the arts three to six times a year and spend between \$100 and \$250 when attending an event. Overall, respondents would be willing to financially contribute to the building of a cultural arts center.

5. Existing Facilities

In order to understand the existing supply of performing arts facilities and programs in the market, we have developed inventories of indoor and outdoor spaces that are used four or more times a year for live performances. In addition, we also created a meeting and events facilities inventory, intended to help us understand how a performing arts facility might also be used to accommodate meetings and events. All inventories are included as Appendix D.

5.1 Indoor Performance Facilities Inventory

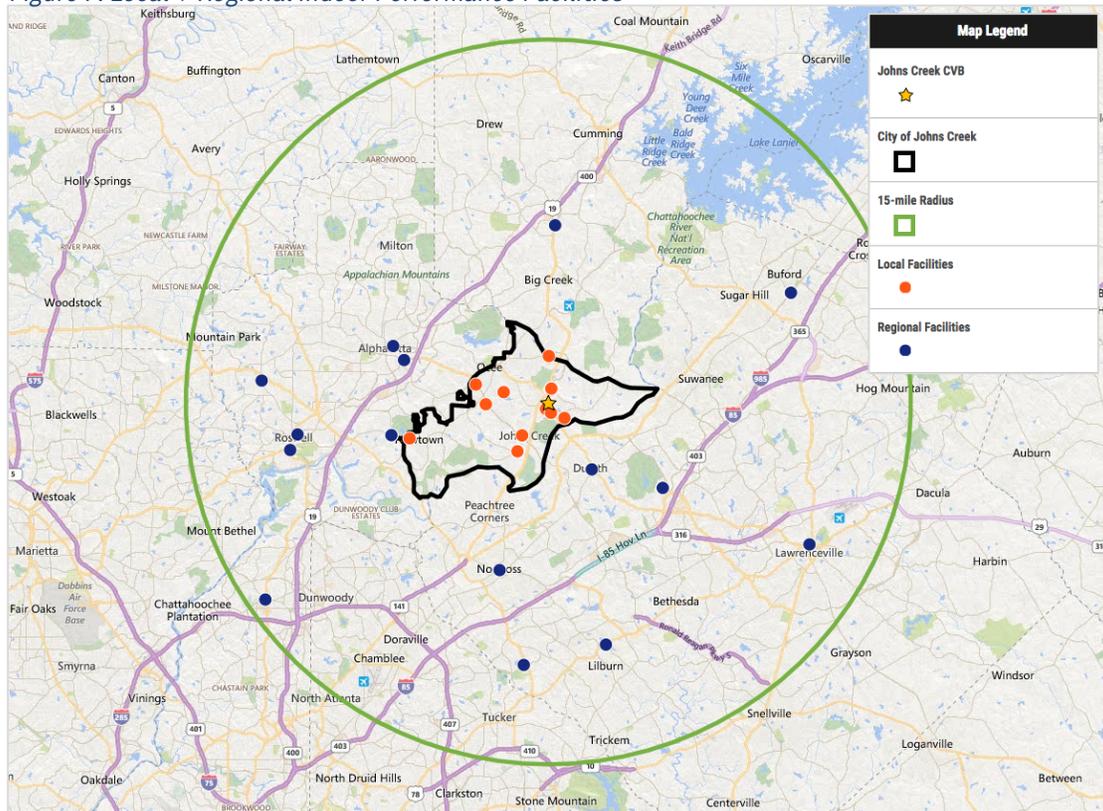
The Performance Facilities Inventory considers the physical features and types of activities hosted in 39 local and regional facilities. In addition, the overall quality of each facility has been rated using eight variables:

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

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

The inventoried facilities range in capacity from 100 to 2,305 seats. Twenty-two of the facilities are in Johns Creek (referred to as 'local' facilities) and 17 are beyond the borders of Johns Creek, but within 15 miles of the JCCVB. To be included in the inventory, the facility must be used for live performances four or more times a year. A map of all facilities is included below (Figure 11).

Figure 7: Local + Regional Indoor Performance Facilities



Facility Programming + Activity: The first table in the appendix (Appendix D, Table 1), organized by seating capacity, shows presenting (when facilities buy touring shows), producing (when the art is created by the building operator), and rental activity (in which case the work comes from another group that assumes the risk in using the facility). Three facilities in Johns Creek, and seven in the region, present performing arts activities. In Johns Creek, music is the only presented activity type. Regionally, four facilities present music, two present headliner/popular music, and one facility each presents family shows, comedy, guest speakers, and culturally specific acts.

When it comes to producing cultural activities, eight facilities in Johns Creek are producing performing arts events and 15 are providing arts education activities. Regionally, nearly half of the inventoried facilities are used for producing performing arts and/or arts education programs. Locally and regionally, most of the inventoried facilities are available for rent by outside users, whether they are cultural organizations, schools/colleges, private entities, or promoters/presenters.

Facility Features + Amenities: The second table in the appendix (Appendix D, Table 2) shows facility features and amenities. In Johns Creek, all of the inventoried facilities have some kind of rehearsal/program space; 59% have flexible seating and 45% have kitchen facilities. Very few facilities, however, have sizeable wingspace, an orchestra pit, or a fly system. Regionally, facilities have a scattered array of features: 53% have rehearsal/program space, 41% have kitchen facilities, 35% have sizeable wingspace, and 24% have an orchestra pit. Eighteen percent (18%) of the inventoried regional facilities have flexible seating and 18% have a fly system.

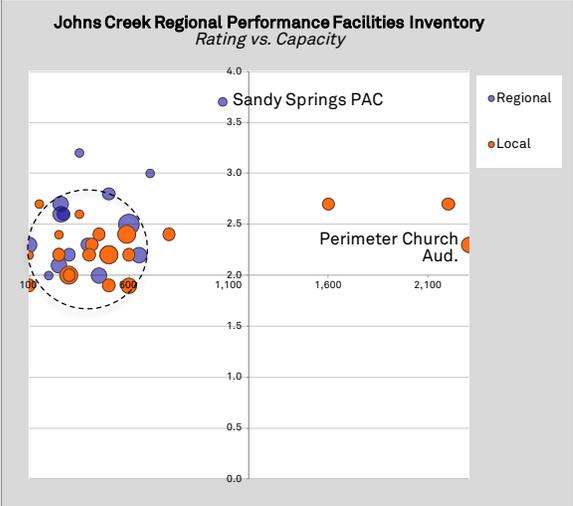
None of the inventoried facilities in Johns Creek allow alcohol and just four have food service/concessions. Regionally, 10 facilities allow alcohol and 11 have food service/concessions.

Nearly all of the inventoried facilities have dedicated parking and lighting, sound, and film/projection equipment. Few facilities, particularly in Johns Creek, have ticketing services.

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

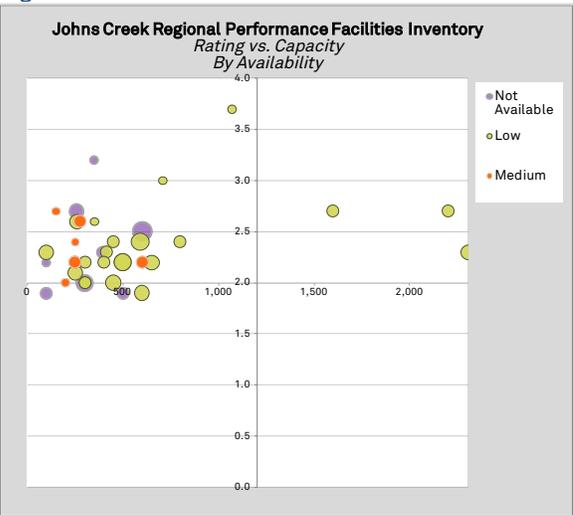
The first matrix (Figure 12) compares the quality and capacity of local facilities (orange dots) to the quality and capacity of regional facilities (red dots). It suggests that most local and regional facilities have between 100 and 600 seats and medium quality ratings, as indicated by the dashed circle. Facilities in Johns Creek cover a range of capacities but tend to have lower quality ratings than facilities in the region. The Main Auditorium at Perimeter Church, for example, is the largest facility on the inventory with a capacity of 2,305 seats. It, however, has a quality rating of just 2.4. The highest rated facility is the soon-to-be open Sandy Springs PAC, which has a rating of 3.7 and a capacity of 1,070. The matrix also suggests that most facilities are used for just a few activity types.

Figure 8



In the second matrix (Figure 13), the facilities are shaded according to their availability. Availability is based on the ease with which an outside user can book a space for use on a prime night of the week (Thursday, Friday, or Saturday) and is determined through interviews with facility managers/users or online research. Of the 39 facilities inventoried, seven have medium availability and none have high availability. Twenty-three of the facilities inventoried have low availability and nine are not available for outside use.

Figure 9



In the third matrix (Figure 14), the color of the circle represents the type of space the facility is, comparing performance spaces to religious facilities and facilities in schools/universities. Thirteen of the inventoried facilities are performance spaces. These include the Buford Community Center, Infinite Energy Center Theater, and the Sandy Springs Performing Arts Center. Seven of the inventoried facilities are in schools or universities and 19 are associated with a religion.

Of the performance facilities inventoried, nine have seating capacities between 100 and 350 seats and a quality ratings between 1.9 and 3.2. Once open, the Sandy Springs PAC will be both the largest and best rated performance facility within 15 miles of the JCCVB.

Religious facilities cover the widest range of capacities but tend to have low quality ratings. School facilities also have low quality ratings and range in capacity from 392 to 650 seats.

Returning to our original matrix (here shown as Figure 15), this research suggests that there are gaps for a high-quality performance facility in the market, as indicated by the dashed circles. This is particularly true in Johns Creek (Figure 16), where none of the facilities have a quality rating above 3.0, nearly every facility has low or no availability, and 16 of the 22 inventoried facilities are affiliated with a religion.

Figure 10

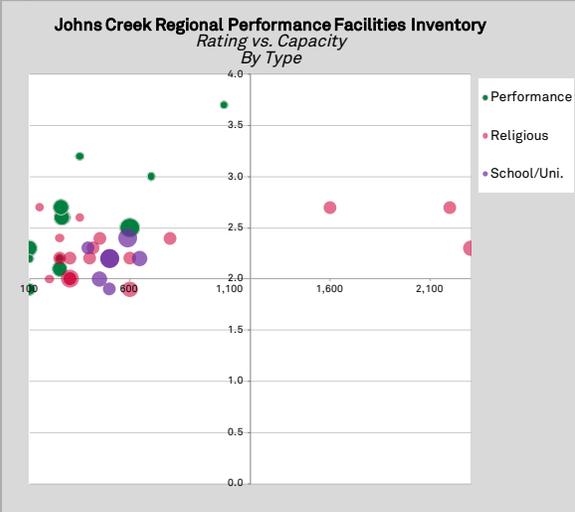


Figure 11

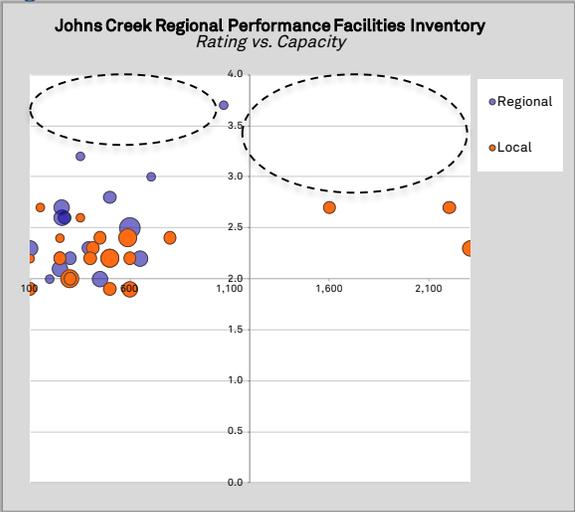
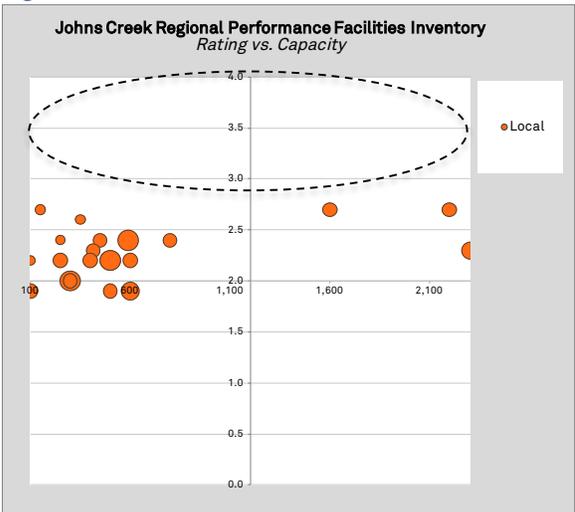


Figure 12



5.2 Outdoor Performance Facilities Inventory

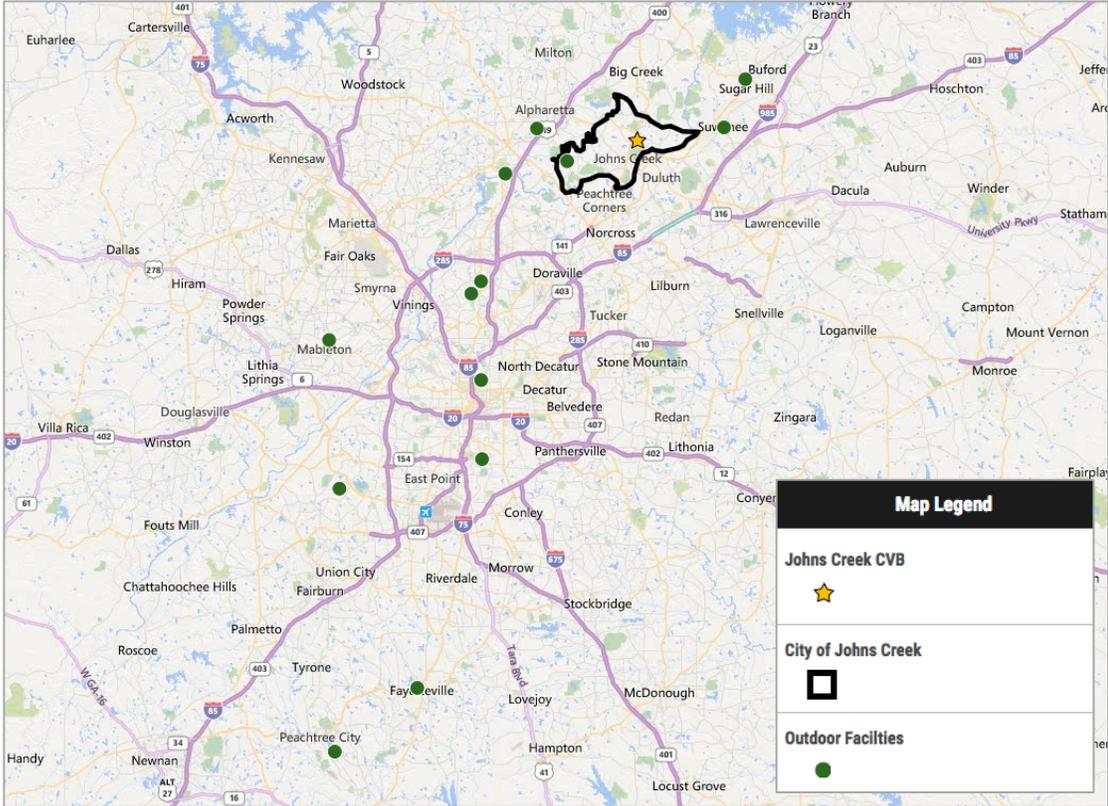
The Outdoor Performance Facilities Inventory considers the programming, features, and amenities of 13 outdoor facilities. These are permanent structures (as opposed to temporary stages) that are used for outdoor programming at least four times a year. As with the Performance Facilities Inventory, each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

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

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

The inventoried facilities range in capacity from 1,000 to 19,000 seats. For the purposes of this exercise, we have included facilities located throughout the Atlanta Metro. A map of these facilities is included below (Figure 17).

Figure 13: Regional Outdoor Performance Facilities



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

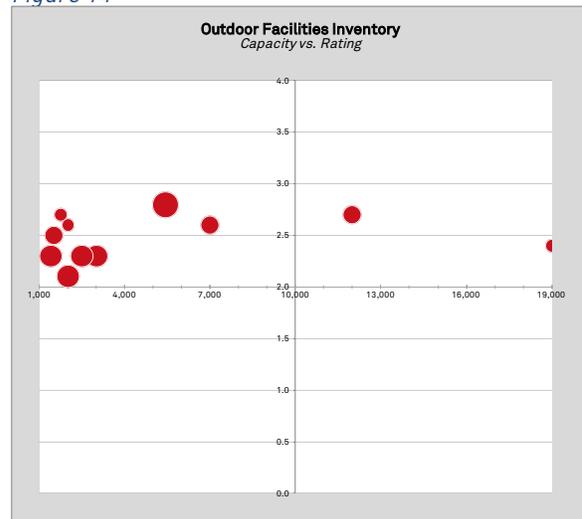
Facility Features + Amenities: Table 4 in Appendix D indicates that half of the inventoried outdoor facilities have covered seating, eleven have lawn seating, and eight have table seating. None of the facilities have fly space, although most have sizeable wingspace.

Outdoor facilities tend to be well-equipped, particularly when it comes to lighting and sound equipment. Just one, however, has film/projection equipment. Eleven of the inventoried facilities serve alcohol, nine have dedicated parking, and ten have food stands, tents, or trucks. Eight of the inventoried facilities offer ticketing services.

Facility Capacity + Quality: Once again, we have created a matrix comparing the qualities and capacities of each inventoried facility (Figure 18). This suggests that all of Atlanta's outdoor facilities are of medium quality. It also suggests that many are quite small—nine of the 13 facilities have capacities between 1,000 and 3,000. As such, this matrix indicates that there is an opportunity for a high-quality, outdoor venue across capacity ranges.

Beyond that, however, the inventory also highlights that all of the facilities are, more or less, traditional amphitheaters. This implies that there is another opportunity in the market: one for a high-quality, non-traditional, outdoor venue that can be used throughout the year for performances and events.

Figure 14



5.3 Meeting + Event Facilities Inventory

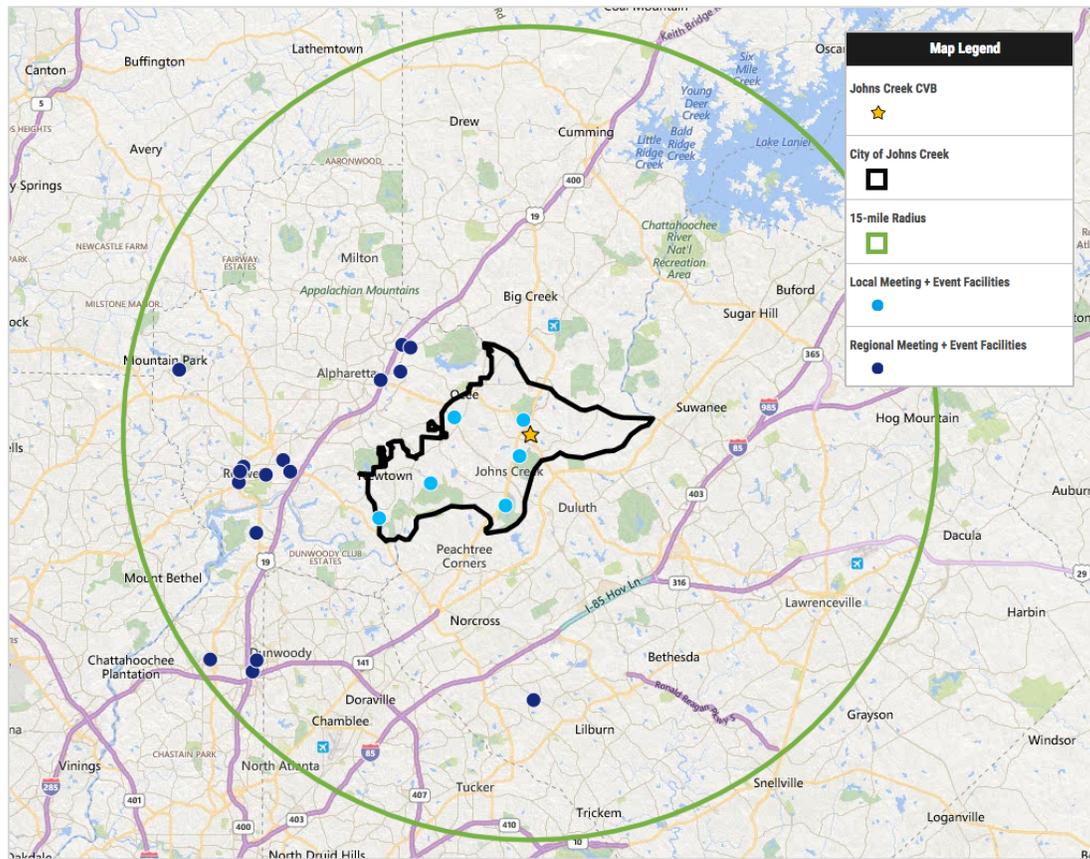
The Meeting + Event Facilities Inventory assesses the physical attributes and event types supported by 25 local and regional meeting and event facilities with reception capacities of 250 or more. Unlike the Indoor and Outdoor Performance Facilities Inventories, the meeting and event facilities have been rated according to six variables:

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

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

The inventoried facilities range in capacity from 250 to 800 seats for a theatre/conference-style set-up and 250 to 1,000 for a standing reception. Six of the inventoried facilities are in Johns Creek (referred to as ‘local’ facilities) and 19 are located beyond the borders of Johns Creek but within 15 miles of the JCCVB (referred to as ‘regional’ facilities). A map of all facilities is included below (Figure 19).

Figure 15: Local + Regional Meeting + Event Facilities



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

In Johns Creek, five of the inventoried venues are golf clubs. The sixth, Inchin’s Bamboo Garden, is a restaurant with a banquet hall.

The Standard Club and Atlanta Athletic Club are the only local facilities with more than one event/meeting room. None of the local facilities have on-site accommodations and only the Atlanta Athletic Club has a stage, dance floor, projection equipment, and equipment available for rent.

Regionally, meeting and event facilities are somewhat better equipped, although most lack a dance floor and/or full-stage.

Across the inventory, catering is primarily handled on-site. None of the local facilities (and very few regionally) allow outside catering nor do they have kitchen space that is available for use. These features tend to be important in diverse communities, as immigrant and minority populations often like to work with caterers from within their communities, prepare food on-site, or bring food that has been prepared at home.

Facility Capacity + Quality: In Figure 20, each meeting and event facility has been plotted according to its reception (standing) capacity and quality rating. Whereas, in the previous matrices, the size of the circles corresponded with the number of activities each facility accommodated, here it correlates with the number of attributes each facility has. Thus, a small circle is an indication of a facility with few attributes.

The matrix suggests that most meeting and event facilities have reception capacities between 250 and 400, as indicated by the dashed circle in Figure 20. They also tend to have medium to high quality ratings—23 have quality ratings between 2.5 and 3.5.

In Figure 21, the facilities have been plotted according to their type. Sixteen are designated event spaces and nine are hotels. Event facilities tend to be smaller in size, vary more in quality, and have minimal attributes. Hotel spaces, on the other hand, are concentrated in two capacity areas: five have capacities between 250 and 350 and four have capacities between 800 and 1,000. Typically, they have more attributes than event spaces.

This suggests an opportunity for high quality meeting and event space across standing capacities.

Figure 20

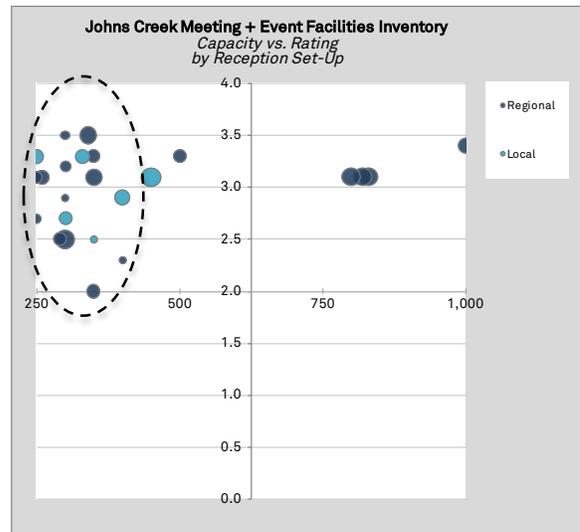
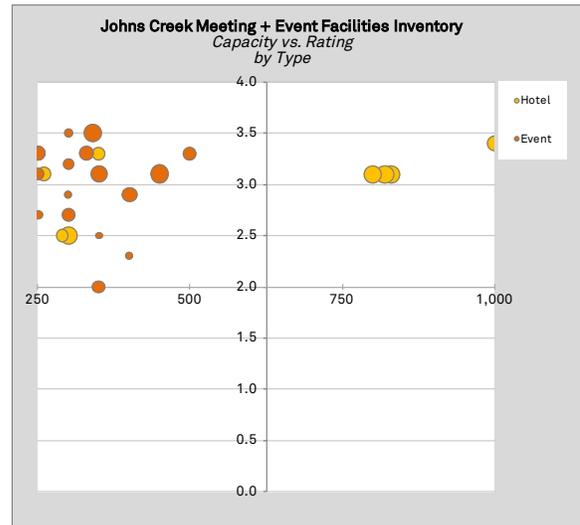
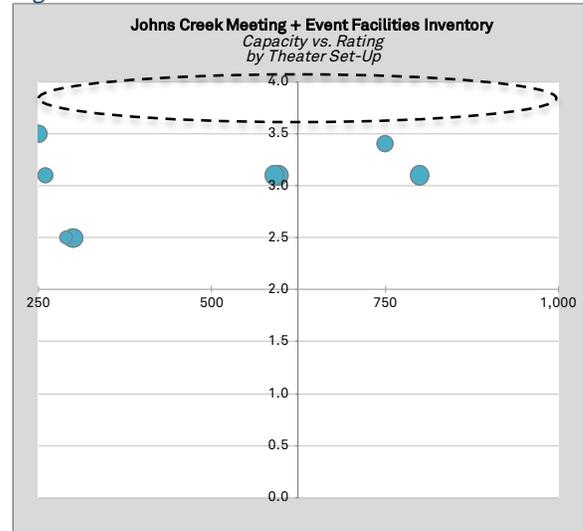


Figure 21



Building on this analysis, the inventoried meeting and event facilities have been plotted according to their theatre/conference capacities (Figure 22). (Not all facilities have a theatre/conference set-up option or capacity of 250 or more; thus, this matrix is less crowded than the previous two.) None of these facilities are located in Johns Creek. Seven are hotels and one is an event space. Locally and regionally, this suggests that there is an opportunity for a high-quality facility for meetings and events that has a unique atmosphere and a seating capacity of 250 or more, as indicated by the dashed circle.

Figure 16



5.4 Existing Facilities Conclusions

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

- * Local and regional indoor performance facilities are primarily used for producing performing arts and academic/educational programming. They are also rented by outside cultural organizations, schools/colleges, and private entities. Few indoor facilities, particularly in Johns Creek, present activity. Amongst those that do, music is the most commonly presented activity type, suggesting opportunities for alternative forms of presented entertainment (theatre, dance, film, family shows, comedy, a lecture series, and so on).
- * Most of the inventoried indoor facilities have capacities between 100 and 600, medium quality ratings, and low to no availability. This suggests that there are gaps for a high-quality performance facility in the market. This is particularly true in Johns Creek, where none of the facilities have a quality rating above 3.0, nearly every facility has low or no availability, and 16 of the 22 inventoried facilities are affiliated with a religion.
- * Outdoor performance facilities are activated through presented music (typically headlining and popular music acts). They cover a range of capacities and tend to be well-equipped, but ultimately have medium quality ratings. In addition, the inventory highlights that all of the outdoor facilities are traditional amphitheaters. This suggests an opportunity for a high-quality, non-traditional outdoor venue that can be used throughout the year for performances and events.
- * The meetings and events facility inventory suggests that most meeting and event facilities in and around Johns Creek have reception capacities between 250 and 400 and quality ratings between 2.5 and 3.5. Event facilities tend to be smaller in size than hotel spaces. They also vary more in quality and have fewer attributes. The facility matrices suggest that there are gaps in the market for high-quality meeting and event space in Johns Creek across capacity ranges, but particularly for meeting and event spaces with seated capacities of 250 or more.

6. User Demand

Understanding the nature of demand for a performing arts facility is an important part of assessing feasibility. This chapter will identify the needs of possible facility users and assess a facility's potential to attract touring product.

6.1 Potential Uses + Users of a New Facility

The following entities have expressed interest in utilizing a new performing arts facility in Johns Creek:

- * ***Atlanta Professional Dance Academy:*** Atlanta Professional Dance Academy (APDA) is a classical ballet academy that was founded in Johns Creek in 1997. The school offers classes in ballet, pointe, pas de deux, modern, hip hop, and Chinese folk dance. APDA currently uses the Infinite Energy Arts Center for performances, but finds that the venue's 700-seat capacity makes it challenging to cover the cost of rent. The ideal facility would have a capacity of 1,200 and professional features and amenities. In addition to APDA performances, the company's founder could also use such a space for presenting international dance events.
- * ***Chopin Society:*** The Chopin Society is a non-profit organization created to promote the music of Fryderyk Chopin. The organization actively engages youth from throughout the Atlanta Metro, presenting concerts, organizing competitions about Chopin's life, providing awards to local music festival and piano competition winners, subsidizing concert tickets for music students, and so on. The organization currently utilizes the Roswell Cultural Arts Center and the salon at the Johns Creek United Methodist Church. Leadership would like to perform in Johns Creek more frequently, but is challenged by the lack of venues. The ideal facility would have 300 to 500 seats and excellent acoustics.
- * ***Fleetwood Dance:*** Fleetwood Dance Center was founded in 1962. In addition to providing dance education to children and adults, the Center is home to the Fleetwood Dance Theatre, a resident performing company. The Center currently performs its annual Nutcracker at the Performing Arts Center at Blessed Trinity Catholic High School. Spring recitals are held at the Roswell Cultural Arts Center. Within their own facility, the Center has developed a 100-seat black box to accommodate smaller events. The organization's ideal facility would have a 700 to 900-seat recital hall and a 300 to 400-seat theater. The entire facility, including the stage, would be ADA accessible and there would be fly space.
- * ***Georgia Piedmont Youth Orchestra:*** The Georgia Piedmont Youth Orchestra is the North Atlanta Metro's youth orchestra. The organization is new to the community and has between 20 and 35 members each year. Although Centennial High School serves as the Orchestra's home base, leadership believes that a more professional facility would help retain and grow membership and audiences.
- * ***Johns Creek Chorale:*** The Johns Creek Chorale is an auditioned choral ensemble that was founded in 2015. All of the group's activities (rehearsals, performances, fundraisers) are

currently held at the Johns Creek United Methodist Church. While the main sanctuary has excellent acoustics, it is a bit too large for the Chorale's audiences. Further, it does not allow the sale of alcohol, which can be problematic for donor events, and some find it off-putting to attend a cultural event in a church. If a new facility were to be built in Johns Creek, the Chorale could envision using it for all activities. The ideal space would have excellent acoustics, rehearsal space, an alcohol permit, and a capacity between 450 and 750.

- * ***Johns Creek Middle Schools:*** Four Fulton County School System middle schools are located in Johns Creek. A lack of auditorium space (all four schools have cafeteriums) and limited availability at the high schools has forced middle school performance programs to utilize the United Methodist Church for events. It is estimated that Johns Creek middle schools could use a 600 to 800-seat facility at least 25 times a year for performances.
- * ***Johns Creek Symphony Orchestra:*** The Johns Creek Symphony Orchestra is a professional, part-time orchestra that was founded in Johns Creek in 2007. The Symphony currently performs at the Johns Creek United Methodist Church, but would like to be in a professional facility with excellent acoustics, a grand piano, a large rehearsal space, and a box office. The ideal capacity would be between 1,000 and 1,800 seats.
- * ***Musik21:*** Musik21 is a classical music school and studio with 300 students. In addition to classes, the organization hosts concerts, masterclasses, and educational events. Annually, there are 20 to 30 student recitals. Musik21's ideal facility would be a concert/recital hall with a high-quality piano and 150 to 300 seats.
- * ***North Atlanta Dance Academy:*** The North Atlanta Dance Academy has been in operation for 22 years, providing Russian ballet training to students aged 3 to 18. The Academy has a 17,000-square-foot facility with an 80-seat performance studio that also accommodates the North Atlanta Dance Theatre, a nonprofit dance company. Currently, the Academy utilizes the Infinite Energy Center Theater and Blessed Trinity Catholic High School. The ideal facility would have 800 to 1,200 seats, a 40 to 50-foot stage with large wings, a warm-up room, and proper dressing rooms.
- * ***Providence Christian Academy:*** Providence Christian Academy is a faith-based school that was founded in 1991. The Academy has a 500-seat cafeteria on its campus; however, as the quality of its theatre program has improved, so has demand for a better venue. While there has been some discussion about building a performing arts center on campus, conversations are in very early stages. If Johns Creek were to develop a 400 to 600-seat space, the Academy could imagine using it 12 times a year for performances.
- * ***Red Phoenix Theatre Company:*** Red Phoenix Theatre Company is an education-based theatre company focused on developing skills for musical theatre. The group currently utilizes the theater at the Buford Community Center, which has become increasingly harder to book. The ideal venue would have 200 to 500 seats, a stage that is 40 feet by 35 feet, and an electric fly system.

* **Tara Winds:** Tara Winds is an all-adult symphonic band that has been performing for over 30 years. The group performs at Kennesaw State’s Bailey Performance Center and Lassiter Concert Hall, but would like to have access to a permanent facility that it can call home. The ideal space would have either 550 to 750 seats or 900 to 1,200 seats.

To illustrate this demand for space, two tables have been created. The first, Table 2 below, quantifies estimated user demand for performance space by potential days of use a year. For each user listed, the number of shows performed as part of the organization’s 2016-2017 season, as well as the facility or facilities used for those performances, has been listed in the column group labeled ‘2016-2017 Season’. (Notably, this highlights just how many organizations are performing outside of Johns Creek in places like Roswell and Buford.) In the second column group, labeled ‘Estimated Use of New Performance Space (in days)’, the estimated number of days that the organization might use a new performance space for performances, rehearsals/tech, and/or other events has been included. These numbers were gathered during the interview process and represent estimated usage. The last column grouping, labeled ‘Capacity’, indicates the ideal facility capacities for each potential user.

Table 2

Johns Creek Arts Center Feasibility Study: Estimated User Demand for Performance Space									
	2016-2017 Season		Estimated Use of New Performance Space (in days)				Capacity		
	Performances Days	Facilities Used	Performances	Rehearsals/Tech	Other	Total	Low Capacity	Average Capacity	High Capacity
Johns Creek Symphony Orchestra	4	Johns Creek United Methodist Church	15	12	3	30	1,000	1,400	1,800
Atlanta Professional Dance Academy	3	Infinite Energy Arts Center	15	15	0	30	1,000	1,200	1,400
Tara Winds: Main Hall	2	Lassiter Concert Hall	2	17	0	19	900	1,050	1,200
North Atlanta Dance Academy	5	Blessed Trinity Performing Arts High School, Infinite Energy Center	5	8	0	13	800	1,000	1,200
Fleetwood Dance: Recital Hall	10	Roswell Cultural Arts Center, Blessed Trinity Performing Arts High School	10	6	0	16	700	800	900
Johns Creek Middle Schools	12	Johns Creek United Methodist Church	25	0	0	25	600	700	800
Tara Winds: Secondary Hall	2	Bailey Performance Center at KSU	2	0	0	2	550	650	750
Johns Creek Chorale	5	Johns Creek United Methodist Church	8	41	0	49	450	600	750
Providence Christian Academy	12	Buford Community Center: Sylvia Beard Theatre, Providence Christian Academy	12	16	0	28	400	500	600
Chopin Society	4	Johns Creek United Methodist Church: Salon, Roswell Cultural Arts Center	8	0	0	8	300	400	500
Red Phoenix Theatre Company	9	Buford Community Center: Sylvia Beard Theatre, Providence Christian Academy	9	12	0	21	200	350	500
Fleetwood Dance: Theater	2	Fleetwood "Black Box" Theater	2	1	0	3	300	350	400
Musik 21	5	Musik21 studios	8	0	0	8	150	225	300
Georgia Piedmont Youth Orchestra	2	Centennial High School	2	24	0	26	100	200	300
Total Estimated Days of Use:			123	152	3	278			

The table suggests that 12 users (two users are represented on the table twice) have 278 days of demand for a performance facility in Johns Creek. Of this demand, 123 days are for performances, 152 days are for rehearsals/tech, and 3 days are for other events (fundraisers, meetings, etc.). Average capacities range from 200 to 1,400 seats.

The next table, Table 3, summarizes this demand for space. It suggests that there is near equal demand for a small, mid, and large-capacity venue. The most users, however, have demand for a 200 to 500-seat capacity venue.

Table 3

Johns Creek Arts Center Feasibility Study: Summary of Estimated User Demand for Performance Space (12 users with 14 uses)				
	Performances	Rehearsals/Tech	Other	Total
1,000 to 1,400 seats (4 users)	37	52	3	92
600 to 800 seats (4 users)	45	47	0	92
200 to 500 seats (6 users)	41	53	0	94
Total Estimated Days of Use:	123	152	3	278

In short, this suggests that there is demand for a high-quality performance venue in Johns Creek. The ideal facility would have a large space to accommodate music and dance performance (including a large stage, wingspace, a fly tower, and excellent acoustics) and a smaller space for theater. Other amenities and features would include ADA accessibility, the ability to sell alcohol, rehearsal space, a green room and dressing rooms, sufficient lobby space, and a box office.

6.1.a Georgia Ensemble Theatre

The Georgia Ensemble Theatre (GET) is an award-winning, professional theatre company based in the neighboring community of Roswell. For the last 25 years, the company has operated out of the Roswell Cultural Arts Center, a 600-seat municipal auditorium operated by the City of Roswell's Department of Recreation + Parks. GET is a resident tenant in the facility, with space for administration and rehearsals. However, it shares the space with another organization and is quickly running out of room. In addition, demand for the Cultural Arts Center has increased over the years, limiting GET's ability to expand or grow programming. Given these challenges, the organization has considered relocating to another community. Johns Creek is currently on the table as an option.

In Roswell, GET is responsible for 148 days of the Cultural Arts Center's activity. In a new facility, it can be assumed that that number would either increase as the organization expanded educational programs and/or add a holiday production. While the group currently uses a 600-seat venue, leadership would be happy with something smaller in size, likely 350 to 500 seats.

The Roswell Arts Fund is also in the midst of a performing arts facilities feasibility study, which includes a recommendation for renovating the Cultural Arts Center and providing GET with administrative and programming space of its own. Given this, we are hesitant to include GET's potential demand for a facility in Johns Creek in the previous user demand tables. If, however, the organization were to relocate, it would more than double the amount of activity in a 350 to 500-seat facility.

6.1.b Johns Creek Arts Center

The Johns Creek Arts Center is a nonprofit organization that provides arts education programs and exhibition space to the residents of North Fulton County. It is the second busiest arts center in the

state, offering 70 youth summer camps and more than 200 classes throughout the year. Over the last five years, program enrollment has increased by 35%.

At present, the Arts Center is operating out of a 6,000-square-foot facility. Due to a lack of space, the organization is opening a digital arts lab at another offsite location. In planning for the future, Arts Center leadership would like a 12,000-square-foot building featuring a 3,500-square-foot gallery space, two 1,700-square-foot ceramic rooms, two 1,000-square-foot instruction rooms, three 450-square-foot instruction rooms, a gift shop, a print making shop, woodworking studios, and a computer digital studio.

6.2 Additional Notes on User Demand

Further to these findings, anecdotal research indicated demand for the following:

- * Access to meeting and event space for weddings and groups of all sizes.
- * A facility with a kitchen that can be used by outside groups and organizations.
- * Access to private teaching space.
- * Fair and flexible access for potential facility users (some regional facilities, for example, require potential users to provide references).

6.3 The Opportunity for Touring Product

Conversations with regional promoters and presenters suggest that a facility in Johns Creek could attract touring entertainment. **Atlanta Professional Dance Academy**, for example, has experience presenting internationally touring dance and believes a new facility could be activated at least three times a year with such acts. In addition, **Georgia Presenters**, a state-wide booking consortium, enables presenters, theaters, and communities to work together to block-book touring entertainment, which can mitigate the financial risk of presenting. Representatives from the consortium believe that there is room in the market for additional touring product, particularly for smaller touring acts.

When it comes to music, promoters, presenters, and musicians suggest that a facility in Johns Creek could attract locally, regionally, and nationally touring acts. Interviewees did caution, however, that, with new facilities planned or coming on-line in Sandy Springs, Peachtree Corners, Alpharetta, and Atlanta, competition in the market for product and audiences is growing. In effort to understand what the opportunity for touring entertainment in Johns Creek might be, we took a closer look at our indoor and outdoor performance facility inventories, breaking down each facility's presented music activity by genre, as seen in the table below (Table 4; presented comedy was also included). In the column labeled 'Presenting Activity (No. of Shows)', the quantities represent the number of times an act of a particular genre was presented in the 2017-2018 season. As an example, of the nine acts presented at Wolf Creek Amphitheatre, three were jazz, three were soul/blues/gospel, two were headliner/popular music, and one was culturally-specific.

Table 4

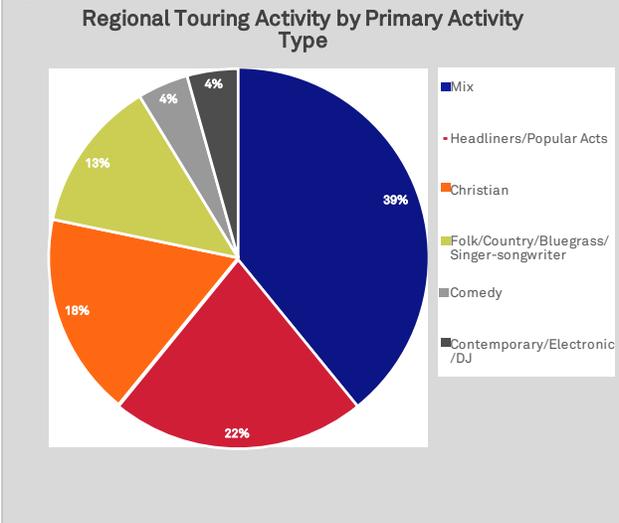
Johns Creek, GA Regional Touring Activity				Presenting Activity (No. of Shows)												
Type	Facility	Primary Activity	Capacity	Rating	Headliner/Popular Music	Contemporary/Electronic/DJ	Folk/Country/Bluegrass/Singer-songwriter	Culturally-specific	Rock	Jazz	Broadway	Classical	Soul/Blues/Gospel	Tribute Bands	Christian	Comedy
Outdoor	Lakewood Amphitheatre	Headliners/Popular Acts	19,000	2.4	13											
Outdoor	Verizon Amphitheatre	Headliners/Popular Acts	12,000	2.7	18											
Outdoor	Chastain Park Amphitheatre	Headliners/Popular Acts	7,000	2.6	9				1							
Outdoor	Wolf Creek Amphitheatre	Mix	5,420	2.8	2		1	3				3				
Outdoor	Piedmont Park*	Mix	3,000	2.3	1		1	1								
Outdoor	Frederick Brown Jr. Amphitheatre	Headliners/Popular Acts	2,500	2.3	4			3					2			
Outdoor	Mable House Barnes Amphitheatre	Mix	2,487	2.3	1								2		1	
Indoor	Mount Pisgah United Methodist Church	Christian	2,000	2.7											3	
Outdoor	Riverside Park	Mix	2,000	2.1		3		2				1				
Outdoor	Centennial Olympic Park: Southern Company Amphitheater (in-development)*	Mix	2,000	2.6	1	1	1		1				1	1		
Outdoor	The Bowl at Sugar Hill	Headliners/Popular Acts	1,750	2.7	5											
Outdoor	Zac Brown's Southern Ground Amphitheatre	Mix	1,500	2.5	1			2				2	3			
Outdoor	Mark Burkhalter Park Amphitheater	Mix	1,400	2.3		1	1				1		2			
Indoor	Variety Playhouse (potential project in-development)	Contemporary/Electronic/DJ	1,000	3.5	6	14	3	10	1			3	4	1	2	
Outdoor	Suwanee Town Center Amphitheatre	Mix	1,000	2.0		1	1		1							
Indoor	Johns Creek Baptist Church	Christian	600	1.9											1	
Indoor	Roswell Cultural Arts Center	Mix	600	2.5		1			1			1				
Indoor	Saint Benedict Catholic Church^	Christian	300	2.0											2	
Indoor	Northminster Presbyterian Church: Sanctuary Space	Christian	300	2.2											2	
Indoor	Buford Community Center- Sylvia Beard Theatre	Folk/Country/Bluegrass/Singer-songwriter	274	2.6			5	2	4				3		1	
Indoor	Red Clay Music Foundry	Folk/Country/Bluegrass/Singer-songwriter	260	2.6	6	5	52	2	4	3			7	6	1	
Indoor	Aurora Theatre Gwinnett	Comedy	257	2.7												12
Indoor	Lionheart Theatre Copmany	Folk/Country/Bluegrass/Singer-songwriter	250	2.1			1									

*Total park capacity for concerts is 80,000. Plans to build permanent amphitheater.
^Number of activities has been estimated.

67 21 67 5 24 16 0 1 20 21 10 16

In total, 23 facilities (10 indoor and 13 outdoor) accommodate presented touring activity in their 2017-2018 seasons. Folk/country/bluegrass/singer-songwriter acts and headliner/popular music were presented the most. Nearly all folk/country/bluegrass/singer-songwriter activity took place at the Red Clay Music Foundry, while headliner/popular music was largely concentrated at the Lakewood and Verizon Amphitheatres. Contemporary/electronic/DJ, rock, jazz, soul/blues/gospel, tribute bands, and comedy acts were presented with medium frequency (there were between 16 and 24 events in 2017/2018). Culturally-specific, Broadway, classical, and Christian acts were presented the least (there 10 or fewer acts presented in 2017-2018). It is important to point out that just one of the 23 inventoried facilities, Variety Playhouse, has a quality rating above 3.0. This facility is a potential project that has yet to be developed.

Figure 17

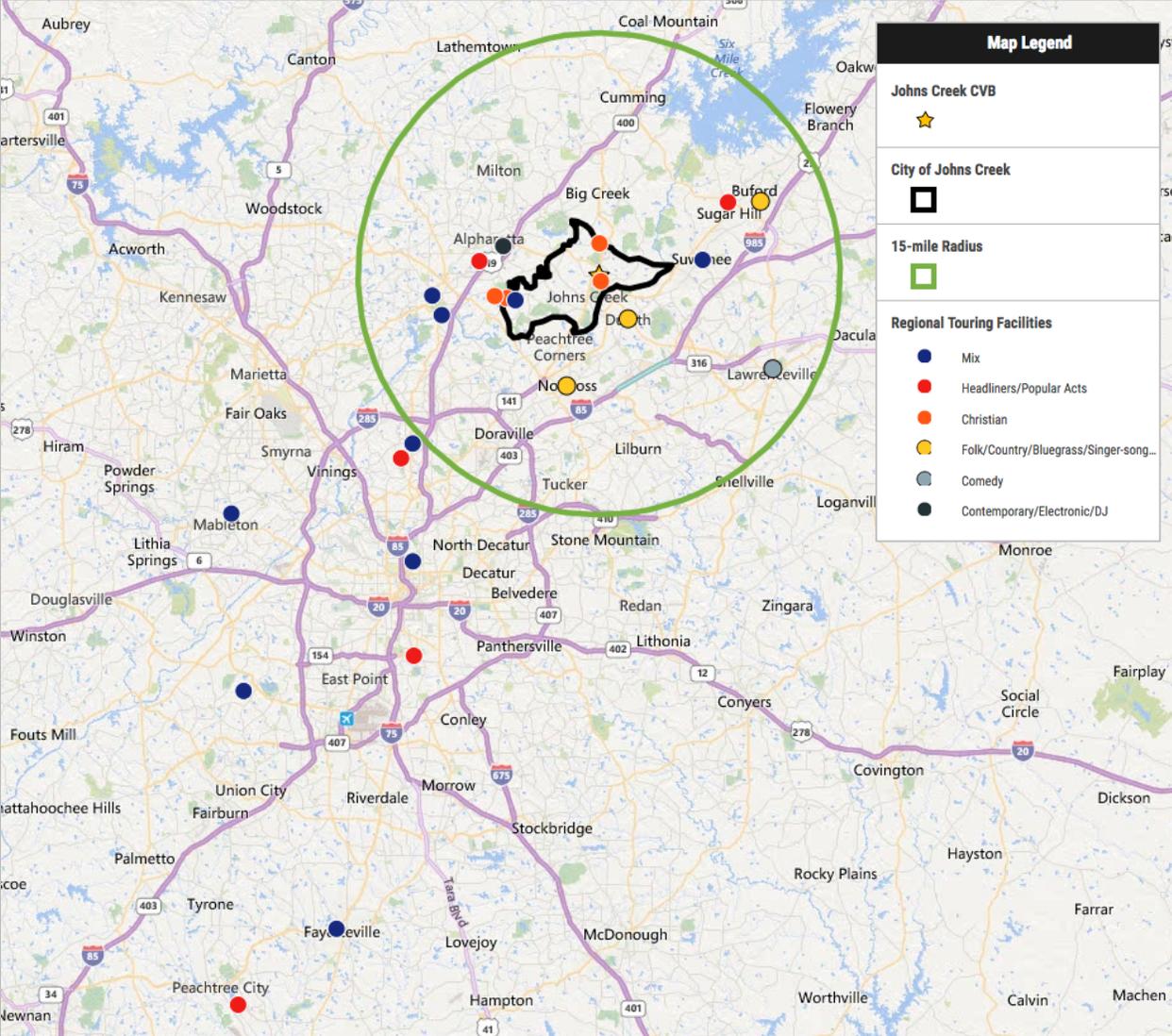


In addition to breaking down the types of activities each facility presents, we also assigned each space a “primary activity” type (Figure 23). This represents the activity, or genre of music, the facility presents most frequently. In cases where genres were presented with equal frequency, the facility’s primary activity was labeled ‘mix’. Typically, facilities with mixed activity types present fewer events in a season and/or have a mission to serve the public-at-large. Thus, they are presenting a diverse set of acts so as to reach as

many people in the community as possible. In total, nine facilities have ‘mix’ as their primary activity type. This represents 39% of the regional facilities with presented touring product. Headliner/popular music acts are the primary activity type in five facilities and Christian acts are the primary activity type in four facilities. Notably, none of the regional presenting facilities have culturally-specific, rock, jazz, Broadway, soul/blues/gospel, or tribute band acts as primary activity types.

Mapping the inventoried facilities by their primary activity type (Figure 24) shows where they are in proximity to Johns Creek. This suggests that, in Johns Creek proper, three facilities primarily present Christian acts and one, Mark Burkhalter Park Amphitheater, presents a mix of activities. Beyond Johns Creek, but within 15-miles of the CVB, three facilities present a mix, two present headliner/popular acts, three present folk/country/bluegrass/singer-songwriters, one presents Christian, one presents comedy, and one presents contemporary/electronic/DJ acts. The circle representing contemporary/electronic/DJ is Variety Playhouse, the planned facility that has yet to be developed.

Figure 18: Regional Touring, by Primary Activity Type



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

6.4 Conclusions on User Demand

This analysis suggests that there is demand for a performance space in Johns Creek, based on the following:

- * Twelve organizations have expressed interest in utilizing a new performing arts facility in Johns Creek. Most of these organizations have demand for space that can accommodate music or dance, although there is demand for a smaller theater space as well. Important facility features include excellent acoustics, rehearsal space, ADA accessibility, a large stage, sufficient wingspace and support spaces, a fly tower, the ability to sell alcohol, and lobby/box office space.
- * In total, users have 278 days of demand for performance space: 123 days for performances, 152 days for rehearsals/tech, and 3 days for 'other' events (fundraisers, meetings, etc.). Of that demand, 92 days are for a facility with 1,000 to 1,400 seats, 92 days are for a facility with 600 to 800 seats, and 94 days are for a facility with 200 to 500 seats.
- * The Georgia Ensemble Theatre has expressed interest in moving operations to Johns Creek. If this were to happen, demand for a 350 to 500-seat theater would increase by roughly 148 days.
- * The Johns Creek Arts Center has outgrown its current facility and is now developing new programs and initiatives at other facilities off-site. The organization is in need of a new facility that is at least 12,000-square-feet.
- * Anecdotal research suggests that there is strong demand for meeting, event, and private teaching space in Johns Creek. In addition, there is interest in a rentable kitchen facility that can be used for private events. For all facilities, it is important that there are fair and flexible operating policies that make each space as accessible as possible for users.
- * Conversations with regional promoters and presenters suggest that there is an opportunity for a facility in Johns Creek to present touring entertainment. Potential partners include the Atlanta Professional Dance Academy, who could present internationally touring dance, and Georgia Presenters, a state-wide booking consortium. Additional touring product might include jazz, culturally-specific, rock, Broadway, soul/blues/gospel acts or tribute band acts.

7. Benefits + Impacts

Investing in arts and culture can have significant impact on a community, strengthening sense of place, contributing to quality of life, and catalyzing economic, neighborhood, and community development.

Interviewees suggested that a performing arts facility in Johns Creek could benefit the community in the following ways:

- * **It would contribute to quality of life.** Johns Creek has been defined as a “premier residential community.” Multiple interviewees believe that, in order for this to be true, the city needs a facility for arts and culture.
- * **It would create sense of place.** Johns Creek has been described as a pass-through community. A performing arts facility could create a sense of place, contributing to the community’s overall identity.
- * **It would diversify tourism and the economy.** Golf is a primary driver of tourism in Johns Creek. But, recent trends suggest that golf courses are becoming harder and harder to sustain. Multiple interviewees view a performing arts facility as an opportunity to bring diversity to Johns Creek tourism and the economy.
- * **It would keep money in the community.** Now, when a Johns Creek arts organization wants to have a performance, it has to go outside of the community to find a space. That means that rental fees are being paid to vendors beyond the borders of the city. It also means that potential audiences are leaving the city to partake in arts, culture, and entertainment.

7.1 City + Community Planning Documents

Over the last 12 years, the City of Johns Creek has engaged in a number of planning efforts, many of which have addressed the opportunity and need for arts and cultural facilities in the community. Released in February 2016, for example, the **Johns Creek Strategic Economic Development Plan: 2016-2021** was created to identify a strategy for addressing the economic needs of the city. In particular, the plan aimed to guide the city on how to increase and diversify its tax base, attract new businesses and create jobs, retain existing businesses, and create a sense of community identity. Community input for the plan suggested that entertainment venues ranked third in the types of businesses that community business leaders would like to see added to the local economy, after more technology and high-end restaurants/hotels/hospitality. In addition, a SWOT analysis suggested that two of Johns Creek’s weaknesses are a lack of evening entertainment and meeting spaces and having no sense of place/city center. The second most identified opportunity in the SWOT analysis, however, was the development of entertainment, arts, and cultural venues.

The study resulted in five economic development themes for Johns Creek, one of which was community development. Within that theme, enhancing arts, culture, and performing arts was an objective. Strategies for meeting that objective included conducting a performing arts/civic center mixed-use feasibility study and considering the use of performing arts, cultural venues, and events as economic development drivers.

Building on the Economic Development Plan, **Connect Johns Creek: Shape an Excellent Future** (June 5, 2017 draft), the city’s comprehensive plan, establishes a vision and five key goals for the community. They are:

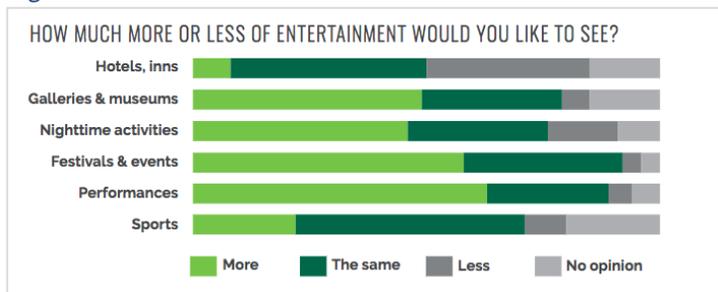
1. **“Create a city-wide multi-modal transportation network.** Create a balanced and sustainable transportation network system that reduces traffic congestion, increases intra-city mobility,

and includes complete streets, cart, bike, and pedestrian pathways that connect neighborhoods to schools, parks, shopping centers, and institutional destinations.

2. **Create an identity for the city.** Create an identity that will guide future development, preserve the quality and character of our existing residential neighborhoods, support educational excellence, and sustain an exceptional quality of life.
3. **Expand the city's economic base.** Expand the city's economic base by nurturing an environment that will retain and attract industries that create high paying jobs while protecting residential home values.
4. **Provide superior recreational + cultural activities throughout the city.** Provide recreational areas/facilities throughout the city that regularly offer cultural activities that positively engage our diverse population.
5. **Develop tools required to implement goals.** Revise the city's zoning ordinance and subdivision regulations to align with the Comprehensive Plan" (*Connect Johns Creek, 7*).

Community outreach for the plan suggested that participants would like to see more arts and culture in the community (Figure 25) and that they view the creation of an arts and cultural center as a primary development opportunity. In fact, included among top comments from stakeholders were "the City needs a hub for fine arts" and "the Johns Creek Symphony needs a home."

Figure 2519 From Connect Johns Creek



This work resulted in the recommendation that Johns Creek undertake a performing arts/civic center feasibility study. It also established "encouraging, allowing, and supporting the private development of a performing/visual arts and event space as an entertainment venue and community resource" (Connect Johns Creek, 110) as one of three policies for the City's goal to expand its economic base.

Further, both the Economic Development Plan and Connect Johns Creek make reference to the development of a Town Center. The City has been exploring the creation of such an area in a portion of Technology Park where a building was recently purchased to be redeveloped into a city hall. The Town Center would also feature a linear park, a hotel, retail, and restaurants. If included in the development, it is thought that an arts facility could serve as an anchor attraction, driving foot traffic and activating the Town Center in the evenings.

Most recently, the City of Johns Creek recently adopted iHeart Johns Creek as a strategic focus for the community. The initiative aims to establish Johns Creek as a health and wellness destination for Metro Atlanta through innovation. iHeart Johns Creek identifies the community as an important part of achieving the initiative and views community activities, arts, culture, and lifestyle necessary to its success. Long-term goals for iHeart Johns Creek include the creation of an innovation or hybrid community center.

Additional research suggests that arts and culture can, in fact, contribute to all of the goals and objectives described above, as follows:

Sense of Place + Quality of Life: Spaces with programs that engage the public, particularly facilities for arts, education, and outreach programs, have potential to contribute to the character and identity of a community. These types of programs and facilities provide opportunities for cross-sectoral and cross-cultural collaboration, socialization, enhancing sense of community, and providing hands-on experiences attractive to regional residents—all contributing to the community's quality of life.

Quality of Workforce + Corporate Recruitment: Studies suggest that strong arts and cultural communities rank among the top factors for decision makers when considering relocation for employment opportunities as they indicate an educated workforce and high quality of life.

Neighborhood + Community Development: Research has shown that community arts programs have enhanced and improved community development. The arts enable individuals and groups to express themselves, and in the process, become more involved in contributing to the development of their community.

Teaching Innovation + Creativity: Finally, the teaching of the arts is now being recognized as a fundamental need for the North American economy and its workforce, given the automation of many jobs and growing competition from lesser-developed economies.

7.2 Benefits + Impacts Conclusions

The City of Johns Creek has identified transportation, community identity, economic development, access to recreation and culture, and identity as a health and wellness destination as some of its main priorities for the future. In addition, the community has expressed interest and desire in facilities for arts, culture, and entertainment throughout multiple rounds of community engagement processes. Research suggests that spaces for arts and culture can contribute to sense of place and quality of life, attract and retain businesses and workers, enhance neighborhood and community development, and teach innovation and creativity. Given this, an arts facility in Johns Creek does appear to be in line with community goals for the future, as it would help build identity in the community, diversify the economy, and contribute to corporate recruitment and retention.

8. Conclusions + Recommendations

This research suggests that there is an opportunity to develop a performance facility in Johns Creek based on the following:

The Market: High levels of educational attainment and household income in Johns Creek and its 15-mile radius indicate strong propensity to support traditional performing arts (ballet, theatre, opera, symphonic music, etc.). At the same time, diversity in age, race, ethnicity, and language spoken at home suggest opportunities for non-traditional, hands-on, and culturally specific programming. This might include weekend classes and programs for young families, festivals, and events.

While there is limited data available on who exactly visits Johns Creek, we know that most are traveling throughout the week for business, indicating an opportunity to grow the leisure market. Regional data suggests that nonresident visitors are educated and affluent, further indicating an opportunity for traditional performing arts events. These visitors like to travel for libation/culinary experiences and for culture.

Lastly, a community survey effort completed in 2017 suggests that there is broad community support for the arts.

Existing Facilities: The facility inventories suggest that there are a few gaps in the market that a new performing arts facility could fill. First, there is an opportunity for a high-quality, indoor performance facility across capacity ranges. This is particularly true in Johns Creek, where none of the facilities have a quality rating above 3.0, nearly every facility has low or no availability, and 16 of the 22 inventoried facilities are affiliated with a religion. Then, there is an opportunity for a high-quality outdoor space, specifically a nontraditional space that could be used year-round for performances and events. Finally, there is an opportunity for a unique meeting and event facility across capacity ranges, but particularly for a meeting and event space with a seated capacity of 250 or more.

User Demand + Potential Partners: An analysis of user demand suggests that a performing arts facility in Johns Creek could be activated by a mix of music, dance, theatre, and presented programs. In sum, 12 users have expressed 278 days of demand for performance space of all sizes. Six users have 94 days of demand for a facility with 200 to 500 seats, four users have 92 days of demand for a facility with 600 to 800 seats, and four users have 92 days of demand for a facility with 1,000 to 1,400 seats (note that Terra Winds and Fleetwood Dance have demand for two differently sized facilities and, as such, are counted twice). The ideal facility would have excellent acoustics, rehearsal space, ADA accessibility, a large stage, sufficient wingspace and support spaces, a fly tower, the ability to sell alcohol, and lobby/box office space.

Georgia Ensemble Theatre and the Johns Creek Arts Center have also expressed interest in new facilities. For Georgia Ensemble Theatre, the ideal space would have between 350 and 500 seats. The organization could activate such a space at least 148 days of the year, although that number would likely increase. The Johns Creek Arts Center, on the other hand, has demand for a 12,000-square-foot facility with gallery, teaching, and studio space. In addition to demand for performance and visual arts space, anecdotal research suggests that there is strong demand for meeting, event, kitchen, and private teaching space in Johns Creek.

Regional promoters and presenters believe that there is an opportunity to attract touring product to Johns Creek. This could include a combination of touring dance, theater, and jazz, culturally-specific, rock, Broadway, soul/blues/gospel acts or tribute band acts.

Benefits + Impacts: Over the last 12 years, the City of Johns Creek has identified a number of goals for the community, many of which are related to economic development, building community identity, and increasing access to recreational and cultural resources. Throughout planning processes, community engagement efforts have consistently revealed support for arts and cultural activities and spaces. A performance facility project in Johns Creek is in line with a number of community goals

and could help propel other initiatives related to economic development, health and wellness, corporate recruitment, and workforce retention.

8.1 Recommendations

Based on the previous conclusions, we recommend the following for the Johns Creek Convention + Visitors Bureau and City of Johns Creek.

Develop a community arts center. This should be a high-quality, state-of-the-art facility for the Johns Creek community. It should feature a 600 to 800-seat venue with a large stage and excellent acoustics for local music and dance organizations, some touring entertainment, and corporate meetings and events. It should have sufficient backstage space, some ability to fly sets, wide wings, storage, and a grand piano. In addition to this space, there should be a smaller, 150 to 350-seat multipurpose room. If Georgia Ensemble Theatre should commit to moving to Johns Creek, we would recommend that the community invest in making this space a working theater. Otherwise, it should have the functionality and flexibility to accommodate theatre activity, smaller music performances, rehearsals, and community meetings and events. The building may also include one or two additional rehearsal spaces that could double as education or meeting/event space.

In addition to performance space, we recommend including space for the Johns Creek Arts Center in the facility. This should include gallery and exhibition space, a digital arts lab, and other teaching and working spaces, as required by the Arts Center.

Finally, the facility should have a large kitchen. This space should be available for rent by the community. It should have flexible catering policies and be designed with the diversity of the Johns Creek community in mind. For example, the kitchen might include a kadai (the Indian version of wok) or other materials that are essential to preparing an Indian meal. Such a space could also be used for teaching hands-on culinary programs.

To be clear, all spaces in the facility (including lobby and gallery space) should have the ability to accommodate standing and/or seated meetings and events. Spaces like the 600 to 800-seat venue and multipurpose room, in particular, should be outfitted with technology and amenities (i.e. sound, projection, and lighting equipment; podiums; wireless mics; etc.) for corporate presentations and guest speakers. This facility could also serve as a temporary or satellite innovation center as part of the iHeart Johns Creek initiative.

Example: Parkers Arts, Culture + Event Center | Parker, CO

The Parker Arts, Culture + Event Center (PACE) is a 50,000-square-foot community arts center that opened in 2011. It features a 542-seat theater, an art gallery, a dance studio, event space, classrooms, a catering and teaching kitchen, and an outdoor amphitheater. Across the street, a 100-year-old school building was rehabilitated to include additional meeting and



event space, a dance studio, a 200-seat theater, additional gallery space, and a heritage center.

Programming at PACE includes performances by local organizations (KidStage, Parker Chorale, Parker Symphony Orchestra, and so on), touring entertainment, a lecture series, school rentals, and gallery exhibitions. Educational programs are provided for children, adults, and families in areas that range from cooking and science to theater, music, multi-media, and the visual arts. The facility is regularly used for meetings and events.

PACE is owned and operated by the Town of Parker, which built the building at a cost \$21.7 million.

Example: Livermore Valley Performing Arts Center | Livermore, CA

Opened in 2007, the Livermore Valley Performing Arts Center (LVPAC) includes a state-of-the-art performing arts facility and art center spread across two locations in downtown Livermore. The 502-seat Bankhead Theater is home to nine resident organizations that produce opera, theater, orchestral and choral music, and an annual film festival. Down the street, the Bothwell Arts Center houses a flexible performance space, visual artist studios, a community kitchen, and multiple classroom and meeting spaces.



Built in phases, the Bankhead Theater is 34,000-square-foot and cost \$22.3 million. During its first season, over 200 performances welcomed 76,000 people to the Theater, including 14,000 youth concertgoers. In addition to resident organization performances, LVPAC presents classical and commercial music, touring dance, and films.

LVPAC is the 501(c)3 owner and operator of the Bankhead Theater and Bothwell Arts Center and manages an \$3.9 million annual operating budget.

Example: North Shore Center for the Performing Arts | Skokie, IL

Located near Evanston, IL on Chicago's north shore, the North Shore Center for the Performing Arts includes an 840-seat theater, lobby, backstage support spaces, and administrative office space for a resident theater group and facility administration. The Center also boasts the Northlight Theatre, a 350-seat multipurpose space primarily used for drama performances. The Northlight is able to adapt into a ballroom by using removable floor panels that cover the theatre seats, transforming the theatre into an event space for special functions.



The facility was constructed in 1996 at a cost of \$18 million. The State of Illinois contributed \$13.2 million to the project and the Village of Skokie contributed \$3.4 million. Private donations supported the remainder of the construction costs. Today, a State-created building authority owns the Center, which is managed by Professional Facilities Management.

Create a year-round, seasonal venue for outdoor entertainment, ideally in partnership with other communities. This facility should be located in a pastoral setting (for example, along the Chattahoochee River). It should have an indoor capacity of 800 to 1,200 with the ability to open up onto an outdoor lawn. It should have state-of-the-art acoustics and technical amenities appropriate for a range of touring music and special events. Programming should be music oriented, although the facility might also host touring dance and popular entertainment. Given the scale of the project and its potential impact on a wider area, a regional partnership for this facility might make sense. As with the previous recommendation, this facility should also have the functionality to accommodate meetings and events.

Example: Indian Hill Music Center | Groton, NH

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



Example: Seiji Ozawa Hall | Tanglewood, MA

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



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