



City of Dublin

**Office of the City Manager**

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# Memo

**To:** Members of Dublin City Council

**From:** Dana L. McDaniel, City Manager 

**Date:** April 2, 2015

**Initiated By:** Michelle L. Crandall, Assistant City Manager

**Re:** Performing/Cultural Arts Center – Facilities Needs Assessment

## Summary

As part of the April 6, 2015 Council workshop session, Duncan Webb with Webb Management Services will provide an overview of the recently completed Performing/Cultural Arts Facilities Needs Assessment. A copy of this report, and associated recommendations, is attached.

Also attached is a mission/vision statement document prepared by Ohio University College of Fine Arts for the University's proposed resident professional theater company and training conservatory. Ohio University has expressed a strong interest in being considered as a primary user of a future performing arts center. The University plans to roll out a summer theater program in 2016 (in temporary space) to begin establishing their presence in the community with the ultimate goal of building into a professional theater company as an independent 501(c)(3).

Additionally, the Dublin Dance Center has provided an overview of their current programs/class participation. This company has also expressed a strong interest in the use of a future performing arts center. Noted in this document as a goal of the Dublin Dance Center is the creation of a professional dance company.

Following the presentation and discussion, staff will be requesting Council's support to move forward with the second part of the assessment, which focuses on the operational/financial feasibility of this potential project. This portion of the assessment would provide a business plan for how a proposed new facility should be programmed, operated and financially sustained.

## Recommendation

Staff is recommending that Council move forward with the second part of the study. Should you have questions related to this study prior to the April 6 workshop, please contact Michelle Crandall at 410-4403 (desk) or 206-4886 (mobile).

## Duncan Webb – Bio

Duncan M. Webb founded Webb Management Services, Inc. to provide management consulting services to the arts and cultural industries. The firm has now successfully completed more than 200 consulting assignments for the development of facilities and districts, and for the advancement of cultural organizations.

Webb's career in the arts began onstage as a lovesick maiden in a 1969 production of Gilbert and Sullivan's *Patience*. After college, he became a banker, spending seven years in commercial lending and international finance. In 1986, after many years of volunteer work in the arts, he came into the field as a producer of experimental, industrial and commercial theatre, with such credits as the Canadian premieres of *Changing Bodies*, *Children of a Lesser God*, *Blood Brothers*, *Orphans*, *Marshall Bravestarr* and *Barbie and the Rockers*. He also developed marketing and sponsorship programs for the Canadian premiere of *Les Miserables*.



In 1989, Webb joined Theatre Projects Consultants as a management consultant, writing feasibility studies for a range of performing arts facilities and ultimately becoming the general manager of the North American practice of this theatre consulting firm. He then spent two additional years at AMS Planning and Research, doing similar work before starting Webb Management Services in March 1997.

A Certified Management Consultant (CMC), Webb has been an active speaker and published writer on arts management and the development, operation and financing of arts facilities. In January 2005, Webb's book "Running Theaters: Best Practices for Managers and Leaders" was published, the first book ever written on the management of performing arts facilities. He is also a professor in New York University's Graduate Program in Performing Arts Administration, where he teaches Finance and Planning for the Performing Arts and Principles & Practices of Performing Arts Administration.

Duncan has a bachelor's degree in Economics from the University of Western Ontario and a master's degree in Business Administration from the University of Toronto. He currently lives in New York City with his wife and two children.

# *dublin* DANCE centre & GYMNASTICS

2665 Farmers Drive - Columbus, Ohio 43235  
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## **Who is Dublin Dance Centre & Gymnastics?**

Artistic Dance Enterprises, dba Dublin Dance Centre & Gymnastics (DDC&G) has been educating local children in the art of dance for 30 years. Currently, DDC&G has just over 1250 students and teaches approximately 2600 weekly class hours in Ballet, Jazz, Hip Hop, Modern, Tap, Break, and recreational Irish and Gymnastics. We currently employ 41 staff members and run programs for toddlers-adults. Dublin Dance Centre & Gymnastics has specialized programs for Special Needs Students to Pre-Professional Dancers including an on-site Physical Therapist (working in conjunction with The Ohio State Wexner Medical Center) and student performing companies who travel locally for Community Outreach and Artist-in-the Schools performances. DDC&G contracts with the City of Dublin providing performances at the annual Spooktacular Event, as entertainment for annual St Patrick's Day and Independence Day parades and brings DDC&G's version of The Nutcracker to the Abbey Theatre for two public performances. Further, DDC&G rents DCRC's The Abbey Theater six times per year for an additional 21 student performances. Outside of The Abbey, we rent other venues for performances with audiences averaging 900 seats per show through 7 performances.

## **The Goal**

"The Bonnie J Lavric Theatre", named in honor of a dear friend and teacher; DDC&G's goal is to build and maintain a theatre venue, offering local families and students a home location for performing arts. In addition to DDC&G using this theatre, there is an opportunity for Dublin to house a local Professional Dance Company\*. A theatre would add vibrant and exciting possibilities for the City of Dublin; performances have the potential to bring hundreds of people to patronize local restaurants and shops- and put Dublin 'on the map' as a leading spot for nationally recognized performing arts groups- from dance to comedy, music and theatre. Currently, local citizens travel outside of Dublin for most of their Performing Arts entertainment.

### Theaters and Seating of other Local Venues

Dublin- The Abbey (184), Jerome HS (700), Coffman HS (700), Scoito HS (600)

Worthington- McConnell Arts (213), Thomas Worthington HS (1128), Worthington Kilbourne (741)

OSU Wexner- Mershon (2477), Film/Video (298), Performance Space (230)

Columbus- Palace (2839), Ohio (2791), Southern (925), Capitol (903), Studio 1 (218), Studio 2 (183), Lincoln (582)

Otterbein's Cowman Hall (1100)

Upper Alington HS (1608)

DDC&G uses and/or has used most of the above listed theaters. **Demand is high!** We currently book The Abbey more than a year in advance- we love The Abbey- but we consistently sell out our shows and dressing room space is scarce. The local schools, rightfully, book school-events first making it unfeasible for us to plan to use and the equipment and space is student driven. Labor Union costs have brought to an end use of The Palace and Ohio Theaters, theaters we used for almost 20 years. Upper Arlington has been a great venue- the stage elements are on-par with CAPA's theaters and the seating is applicable to the demands of the performances- but, it's in Arlington!

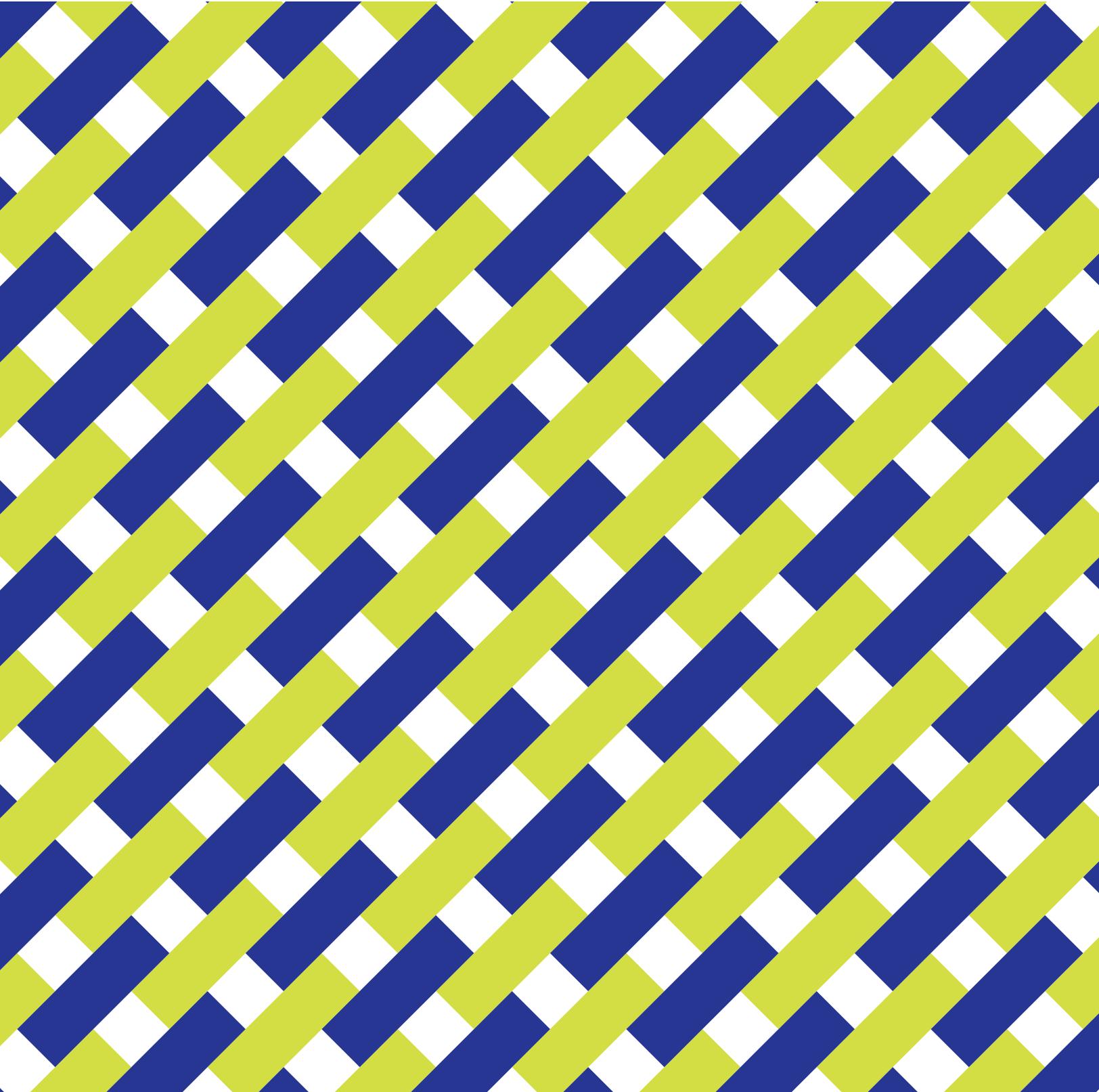
Through our years producing performances, we have numerous expert contacts for lighting, sound and stage management. We have also acquired lighting and stage equipment necessary to start a new venue.

\*Professional Dance Company to start in 2015-2016. We have two committed dancers with strong experience in numerous professional companies- from New York to Nashville. Both have started companies in New York (still running) and guest-perform around the nation.

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February 2015

# Performing Arts Facilities Needs Assessment

City of Dublin, OH

1. Executive Summary
2. Presentation Deck
3. Dublin Market Analysis
4. Comparable Markets Analysis
5. Facility Inventory

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# **Section 1. Executive Summary**



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# executive summary

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to: Michelle Crandall, City of Dublin  
from: Duncan Webb + Carrie Blake, Webb Management Services  
regarding: Performing Arts Facilities Needs Assessment  
date: February 12, 2015

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Following is an executive summary of our needs assessment for the potential development of new performing arts facilities in Dublin.

## Introduction

Webb Management Services, Inc. is a management consulting practice for the development and operation of performing arts facilities. We work for governments, schools, developers, and arts organizations on facility feasibility, business planning, and strategic planning. The practice was founded in 1997, and we just started our 342<sup>nd</sup> assignment.

For this first component of our work, we have been asked to establish if there is a need and opportunity to develop new performing arts facilities in and for the City of Dublin. Our approach is to assess potential demand for facilities (on the part of audiences and users), the current supply of facilities, and how the development of new facilities might serve the broader goals of the City. We have also considered if and how a partnership with Ohio University might make sense for the City, supporting the creation of a new summer theatre festival and, eventually, a new resident professional producing theatre company based in new facilities.

## The Market for Performing Arts Facilities in Dublin

The first component of the assessment is to consider the potential audience for events that might take place at new performance facilities. A comprehensive market analysis utilized demographic information for Dublin, the City's 15- and 30-mile radii, and the Columbus CBSA. (CBSA, or Combined Statistical Area, is an acronym used by the U.S. Census Bureau to define a metropolitan region.) National figures are also included for context where appropriate. These data, along with input from interviews, allow the resident market to be characterized as:

- \* *Growing:* In all market areas, the population is growing. In Dublin, the population is projected to reach 48,338 by 2020, a change of 15.20% from 41,751 in 2010. Although the population is growing in the 15- and 30-mile radii and CBSA, growth is happening at a

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slightly slower rate. In the CBSA, for example, the rate of growth between 2010 and 2020 is projected at 8.91%, while in both radii it is projected at 10.5%.

- \* *Well Educated:* Dublin's population has very high levels of educational attainment. Seventy-one percent of the population has a Bachelor's degree or higher compared to 42% of the population in the 15-mile radii, 33% in the CBSA, and 28% in the US as a whole.
- \* *Affluent:* The City of Dublin has a considerable amount of wealth. Nearly 35% of the population has a household income of \$150,000 or higher. Nationally, only 8% of the population falls into this income bracket. Throughout the region, household income levels are largely concentrated in the \$50,000-\$74,999 range or lower. There are also significant gaps in median household incomes. While in Dublin the median household income is projected to reach \$124,198 by 2020, it will hover around the \$60,000 mark in the 15- and 30-mile radii and CBSA. Although significant, the gaps in income correlate with levels of educational attainment.
- \* *Family Oriented:* Locally and regionally the population is young. In Dublin, 28% is age 17 or younger, while in the radii and CBSA 24% is 17 or younger. Dublin, however, also has a significant population between the ages of 45 and 54 (17%) and 55 and 64 (14%). Outside of Dublin, we see somewhat larger percentages of 25 to 34-year-olds and 18 to 24-year-olds in the 15-mile radius.
- \* *Diverse:* Dublin and the surrounding area are quite diverse. While the white population is significant, there are growing Black or African American, Asian, and Hispanic or Latino populations. Interestingly, populations appear to be concentrated in specific areas. In Dublin, for example, roughly 15% of the population is Asian compared to 5% in the 15-mile radius. The 15-mile radius, however, has a slightly larger Hispanic or Latino market than Dublin, the 30-mile radius, or the CBSA. And, in the 30-mile radius there is a larger Black or African American population.

This diversity is further emphasized linguistically. Although 84% of Dublin's population speaks English at home, 8% speak an Asian Pacific Islander language, and 5% speak an Indo-European language. Anecdotal information suggests that more than 60 languages are spoken in Dublin City Schools, which services Dublin as well as a portion of Columbus.

When considering audience potential, it is also important to understand tourists and tourism:

- \* According to the Dublin Convention and Visitors Bureau, 2.6 million people visited Dublin last year. The City includes 15 hotels with more than 2,000 rooms, which had an occupancy rate of 66% last year. Visitors are regional; most travel from between 250 and

400 miles away. Key markets include Cleveland, Akron, Pittsburgh, Detroit, and Indianapolis.

- \* A 2011 visitor survey by the Dublin CVB confirmed that visitors are mostly middle-aged and relatively affluent. Thirty-seven percent of those surveyed had visited Dublin four times or more, and 69% of visitors overall were repeat visitors. Visitors travel to Dublin to see an attraction (26%), attend the Irish Festival (13%), or to attend or participate in a sporting event (11%). While in Dublin, only 3% of visitors went to the theater/attended a play or performance, 4% saw Art in Public Places exhibitions, and 10% went to an historical museum or landmark. When asked what would make them more likely to visit Dublin, 15% of respondents answered cultural and arts events/activities.
- \* In 2006, the Dublin Convention and Visitors Bureau (DCVB) teamed up with North Star Destination Strategies to develop a brand for the City of Dublin. Interestingly, the study found that despite Dublin's lack of Irish heritage, visitors expected to have an Irish experience based a perceived connection to Dublin, Ireland. Based on this, the CVB adopted the tagline, "Irish is an Attitude".

All of this suggests that the market for new arts facilities is small but very strong, with interesting diversity and a family focus. The regional market also has potential to participate in the arts, particularly within the 15-mile ring. The tourist market is sizeable and focused on weekday and business travel; even still, many visitors like to participate in arts activities, and there is a goal to increase weekend visitation. In addition, regional arts groups report that northern Columbus (including Dublin) represents a regional market opportunity.

### **The Arts in Dublin**

This needs assessment was informed by a set of interviews with local artists, organizations, community leaders, and members of the community, which helped to suggest the state of the local arts community, levels and types of demand for particular cultural facilities and programs in Dublin and potential partnerships to support the development of any recommended facilities. That research suggested the following:

- \* There is demand for up to 228 uses of performance space that ranges in capacity from 150 to 2,000 seats. Most of this demand is for facilities of less than 700 seats.
- \* Dublin supports very strong visual arts and public art programming via Dublin Arts Council (DAC). But while DAC presents some summer performances in the parks, there is an overall lack of performing arts—even in restaurants and bars. Community interviews suggest programming gaps and latent demand for theatre, dance, music, opera, performing arts camps and programs for kids, family programming and hands-on and interactive

programming. There is a general sense that the City's Abbey Theater is underutilized, however the public does not understand its physical and technical limitations.

- \* Dublin City Schools has emerged as an interested and potential partner for the development and use of new facilities. District leadership is interested in new facilities to support training opportunities for students, afterschool arts programs, middle school performances and spaces that might support a 'creativity movement' that is developing in its schools.
- \* Even more intriguing is a potential partnership with Ohio University on the development of a new regional professional producing theatre company in Dublin. While discussions were initially focused on new facilities in Dublin as a potential home for the University's summer theatre festival (previously located on Cape Cod), there is now recognition of a larger opportunity to eventually extend the summer festival into a year-round organization.

### **Existing Facilities**

In order to understand the competitive situation for facilities and programming, we have identified 67 total facilities in the region (8 in Dublin) that are used on a regular basis for live performance. Dublin has one true community performance facility (the Abbey Theater), which has significant technical limitations. Local producing occurs in churches and schools. Regionally, there is a lot of producing activity, with more than half of facilities producing their own content (however, many of these are schools/universities). There is limited local presenting (the presentation of touring artists and entertainment), though the City does present family programming at the Abbey Theater.

Regionally, there is a large and diverse set of facilities serving the market, though few have high levels of availability for potential renters. CAPA and Promowest Live operate a number of facilities and are the primary regional presenters. While CAPA presents a mix of commercial and local performances of varying genres, Promowest Live focuses solely on music. A few suburban community arts venues have been developed in the last several years, including those in Worthington and New Albany.

All of this suggests that there are gaps in the inventory of facilities and that opportunities for participation are lacking. The principal size gap is in the  $\pm 500$  seat capacity range; locally there is a quality gap across the board.

### **Community Benefits + Impacts**

The Dublin Community Plan has established priorities in the areas of education (new and better opportunities), public places (more and better places), Town Center development (expanded to

create a sense of place and support a range of activities) and community character (expressed through festivals, events, and other cultural opportunities). There is also a desire to develop the community in such a way that additional companies can be recruited to Dublin and that they can build and support a younger workforce.

The development of new cultural facilities can be a key element in pursuing all of these broader community goals. They can support new educational opportunities, build a sense of places, enliven the Town Center, strengthen community character and support a younger workforce.

### **Conclusions on the Viability of New Performance Space**

There is a case to develop new arts facilities in Dublin based on the following:

- \* Dublin and its surrounding area is a strong market for the arts, with high levels of educational attainment, household income, and a large set of visitors.
- \* Locally, there is a lack of quality local performance space and regionally there is a lack of available performance space.
- \* There is an opportunity for more diverse and consistent performing arts programming to complement existing visual and public art and serve the local and regional population.
- \* There is a strong set of potential partners with the ability to develop quality programming.
- \* There is strong demand for performance space on the part of arts groups, schools, City programs, and community organizations.
- \* Finally, new facilities would support City goals and priorities and provide increased economic impacts.

### **Recommendations**

All of this leads to a series of recommendations, which are not mutually exclusive. Elements can be developed over time.

#### **1. New Mid-Size Flexible Performance Space**

We propose a new 300 to 400-seat performance space with a high level of flexibility, including the ability to convert to flat floor. It should also have a multi-purpose room that can act as a rehearsal hall, event space and even support smaller performances, as well as other support spaces. There should be large public spaces with strong food and beverage capabilities, and then classrooms and other program space depending on the needs of partners.

This recommendation will support the summer partnership with OU and the opportunity to develop a professional producing theatre program with the University. It complements the Abbey Theater, which can remain a workhorse, training ground and family destination while a new facility would

provide aspirational performance space for students and amateurs. And it responds to demand on the part of local groups and complements proposed banquet/conference center

There are a number of good examples of facilities like this around the country, ranging from the very expensive Polonsky Shakespeare Center in Brooklyn to the very reasonable Near West Theatre in Cleveland. Since new facilities could be located near the proposed banquet space, Addison Conference and Theatre Center in suburban Dallas provides a good example of co-locating cultural and conference facilities.

## **2. Indoor/Outdoor Performance and Event Space**

We would also recommend considering the development of a new  $\pm 1,000$ -seat seasonal but enclosed performance event space. This idea is to create a larger and flexible space that can be used for a good portion of the year (say up to six months) to support a range of events, from concerts and other performances to festivals and other community gatherings. The space should have the acoustical quality to support both unamplified and amplified music, and should have some backstage accommodations.

There are a number of precedents for a project like this. There is the musically oriented Ozawa Hall at Tanglewood, owned and operated by the Boston Symphony Orchestra in support of its summer season in the Berkshires (MA). The hall operates as an enclosed summer space for up to 1,200 patrons. But when the weather is favorable the back and side walls are opened to allow additional patrons to view and hear performances from the surrounding lawn.

Another example is the Wild Beast at CalArts in Valencia CA. Here there is an enclosed stage and outdoor seating for up to 1,000 people. An indoor version is created by closing a large rolling wall, making an indoor classroom or recital hall with a capacity of up to 150.

We are drawn to this idea as a relatively low-cost way to support additional programs in Dublin. The seasonality fits with the current schedule of festivals, and plans are already in the works for an outdoor amphitheater.

## **3. Create a Cultural District**

Our third recommendation is to partner with developers and arts organizations to animate other parts of the Bridge Street Project with arts and culture, effectively creating a cultural district. This might include public art, temporary art installations in empty or raw retail space, and/or incentives to arts businesses to locate in the area.

We see this as an attractive opportunity, as it builds on strengths of Dublin Arts Council, helps to develop a cultural identity for Dublin, and promotes the Town Center as a destination. There are

many good examples of cultural districts in communities similar to Dublin. One of our favorites is the Canalway Cultural District in Lowell, Massachusetts.

### **Endorsement of the Professional Producing Theatre Company**

Finally, we endorse the idea of developing a regional professional producing theatre company in partnership with Ohio University. An analysis of comparable markets suggested that Columbus has capacity to support additional professional producing theatre. The program and space would create a unique attraction for Dublin. And we see potential for the project to contribute to City goals around Town Center development, developing a younger workforce, and corporate recruitment.

We also like the idea of incrementally developing the theatre producing function, starting with the summer program like the one that OU maintained in Monomoy. It will be important to ensure that programming is different from the work coming out of groups like Short North and CATCO. After the summer program has established a model, audience base and reputation, expansion into a year-round organization will be a reasonable extension. Note that the expansion to a year-round organization will drive the need to add a set of production-related spaces to the project.

## **Section 2. Presentation Deck**

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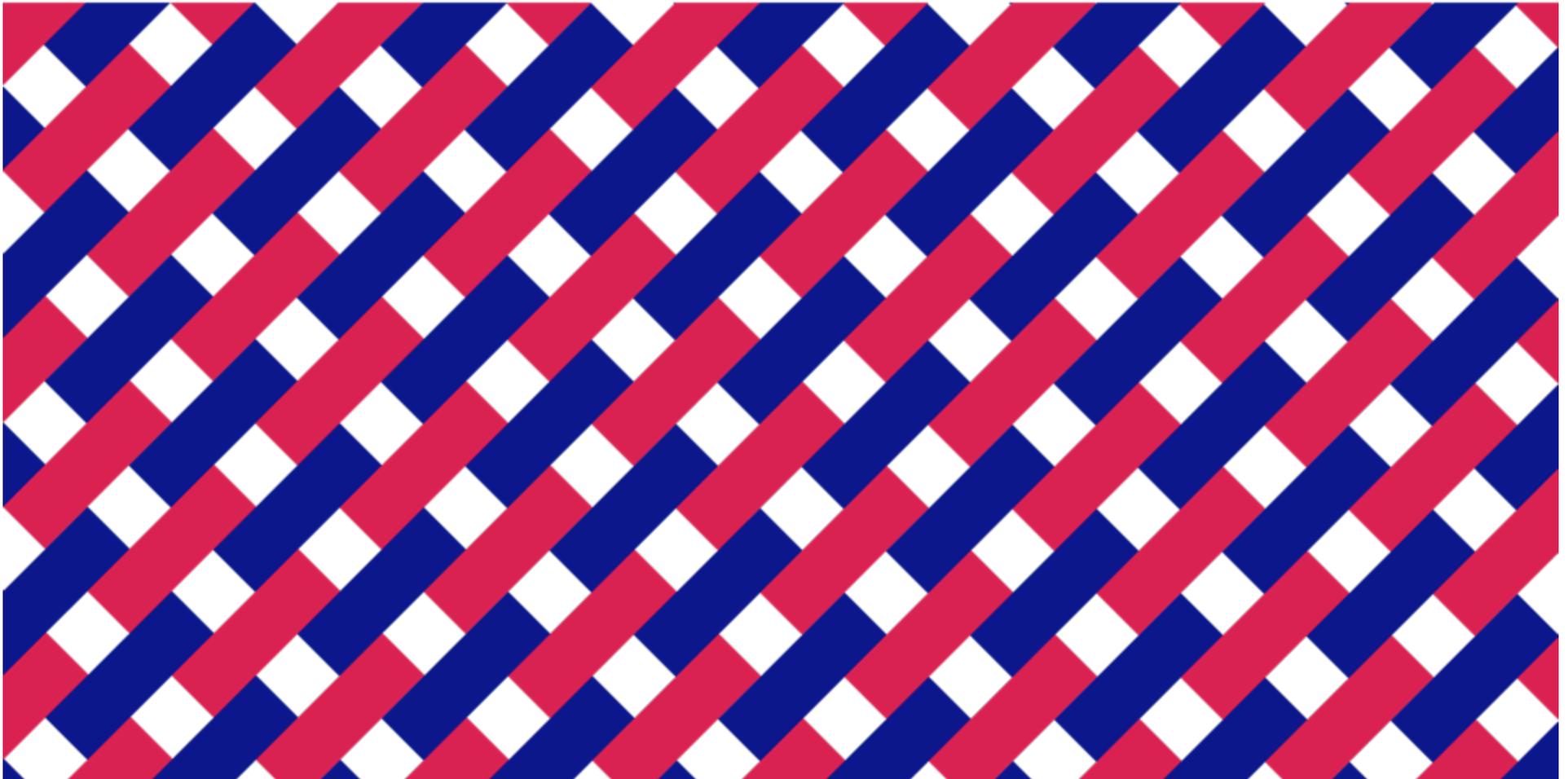
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January 26, 2014

# Performing Arts Facilities Needs Assessment

City of Dublin



# Webb Management Services

## Background

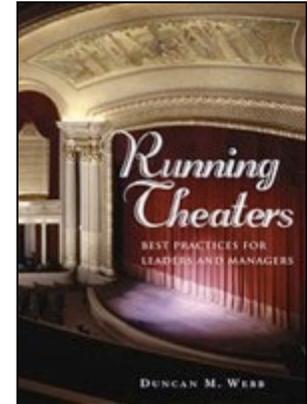
- \* Management consulting practice for cultural facility development and operation
- \* Small and focused company based in NYC
- \* Clients are government, arts groups, developers and educators
- \* In our 16<sup>th</sup> year, starting our 342<sup>nd</sup> project

## Services

- \* Feasibility studies
- \* Business plans
- \* Strategic plans
- \* Cultural plans
- \* District plans

## Staff

- \* Former artists + arts administrators
- \* Degrees in arts, business and finance
- \* Experts in cultural planning, organizational development, research and facilities



## Needs assessment scope of services

- \* Investigate the need for performing arts facilities
- \* Along the way, consider the potential opportunity to develop a regional producing professional theatre company in conjunction with Ohio University
  
- \* The four key issues:
  - \* Audience demand
  - \* Facility + regional theatre supply
  - \* Uses, users + partners
  - \* Community impacts + benefits



## Study informants

|                          |                                     |                      |                         |
|--------------------------|-------------------------------------|----------------------|-------------------------|
| Margie Amorose           | Dublin Chamber of Commerce          | Michael Lincoln      | Ohio University         |
| Becky Carlson            | City of Dublin                      | Yung-Chen Lu         | Asian Festival          |
| Mary Fran Cassidy        | Dublin Singers                      | Marivi Magan         | Dublin Arts Council     |
| Marilee Chinnici-Zuecher | City of Dublin                      | Dana McDaniel        | City of Dublin          |
| Jon Cook                 | McConnell Arts Center               | Tracy Miller         | Dublin School District  |
| Rachel Cornish           | Ohio University                     | Jack Pigman          | Dublin Community Bands  |
| Michelle Crandall        | City of Dublin                      | Amy Saley            | City of Dublin          |
| Scott Dring              | Dublin Convention + Visitors Bureau | Lynette Santoro-Au   | City of Upper Arlington |
| Matt Earman              | City of Dublin                      | Michael Schirtzinger | City of Dublin          |
| Bryan Faller             | Dublin Arts Council                 | Bob Shook            | Schuler Shook           |
| Kathleen Fox             | Pizzuti Solutions                   | Press Southworth     | Jazz Arts Group         |
| Robert Gibson            | Dublin School District              | Bob St. Lawrence     | Ohio University         |
| Donna Goss               | Ohio University                     | Matthew Starr        | Crawford Hoying         |
| Marsha Grigsby           | City of Dublin                      | Nelson Yoder         | Crawford Hoying         |
| David Guion              | Dublin Arts Council                 |                      |                         |
| Tom Hoadley              | Dublin City Schools                 |                      |                         |
| Tom Holton               | Dublin Historical Society           |                      |                         |
| Naomi Hoyt               | Dublin Arts Council                 |                      |                         |
| Margaret Kennedy-Dykas   | Ohio University                     |                      |                         |
| Steve Langworthy         | City of Dublin                      |                      |                         |
| Tim Lecklider            | City of Dublin                      |                      |                         |
| Alison LeRoy             | City of Dublin                      |                      |                         |



## Forces + trends

- \* Decline in traditional performing arts audience
- \* Decline in traditional public sector arts funding
- \* Increasing competition for private sector philanthropy
- \* Increasing fragility of nonprofit arts organizations

At the same time...

- \* Increasing active arts participation
- \* Improving arguments for arts “value”

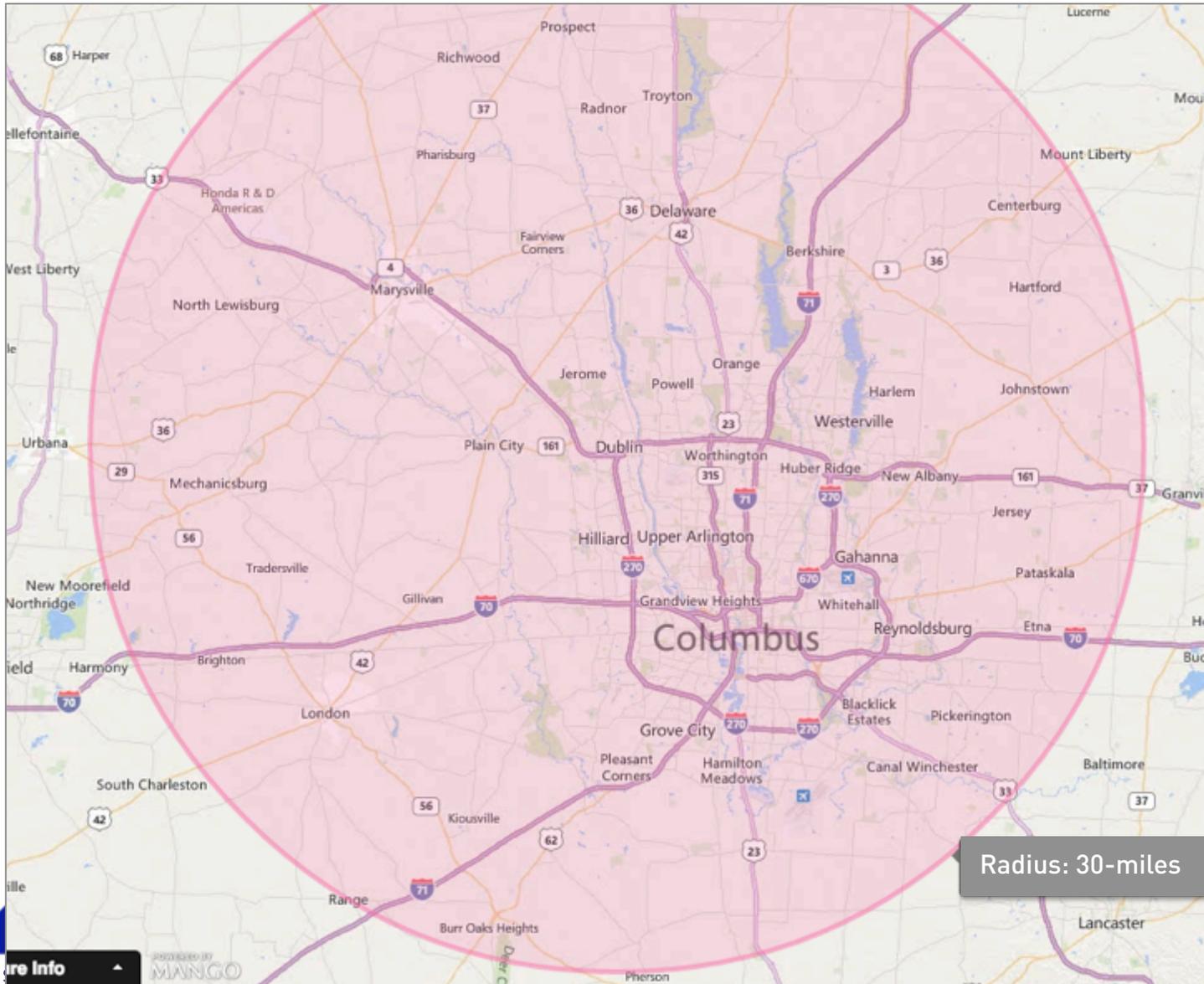


## How to respond?

- \* From “Friday night lights” to “the community living room”
- \* More opportunities for active participation and education
- \* Low cost of access
- \* From arts palaces to arts districts
- \* Stress the social experience
- \* Partners, partners, partners



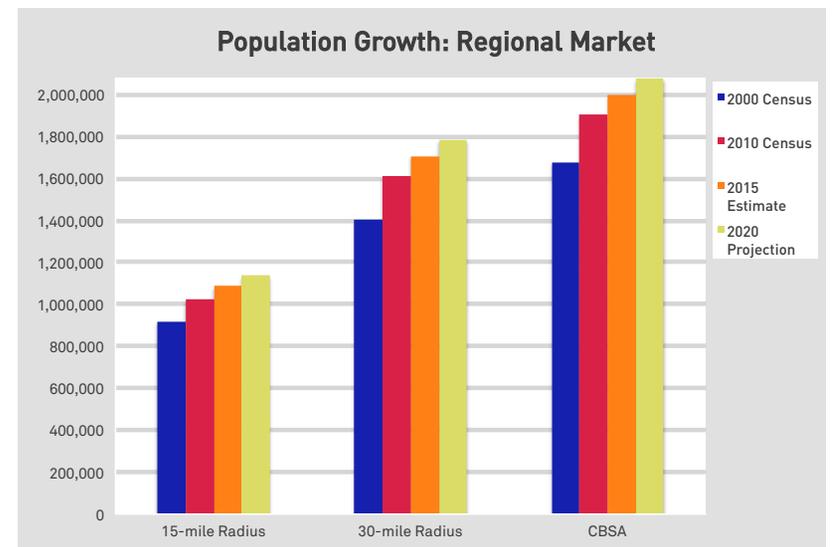
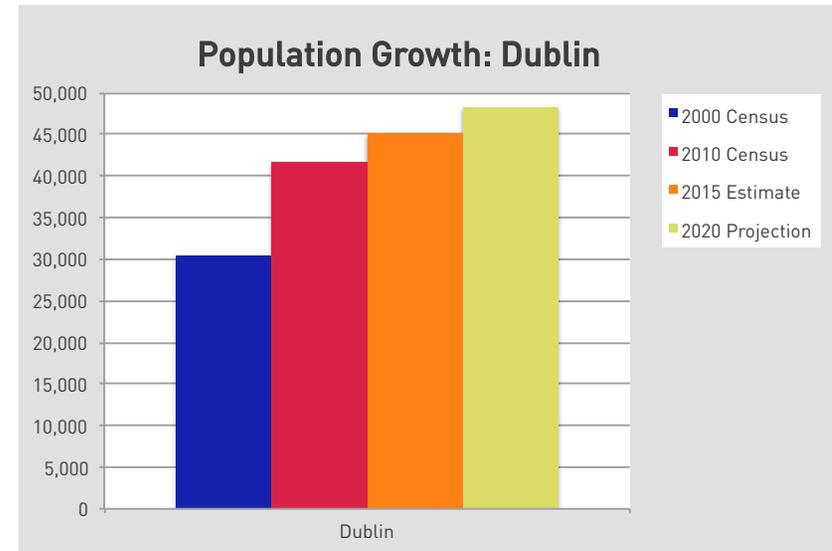
# Market definition



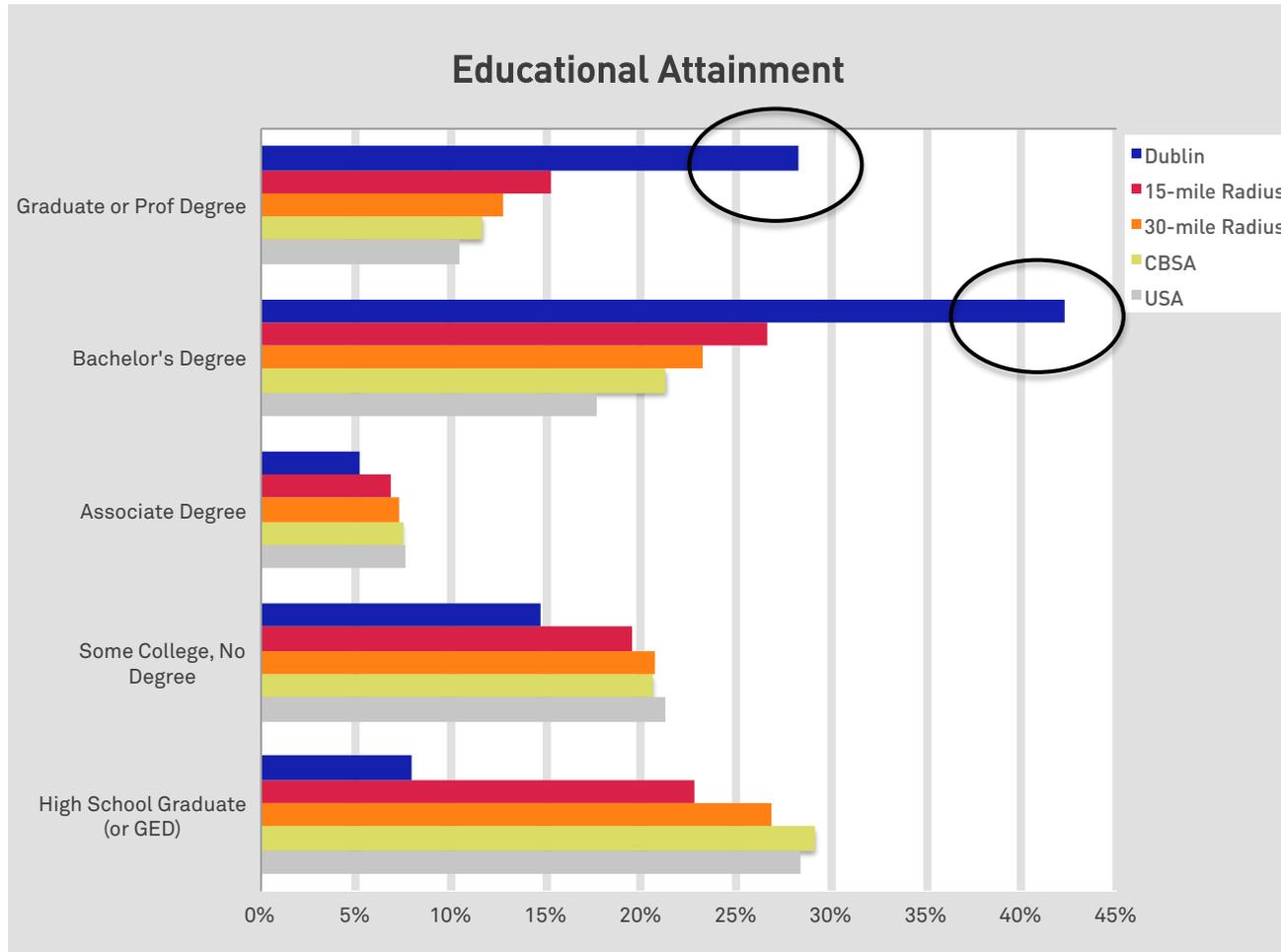
## Market size

- \* For the purpose of this study, we examined a regional market defined as Dublin, the 15 and 30 mile radii surrounding Dublin, and the Columbus CBSA
- \* Dublin is growing at a faster rate than the all other market segments

| Regional Population Growth Rates |           |           |           |
|----------------------------------|-----------|-----------|-----------|
|                                  | 2000-2010 | 2010-2015 | 2015-2020 |
| Dublin                           | 37.1%     | 8.0%      | 7.2%      |
| 15-mile Radius                   | 11.4%     | 6.0%      | 4.5%      |
| 30-mile Radius                   | 14.9%     | 6.0%      | 4.5%      |
| CBSA                             | 13.6%     | 5.1%      | 3.9%      |



# Market characteristics

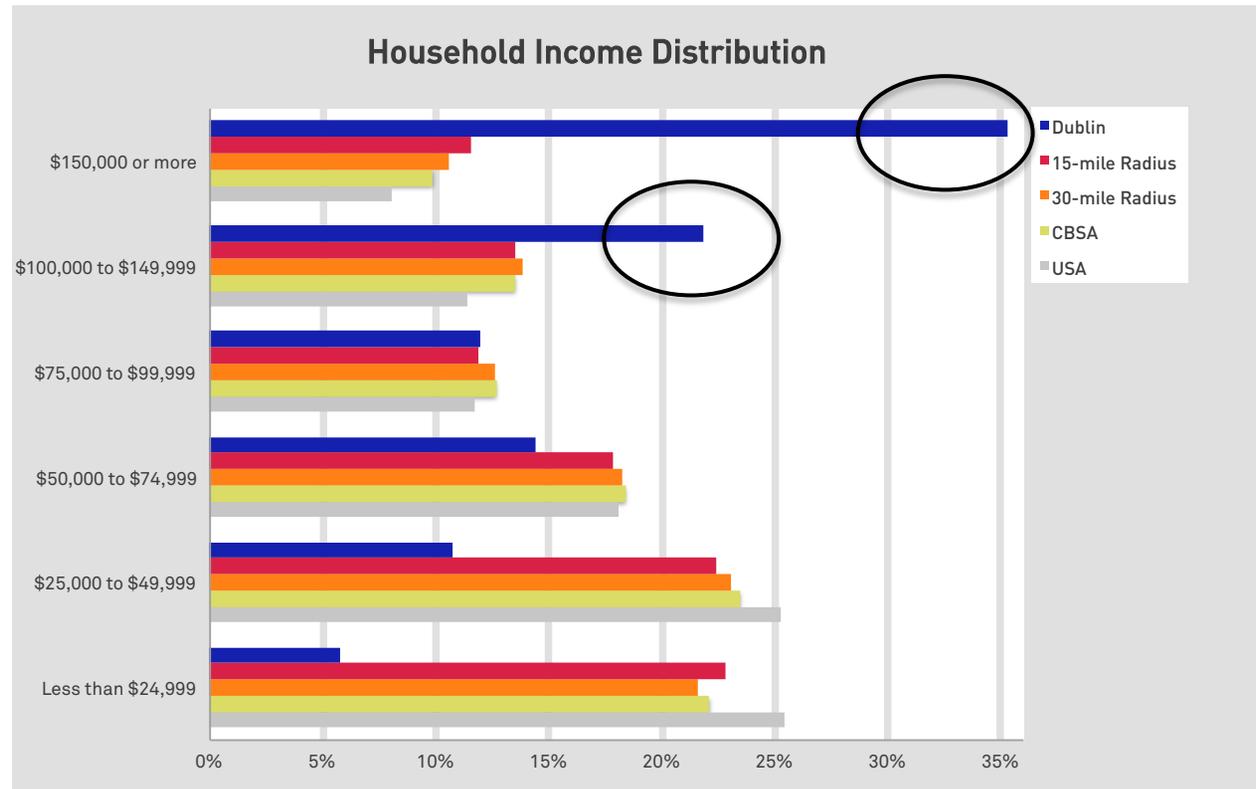


\* Dublin has significantly higher levels of educational attainment than the region



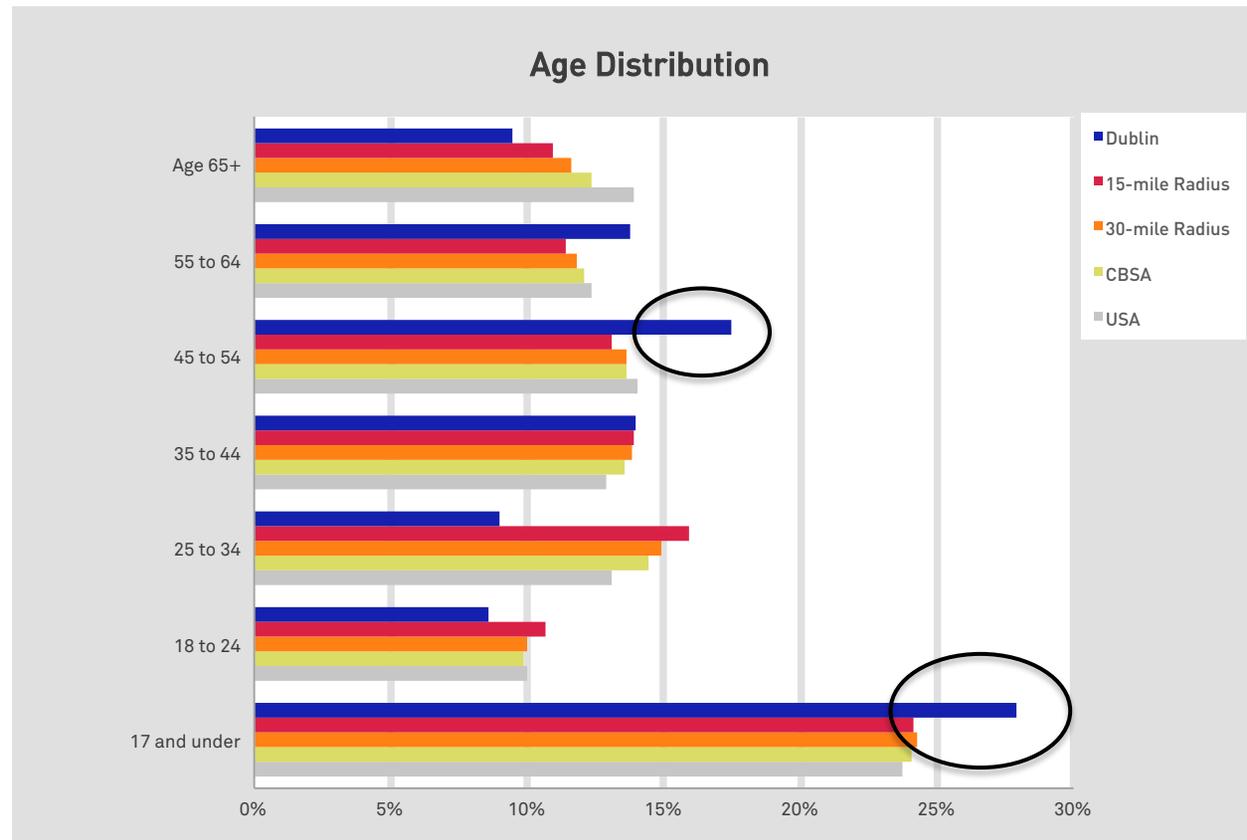
## Market characteristics

\* Dublin is also quite affluent, significantly more so than the region, which has higher than average levels of household income



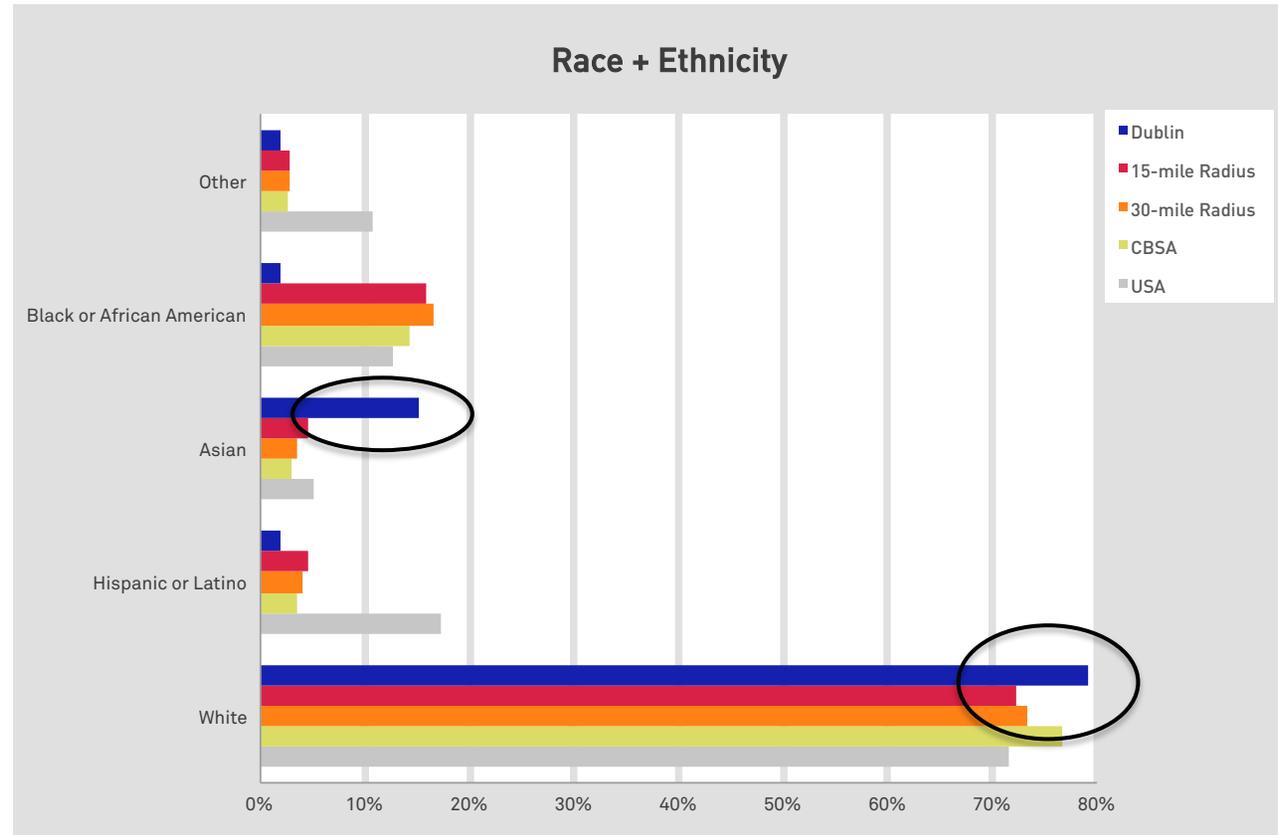
## Market characteristics

- \* Dublin is very family oriented, with a large concentration of children
- \* There is also a higher than average concentration of empty nesters
- \* There are lower levels of retirees and young adults than the nation and the region



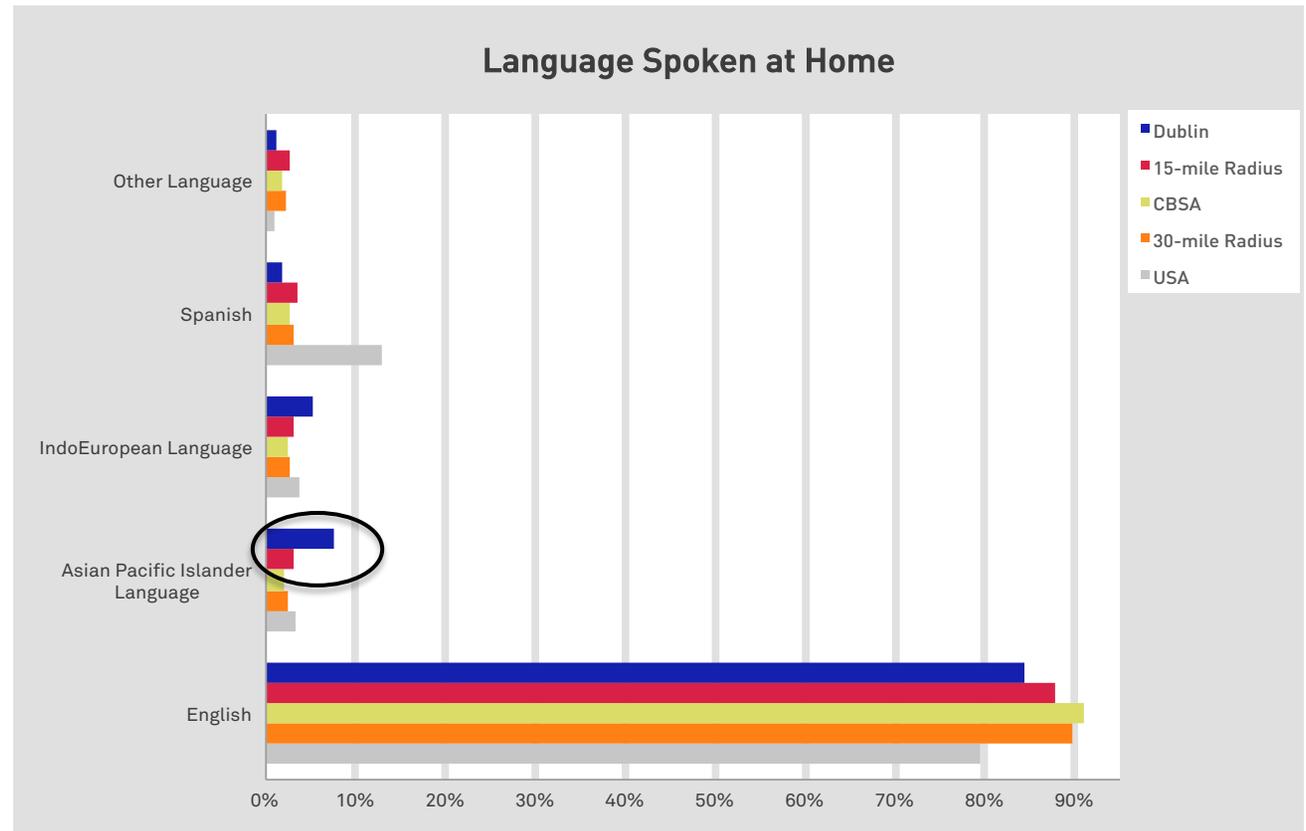
## Market characteristics

- \* Dublin and the surrounding area have moderate levels of diversity
- \* Locally there is a large Asian population
- \* Regionally there is a larger than average Black/African-American population
- \* The region has a much lower concentration of Hispanic/Latino residents than the nation



## Market characteristics

- \* Diversity is further emphasized linguistically
- \* 8% of households speak an Asian Pacific Islander language at home
- \* Anecdotal information suggests that more than 60 languages are spoken in Dublin City Schools, which services Dublin and a portion of Columbus



## Local tourism

- \* Dublin CVB indicates:
  - \* 2.6M visitors annually; 70% is business travel
  - \* 15 hotels with 2,000+ rooms that had a 2014 occupancy rate of 66%; weeknights are busiest
  - \* Visitors are primarily regional, with most coming from up to 300 miles away
  - \* Art in Public Places is rated high for visitor satisfaction
  - \* A key challenge is lack of convention space; largest accommodates 300 people
- \* A 2011 survey of brand effectiveness suggested:
  - \* Visitors tend to travel in pairs and many are repeat visitors
  - \* Many travel to see an attraction (26%), attend the Irish Festival (13%) or participate in a sporting event (11%)
  - \* Smaller proportions attend live performance (3%), see Art in Public Places (4%), or visit an historical museum or landmark (10%)
  - \* 15% would be more likely to visit if there were more/other cultural and arts events
  - \* Most are influenced by the City's 'Irish feel'
  - \* Sports visitors are trying to save on lodging costs by staying out-of-town



## Market conclusions

- \* The local market for arts and culture is small but very strong, with interesting diversity and a family focus
- \* The regional market also has potential, particularly within the 15-mile ring
- \* The tourist market is sizeable and focused on weekday and business travel; even still, many visitors like to participate in arts activities, and there is a goal to increase weekend visitation
- \* Regional arts groups report that northern Columbus (including Dublin) represents a market opportunity
- \* Interesting market segments include:
  - \* *Asian population for Asian language and ethnically specific programming*
  - \* *Families for family programming, group participation and arts education*
  - \* *Middle-age adults and empty-nesters for participatory opportunities and live performance*
  - \* *Tourists for a variety of offerings*



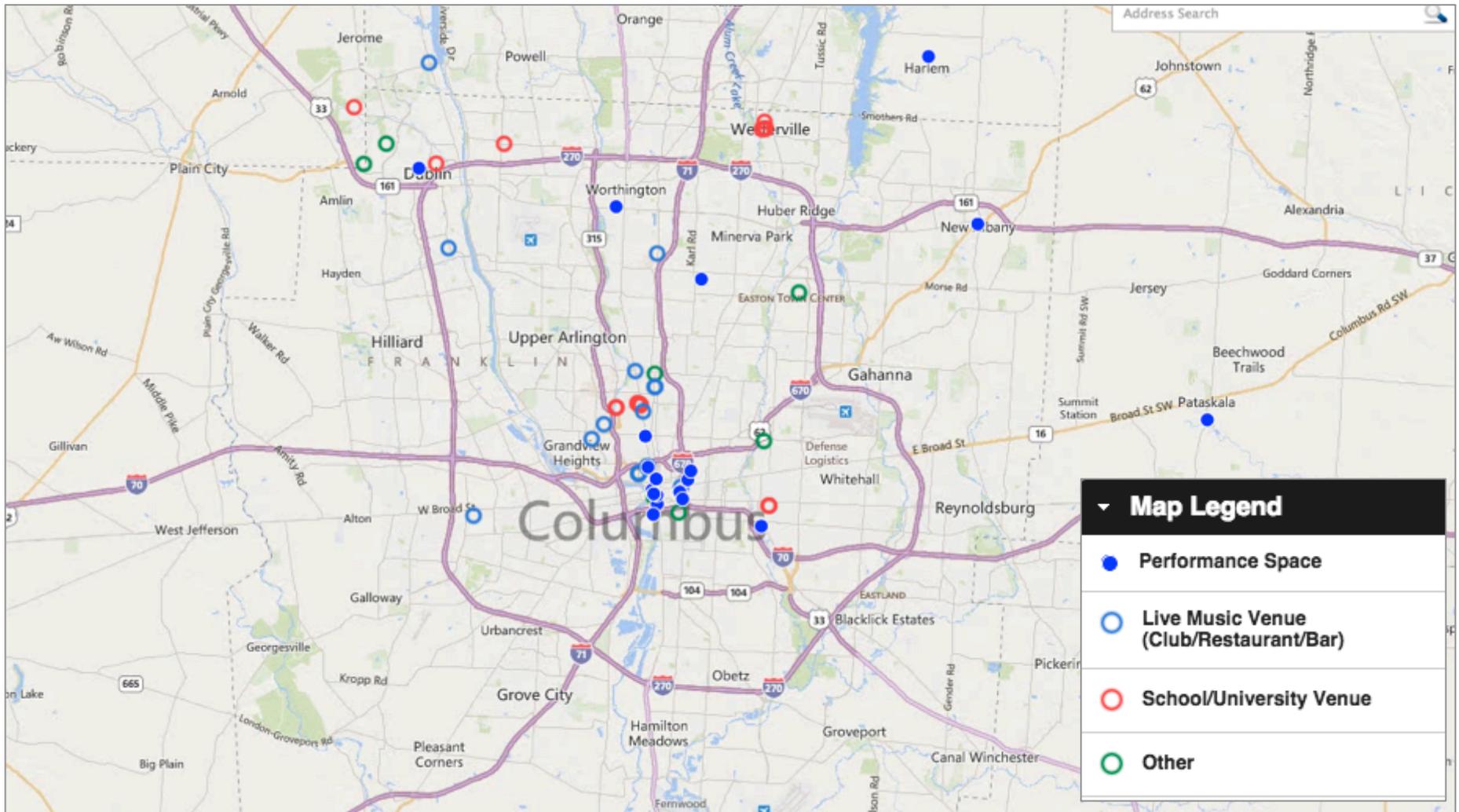
## Arts in Dublin

- \* Very strong visual arts and public art via Dublin Arts Council
- \* While DAC does some summer performances in the parks, there is an overall lack of performing arts—even in restaurants and bars
- \* Community interviews suggest programming gaps and latent demand for:
  - \* *Theatre*
  - \* *Dance*
  - \* *Music*
  - \* *Opera*
  - \* *Performing arts camps and programs for kids*
  - \* *Family programming*
  - \* *Hands-on and interactive programming*
- \* There is a general sense that the Abbey Theater is underutilized, however the public does not understand its physical and technical limitations





# Existing facilities



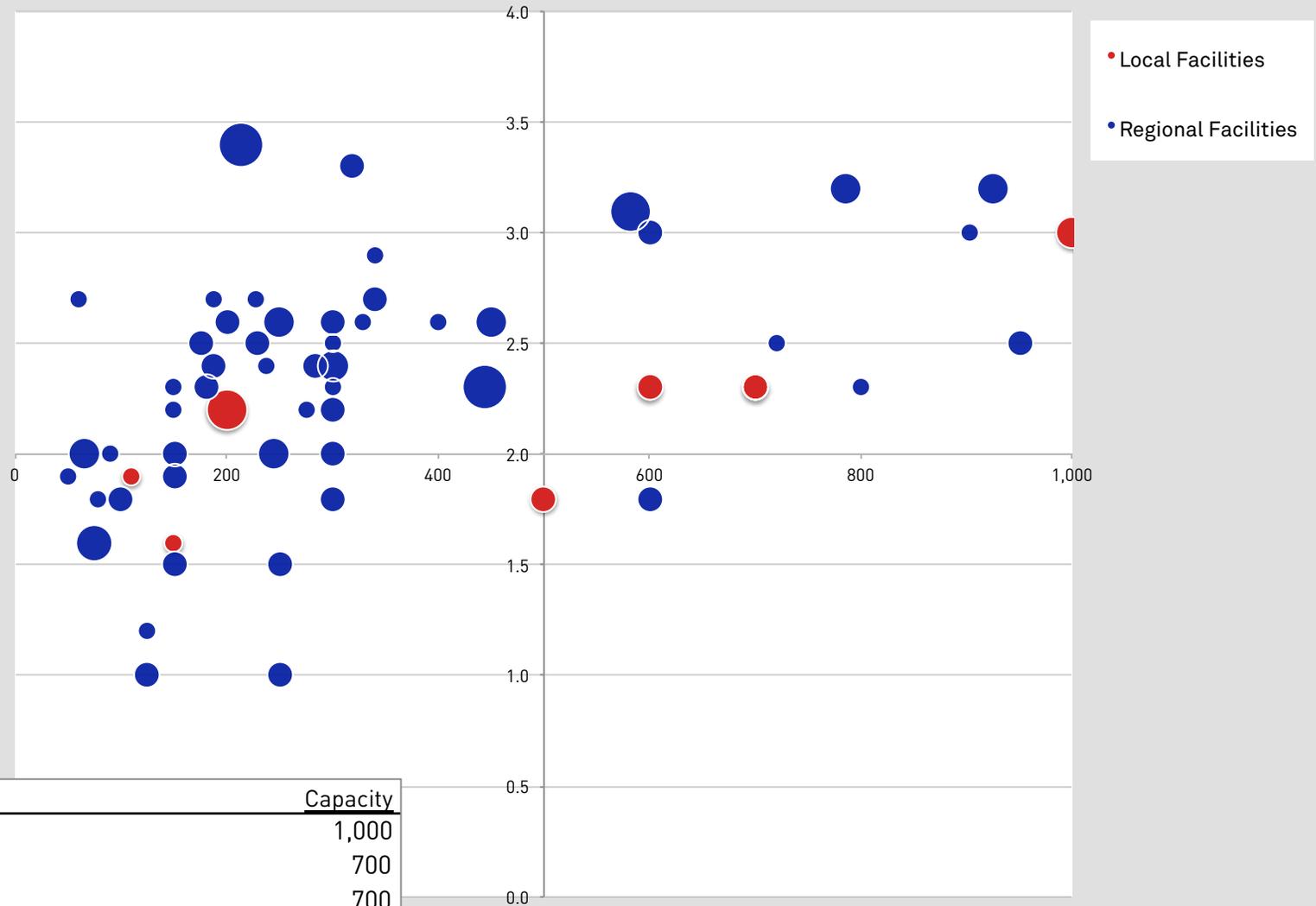
## Existing facilities

- \* 67 total facilities - 8 in Dublin used on a regular basis for live performance
- \* Dublin includes one true community performance facility (Abbey Theater) which has significant technical limitations
- \* *Producing*: Local producing occurs in churches and schools; Regionally, there is a lot of producing activity, with more than half of facilities producing their own content (however, many of these are schools/universities)
- \* *Presenting*: Limited local presenting, though the City presents family programming at the Abbey Theater
- \* Local facilities are generally well-equipped but have low to no availability for outside groups as they are located in schools, churches, or are restaurants/bars



Existing facilities

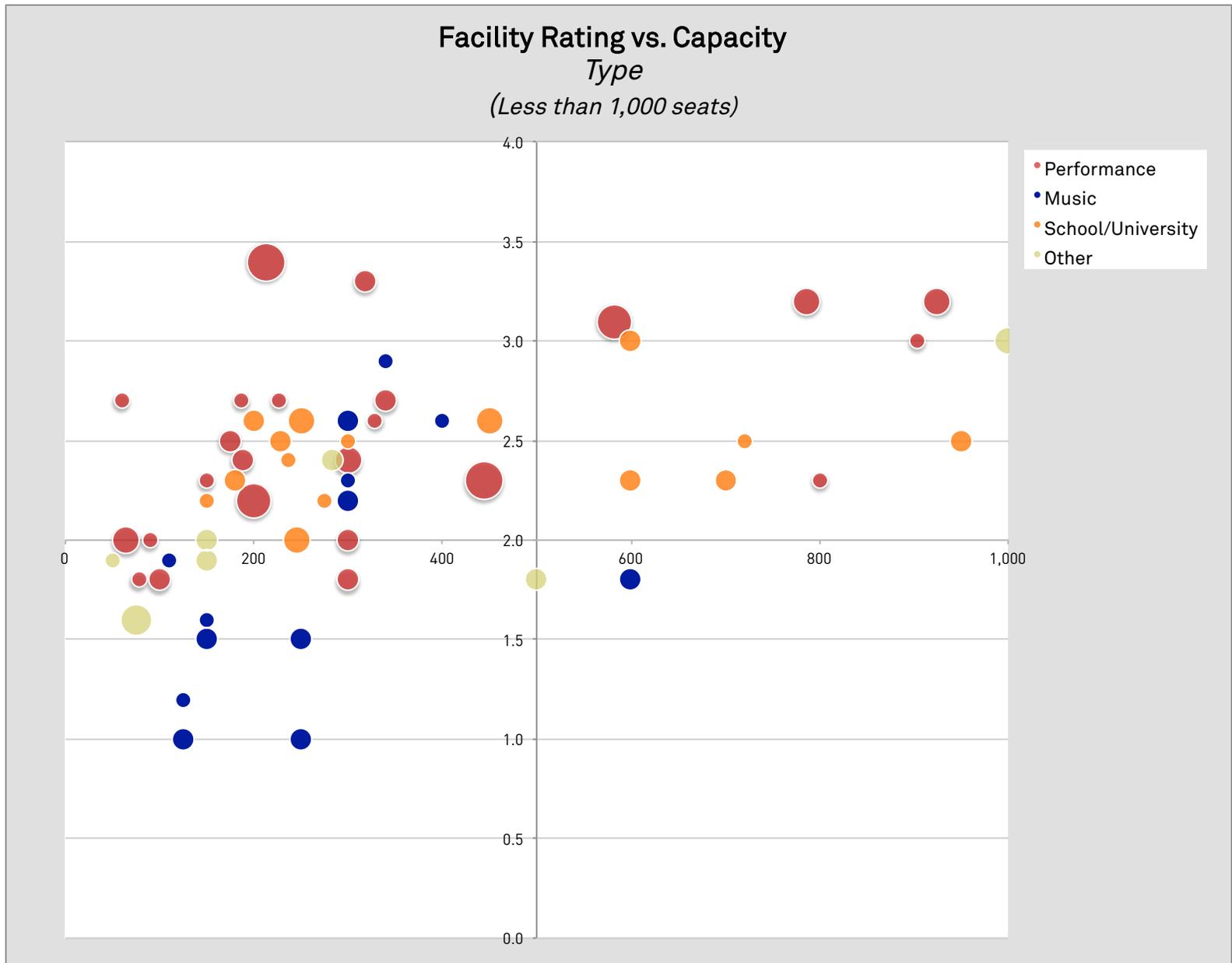
**Facility Rating vs. Capacity**  
(Less than 1,000 seats)



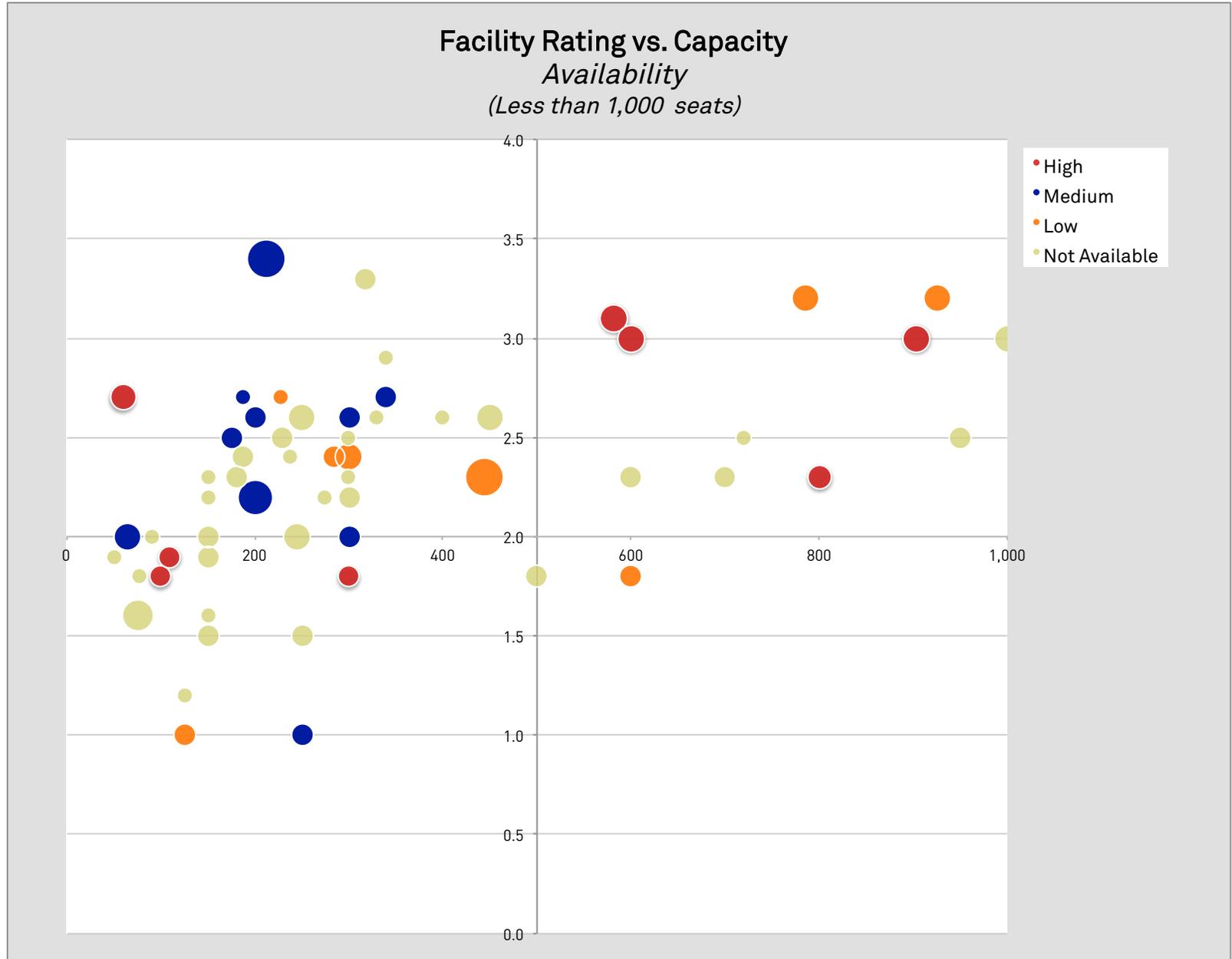
| Local Facility                                    | Capacity |
|---|----------|
| Radiant Life Church                               | 1,000    |
| Coffman High School                               | 700      |
| Jerome High School                                | 700      |
| Scioto High School: Marina Davis PAC              | 600      |
| St. Brigid of Kildare Catholic Church             | 500      |
| Dublin Community Recreation Center: Abbey Theater | 200      |
| On the Rocks                                      | 150      |
| Morgan House                                      | 110      |



# Existing facilities



Existing facilities



## Performance space conclusions

- \* Local facilities and opportunities for participation are lacking
- \* Dublin includes one true performance space, which has significant limitations in terms of quality and features
- \* Other existing spaces are affiliated with schools, churches or are restaurants/bars
- \* A good mix of regional spaces but few have high availability
- \* CAPA and Promowest Live operate a number of facilities and are the primary regional presenters; while CAPA presents a mix of commercial and local performances of varying genres, Promowest Live focuses solely on music
- \* A few suburban venues have been developed in the last several years, including those in Worthington and New Albany
- \* The principal size gap is in the  $\pm 500$  seat capacity range; locally there is a quality gap across the board



# User demand

## User Demand: Performance Facilities

|  | Performances | Rehearsals/<br>Tech | Other     | Total      | Desired<br>Venue<br>Capacity | Notes                         |
|--|--------------|---------------------|-----------|------------|------------------------------|-------------------------------|
| Dublin Arts Council*                           | 4            |                     |           | 4          | Varies                       |                               |
| City of Dublin Events*                         | 6            |                     |           | 6          | 2,000                        | Presenting                    |
| Dublin Singers                                 | 1            | 1                   |           | 2          | 1,500                        | Acoustics                     |
| Asian Festival*                                | 6            | 3                   |           | 9          | 1,000+                       | Presenting; All disciplines   |
| Dublin School District: Middle School Concerts | 6            | 6                   |           | 12         | 700+                         | Acoustics, large stage        |
| Dublin School District: Music Competitions     | 12           |                     |           | 12         | 700+                         | Acoustics, large stage        |
| Dublin School District: Musical Theatre        | 12           | 25                  |           | 37         | 700+                         |                               |
| Jazz Arts Group Presenting Series              | 4            |                     |           |            | 600+                         |                               |
| Dance Schools (Various)*                       | 6            | 6                   |           |            | 500+                         |                               |
| Jazz Arts Groups Performance Groups            | 6            | 6                   |           | 12         | 400+                         | Flat floor option             |
| Dublin Singers                                 | 3            | 3                   |           | 6          | 400+                         | Acoustics                     |
| Meetings + Conventions*                        |              |                     | 10        | 10         | 400+                         |                               |
| Dublin Community Bands Joint Concert           | 1            | 1                   |           | 2          | 300+                         |                               |
| Upper Arlington Cultural Arts Division*        | 4            | 4                   |           | 8          | 300+                         |                               |
| Dublin Historical Society                      | 4            |                     |           | 4          | 300                          |                               |
| Dublin Wind Symphony                           | 4            | 4                   |           | 8          | 300                          | Large stage                   |
| Ohio University*                               | 48           | 32                  |           | 80         | 300                          | 8 prod, 12 weeks; Flexibility |
| Dublin Swing Orchestra                         | 4            | 4                   |           | 8          | 200                          | Flat floor for dancing        |
| Dublin Brass Band                              | 4            | 4                   |           | 8          | 150                          |                               |
| <b>Total</b>                                   | <b>135</b>   | <b>99</b>           | <b>10</b> | <b>228</b> | <b>-</b>                     |                               |

\*Indicates estimation



## User demand

| User Demand: Performance Facilities |              |                     |       |       |
|-------------------------------------|--------------|---------------------|-------|-------|
|                                     | Performances | Rehearsals/<br>Tech | Other | Total |
| 1,000 seats+                        | 17           | 4                   | 0     | 21    |
| 401 to 999 seats                    | 40           | 37                  | 0     | 61    |
| 150 to 400 seats                    | 78           | 58                  | 10    | 146   |
| Total (Days)                        | 135          | 99                  | 10    | 228   |

- \* Majority of demand for small to mid-size performance space
- \* Users of larger space are more concerned with acoustics and include a few presenters



## User demand

### Key Potential Partners

- \* Ohio University
  - \* *Opportunity to develop professional summer theatre program with potential to expand to year round*
- \* Dublin Recreation + Parks
  - \* *Keen to help develop programming for new facilities that moves beyond what the Abbey Theater can accommodate*
- \* Dublin City Schools
  - \* *Opportunities to provide training opportunities for students*
  - \* *Need space for afterschool arts programs*
  - \* *Need space for middle school performances*
  - \* *Educators establishing a 'creativity movement'*
- \* Presenting Organizations
  - \* *Several presenting organizations (Asian Festival, Jazz Arts Group) have interest in establishing series at a Dublin facility*



## The regional professional producing theatre opportunity

- \* Significant impetus for this study comes from potential for the City to partner with Ohio University to develop a professional regional producing theatre company, starting with the summer theatre festival
- \* There is quite a bit of theatre production occurring in the market, most is at colleges and universities like Otterbein, OSU, Ohio Wesleyan and Capital University
- \* The Columbus region supports two professional producing theatre organizations, CATCO and Short North Theatre

### Regional Producing Theatres

#### Professional

CATCO  
Short North Stage

#### School/University Producing Theatre

Dublin City Schools (local)  
Capital University  
Ohio Wesleyan University  
Ohio State University  
Otterbein University  
Various secondary schools

#### Semi-Professional

MadLab  
Shane's Dinner Theatre

#### Community Theatre

Abbey Theater (local)  
Curtain Players  
Gallery Players  
Shadowbox Live  
Town Hall Theatre  
Worthington Community Theatre

#### Family/Youth Theatre

Columbus Children's Theatre  
Sterling Summer Youth Theatre  
Wagnall's Community Theatre



# The regional professional producing theatre opportunity

## Comparable Markets: Professional Producing Theatre Activity

|   | Columbus, OH | Indianapolis, IN | Cleveland, OH | Austin, TX |
|---|--------------|------------------|---------------|------------|
| Population Size: 25-mile Radius                               | 1,636,758    | 1,691,855        | 1,847,626     | 1,654,121  |
| Population Size: Metropolitan Area (CBSA)                     | 1,998,079    | 1,987,044        | 2,061,395     | 1,927,989  |
| Educational Attainment: Bach and Higher, Age 25+              | 36.74%       | 33.21%           | 30.15%        | 42.81%     |
| Median Household Income                                       | \$57,179     | \$54,607         | \$48,841      | \$63,068   |
| Race/Ethnicity: Hispanic/Latino Population                    | 4.6%         | 7.3%             | 5.0%          | 49.0%      |
| Race/Ethnicity: Black/African American Population             | 17.6%        | 16.6%            | 21.7%         | 7.5%       |
| Arts/Entertainment Spending per Capita                        | \$25.30      | \$24.70          | \$23.30       | \$26.70    |
| <b>Professional (Equity) Producing Theatre Activity</b>       |              |                  |               |            |
| # of theatre organizations                                    | 2            | 5                | 3             | 3          |
| # estimated annual productions                                | 17           | 35               | 20            | 21         |
| # estimated annual performances                               | 206          | 819              | 411           | 391        |
| # estimated annual professional theatre seats sold*           | 22,601       | 318,289          | 115,030       | 143,653    |
| # estimated annual professional theatre seats sold per capita | 0.01         | 0.19             | 0.06          | 0.09       |

\*Assumes 2/3 capacity

✳ A review of professional producing theatre activity in comparable markets suggests that Columbus has market capacity for additional professional theatre activity



## Community benefits + impacts

Dublin Community Plan building blocks and priorities include:

- \* *Education:* Outstanding educational opportunity is a hallmark of the local quality of life, as well as a key economic development component
- \* *Public Places:* Public places support interaction, quality of life; Future public areas will provide inviting spaces where the community can gather for cultural, social...civic activities
- \* *Town Center:* Creates a sense of place and supports a range of economic, recreational and housing opportunities, particularly in the Bridge Street District
- \* *Community Character:* Including community festivals and events, cultural opportunities and otherwise

A recent update to the plan added Public Art as a key element of Dublin's character



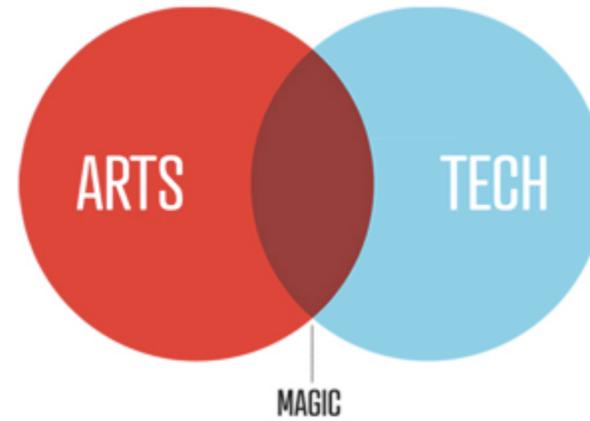
## Community benefits + impacts

Other priorities heard in interviews:

- \* *Building a Younger Workforce*: Ensuring that local corporations have a young and talented employment base; reducing the ‘brain drain’
- \* *Corporate Recruitment*: Continuing to build on Dublin’s strong base of corporations and businesses



# Community benefits + impacts



## Conclusions

There is a case to develop new arts facilities based on:

- \* *The market:* A strong market for the arts, with high levels of educational attainment, household income, and a large set of visitors
- \* *Existing facilities:* A lack of quality local performance space and a regional lack of available performance space
- \* *Programming opportunities:* More diverse and consistent performing arts programming to complement existing visual and public art and serve the local and regional population; Particular opportunity for music and regional professional theatre
- \* *Partnerships:* A strong set of potential partners with the ability to develop quality programming
- \* *User demand:* Strong demand for performance space on the part of arts groups, schools, City programs, and community organizations
- \* *Community benefits + impacts:* New facilities would support City goals and priorities and provide increased economic impacts



## Recommendations

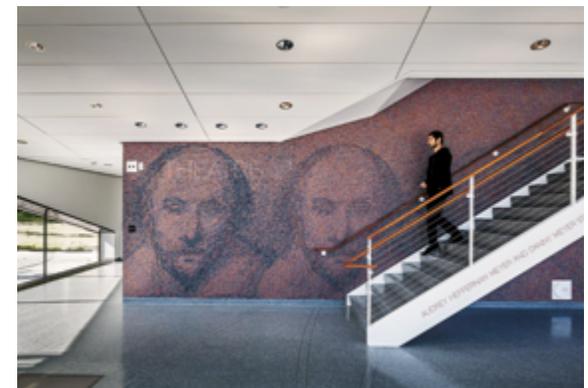
### 1. New Mid-Size Flexible Performance Space

- \* *What:* New 300-400 seat performance space including:
  - \* High level of flexibility, with the ability to convert to flat floor
  - \* Rehearsal and other support space
  - \* Large public spaces with F&B capabilities
  - \* Classrooms and other program space depending on partners
- \* *Why:*
  - \* Facilitates summer partnership with OU and opportunity for professional producing theatre program
  - \* Complements the Abbey Theater, which can remain a workhorse, training ground and family destination while a new facility would provide aspirational performance space for students and amateurs
  - \* Responds to demand on the part of local groups and complements proposed banquet/conference center



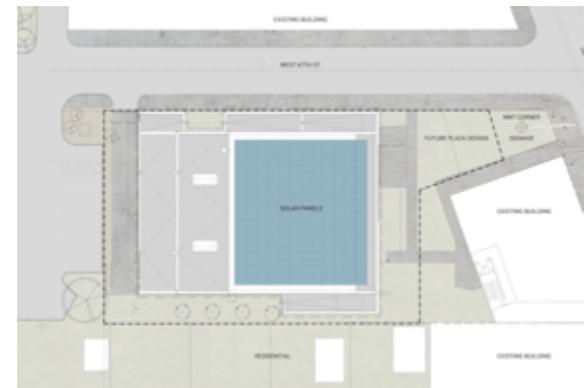
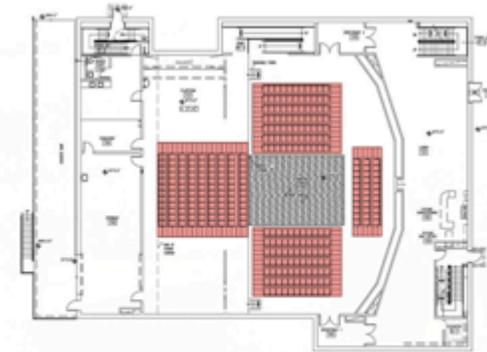
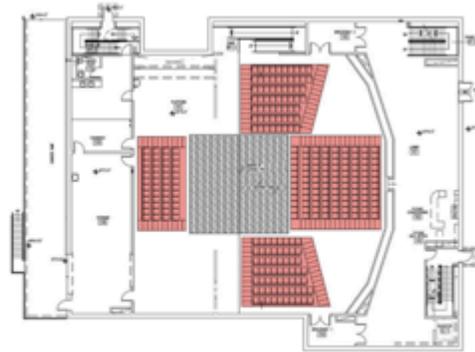
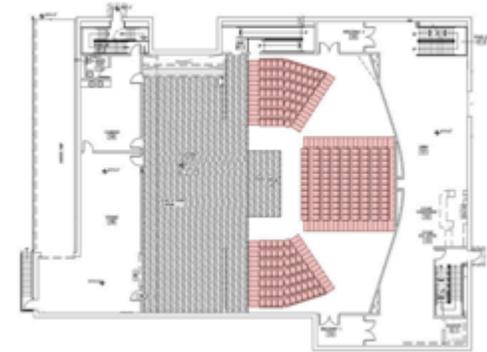
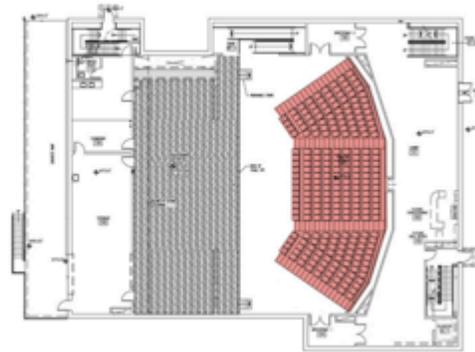
## Polonsky Shakespeare Center | Brooklyn, NY

- \* Opened in 2014, this 299-seat theater provides a home for a long itinerant organization
- \* Other space includes production, rehearsal and administrative space, and a four story day-lit lobby
- \* Extremely high level of height and flexibility to accommodate proscenium, thrust, runway, or in the round configurations
- \* 2 seating galleries wrap around the stage
- \* Cost: \$47M in 2014



## Near West Theatre | Cleveland, OH

- \* Opening in 2015 on the near west side of Cleveland
- \* A 300-seat flexible studio used by this producing theatre and accessible to other regional groups
- \* Multiple configurations including proscenium, thrust, round, and more
- \* Other spaces include administrative space, concessions and a multipurpose space
- \* Funds were raised through a collaborative capital campaign with two other organizations to benefit the Gordon Square Arts District
- \* A low budget project at a size of 25K sf and cost of \$7.3M



## Addison Conference + Theatre Centre | Addison, TX

- \* Built in 1992; developed out of an initiative led by WaterTower Theatre
- \* The 32,000 sf building was developed for the Theatre, including a 300-seat flexible main stage and 75-seat studio
- \* Adjacent conference facilities include a 6K sf conference center and board room
- \* WaterTower Theatre leases the theatre facilities for most of the year, presenting 11 productions



## Recommendations

### 2. Indoor/Outdoor Performance and Event Space

- \* *What:* New  $\pm$ 1,000-seat performance space including:
  - \* The ability to expand capacity seasonally
  - \* High quality acoustics
  - \* Sprung floor and backstage accommodations for dance as well as music
- \* *Why:*
  - \* Plans are already in the works for an outdoor amphitheater
  - \* Accommodates demand for larger capacity venue
  - \* Can support a range of community festivals & events



## Ozawa Hall, Tanglewood Music Center | Lenox, MA

- \* A 1,180-seat facility designed to mimic the rolling landscape of the Berkshire Mountains
- \* Unique features include a sliding back door that opens to accommodate an additional 2,000 people on the lawn
- \* Programming includes chamber music, concerts, recitals, Tanglewood Music Center orchestra concerts, dance, and popular, folk, jazz and other music and arts by well-known and world-class performers and ensembles
- \* Performances attracted 320,000 visitors in 2013
- \* Cost: \$17.1M (in 2014 dollars)



## The Wild Beast, CalArts | Valencia, CA

- \* 3,200 sf flexible music pavilion opened in 2010
- \* High quality acoustics
- \* When closed, the venue has a capacity of 140 and is used as a classroom and recital hall
- \* A 44-foot “rolling wall” allows the space to transform into an orchestra shell with a capacity of 1,000
- \* Used for classes, rehearsals, recitals, performances, and a summer concert series
- \* Cost: \$4.3M (in 2014 dollars)



## Recommendations

### 3. Create a Cultural District

- \* *What:* Partner with developers and arts organizations to animate other parts of the Bridge Street Project with arts and culture through:
  - \* Public art
  - \* Temporary art installations in empty or raw retail space
  - \* Incentivizing arts businesses to locate in the project
- \* *Why:*
  - \* Builds on strengths of Dublin Arts Council
  - \* Develops cultural identity
  - \* Promotes the Town Center as a destination



## Alberta Arts District, Portland, OR

- \* 20 block arts district in Alberta Neighborhood of northeast Portland
- \* An arts, restaurant, and shopping destination with hostels and a hotel
- \* Anchored by the 300-seat Alberta Rose Theatre, which presents live music, comedy and a twice-monthly recording of a public radio show
- \* Arts businesses, including art supply stores that also offer classes, are complemented by retail, local restaurants, and food trucks



## Canalway Cultural District, Lowell, MA

- \* Downtown animated with the arts through public-private partnerships
- \* Visual, literary, and performing artists and arts organizations were incentivized to locate in the district through financing and donated or discounted space
- \* Lowell now supports seven festivals, multiple performance spaces, arts organizations, galleries and the Whistler House Museum of Art



## Third Street Promenade, Santa Monica, CA

- \* Pedestrian neighborhood including theaters, cinemas, retail, and restaurants
- \* Outdoor programs include a twice weekly farmers market and street performer program
- \* Indoor events are held at the Santa Monica Library Auditorium, Santa Monica Playhouse, churches, bars, restaurants, and retail establishments
- \* Eight formal district-wide events include an arts festival and Sri Lanka Day Expo
- \* The district also hosts a winter skating rink and other holiday events



## Endorsement

### The Professional Producing Theatre Company

*We endorse the idea of developing a regional professional producing theatre company in partnership with OU*

\* Why?

- \* The market has capacity to support additional professional producing theatre
- \* The program and space would create a unique attraction for Dublin
- \* Particular potential to contribute to City goals around Town Center development, developing a younger workforce, and corporate recruitment

\* How?

- \* Begin with a summer program like the one that OU maintained in Monomoy
- \* Ensure that programming is unique from Short North and CATCO
- \* Expand to year-round after the model and audience base are established
- \* Drives the addition of a set of production-related spaces to the project



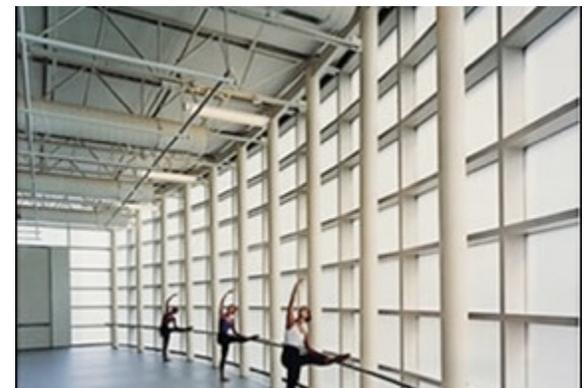
## Kean University + Premiere Stages | Union, NJ

- \* Premiere Stages develops and produces Equity theatre premieres, professional development, and educational initiatives for local and campus communities
- \* In-residence at Kean University, outside NYC, providing students with professional training, credits towards AEA affiliation, and paid positions as actors, assistants, and interns
- \* Premiere Stages produces the Premiere Play Festival in the summer, two main stage plays, an annual staged reading, and The Premiere Play Factory, a state-wide education program



## Webster University + The Repertory Theatre of St. Louis | St. Louis, MO

- \* A partnership developed in the early 1960s
- \* Webster students have the opportunity to assist on productions
- \* Orgs share the Loretto-Hilton Center for the Performing Arts, the first facility designed specifically to house a professional acting company and undergraduate theatre arts department
- \* The facility includes a flexible 763-seat thrust auditorium and 125-seat studio theater, a lobby/art gallery, and various practice/rehearsal rooms
- \* The Center is also home to the Opera Theatre of Saint Louis



## The REP, Point Park University | Pittsburgh, PA

- \* A professional theatre company established at Point Park University in 1999
- \* Functions as a laboratory for provocative theatre
- \* Produces a regular season of four productions
- \* Housed within Point Park University's Pittsburgh Playhouse located in the Oakland neighborhood
- \* The University is currently in the midst of a \$74M campaign to move the Rep and conservatory programs to new facilities in a downtown campus
- \* New facilities are envisioned to allow the public to watch the production process



## St. Petersburg College + American Stage | St. Petersburg, FL

- \* St. Petersburg College and American Stage entered into a partnership to build a new theater in 2006
- \* The 182-seat Raymond James Theatre opened in 2009 as a Downtown Cultural Arts Center within a new downtown College campus
- \* The College also uses a nearby church for performances and maintains a shared box office for cultural partners
- \* As part of the relationship between the theatre and the school, students have the opportunity to work on productions
- \* Cost: \$4.4M (in 2014 dollars)



## UT Knoxville + Clarence Brown Theatre | Knoxville, TN

- \* Relationship developed out of the success of a co-production between UT and the Knoxville Junior League in 1951
- \* Facility, developed in 1970, is operated by the Department of Theatre
- \* The head of the Department of Theatre is also the Artistic Director of the CBT, allowing the entities to be fully integrated
- \* Students gain professional experience in all aspects of theatre
- \* The relationship has allowed UT to develop one of the foremost MFA programs in the nation



## George Brown College + Soulpepper Theatre Company | Toronto, ON

- \* Founded in 1998, Soulpepper felt constrained to a summer season due to a lack of space
- \* In 2000, Soulpepper entered into a partnership with George Brown College to develop/operate facilities
- \* Opened in 2006, the 44K sf Young Centre has four flexible performance venues, four studios, classrooms, production and admin
- \* Facilities are an extension of GBC's downtown campus, in Toronto's historic distillery district
- \* Education and training programs remain independent
- \* Cost: \$17M (in 2014 CAD) – each organization pursued separate capital campaigns

\*



## Discussion

### Questions

- \* Have we fairly described Dublin and the facilities issues?
- \* What additional input and information is needed?
- \* Are the recommendations in line with your sense of needs?

### Things to consider

- \* Interviews suggest great support for the idea but lots of questions around sustainability
- \* The concept is relatively unique; most professional producing companies partnered with a college/university are on a campus



# **Section 3. Dublin Market Analysis**

## The Market for Performing Arts Facilities in Dublin

While it might seem like a simple exercise, defining a market (or audience) can actually be a complicated issue for arts facilities. In a fundamental sense, the market for arts facilities in Dublin is Dublin. But the City is part of a large and dense urban and suburban region, with additional visitors coming from far and wide. While those who live closer are likely to be more intensely involved and engaged in new facilities and programming, facilities will draw audiences, renters, and program participants from a larger area.

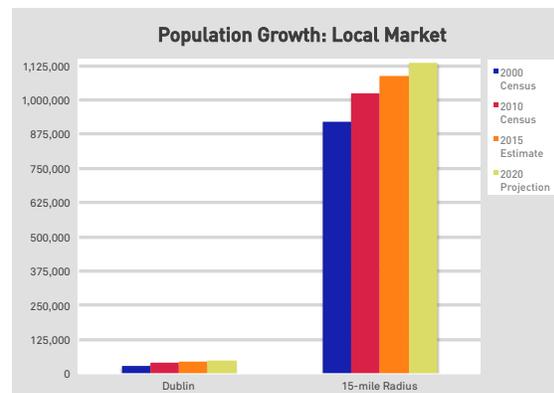
Plans for new facilities must succeed when they open (say, 3 to 5 years from now), but should also respond to growth and changes in the community over the next 30 years.

### Definition and Characteristics

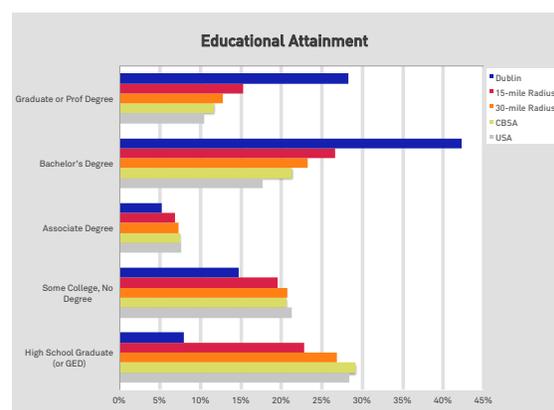
Our first objective in assessing demand for arts programming and facilities was to define the market and examine the potential to attract and serve additional audiences. Following this narrative is a set of demographic data highlights purchased from Nielsen, a marketing research resources company that expands and extrapolates Census data using a variety of inputs.

Key charts below compare figures for Dublin, the City's 15- and 30-mile radii, and the Columbus CBSA. National figures are also included for context where appropriate. These data, along with input from interviews, allow us to characterize the resident market as:

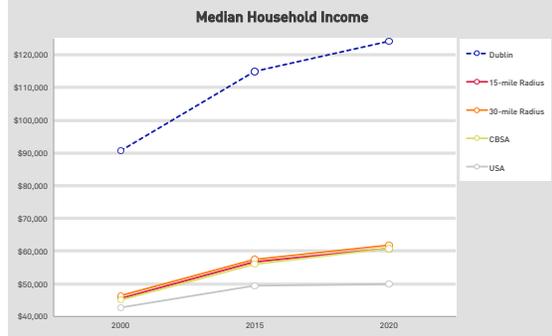
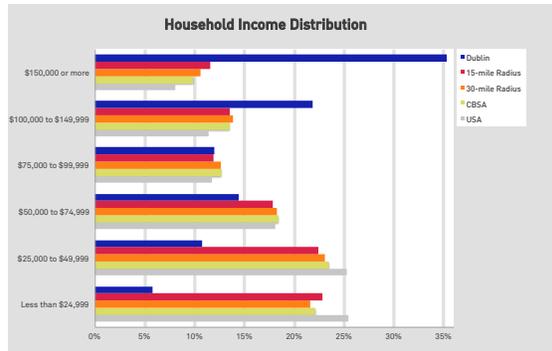
*Growing:* In all markets, the population is growing. In Dublin, the population is projected to reach 48,338 by 2020, a change of 15.20% from 2010's 41,751. Although the population is growing in the 15- and 30-mile radii and CBSA, growth is happening at a slightly slower rate. In the CBSA, for example, the rate of growth between 2010 and 2020 is projected at 8.91%, while in both radii it is projected at 10.5%.



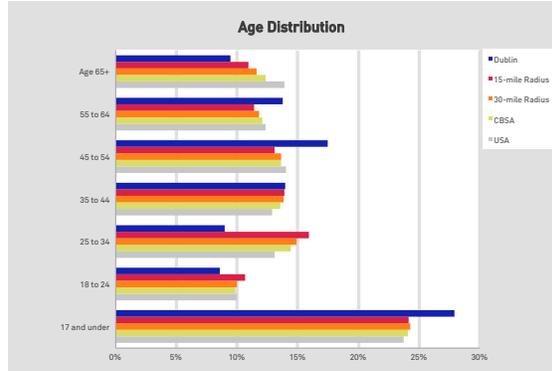
*Well Educated:* Dublin's population has very high levels of educational attainment. Seventy-one percent of the population has a Bachelor's degree or higher compared to only 42% of the population in the 15-mile radii, 33% in the CBSA, and 28% in the nation.



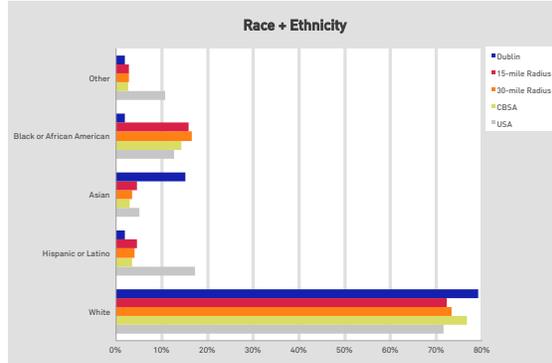
**Affluent:** The City of Dublin has a considerable amount of wealth. Nearly 35% of the population has a household income of \$150,000 or higher. Nationally, only 8% of the population falls into this income bracket. Throughout the region, household income levels are largely concentrated in the \$50,000-\$74,999 range or lower. There are also significant gaps in median household incomes. While in Dublin the median household income is projected to reach \$124,198 by 2020, it will hover around \$60,000 mark in the 15- and 30-mile radii and CBSA. Although significant, the gaps in income correlate with levels of educational attainment.



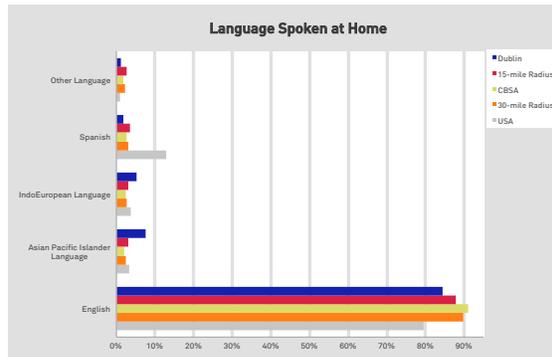
**Family Oriented:** Locally and regionally the population is young. In Dublin, 28% is age 17 or younger, while in the radii and CBSA 24% is 17 or younger. Dublin, however, also has a significant population between the ages of 45 and 54 (17%) and 55 and 64 (14%). Outside of Dublin, we see somewhat larger percentages of 25 to 34-year-olds and 18 to 24-year-olds in the 15-mile radius.



**Diverse:** Dublin and the surrounding area are quite diverse. While the White population is significant, there are growing Black or African American, Asian, and Hispanic or Latino populations. Interestingly, populations appear to be concentrated in specific markets. In Dublin, for example, roughly 15% of the population is Asian compared to 5% in the 15-mile radius. The 15-mile radius, however, has a slightly larger Hispanic or Latino market than Dublin, the 30-mile radius, or the CBSA. And, in the 30-mile radius we see a larger Black or African American population.



Linguistically, this diversity is further emphasized. Although 84% of Dublin's population speak English at home, 8% speak



an Asian Pacific Islander language, and 5% speak an Indo-European language.

## **Tourists + Tourism**

In 2006, the Dublin Convention and Visitors Bureau (DCVB) teamed up with North Star Destination Strategies to develop a brand for the City of Dublin. Interestingly, the study found that despite Dublin's lack of Irish heritage, visitors expected to have an Irish experience based on its connection to Dublin, Ireland. Based on this, the DCVB adopted the tagline, "Irish is an Attitude". Five years later, in 2011, the DCVB decided to evaluate the effectiveness of their branding efforts, partnering once again with North Star. After a survey effort designed to gather responses from Dublin consumers and potential consumers, a final report suggested the following:

- \* Survey respondents fell largely between the ages of 45-54 (28%) and were mostly female (71%).
- \* The average household income of respondents was between \$50,000 and \$74,999.
- \* Thirty-seven percent of those surveyed had visited Dublin four times or more, and 69% of visitors overall were repeat visitors.
- \* Most visitors stayed for two nights (51%) or one night (25%). Eighty-six percent of overnight visitors stayed in a hotel.
- \* Visitors tend to travel in pairs.
- \* Visitors travel to Dublin to see an attraction (26%), attend the Irish Festival (13%), or to attend or participate in a sporting event (11%). While in Dublin, only 3% of visitors went to the theater/attended a play or performance, 4% saw the Art in Public Places Exhibits, and 10% went to an historical museum or landmark.
- \* When asked what would make them more likely to visit Dublin, 15% of respondents answered cultural and arts events/activities.
- \* Most Dublin tourists are leisure visitors who travel to the area once and are influenced by the area's Irish "feel". Comparatively, sports visitors visit more frequently, are younger in age, use fewer resources, and try to save on lodging costs by staying outside of town.

Additional information from the DCVB states that:

- \* Dublin receives 2.6 million visitors annually.
- \* There are 15 hotels with more than 2,000 rooms. The occupancy rate for this past year was 66%.
- \* Visitors are regional, traveling from between 250 and 400 miles away.
- \* Key markets include Cleveland, Akron, Pittsburgh, Detroit, and Indianapolis.

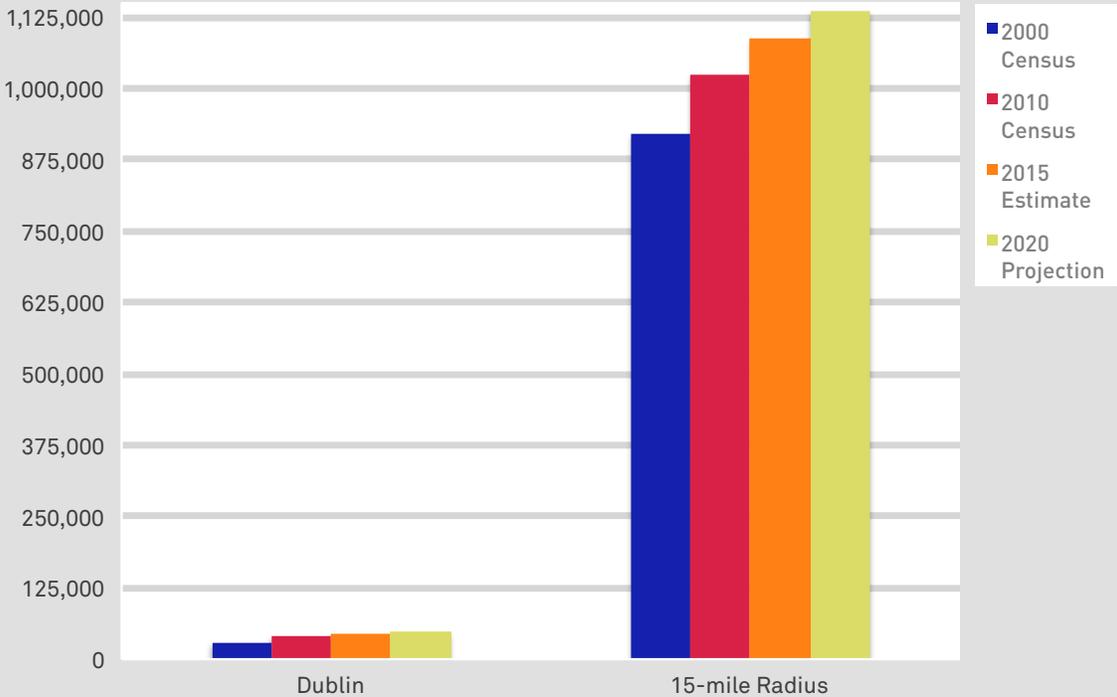
## **Market Summary**

All of this research and analysis suggests the following:

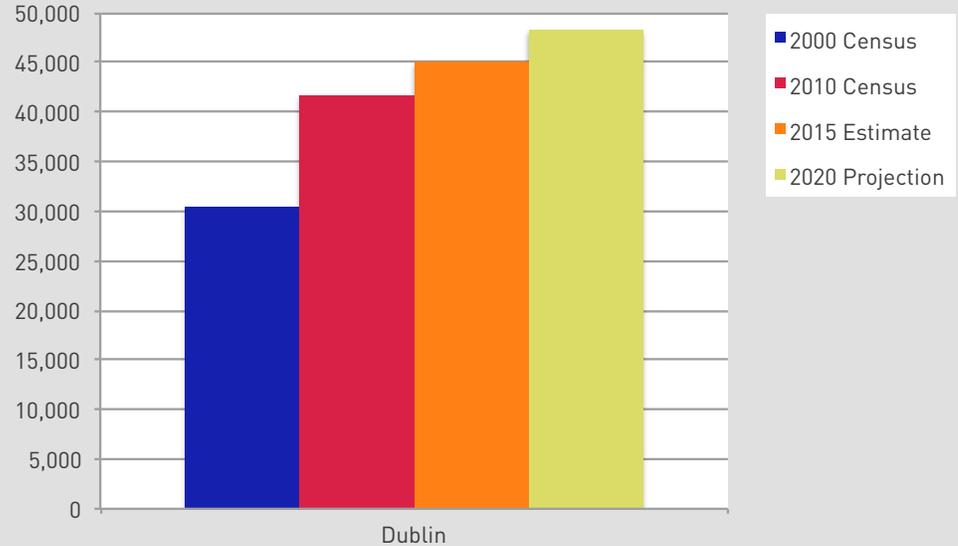
- \* Key market segments include families, empty nesters, minority populations, and regional tourists.

- \* Locally and regionally, the population is growing.
- \* The market has high levels of educational attainment and income, two of the strongest indicators of arts participation and support.
- \* There is ethnic and linguistic diversity, indicating a need for diverse and culturally specific programming.
- \* Dublin is an established tourist destination that is attractive to visitors seeking a cultural experience.

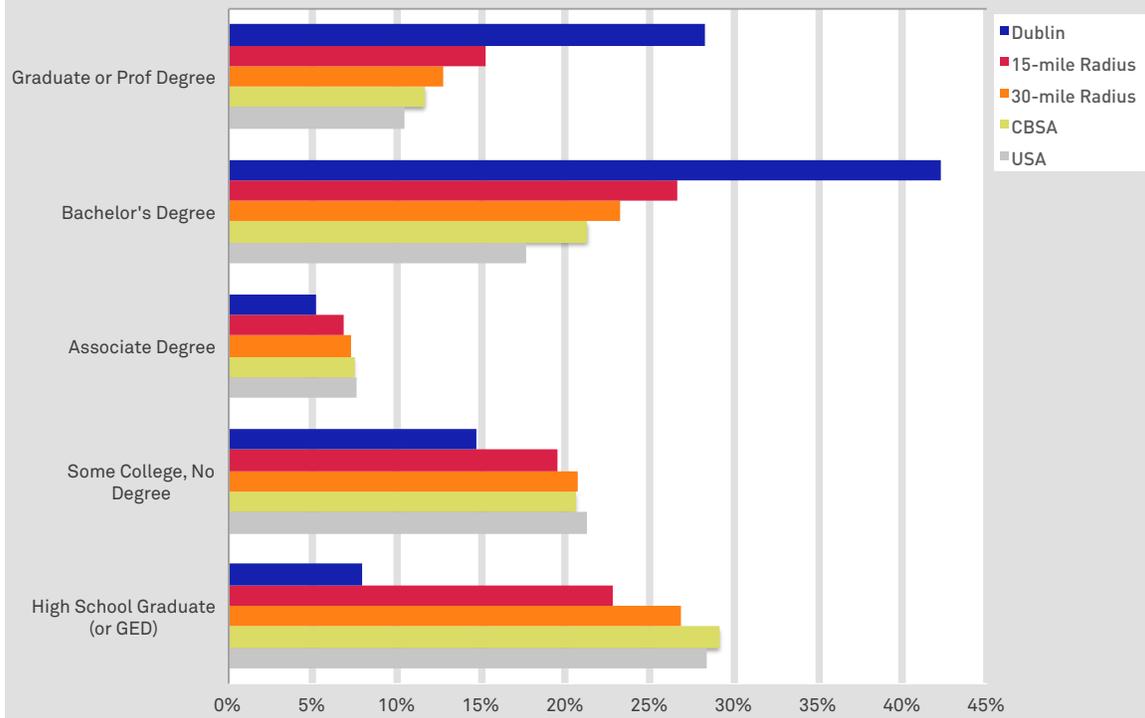
### Population Growth: Local Market



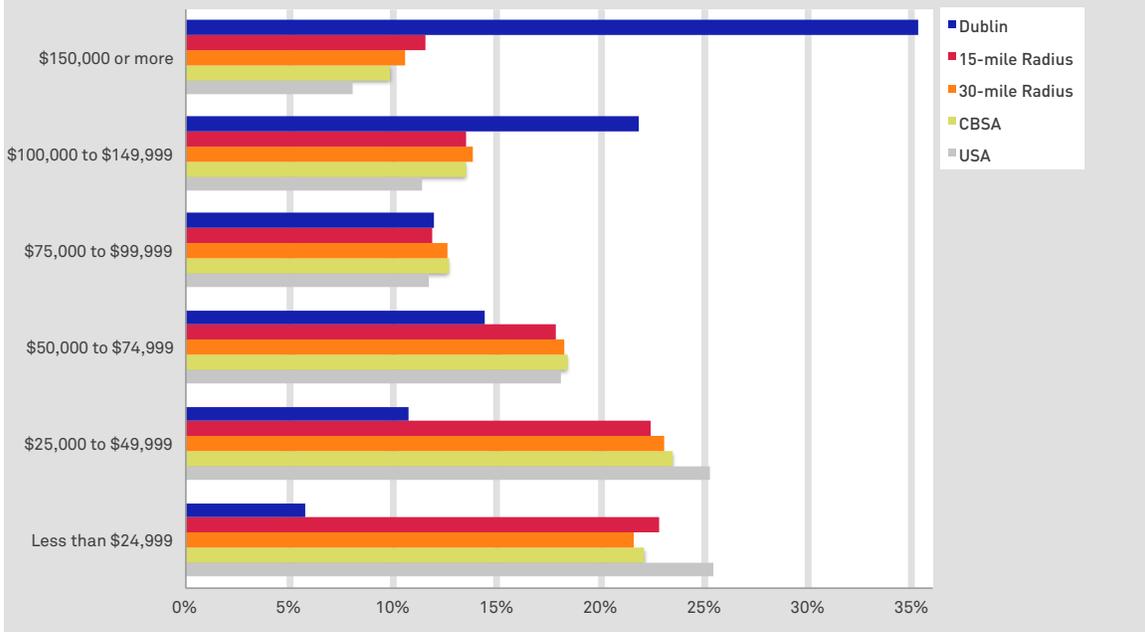
### Population Growth: Dublin



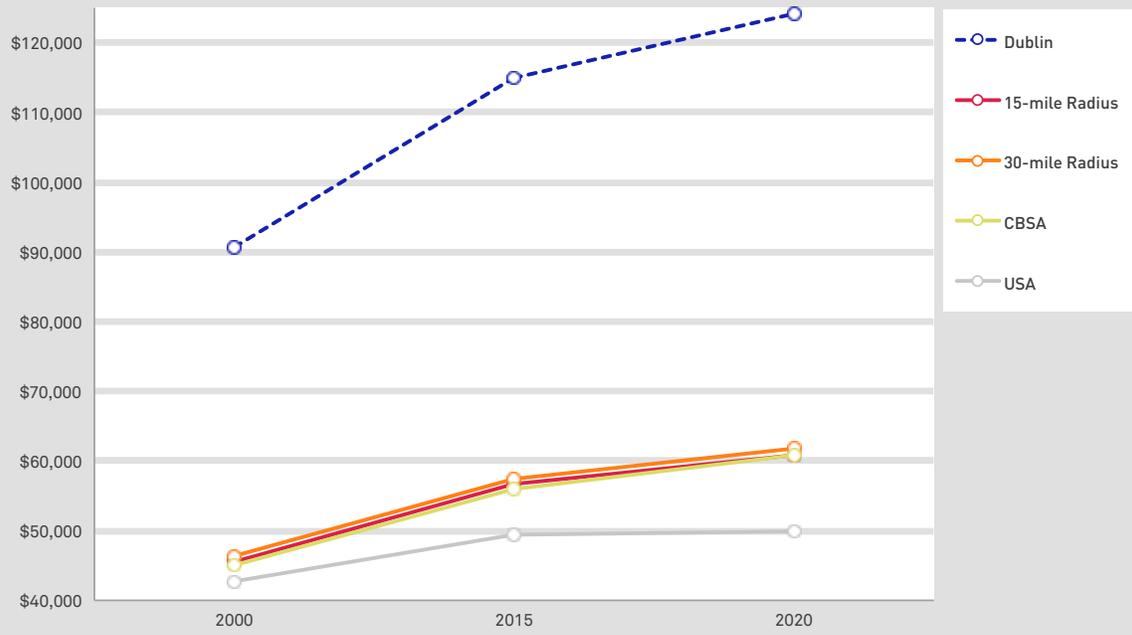
## Educational Attainment



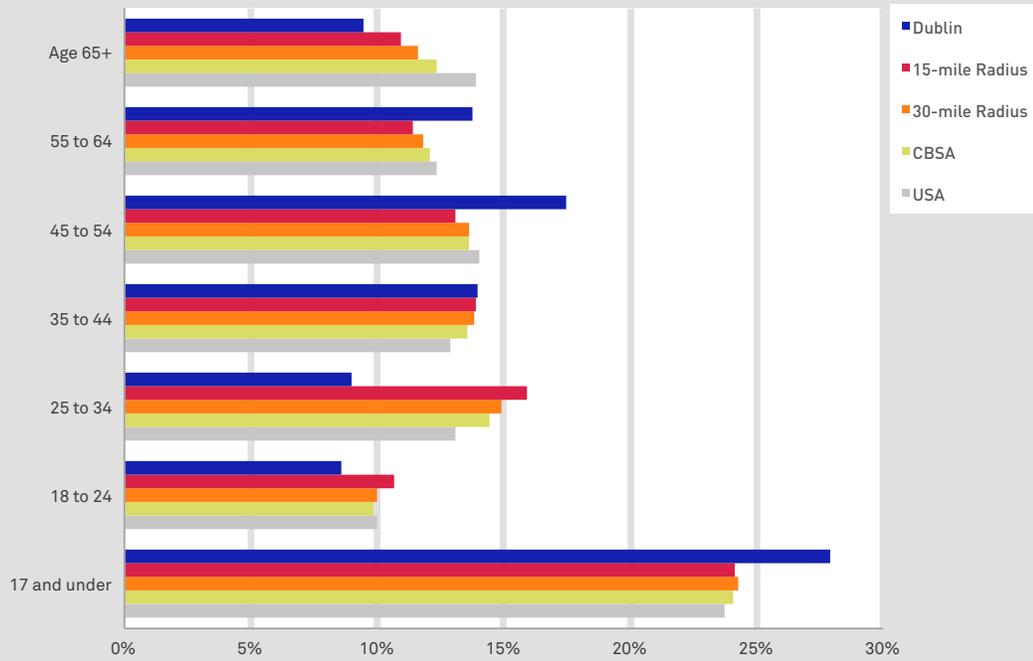
## Household Income Distribution



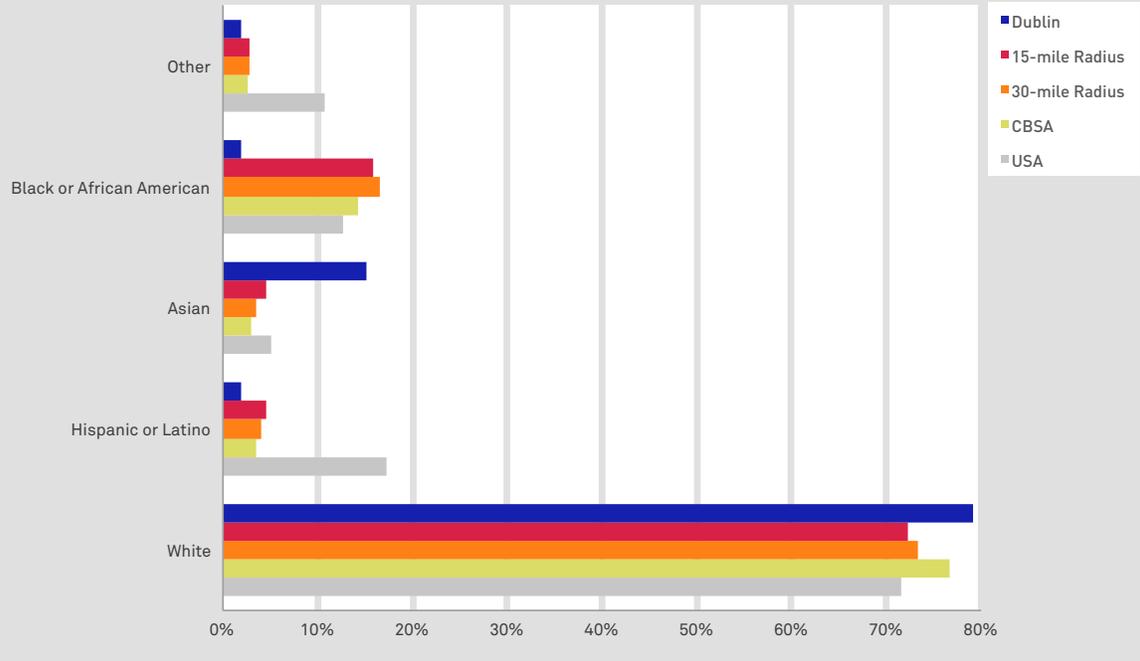
### Median Household Income



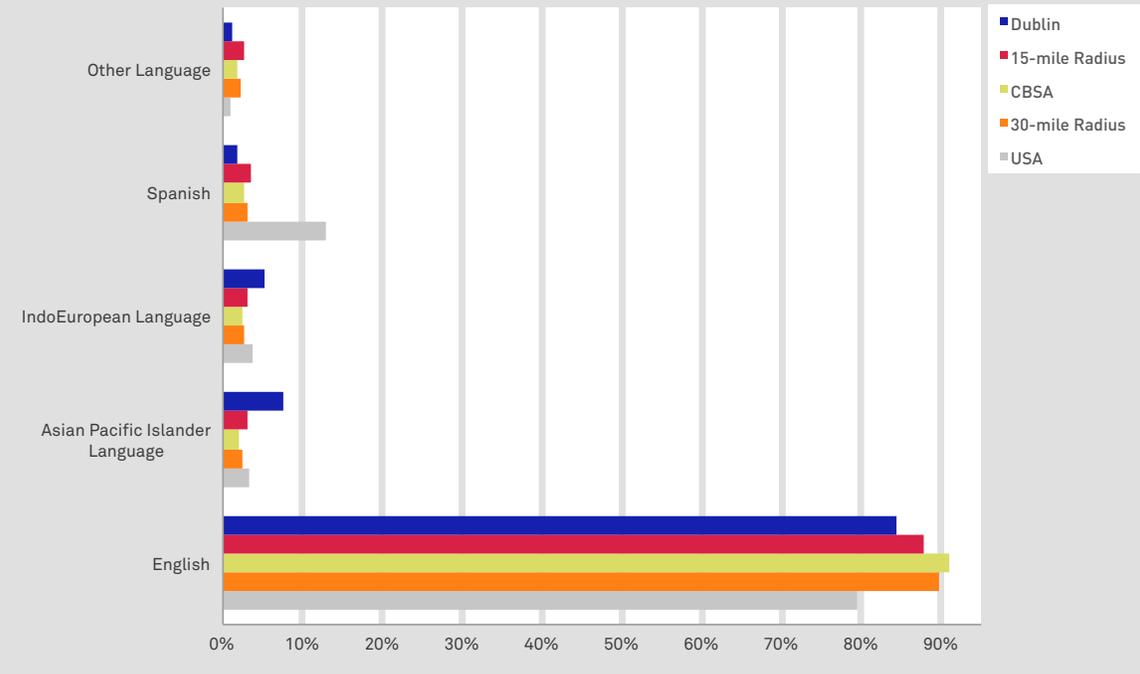
### Age Distribution

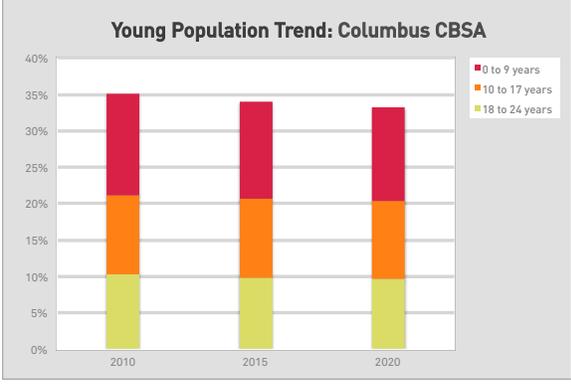
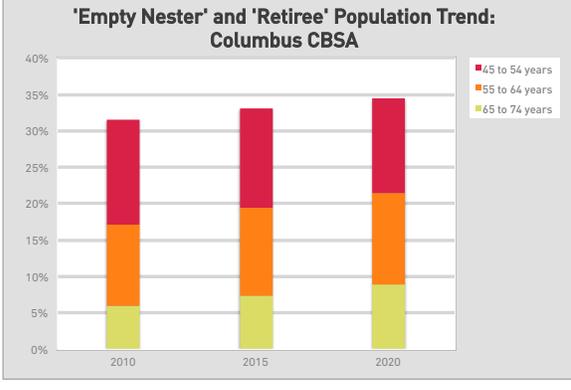
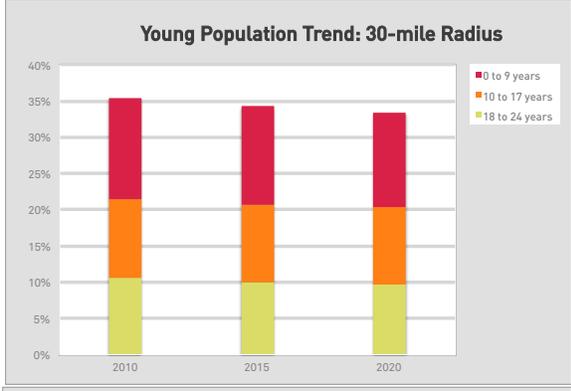
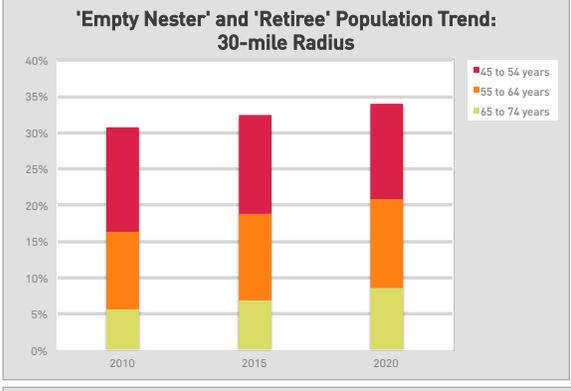
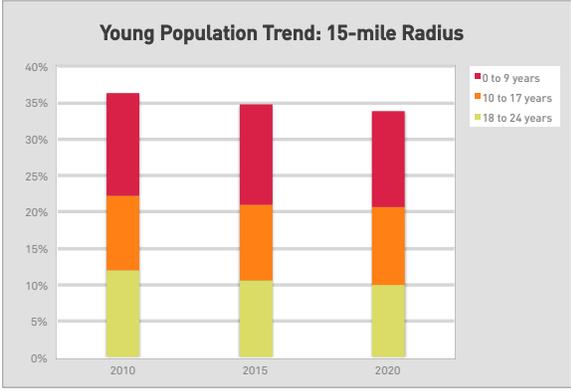
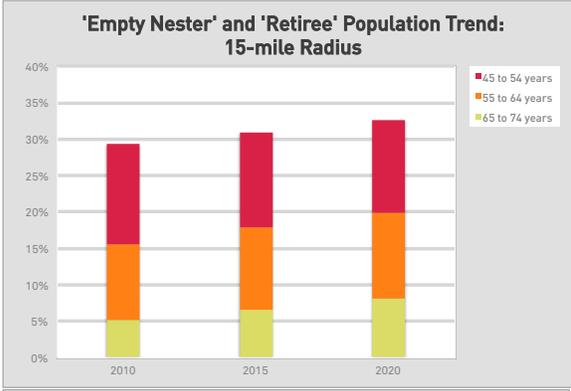
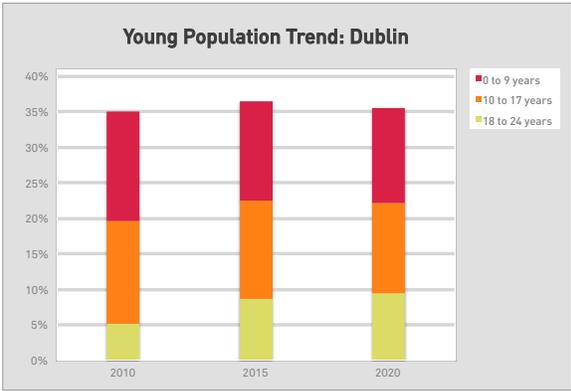
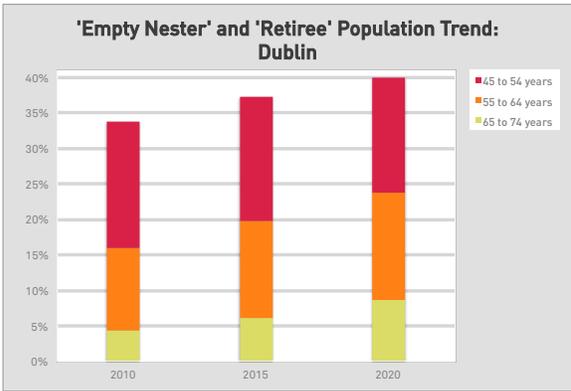


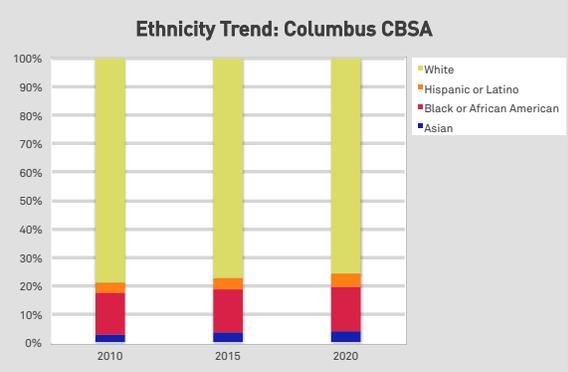
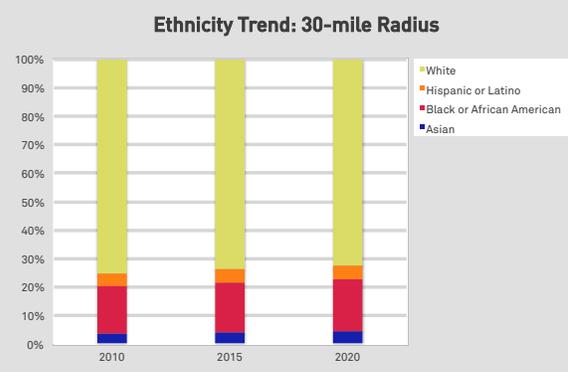
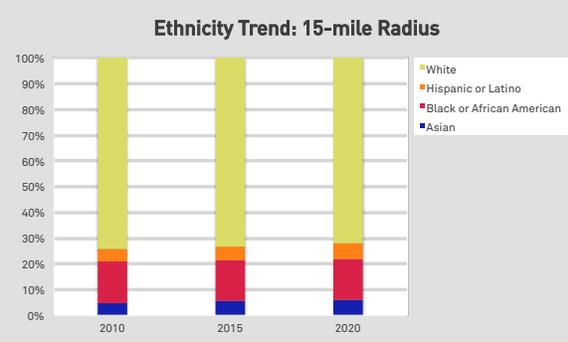
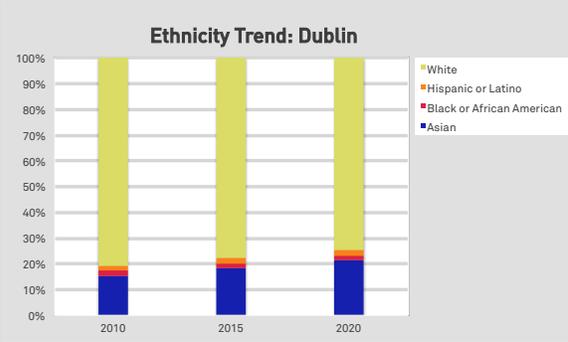
## Race + Ethnicity



## Language Spoken at Home







# **Section 4. Comparable Markets Analysis**

## Comparable Markets: Professional Producing Theatre Activity

|   | Columbus, OH | Indianapolis, IN | Cleveland, OH | Austin, TX |
|---|--------------|------------------|---------------|------------|
| Population Size: 25-mile Radius                               | 1,636,758    | 1,691,855        | 1,847,626     | 1,654,121  |
| Population Size: Metropolitan Area (CBSA)                     | 1,998,079    | 1,987,044        | 2,061,395     | 1,927,989  |
| Educational Attainment: Bach and Higher, Age 25+              | 36.74%       | 33.21%           | 30.15%        | 42.81%     |
| Median Household Income                                       | \$57,179     | \$54,607         | \$48,841      | \$63,068   |
| Race/Ethnicity: Hispanic/Latino Population                    | 4.6%         | 7.3%             | 5.0%          | 49.0%      |
| Race/Ethnicity: Black/African American Population             | 17.6%        | 16.6%            | 21.7%         | 7.5%       |
| Arts/Entertainment Spending per Capita                        | \$25.30      | \$24.70          | \$23.30       | \$26.70    |
| <b>Professional (Equity) Producing Theatre Activity</b>       |              |                  |               |            |
| # of theatre organizations                                    | 2            | 5                | 3             | 3          |
| # estimated annual productions                                | 17           | 35               | 20            | 21         |
| # estimated annual performances                               | 206          | 819              | 411           | 391        |
| # estimated annual professional theatre seats sold*           | 22,601       | 318,289          | 115,030       | 143,653    |
| # estimated annual professional theatre seats sold per capita | 0.01         | 0.19             | 0.06          | 0.09       |

\*Assumes 2/3 capacity

## Columbus, OH

| Producing Org     | Venue Name         | Venue Capacity | Productions | Performances | Attendance 2/3 Cap |
|-------------------|--------------------|----------------|-------------|--------------|--------------------|
| CATCO             | Riffe: Studio 1    | 227            | 4           | 55           | 8315               |
| CATCO             | Riffe: Studio 3    | 60             | 2           | 37           | 1479               |
| CATCO             | Riffe: Studio 2    | 187            | 4           | 55           | 6850               |
| CATCO             | Shedd              | 340            | 2           | 9            | 2038               |
|                   |                    |                | <b>12</b>   | <b>156</b>   | <b>18,681</b>      |
| Short North Stage | The Garden Theater | 150            | 3           | 31           | 3097               |
| Short North Stage | The Green Room     | 65             | 2           | 19           | 823                |
|                   |                    |                | <b>5</b>    | <b>50</b>    | <b>3,919</b>       |

## Indianapolis, IN

| Producing Org             | Venue Name                   | Venue Capacity | Productions | Performances | Attendance 2/3 Cap |
|---------------------------|------------------------------|----------------|-------------|--------------|--------------------|
| Indiana Rep               | One America Stage            | 610            | 5           | 124          | 50376              |
| Indiana Rep               | IRT Upper Stage              | 314            | 3           | 64           | 13384              |
| Indiana Rep               | IRT Cabaret                  | 100            | 1           | 19           | 1265               |
|                           |                              |                | <b>9</b>    | <b>207</b>   | <b>65,026</b>      |
| Beef + Boards             |                              | 450            | <b>11</b>   | <b>391</b>   | <b>117,183</b>     |
| Actors Theatre of Indiana | Carmel CPA: Studio Theater   | 200            | <b>5</b>    | <b>62</b>    | <b>8,258</b>       |
| Heartland Actors Rep      | White River State Park       | 5,000          | <b>1</b>    | <b>2</b>     | <b>117,183</b>     |
| Phoenix Theatre           | Livia + Steve Russell Stage  | 135            | 4           | 70           | 6294               |
| Phoenix Theatre           | Frank + Katrina Basile Stage | 75             | 5           | 87           | 4346               |
|                           |                              |                | <b>9</b>    | <b>157</b>   | <b>10,639</b>      |

## Cleveland, OH

| Producing Org        | Venue Name      | Venue Capacity | Productions | Performances | Attendance 2/3 Cap |
|----------------------|-----------------|----------------|-------------|--------------|--------------------|
| Cleveland Play House | Allen Theatre   | 500            | 5           | 131          | 43623              |
| Cleveland Play House | Outcalt Theatre | 334            | 2           | 52           | 11567              |
| Cleveland Play House | The Helen       | 114            | 2           | 20           | 1518               |
|                      |                 |                | <b>9</b>    | <b>203</b>   | <b>56,709</b>      |
| Great Lakes Theater  | Hanna Theatre   | 550            | 4           | 78           | 28571              |
| Great Lakes Theater  | Ohio Theatre    | 1,000          | 1           | 24           | 15984              |
|                      |                 |                | <b>5</b>    | <b>102</b>   | <b>44,555</b>      |
| Dobama Theatre       |                 | 195            | <b>6</b>    | <b>106</b>   | <b>13,766</b>      |

## Austin, TX

| Producing Org   | Venue Name             | Venue Capacity | Productions | Performances | Attendance 2/3 Cap |
|---|------------------------|----------------|-------------|--------------|--------------------|
| ZACH Theatre  | Topfer Theatre         | 420            | 7           | 191          | 53427              |
| ZACH Theatre  | Whisenhunt Stage       | 130            | 2           | 42           | 3636               |
| ZACH Theatre  | Kleberg Stage          | 230            | 3           | 62           | 9497               |
|   |                        |                | <b>12</b>   | <b>295</b>   | <b>66,560</b>      |
| Mary Moody Northern Theatre @ St. Edward's University |                        | 180            | <b>4</b>    | <b>32</b>    | <b>3,836</b>       |
| Austin Shakespeare                                    | Curtain Theatre*       | 220            | 1           | 9            | 1319               |
| Austin Shakespeare                                    | Rollins Studio Theatre | 229            | 3           | 35           | 5338               |
| Austin Shakespeare                                    | Hillside Theater*      | 5,000          | 1           | 20           | 66600              |
|   |                        |                | <b>5</b>    | <b>64</b>    | <b>73,257</b>      |

## **Section 5. Facility Inventory**





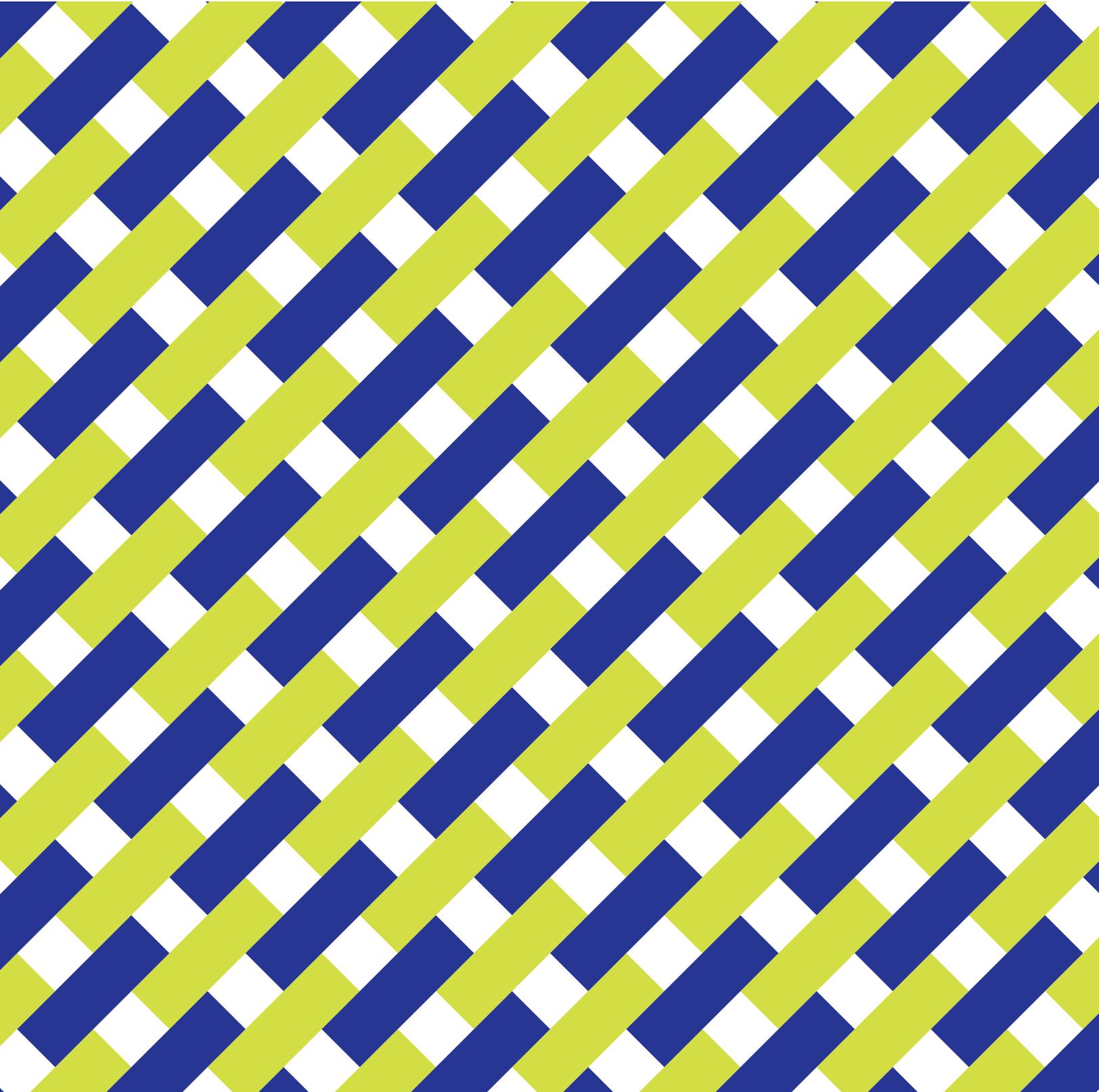




webb

management  
services  
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[webbmgmt.org](http://webbmgmt.org)



### **Mission**

Our mission is to create and propel forward a resident professional theater company and training conservatory in Dublin, Ohio in partnership with the city of Dublin and the Ohio University College of Fine Arts. We seek 1) to connect and impact the Dublin and Athens communities through educational outreach and culturally diverse innovative programming that encompasses multiple disciplines, 2) to develop new work and offer new points of view on classic stories that have contemporary relevance, and 3) to offer opportunities for intercultural exchange.

### **Core Values**

We believe that:

- Artistic investigation, cultural diversity and inclusion are essential aspects of a robust community, and lay the foundation for an engaged and responsible citizenry.
- Meaningful partnerships between the arts and corporate, civic and academic stakeholders build richer communities.
- Theater must challenge ideas of local, national, and global citizenship.
- The power of theater lies in the potential for an opened mind or a reconsidered point of view.
- We are responsible to future generations of theater artists and audiences to maintain and elevate the highest standards of the profession.
- We believe in creating a model of operations for this venture that can best assure financial sustainability.

### **Vision**

We envision an inspirational civic gathering place where regional, national and international cultural activities illuminate, educate, and inspire citizens of Dublin and the greater Columbus area. This major cultural destination will be a catalyst for thriving restaurants, shops and residential development. This center will enrich the quality of life and provide affordable cultural activities accessible to all. Educational outreach programs will serve as learning laboratories that nurture the citizens and artists of tomorrow. Partnerships between professional theatres and universities enhance learning and create a meaningful bridge to the community: Ohio University, the College of Fine Arts and the Dublin City Schools will be primary players in a vital performing arts center providing teaching, performance and art making opportunities for faculty, graduate students and professional visiting artists. The core tenant of the center will be a resident professional theater which will grow out of the seed of the summer theater planned to launch in summer 2016 (in a temporary location), producing work made in the heart of Ohio. From that seed, we see this center blossoming into a producing and presenting organization encompassing all the arts, able to explore cultural connections with sister city Dublin, Ireland, and other international centers.

### Next Steps

In collaboration with the steering committee formed in the fall of 2014, the Division of Theater will:

- Establish working relationships with Dublin City Schools drama teachers
- Appoint an Educational Outreach Director to coordinate the educational mission
- Establish an educational committee to determine workshops for Dublin City School's students beginning in 2016
- Determine a single site for productions in summer 2016
- Use existing budgeting models, establish a budget for summer 2016
- Determine a name for the producing entity
- Continue discussion relative to the Arts Center and Bridge Park Development, utilizing the expertise of:
  - Robert Shook of Schuler Shook Theatre Planners
  - Duncan Webb of Webb Management Services
  - Greg Kandel of Management Consultants for the Arts

The Division of Theater will:

- Name Artistic Director for 2016 summer productions
- Establish a production season for summer 2016

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### **Theater Division Mission Statement**

Ohio University Theater Division is committed to the development of the highest quality theater artists and scholars, through rigorous professional training, humanistic inquiry, and creative activity. We challenge our students to engage critically and creatively with research, the arts, and the world to prepare them for leadership roles as artists and citizens.

### **Guiding Principles**

- We emphasize collaboration and critical thinking, which prepare students to work in interdisciplinary contexts and as contributing members of their future communities.
- We value a deep level of mentorship and active engagement with our students, as teachers and advisors.
- We strive for professional standards and practices in our classrooms, shops and theaters and professional student placement after graduation.
- Faculty, staff, and students contribute to the university's Research and Creativity profile by producing play scripts, theatrical designs, original performances, and scholarly research.
- We encourage and foster the development of original work by students, staff, and faculty.
- Theater at Ohio University is a vital part of the intellectual life of the university, the local community, and the region.

- The Theater Division is comprised of and encourages multiple perspectives, including but not limited to those shaped by race, ethnicity, gender, sexuality, age, class, ability, and national origin.

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### **College of Fine Arts Mission Statement**

The College of Fine Arts celebrates innovative creativity and scholarship, and engages students through a challenging and supportive learning environment. We infuse the arts into the university, the region, and the world, by embracing a broad spectrum of traditions and emerging practices.

### **Vision**

The College of Fine Arts aspires to be an internationally significant center of creative practice and scholarship, by launching arts initiatives that reflect a diversity of ideas and cultures.

### **Value Statements**

1. The arts have transformative power on society and on individual lives.
2. A diversity of arts should be both accessible and challenging.
3. Traditional and emerging practices should reflect the most rigorous measures of artistic and scholarship production.
4. Creative processes and the scholarly study of the arts contribute to humanity and produce skills and insights that are transferable to many other areas of knowledge.
5. Students who study diverse cultures gain a deeper understanding of our changing world.

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### **Ohio University Mission**

Ohio University holds as its central purpose the intellectual and personal development of its students. Distinguished by its rich history, diverse campus, international community, and beautiful Appalachian setting, Ohio University is known as well for its outstanding faculty of accomplished teachers whose research and creative activity advance knowledge across many disciplines.

### **Ohio University Vision**

Ohio University will be the nation's best transformative learning community where students realize their promise, faculty advance knowledge, staff achieve excellence, and alumni become global leaders.

### **Ohio University Core Values**

- Excellence is our hallmark: Outstanding people, ideas, and programs drive our educational mission.
- Integrity, civility, and diversity define our community: These values guide our leadership in a global society.
- Stewardship enhances our legacy: As Ohio's first institution of public higher education, we are mindful of our accountability to the public trust.

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**City of Dublin Mission Statement**

The City of Dublin strives to preserve and enhance the unique high quality of life offered to those who live or work in our community by providing the vision, leadership and performance standards, which allow for managed growth and development. We endeavor to deliver our services cost-effectively, with an emphasis on quality and innovation. The City of Dublin seeks recognition in the field of local government as being responsive, cooperative, and culturally and environmentally sensitive, while embracing the highest standards of integrity and accountability to those we serve.