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Research & Planning for the Arts

Steamboat Springs PAC

Assessment & Opportunities

March 18, 2020

— building creativity —

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Agenda

- Our Firm
- Background
- Market Analysis
- Competitive Analysis
- Uses & Users
- Community Benefits & Impacts
- Conclusions & Recommendations
- Next Steps

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Our Firm

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Webb Management Services

Background

- Management consulting practice for cultural planning, organizations and facilities
- Small and focused company based in NYC
- Clients are governments, arts groups, developers and educators
- In our 22nd year, starting our 448th project

Services

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

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Background

Context & Study Brief

Thirty years ago, a feasibility study was conducted to assess the need for additional performing arts facilities in Steamboat Springs. At that time, it was determined that a Performing Arts Center would be too financially taxing on the City of Steamboat Springs and it was recommended that the City not move forward with the project.

An additional study was conducted in 2000 by Ordinary Magic, Andrews & Anderson and Semple Brown, suggesting that a sustainable arts center was not viable at the time and an emphasis on cultural capacity building across the City was necessary.

Since then, the City has grown and there is renewed interest from nonprofit arts organizations and residents to investigate the feasibility of performing arts facilities.

Thus, in 2019, Steamboat Creates undertook a strategic planning process to assess the needs and wants of the creative community and community at large.

The most pressing need and want was for a performing arts center. As such, Steamboat Creates issued an RFP for the completion of a Needs Assessment and Feasibility Study.

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Assessment Components

- What are the characteristics, growth and trends relating to permanent & seasonal residents and visitors as audiences?

- What is the level and nature of demand on the part of local and regional users and partners?

- What existing facilities serve the market and what gaps might be filled with additional facilities?

- What is the best project to advance community goals?

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Forces & Trends

— building creativity —

Forces & Trends

overview

When considering the four key questions of a Market Assessment, it is important to understand some of the national trends, both good and bad, that impact performing arts facilities and how these facilities are responding.

The following charts and infographics are based on national data sources from the National Endowment for the Arts, Giving USA and Americans for the Arts.

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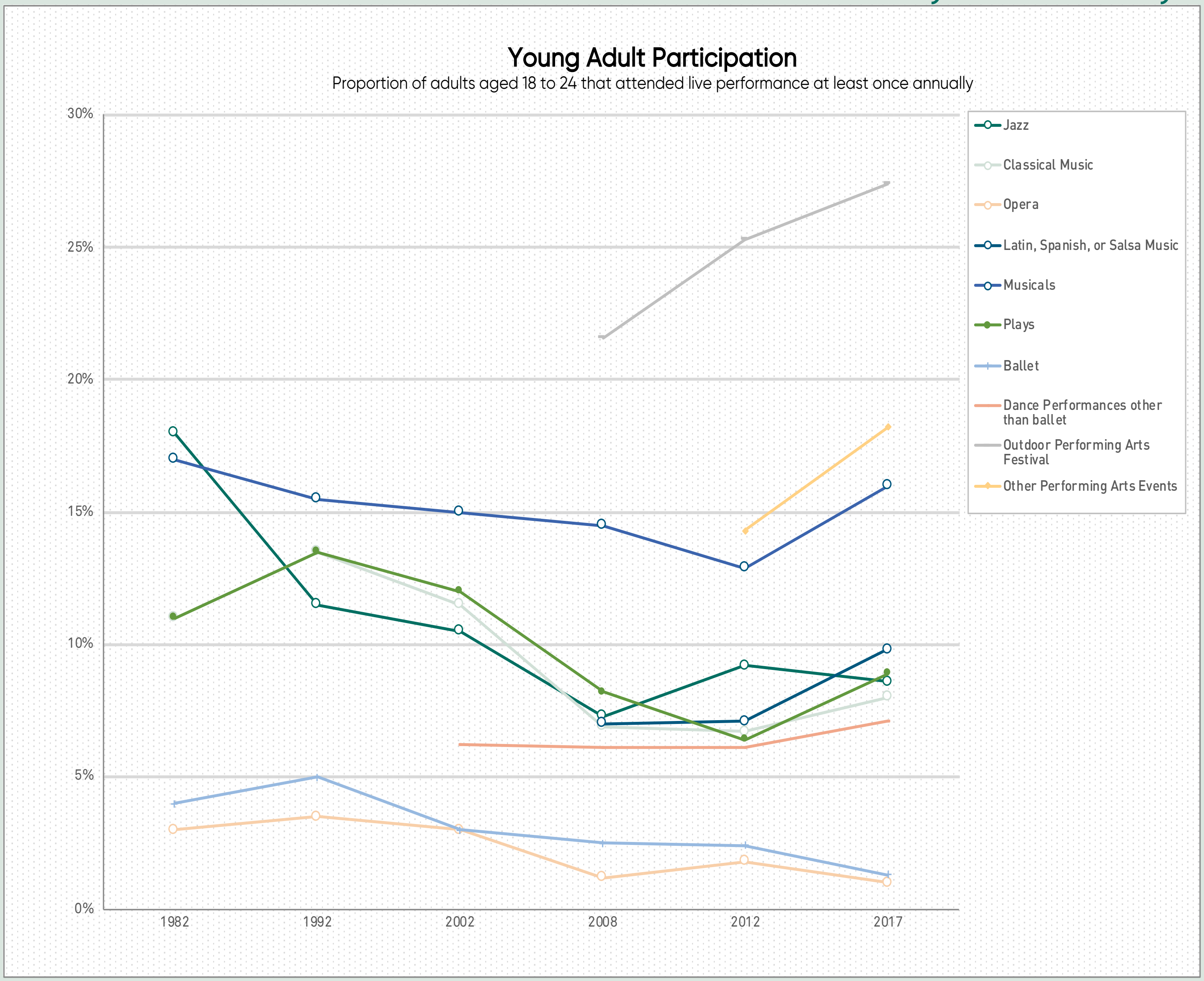
Bad news

steady decline in young adult attendance



[National Endowment for the Arts, Survey of Public Participation in the Arts, 2017]

Of concern is the decline in participation in traditional performing arts, most importantly on the part of younger adults, ages 18 to 24.

However, adults under 40, report greater attendance at arts and cultural events that spark hands-on experiences and "instragram-able moments."

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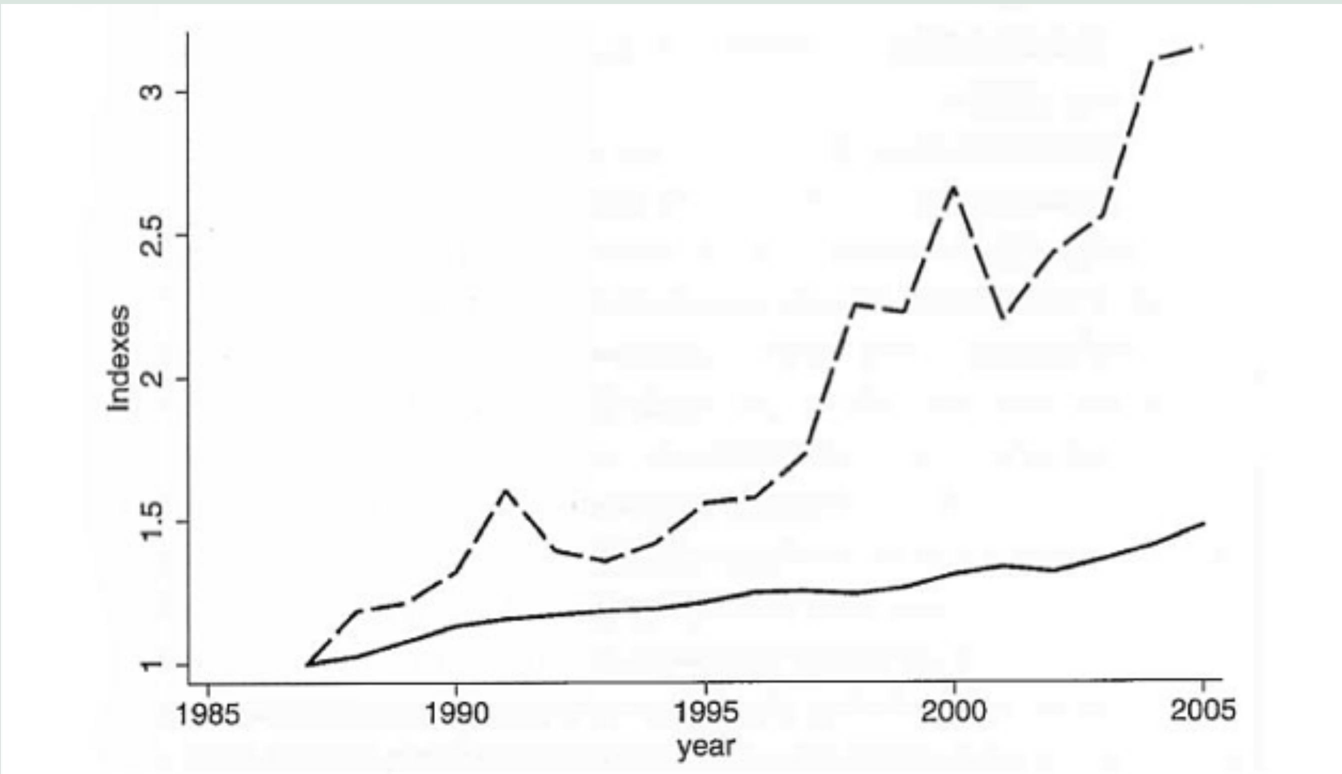
Bad news

Baumol's cost disease



Expenses per concert   Producer Price Index

Over an 18-year period, the average cost per concert for the 50 largest Symphonies increased by 300%, as opposed to a 40% increase in operating costs in the commercial sector.

This is because there are no productivity gains over time in artistic creation.

Thus, all arts organizations become more reliant on fundraising every year just to balance their budget.

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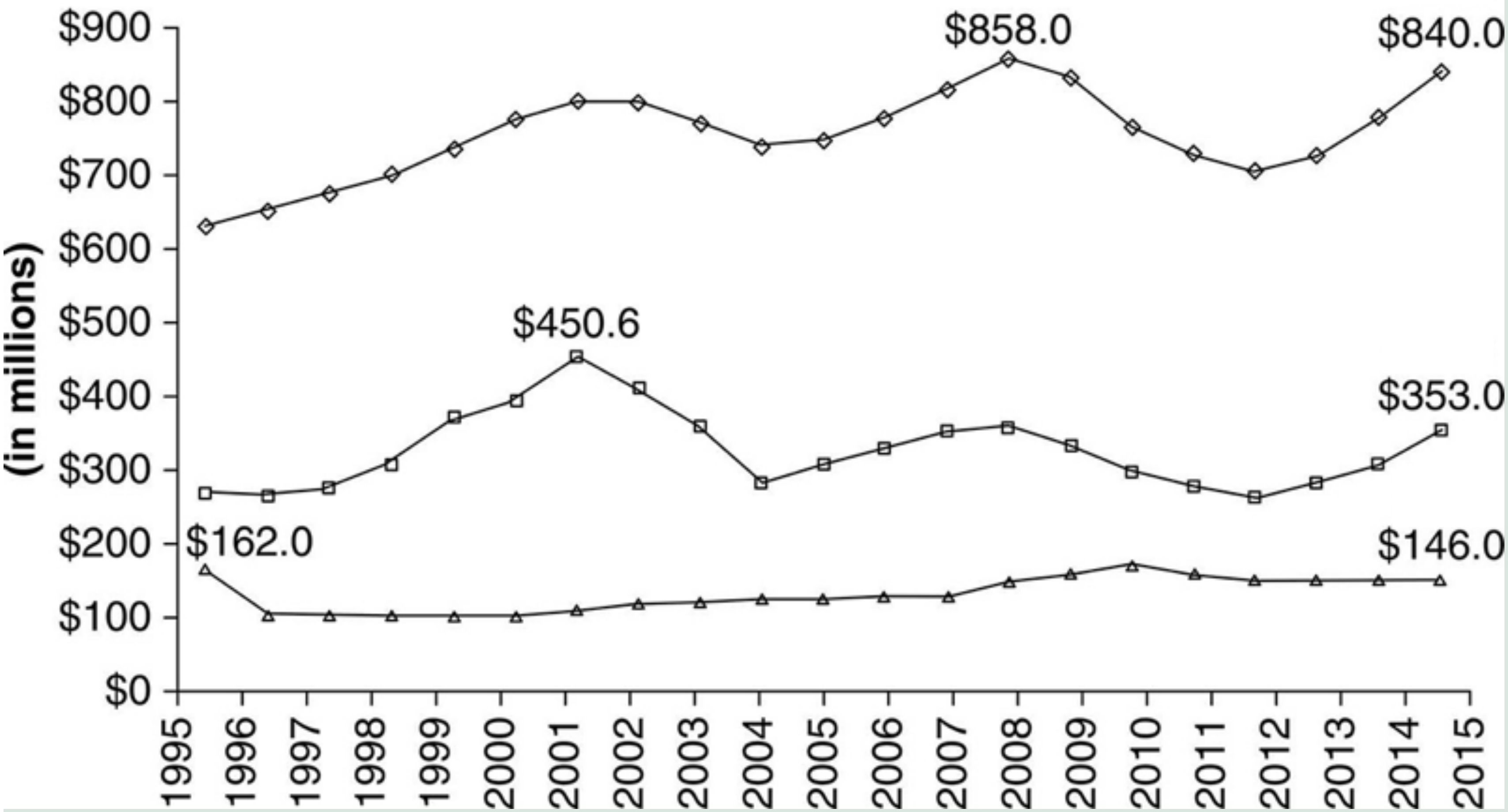
Bad news

government support of the arts

- Pressure on municipal budgets
- Pension obligations
- Tea-party impacts



Estimated total direct expenditures on the arts by local governments

Total legislative appropriations to state arts agencies

Total federal appropriations to the National Endowment for the Arts

[Urban Cultural Policy & the Creative Economy, Julie Hawkins, CQ Press]

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Bad news

competitive fundraising landscape

Contributions by source *(by percentage of the total)*

% of total giving in 2018			% change from 2017	inflation adjusted
29% to Religion	$124.52 billion	↓	-1.5%	-3.9%
14% to Education	$58.72 billion	↓	-1.3%	-3.7%
12% to Human Services	$51.54 billion	=	-0.3%	-2.7%
12% to Foundations	$50.29 billion	↓	-6.9%	-9.1%
10% to Health	$40.78 billion	=	0.1%	-2.3%
7% to Public-Society Benefit	$31.21 billion	↓	-3.7%	-6.0%
5% to International Affairs	$22.88 billion	↑	9.6%	7.0%
5% to Arts, Culture, and Humanities	$19.49 billion	=	0.3%	-2.1%
3% to Environment/Animals	$12.70 billion	↑	3.6%	1.2%
2% to Individuals	$9.06 billion		-	-

= indicates growth in current dollars with a decline after adjusted for inflation

Arts organizations now must fight for dollars from other charitable groups.

The emergence of environment/animal causes and international affairs has put additional pressure on arts organizations.

A strong value proposition is necessary to compel donors to choose your cause now.

[Giving USA, 2019]

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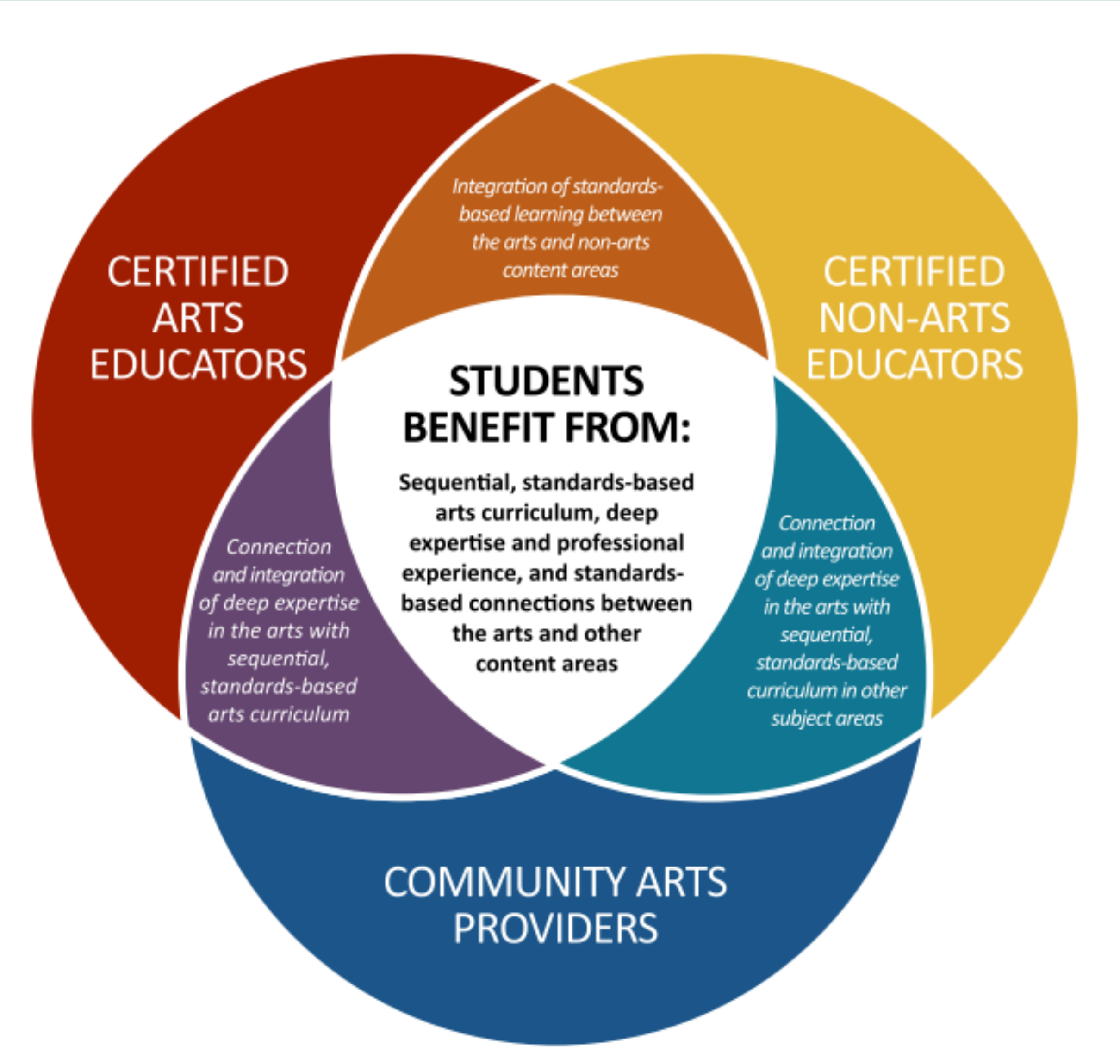
Good news

emergence of sector-sponsored arts ed



[Americans for the Arts, 2013]

Arts facilities are now providing more arts education programming to communities and schools.

This is an excellent way to build community ties and generate goodwill within the community.

Additionally, arts ed programs can activate facilities on mornings and afternoons when many facilities are usually dark.

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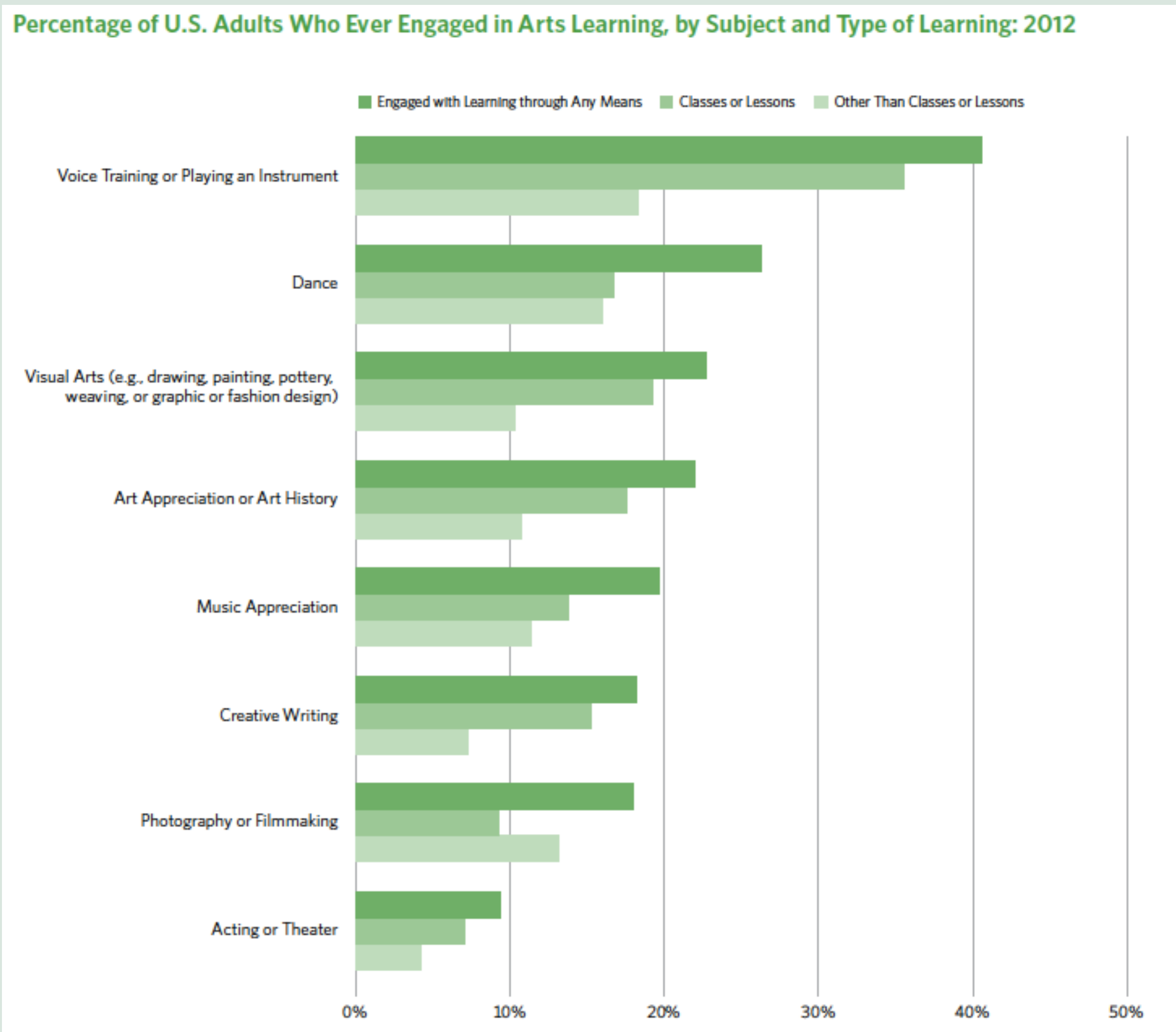
Good news

wide ranging interest in active arts participation



Modern day arts consumers want to engage with the arts now more than ever.

Individuals are seeking out opportunities where they can play, dance and act in formal and informal ways.

Participatory activities are being incorporated in events that were previously passive experiences for the user.

[National Endowment for the Arts, 2012]

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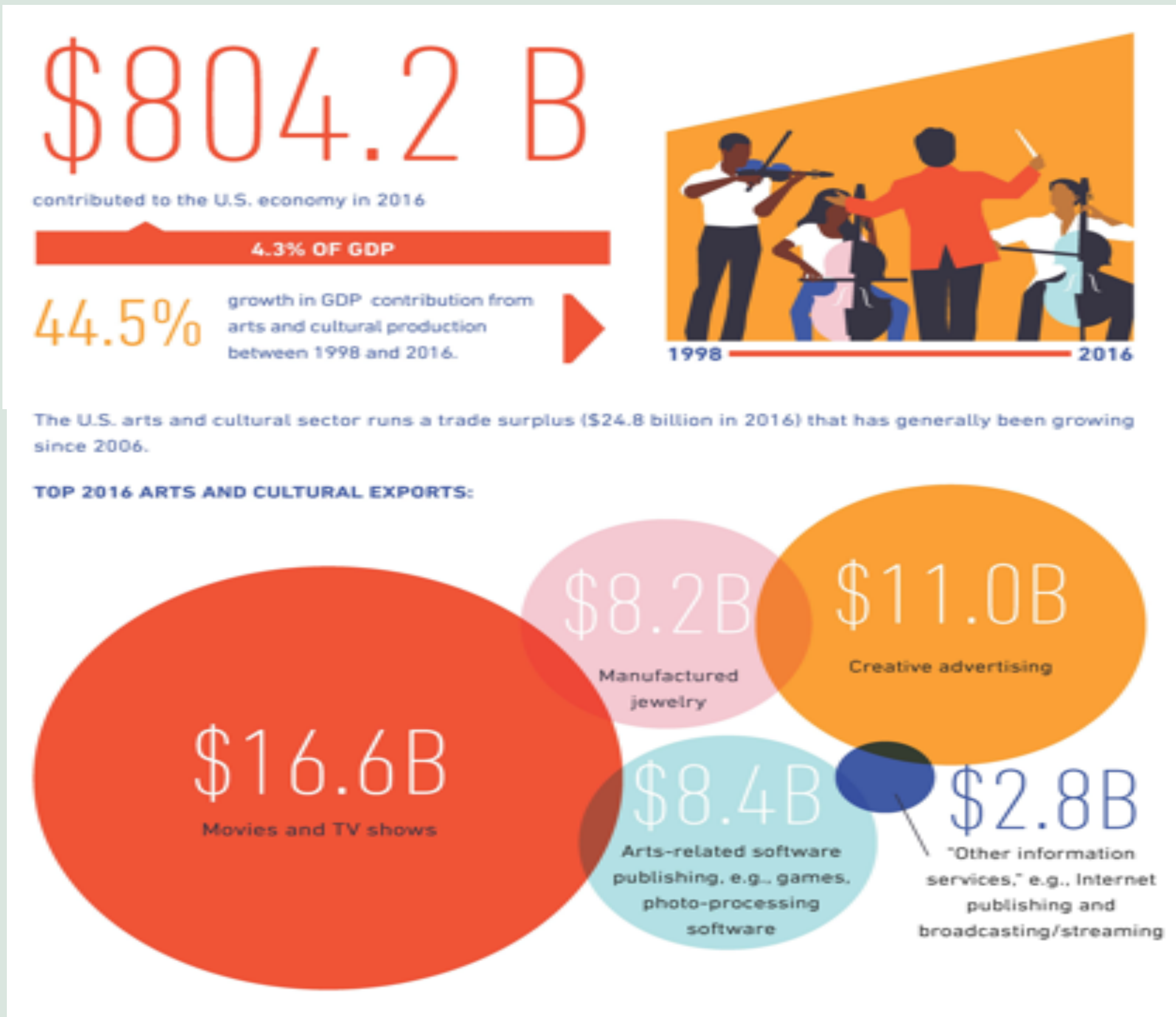
Good news

Value proposition for the arts recognizes the economic benefits of arts and culture



In 2016, real value added by arts and culture exceeded that of the construction, transportation and agriculture sectors.

Movies, television and video games top the list of arts and cultural exports, however, opportunities for economic stimulation are varied.

[National Endowment for the Arts, 2017]

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Good news

Research now emphasizes the healing, emotional and social benefit of the arts

[National Endowment for the Arts, 2017]

A shift in healthcare, with more attention being paid to holistic health, has led to greater insight into the effects of the arts on wellness.

Research has shown that engagement in the arts can reduce stress and depression, two conditions most associated with common diseases.

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How Facilities Respond

- Embracing a broader definition of cultural activity
- Shifting from “Friday Night Lights” to the “Community Living Room”
- Partnering with educators
- Evolving from palaces to districts
- Supporting active and passive participation
- Enhancing the social experience
- Maintaining low cost of access
- Addressing economic and community development issues
- Facing outward

[Image: Dallas Arts District]

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What’s happening in ski resort communities?

According to the California Ski Industry Association, millennials make up the biggest group of visitors at resorts, but they look to do more than just hit the slopes while on vacation or on days off from work.

Dan Sherman, CMO of Ski.com, believes "millennials are looking for a variety of things to do, whether that’s mountain coasters, climbing walls, DJs, or festivals."

People between the age of 20 and 40 are playing in the snow one day and then finding other things to do on other days, with an emphasis on authenticity and the ‘experience’ of the whole trip.

“It’s about skiing for pleasure and leisure — they’re looking for moments on the mountain with friends and kids and family. They’re spending less time on the slopes because ***people expect to do more than skiing***, whether that’s visiting the spa, going for a swim, ***enjoying great food, or exploring mountain villages***."

-Sylvain Rabuel of Club Med CEO France, Europe, and Africa

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Market Analysis

Market Definition
overview

To define the market for performing arts facilities in Steamboat, we mapped audience data for events taking place in the Strings Music Pavilion. Event activities include:

- Strings Music Festival Single—Ticket & Subscription ticket buyers
- Steamboat Springs Orchestra ticket buyers
- Community Rental ticket buyers

Together, this analysis informs where individuals taking part in performing arts activities are traveling from.

The distribution of ticket buyers across the USA reflects the number of seasonal residents and visitors attending performing arts events at Strings.

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Strings Single-Ticket Audience Map

ticket buyers from the 2017, 2018 & 2019 seasons

Legend

City Hall

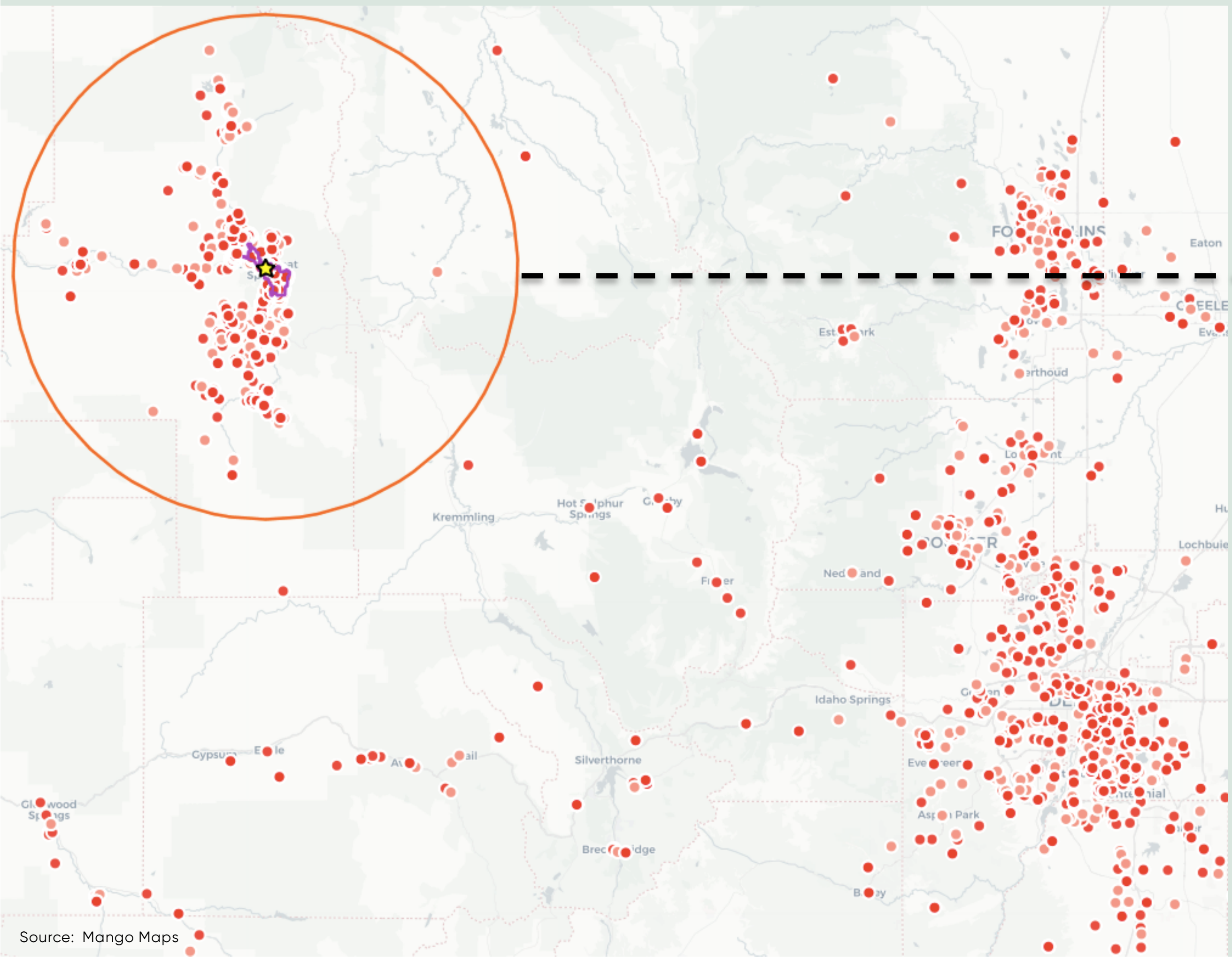
Steamboat Springs, CO

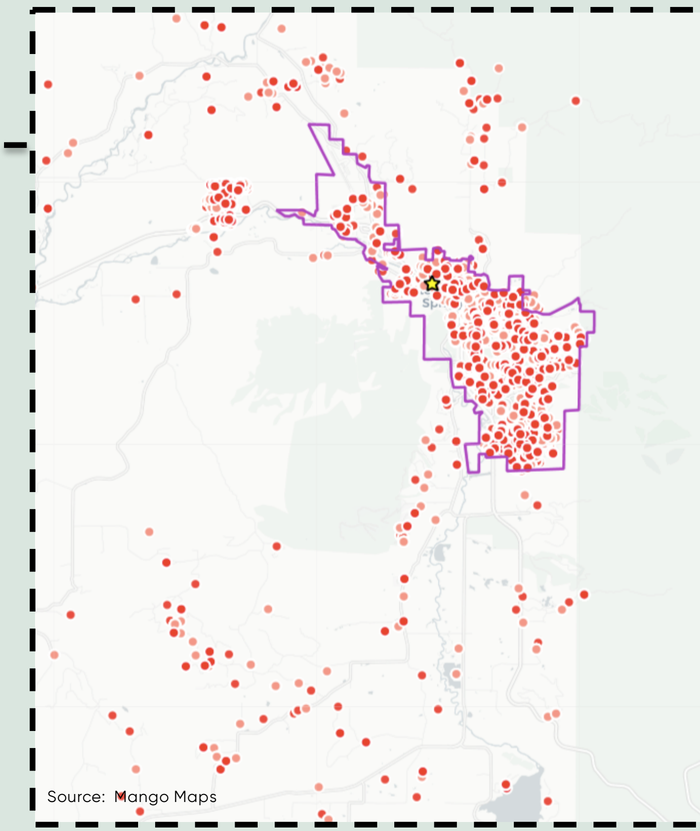
30-mile Radius

Strings Single-Ticketbuyers '17

Strings Single-Ticketbuyers '18

Strings Single-Ticketbuyers '19





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Strings Subscription Audience Map

ticket buyers from the 2018 & 2019 seasons

Legend

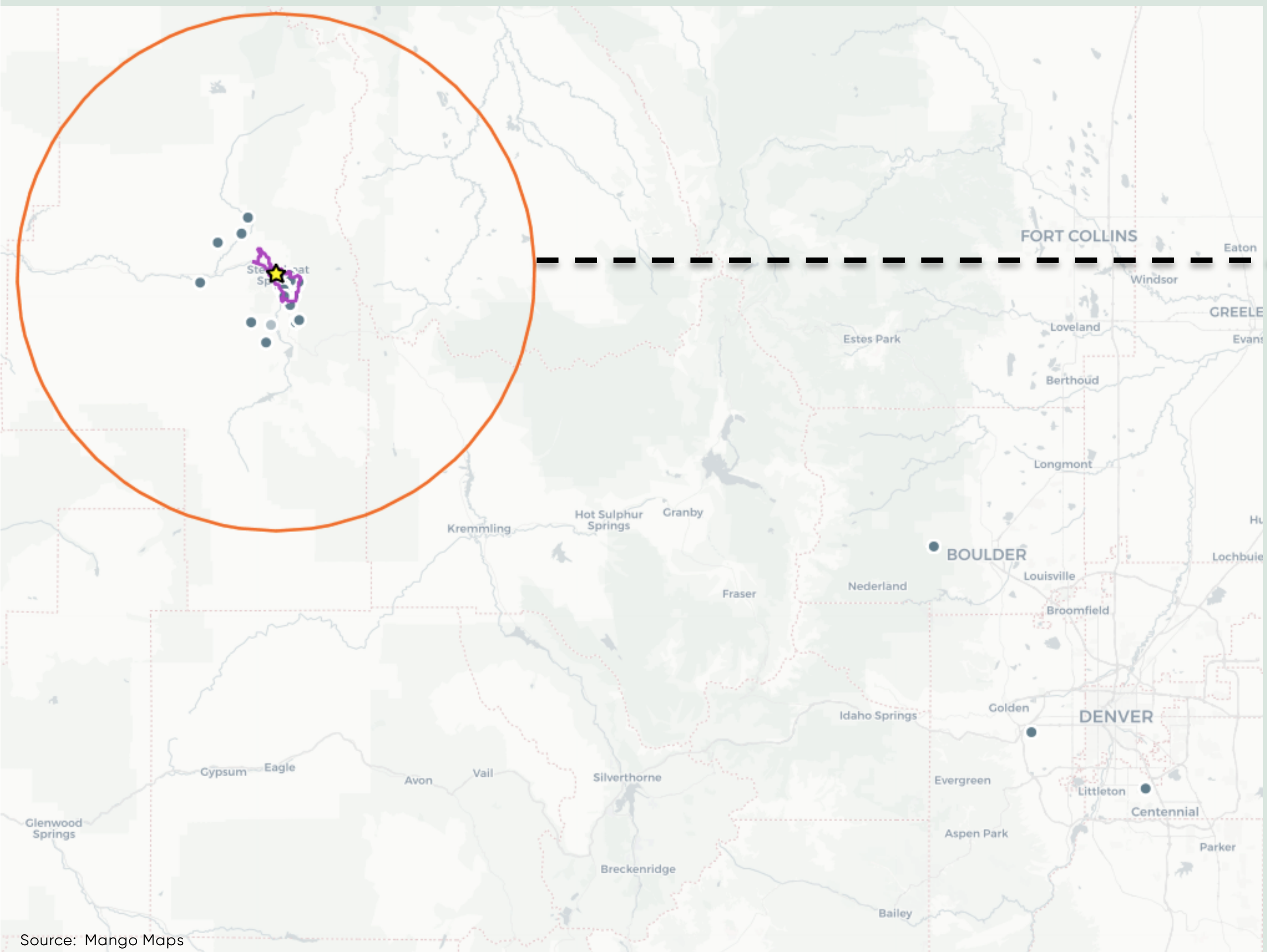
City Hall

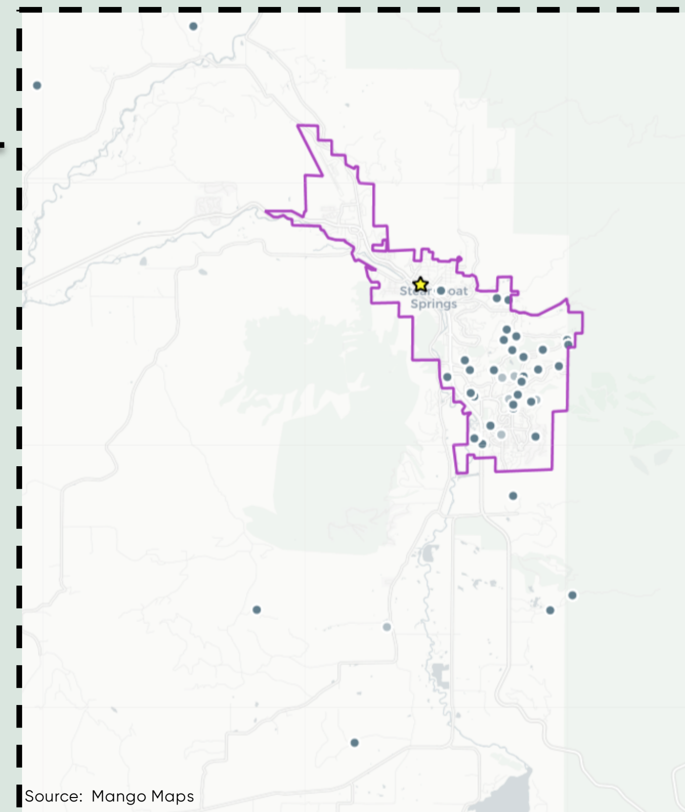
Steamboat Springs, CO

30-mile Radius

Strings Subscription-buyers '18

Strings Subscription-buyers '19





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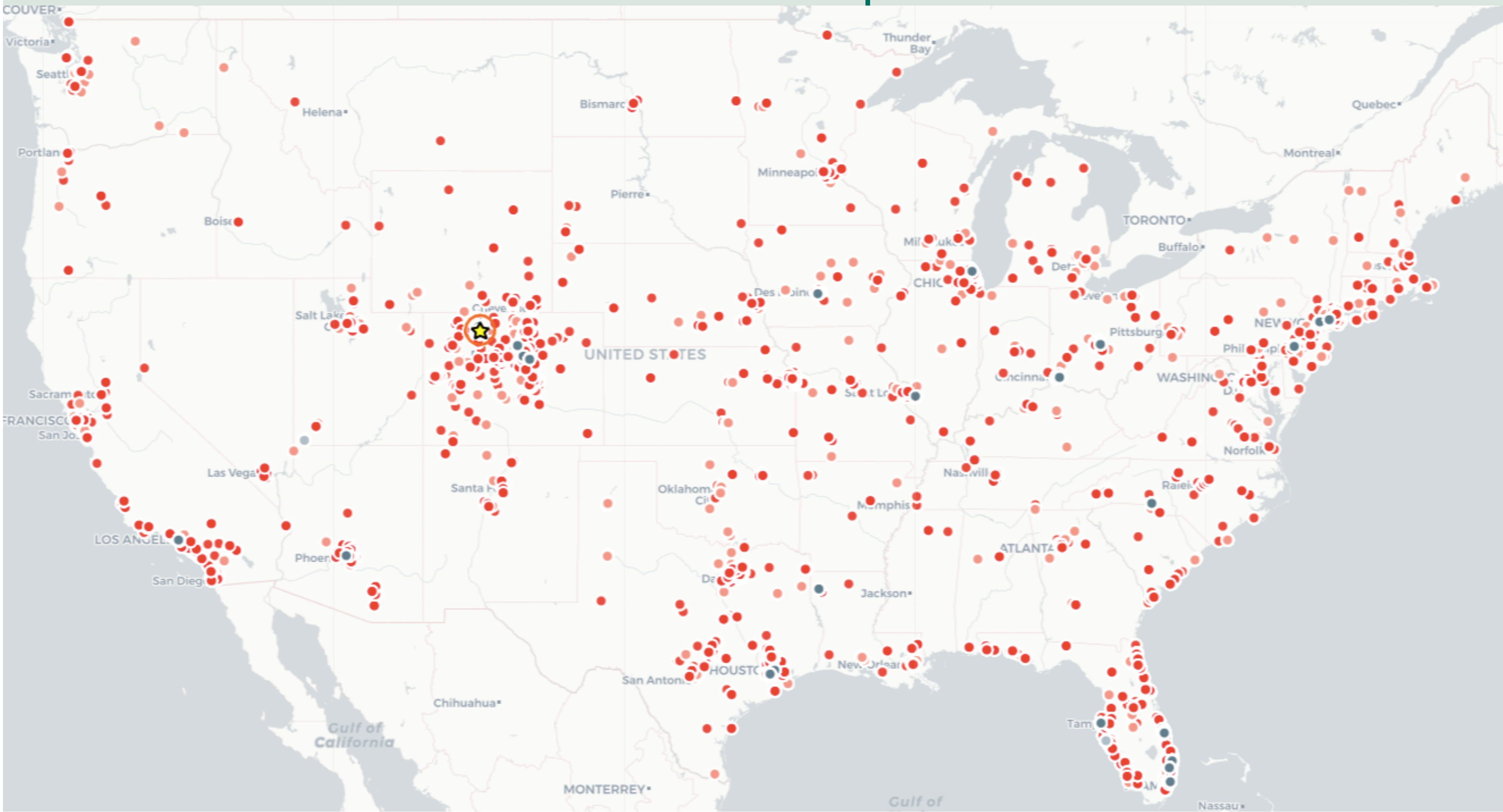
Strings Single-Ticket & Subscription National Distribution Audience Map



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Market Definition

Strings Pavillion: Strings Single-Ticket Buyers						
	Ticket Buyers			Ticket Buyers By Market		
Within:	2017	2018	2019	2017	2018	2019
Steamboat Springs	8195	8366	9846	43%	54%	55%
30-mile radius	13271	10320	11879	70%	67%	67%
Beyond: 30-miles	5711	5104	5975	30%	33%	33%
Total Ticket Buyer Individuals	**18982**	**15424**	**17854**			

Strings Pavillion: Strings Subscription-Ticket Buyers				
	Ticket Buyers		Ticket Buyers By Market	
Within:	2018	2019	2018	2019
Steamboat Springs	2943	2997	64%	70%
30-mile radius	3422	3358	75%	78%
Beyond: 30-miles	1142	947	25%	22%
Total Ticket Buyer Individuals	**4564**	**4305**		

Source: Strings Music Festival

Nearly 70% of Single-Ticket and 80% of Subscription Ticket Buyers are within 30-miles of the Steamboat City Hall.

Seasonal residents & visitors represents over 25% of Strings annual ticket buyers.

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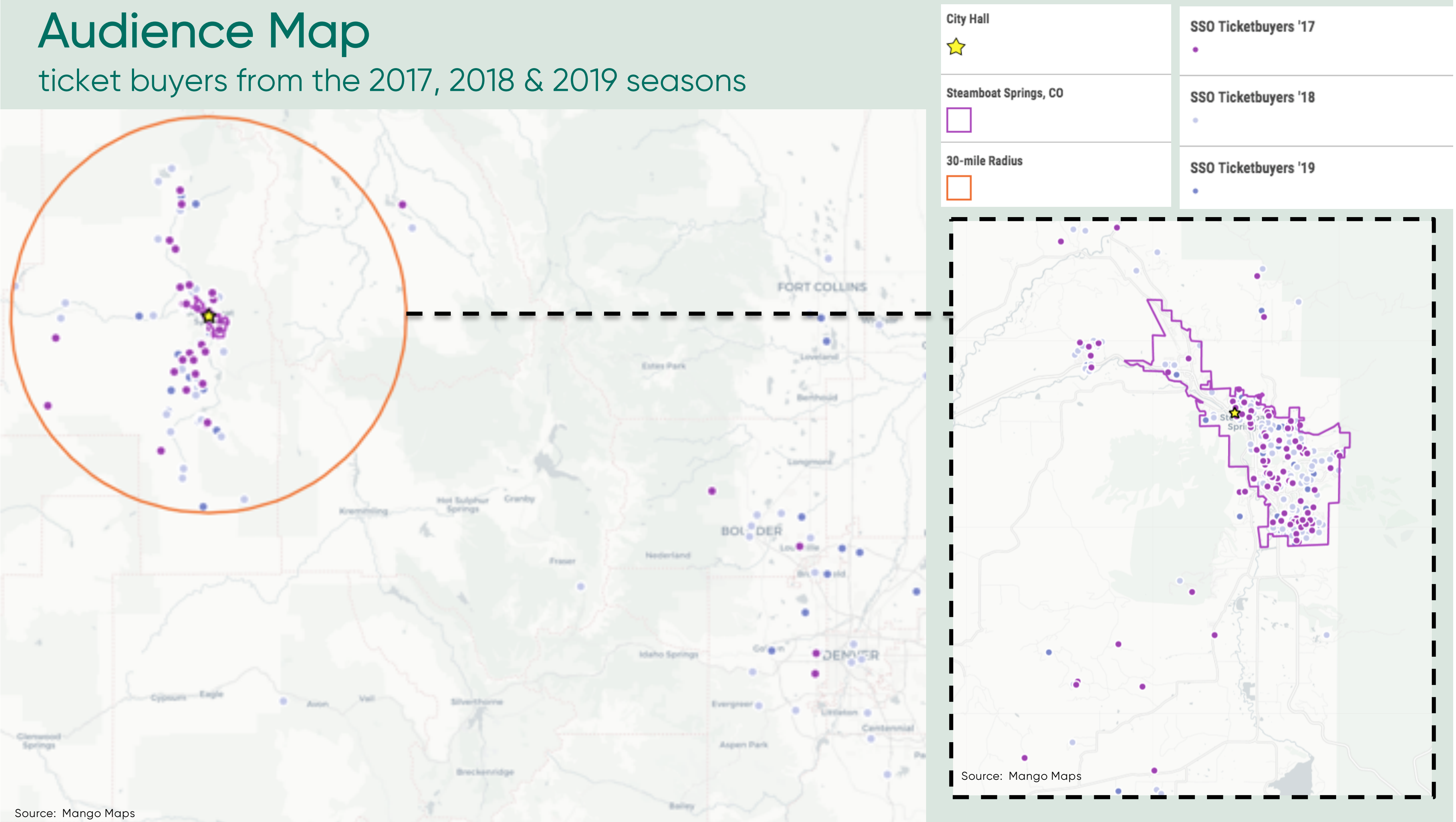
Steamboat Springs Orchestra Audience Map

ticket buyers from the 2017, 2018 & 2019 seasons



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Market Definition

Strings Pavillion: Steamboat Springs Symphony Orchestra Ticket Buyers						
	Ticket Buyers			Ticket Buyers By Market		
Within:	2017	2018	2019	2017	2018	2019
Steamboat Springs	569	1312	893	78%	70%	75%
30-mile radius	663	1591	1079	91%	85%	91%
Beyond: 30-miles	69	289	113	9%	15%	9%
Total Ticket Buyer Individuals	**732**	**1880**	**1192**			

Source: Strings Music Festival

On Average, 75% of ticket buyers are traveling from within Steamboat Springs to attend SSO concerts.

Over 85% of ticket buyers travel within 30-miles of Steamboat Springs.

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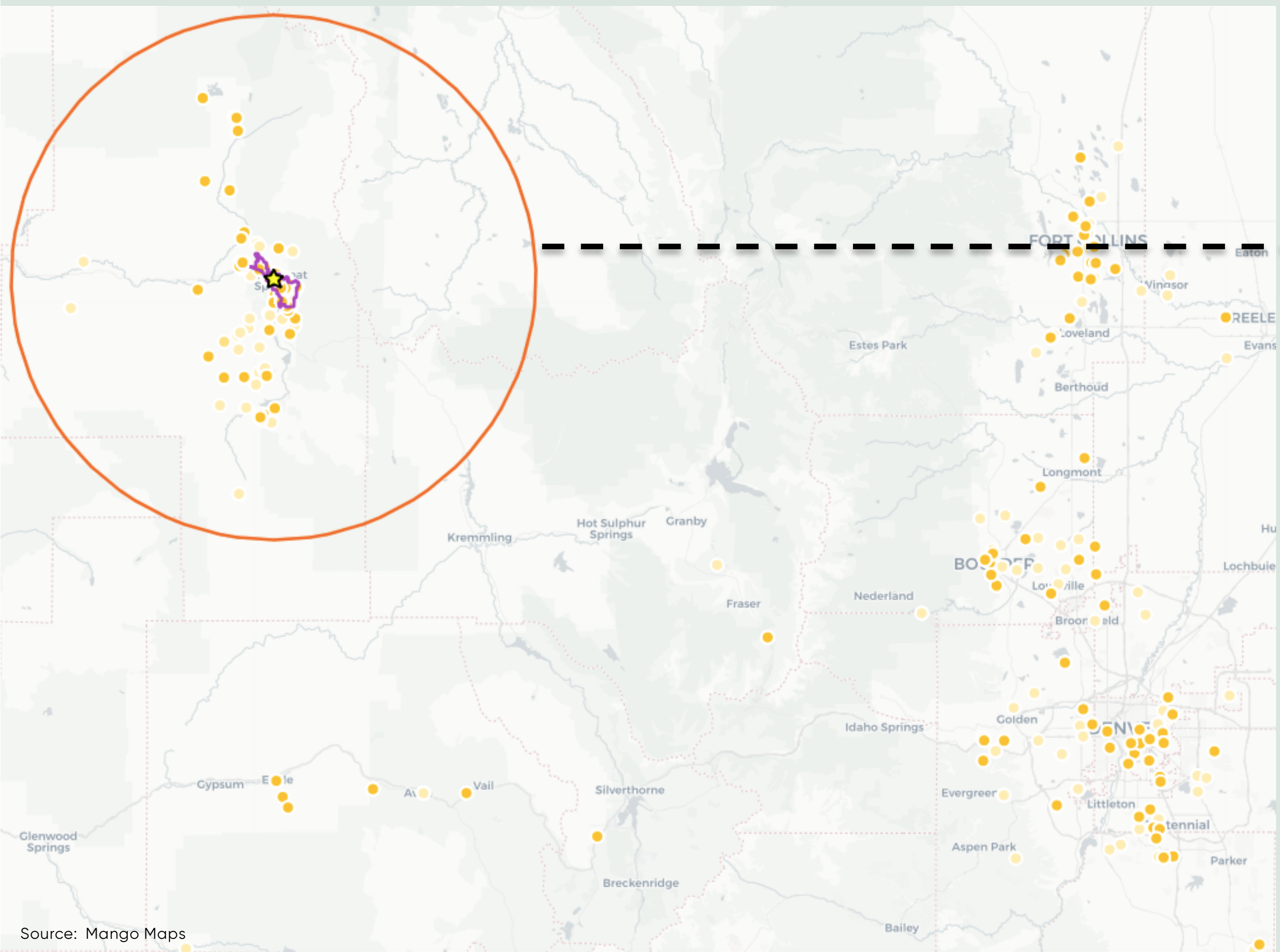
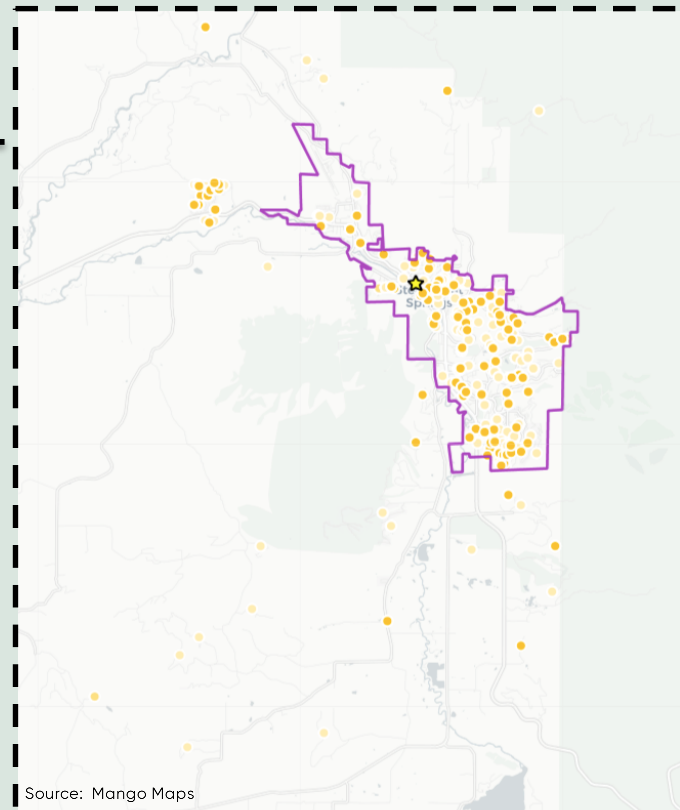
Strings Pavilion Rental Audience Map

ticket buyers from community group rentals
from 2018 to 2020

Legend

City Hall	Rental Ticketbuyers '18
Steamboat Springs, CO	Rental Ticketbuyers '19
30-mile Radius	Rental Ticketbuyers '20





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Market Definition

Strings Pavillion: Rental Ticket Buyers						
	Ticket Buyers			Ticket Buyers By Market		
Within:	2018	2019	2020	2018	2019	2020
Steamboat Springs	521	794	51	50%	57%	61%
30-mile radius	661	973	53	64%	70%	63%
Beyond: 30-miles	375	426	31	36%	30%	37%
Total Ticket Buyer Individuals	1036	1399	84			

Source: Strings Music Festival

Nearly 70% of ticket buyers to community rental events are traveling from the 30-mile radius.

Similar to Strings Music Festival events, over 30% of ticket buyers are from outside the 30-mile radius, representing a strong seasonal resident & visitor attendance rate.

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Market Definition
overview

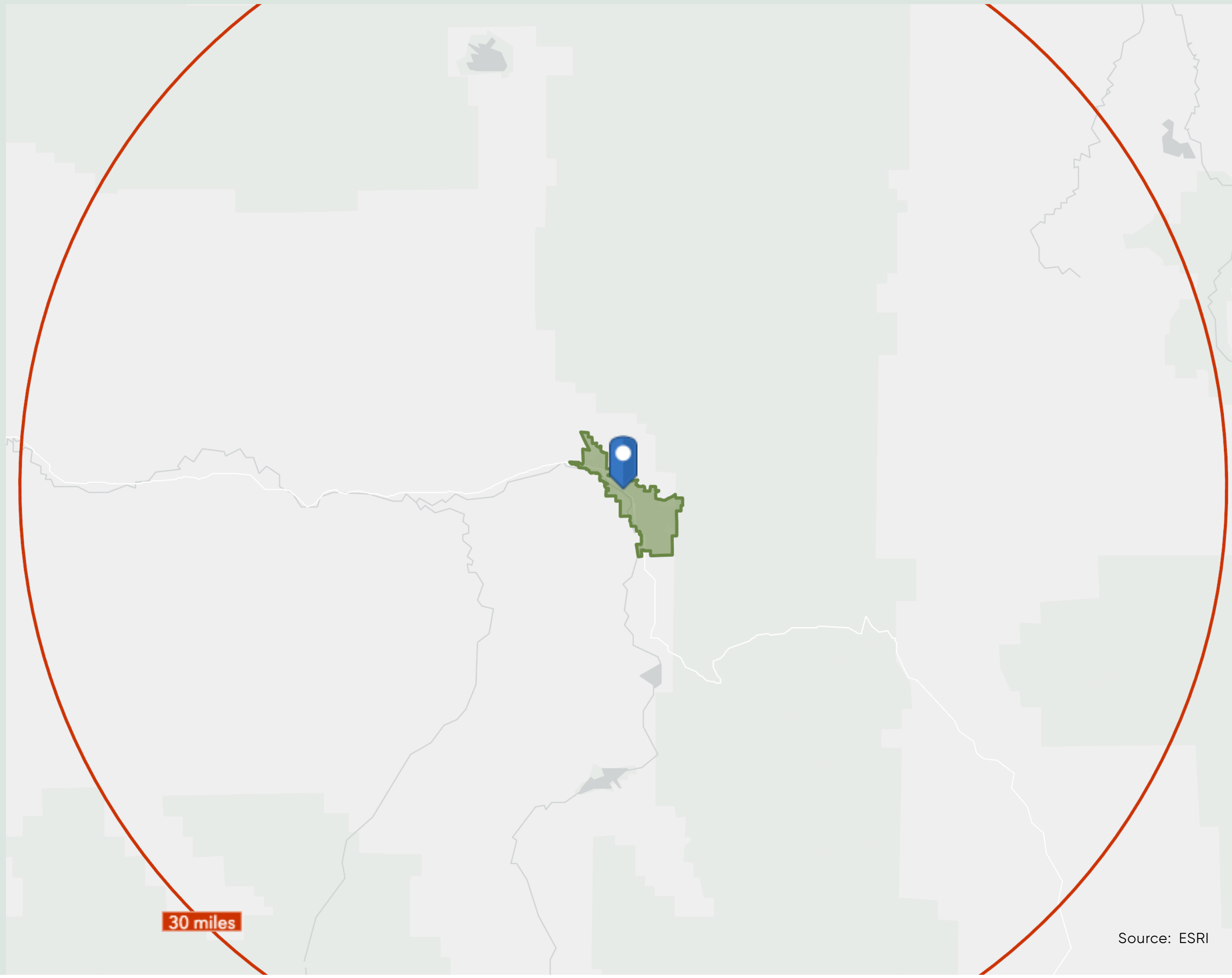
Primary Market:

Steamboat Springs city-limits

Secondary Market:

30-mile radius from City Hall

Population statistics are benchmarked against the United States averages using ESRI Business Analyst data sets



Market Analysis

overview

According to national studies, an individual’s educational attainment and annual household income are the most statistically significant indicators of art and culture attendance.

For example, results from the NEA’s Survey of Public Participation in the Arts shows a positive link between arts attendance and family income—where the percentage of individuals that attend an arts event steadily increases as their income level increases.

Age and race/ethnicity also matter, but are not nearly as impactful as education and income characteristics.

Therefore, when studying the local, primary and secondary markets, an analysis of the size, education, income, age and race/ethnicity informs the strength of the market for arts and cultural attenders.

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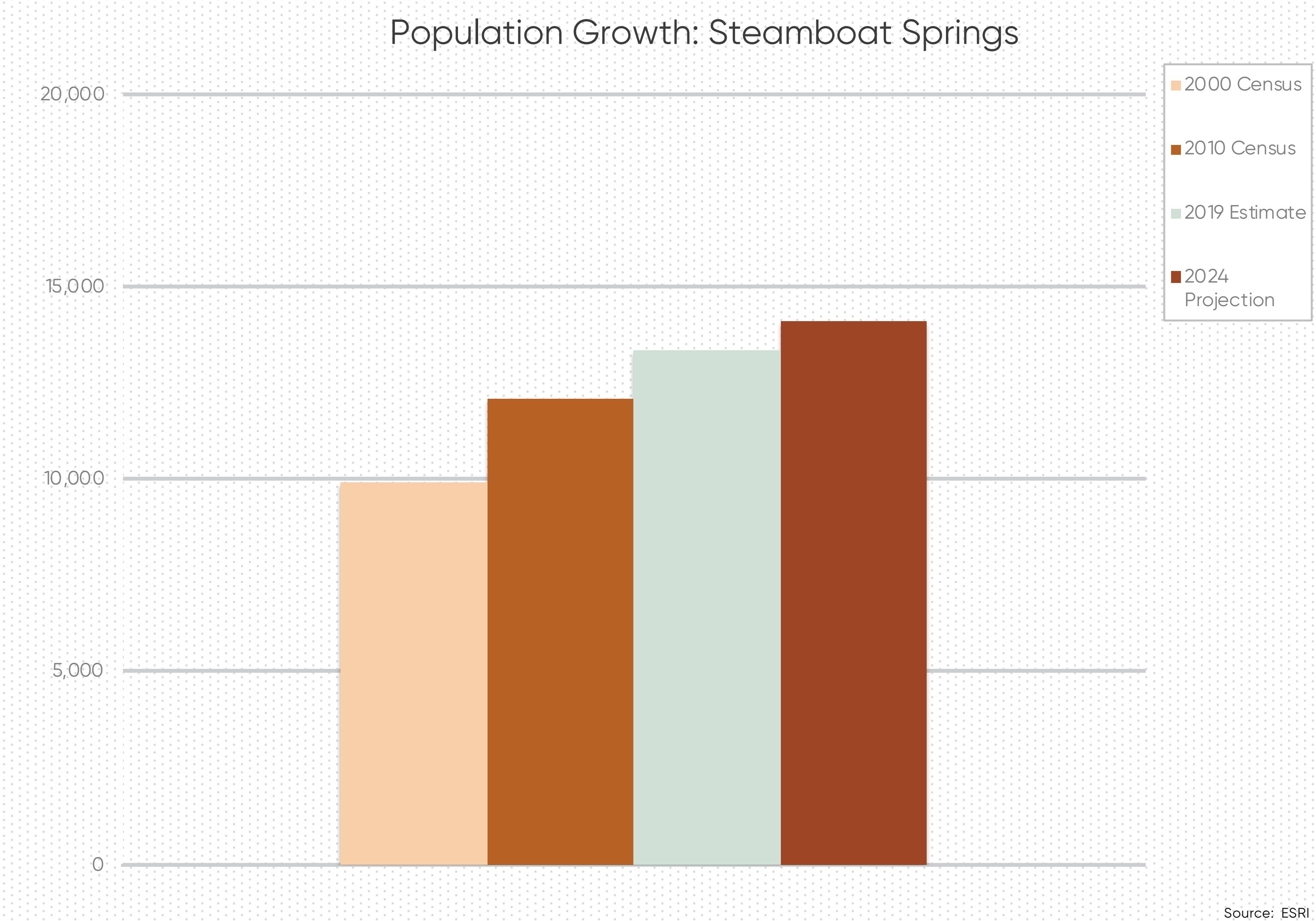
Growing local population

the City's population is growing steadily



The City's population has increased by nearly 5K since 2000

By 2024, the population will reach 14,000

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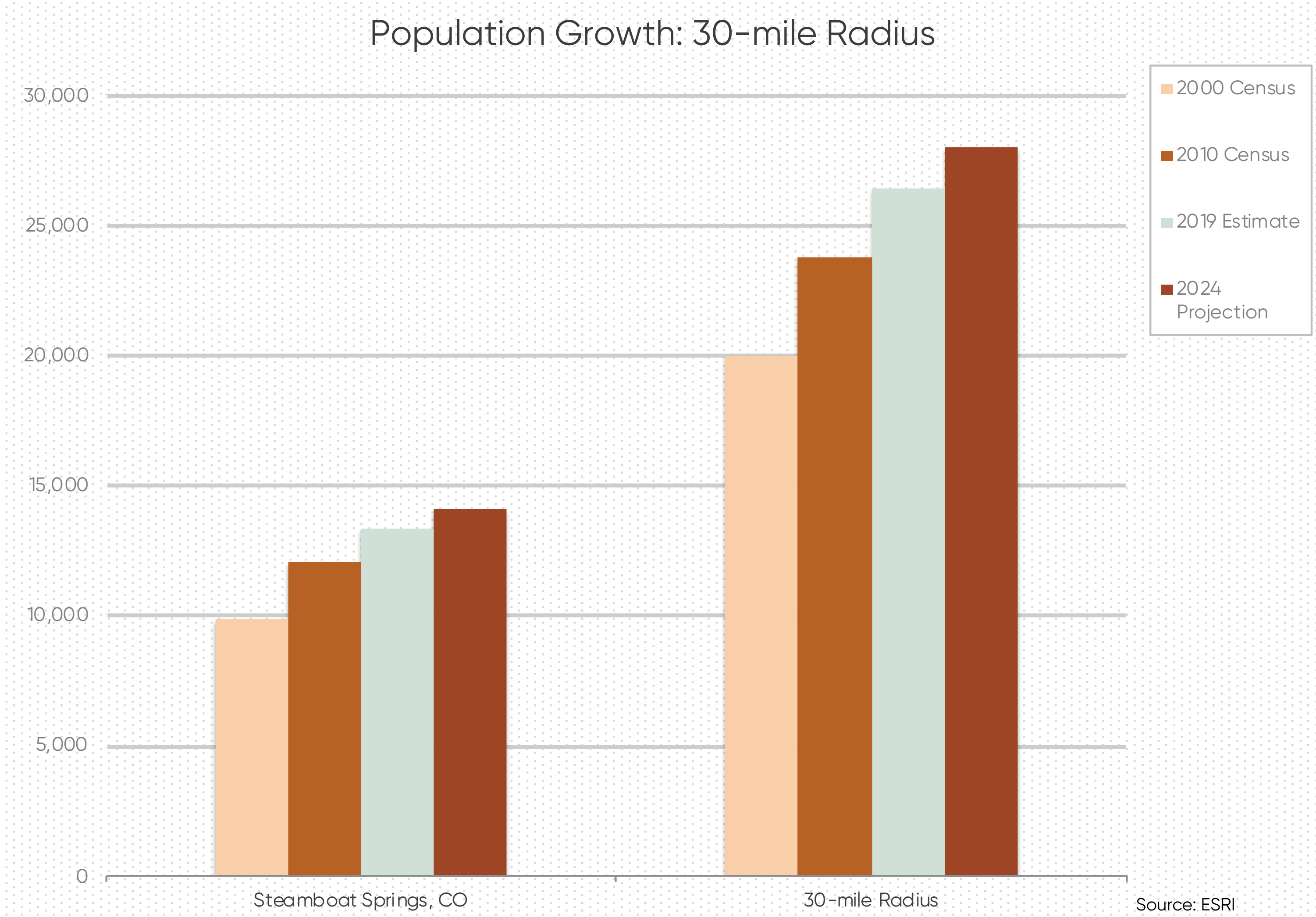
Regional population growth

steady growth is found in the 30-miles surrounding Steamboat



Source: ESRI

In 2019, the secondary market eclipsed 25,000 residents

By 2024, the 30-mile radius will grow to 28,000 residents

There is a long-term concern about the viability of communities in the 30-mile radius surrounding Steamboat Springs

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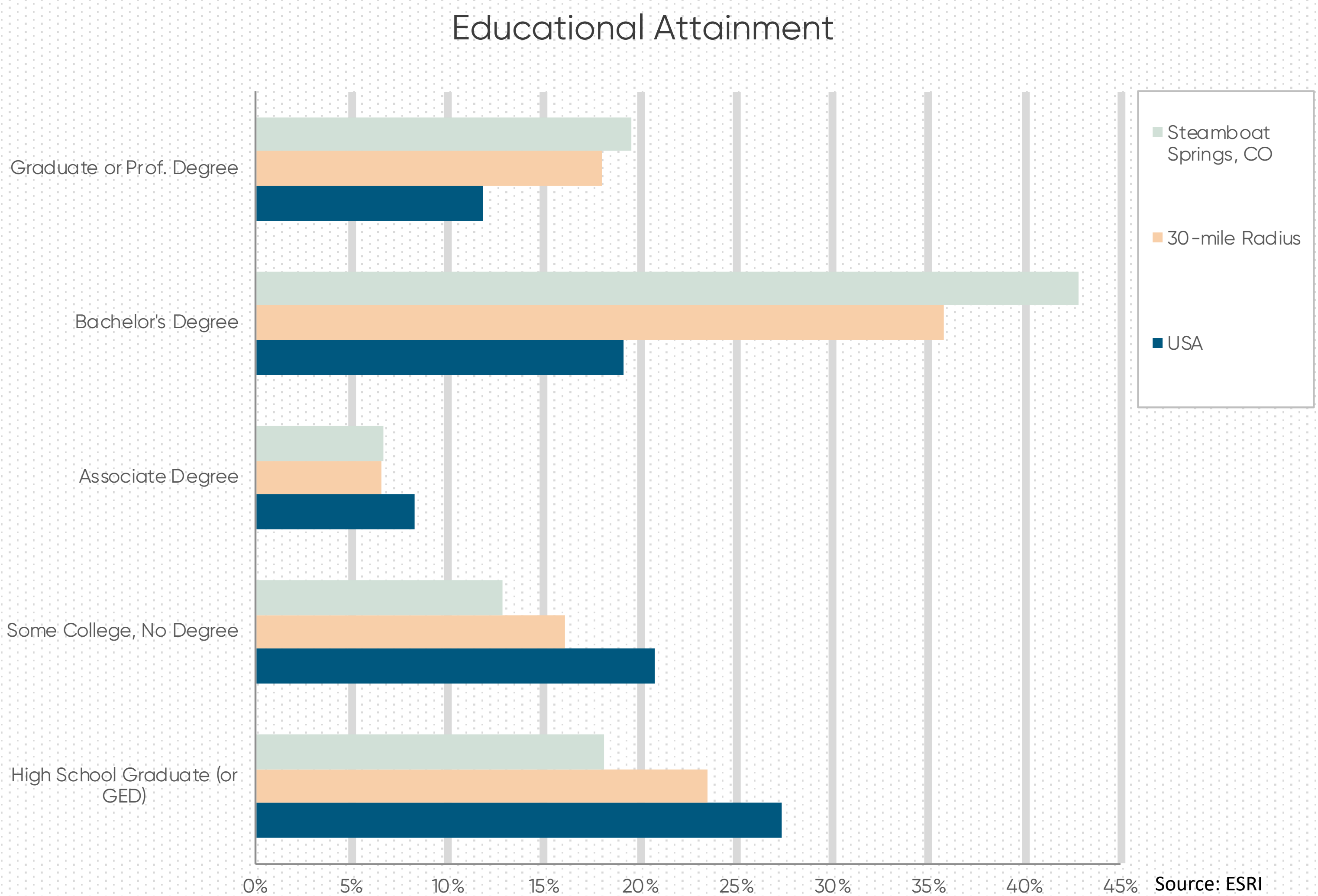
Above average education levels

over 60% of the primary and 50% of the secondary market has a Bachelor's degree or higher



Source: ESRI

Each of the market areas have education levels above the National average

Locally, nearly 20% of residents have a graduate degree or higher

There are 10% fewer individuals in Steamboat with a High School Diploma or GED than the National average

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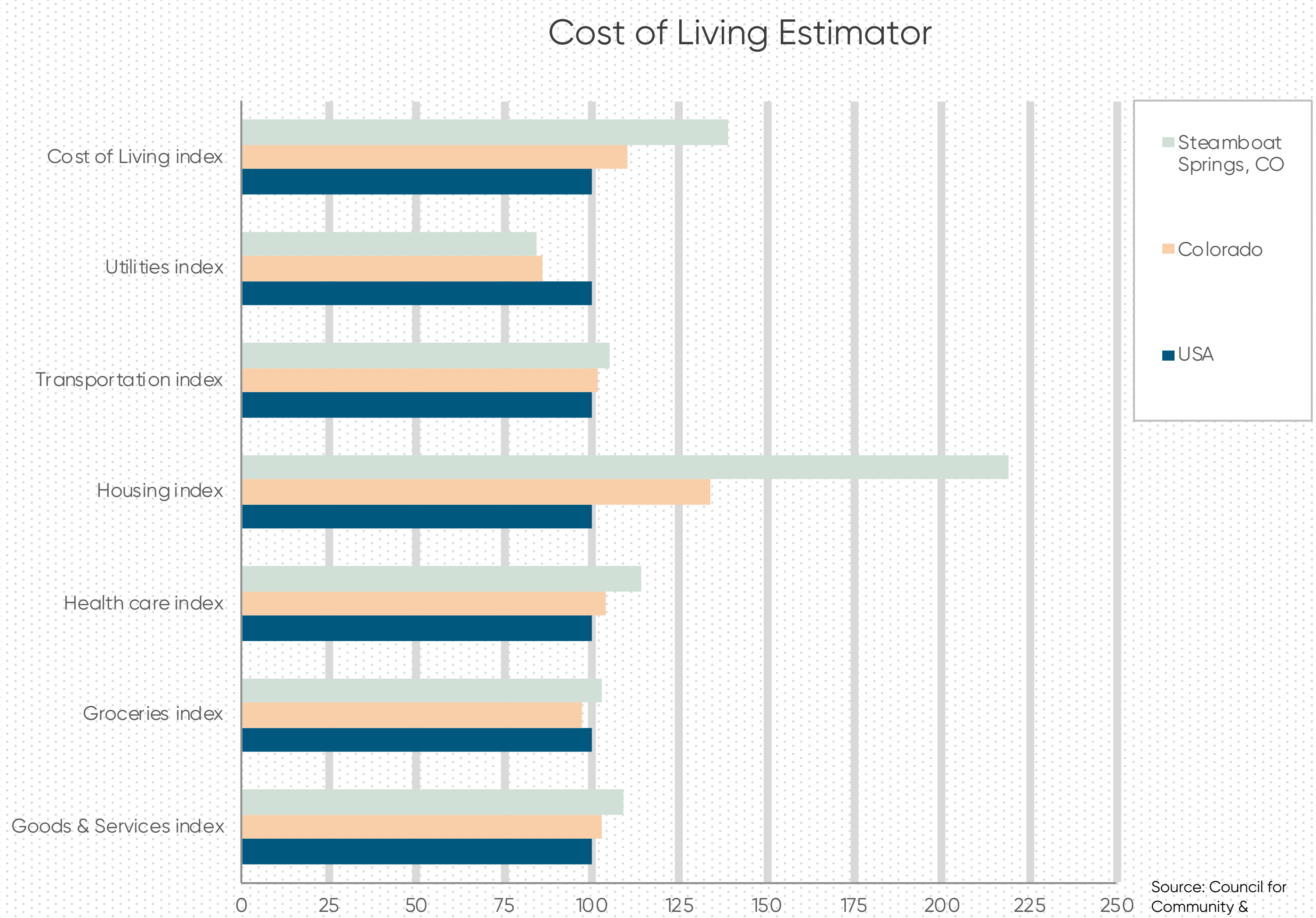
Local spending capacity

residents in Steamboat have a higher housing cost index that leads to a higher cost of living



Source: Council for Community & Economic Research

The COL score provides an overview of the affordability of an area

The score considers goods and services, housing, groceries, utilities, transportation and health care as well as the state sales and income tax rates

Each index is calculated based on comparison to the national average (100)

Cost of Living Index Scores:

- Steamboat – 139
- Colorado - 110

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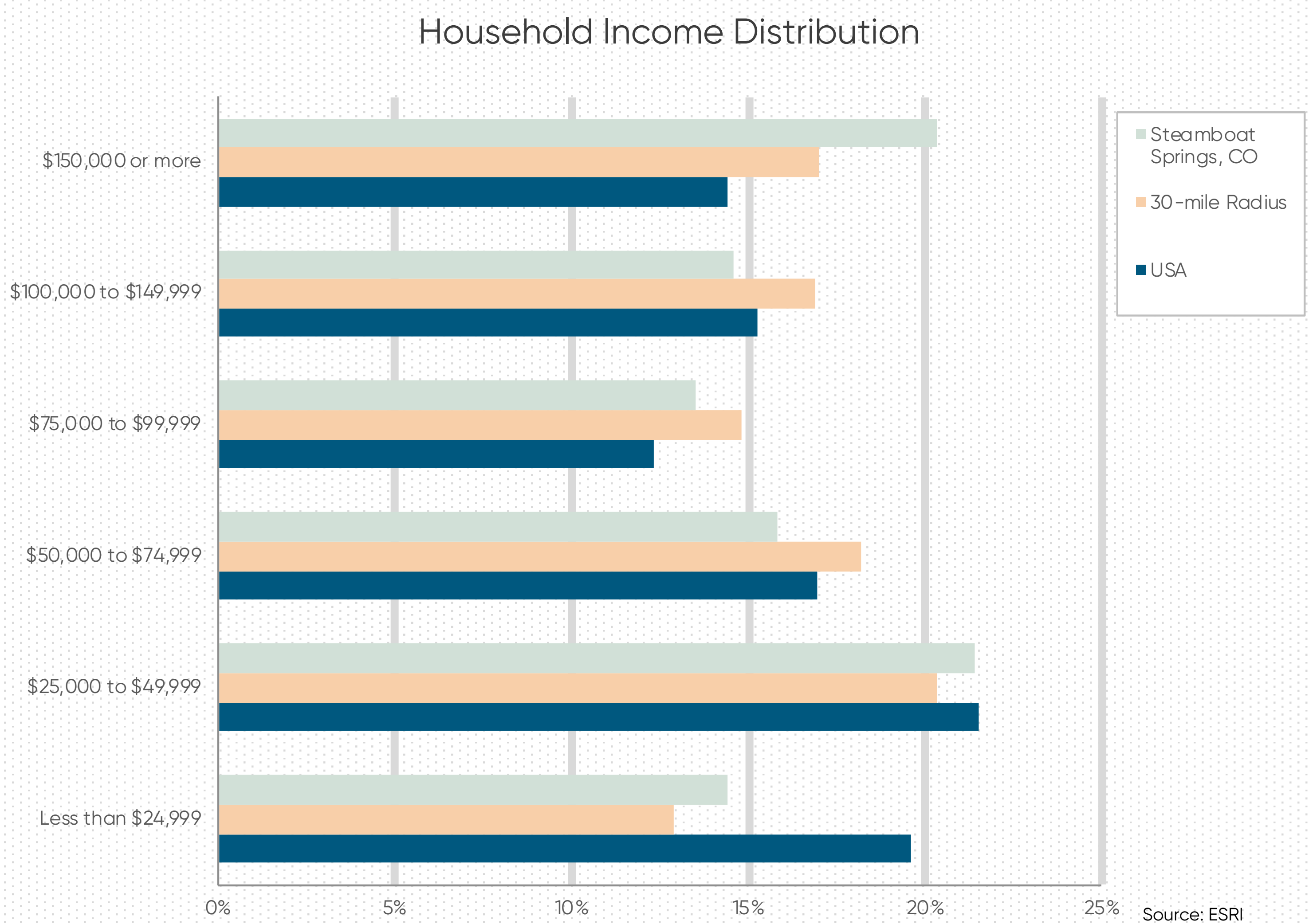
Local & regional affluence

both market areas have high household income levels



Source: ESRI

Over 35% of Steamboat households earn $100,000 or more, higher than the 29% National average

Income brackets between $25,000 - $100,000 are similar across both market areas and the National average

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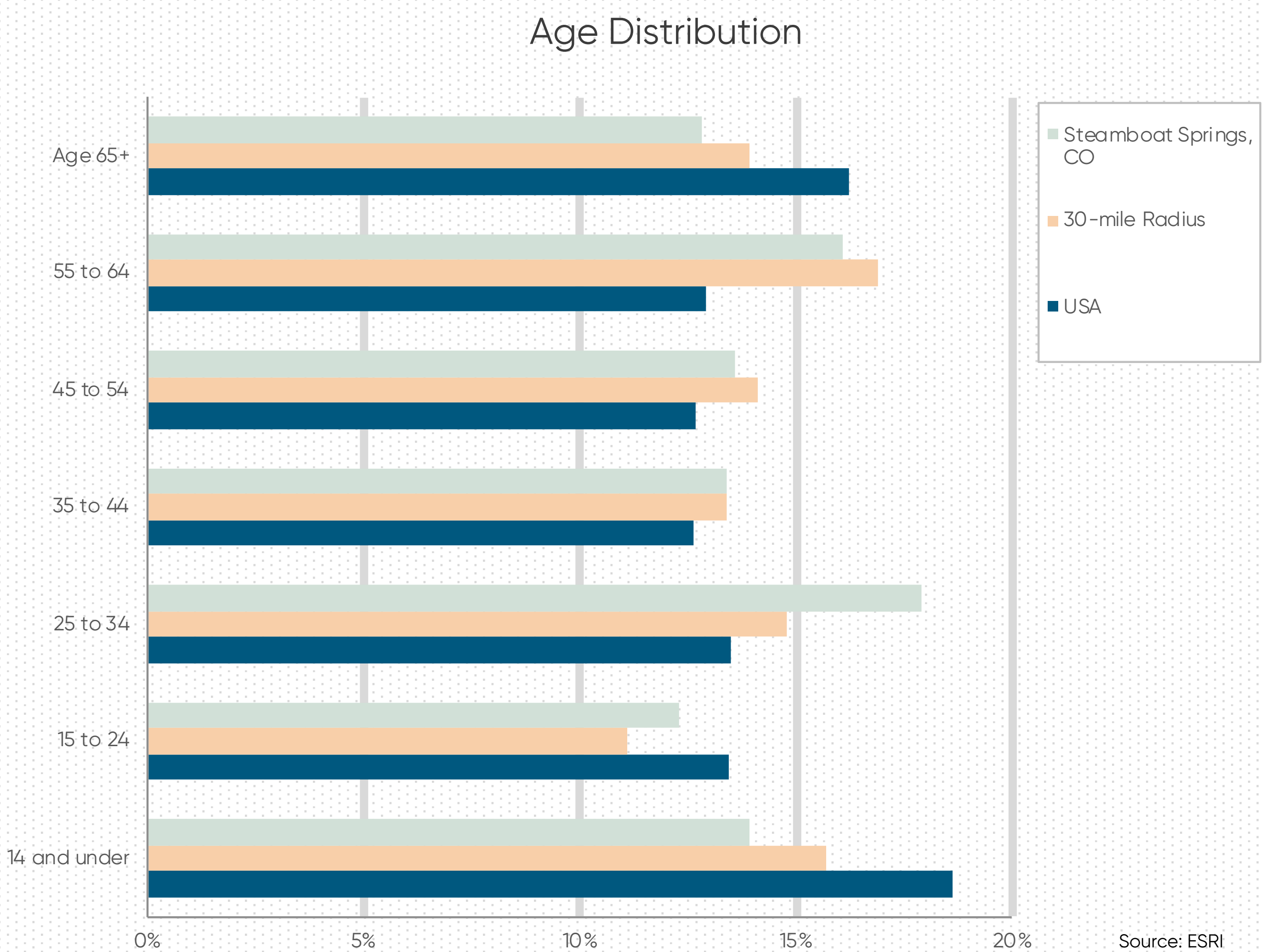
Large millennial population

above national averages for individuals between the ages of 25 to 34 and 55 to 64



Source: ESRI

Over 60% of Steamboat residents are between the ages of 25 and 64, 10% higher than the National average

Steamboat is below the National average for children ages 14 and under

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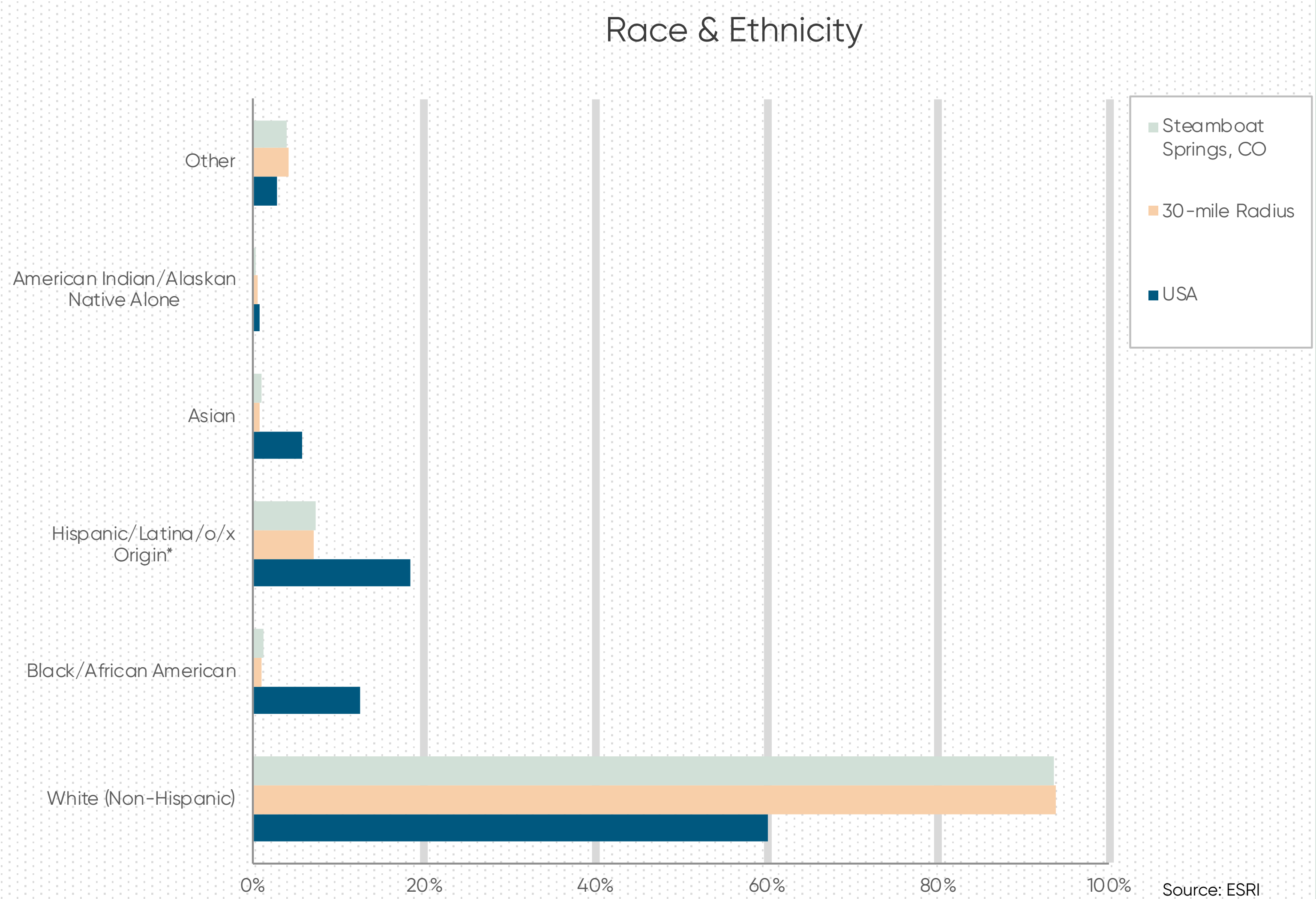
Predominately Caucasian pop

both market areas are predominately White (Non-Hispanic)



Nearly 95% of residents in Steamboat and the 30-mile radius are White (Non-Hispanic)

7% of residents are Hispanic/Latinx, making up the largest minority group in the region

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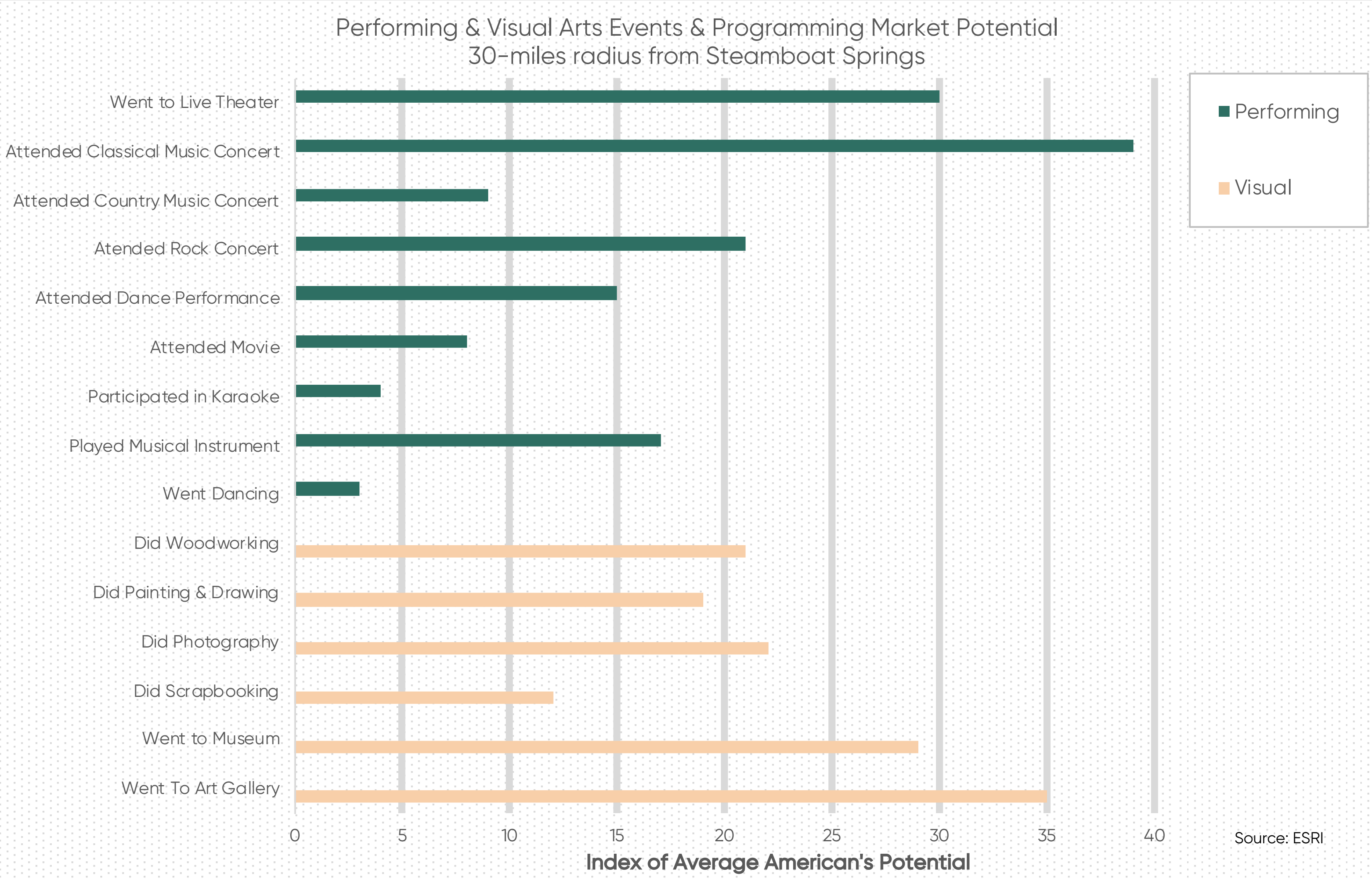
Strong market potential

residents have a higher market potential to attend music & live theater than the US average



The x-axis is an index score for a market's potential to attend an event

Zero represents the average American and any score above zero is interpreted as a higher potential than the average

Residents within the 30-miles surrounding Steamboat Springs received a higher market potential score than the average American

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Seasonal & Second Homeowners

significant portion of the population is seasonal

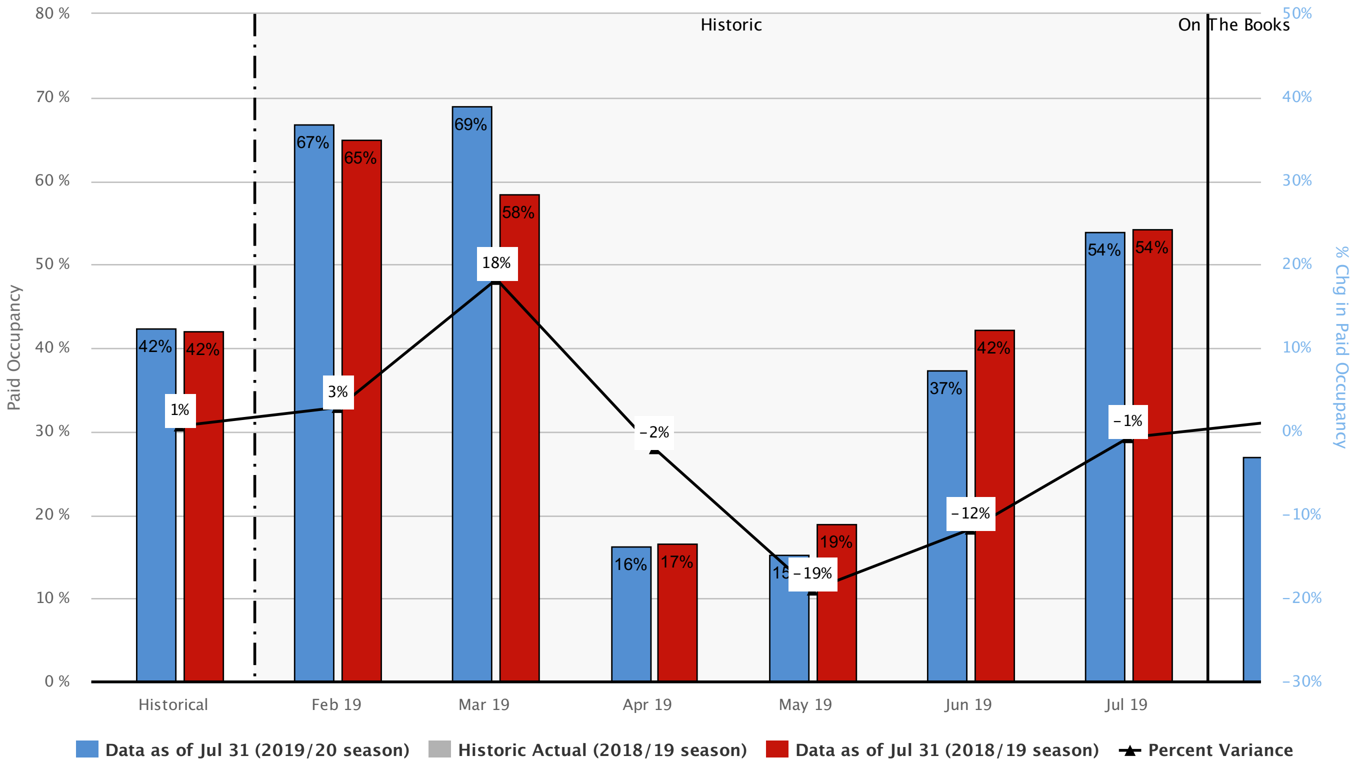
Steamboat Springs, Vacancy Status	
Total:	**5,038**
For rent	1,237
Rented, not occupied	195
For sale only	180
Sold, not occupied	16
For seasonal, recreational, or occasional use	3,203
For migrant workers	0
Other vacant	207

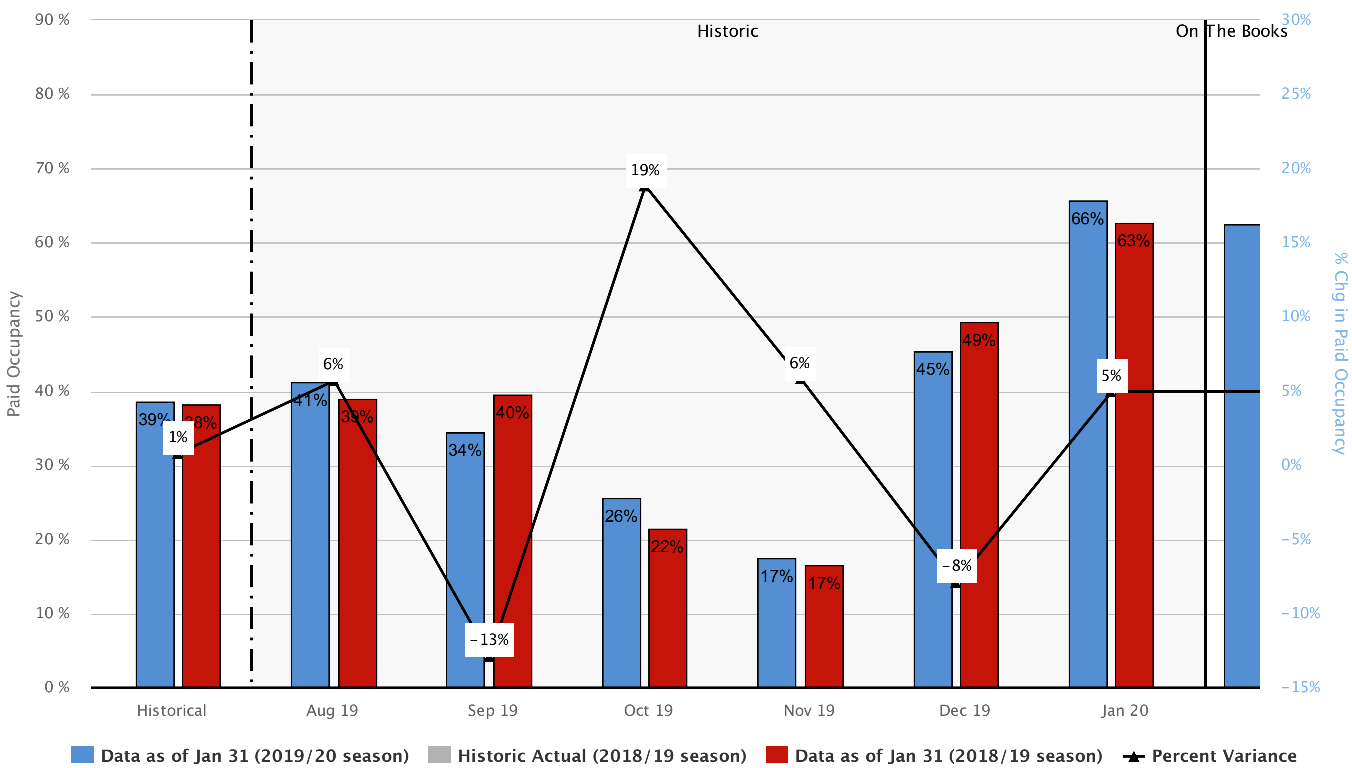
Source: U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates

Seasonal residents/second homeowners make up a large portion of Steamboat's population

Over 3K housing units in the market are designated as Seasonal, Recreational or Occasional Use

Anecdotally, peak Winter & Summer seasons bring upwards of 30,000 seasonal residents and visitors into the market





Steamboat Paid Occupancy

Accommodations inventory includes:

- 3119 units
- 10,938 beds
- 17,826 pillows

During peak months (Jan – March and July) estimated occupancy is between 54 and 69%

Based on these occupancy estimates, at any given time during the peak seasons in Steamboat, 11,000 to 12,000 visitors are in the market

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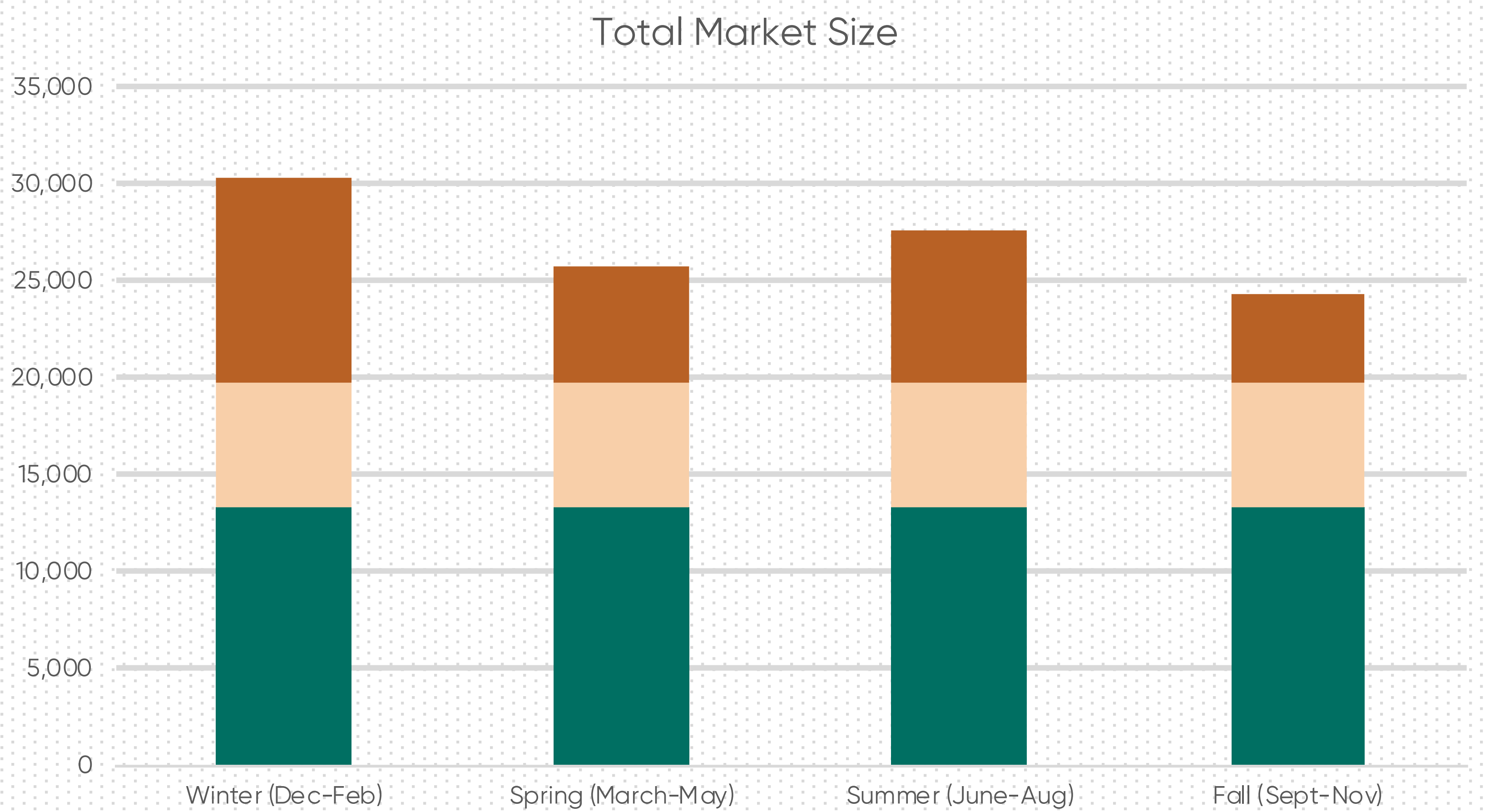
Size of Steamboat Population

seasonal population estimates



Source: ESRI Business Analytics, Steamboat Chamber of Commerce

Seasonal residents have been estimated based on the 3,203 seasonal residences in the latest U.S Census American Community Survey

Visitors have been estimated by averaging the lodging occupancy percentage per season by the 17,826 available pillows for visitors

Note: these data do not reflect rentals by homeowners, a portion of the rental market that has increased over recent years and contributed to lower occupancy rates in hotels/motels

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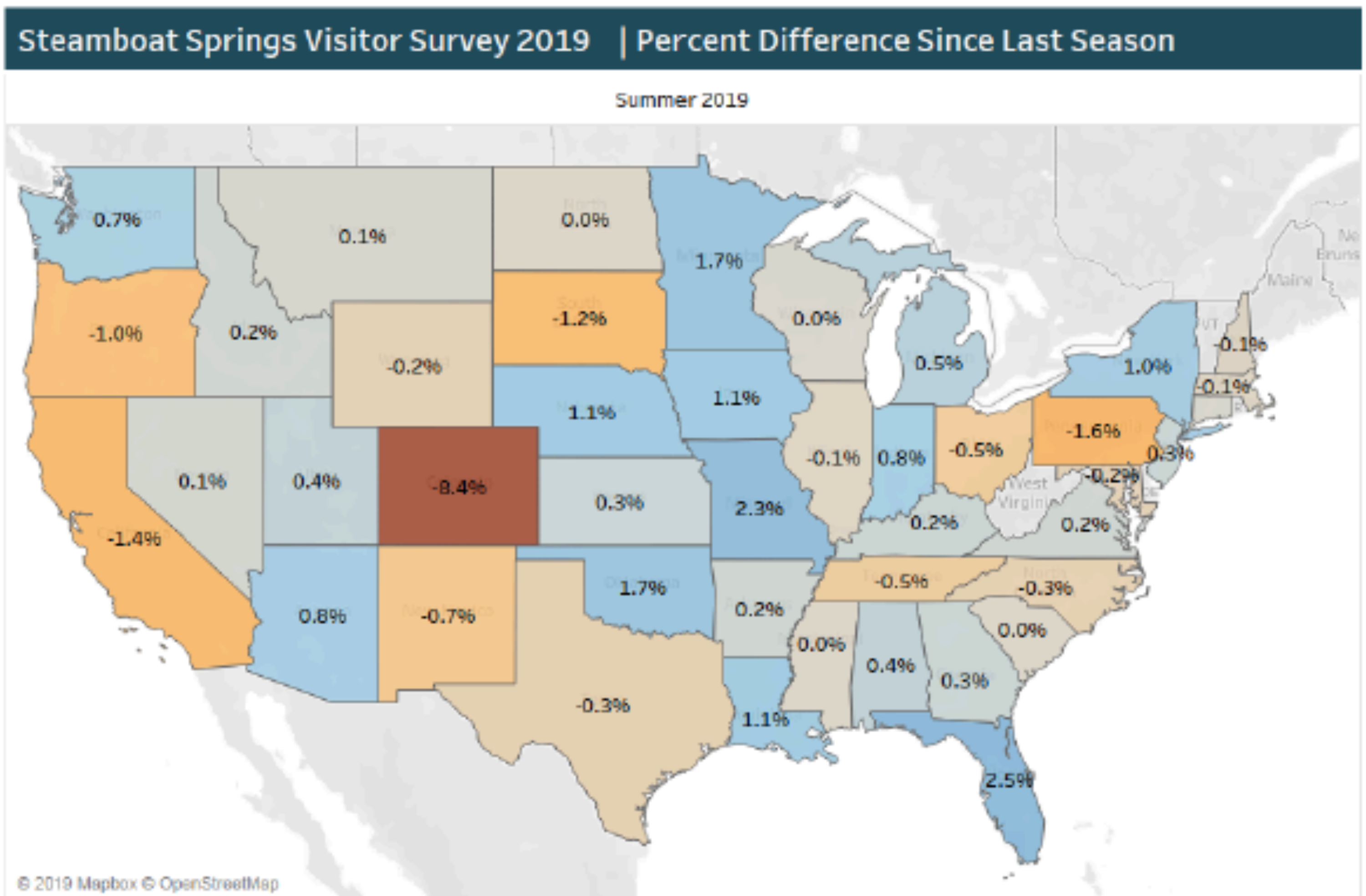
Summer Visitors

visitors' states of residence



In 2019, 29% of visitors were from Colorado, down from 37% in 2018

Texas (6%), Florida (5%), and Illinois (3%) represent the largest out of state markets

The Top 4 states increasing in attendance in 2019 are:

- Florida
- Missouri
- Minnesota
- Oklahoma

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Summer Visitors

most popular activities for Summer 2019

1/ Dining | 66%

2/ Hiking | 62%

3/ Shopping | 59%

4/ General Sightseeing | 57%

5/ Running/walking | 38%

Note: 2019 Surveys did not include arts and culture events as an option for respondents to select

Source: Steamboat Springs Summer 2019 Visitor Research | THC Associates

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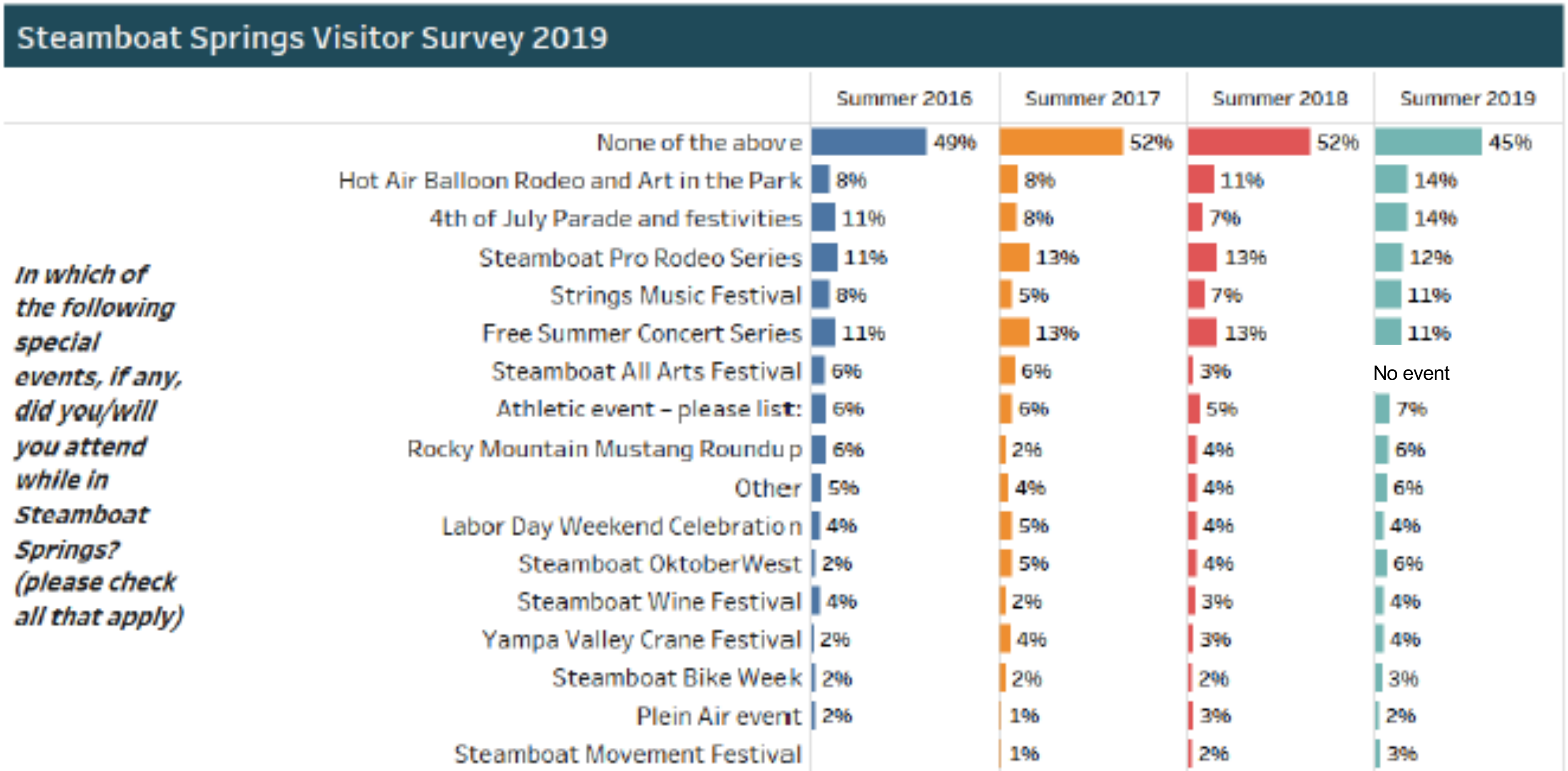
Summer Visitors

attendance at special events



More visitors are attending events than in previous years.

Strings Music Festival has attracted more visitors while the Free Summer Concert Series has remained the same over the past 4 years.

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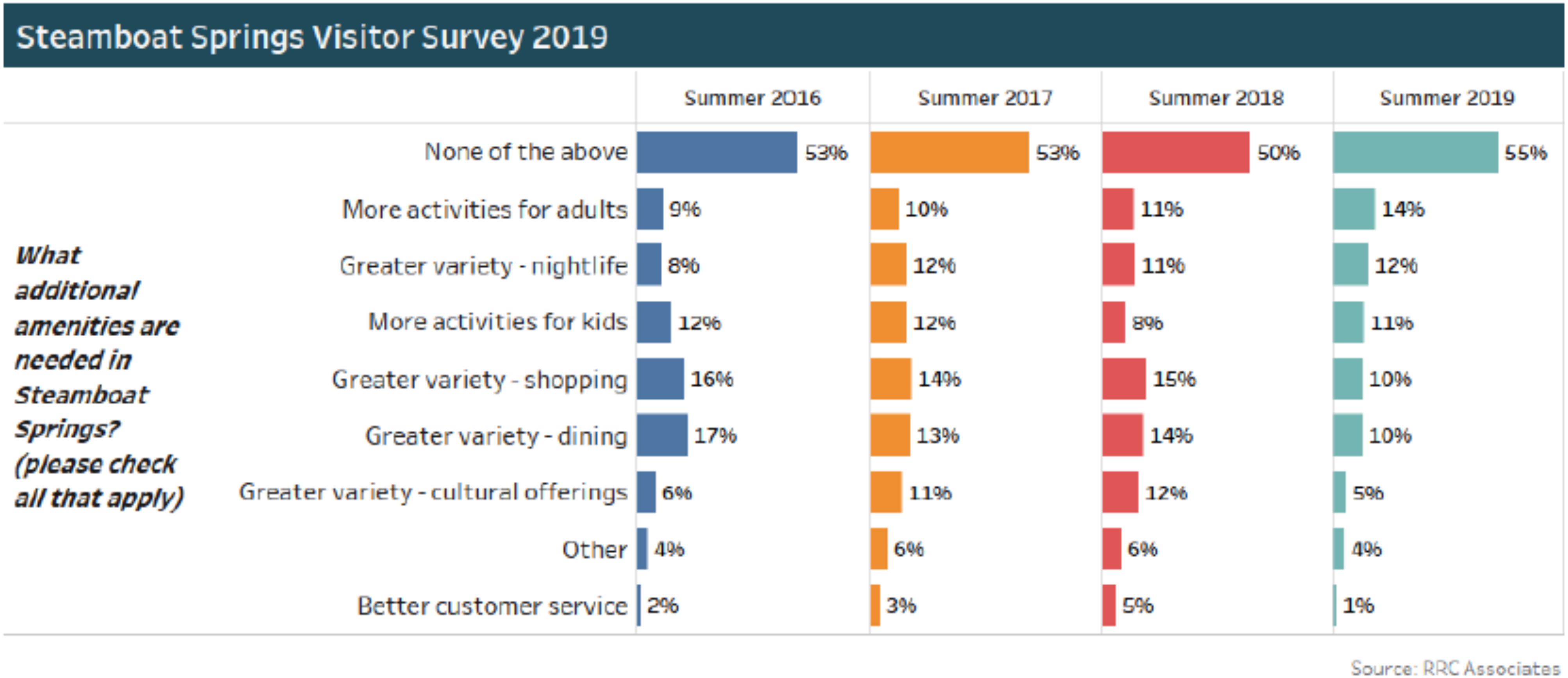
Summer Visitors

interest in additional amenities



Majority of those surveyed do not see a need for additional amenities.

Of those that did, more activities for adults and a greater variety of night life ranked highest.

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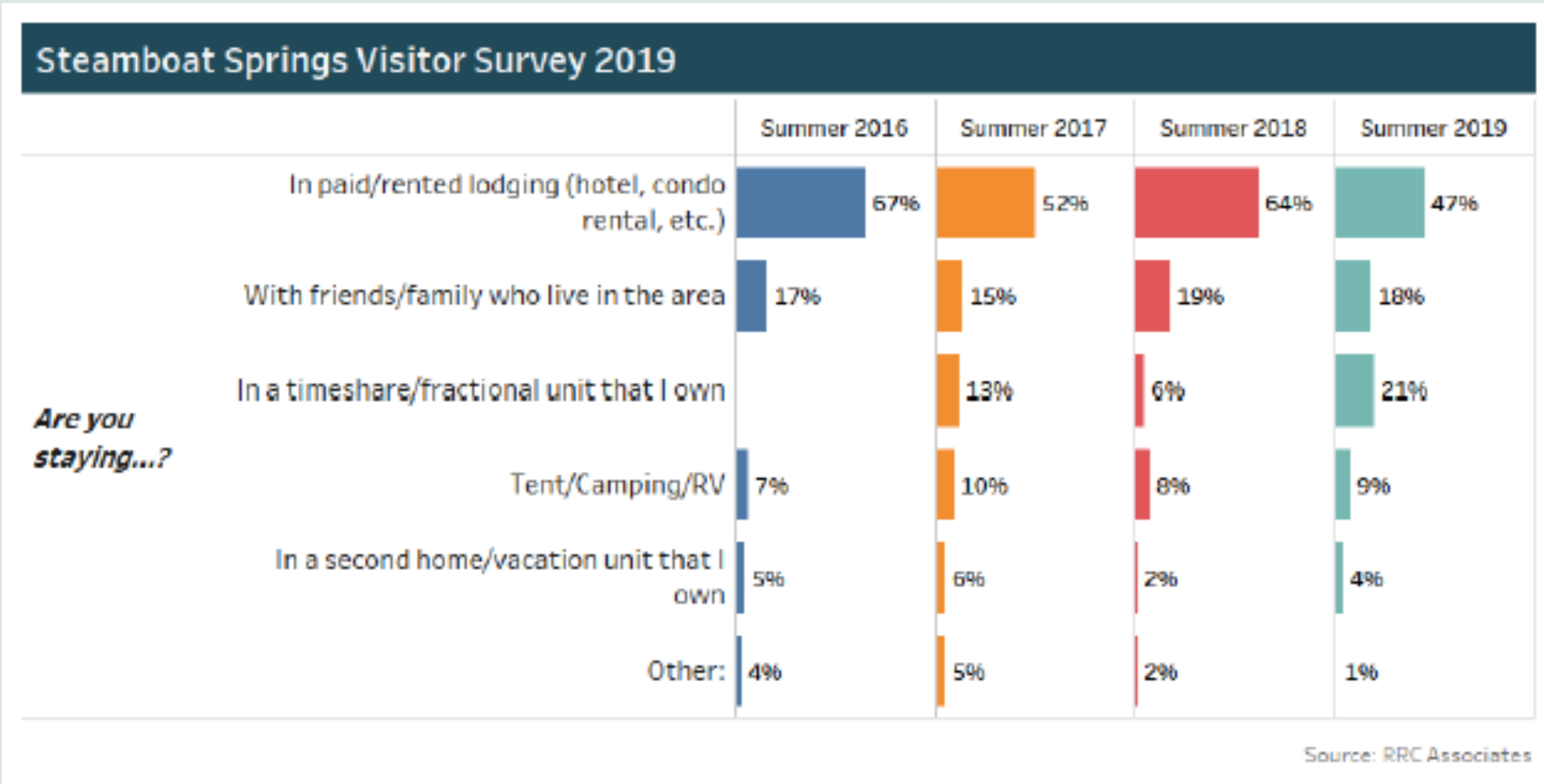
Summer Visitors

visitor accommodations



Paid/rented lodging is the primary accommodation type (47%), though it decreased in 2019 significantly.

Timeshare units grew considerably in 2019, representing over 20% of the market.

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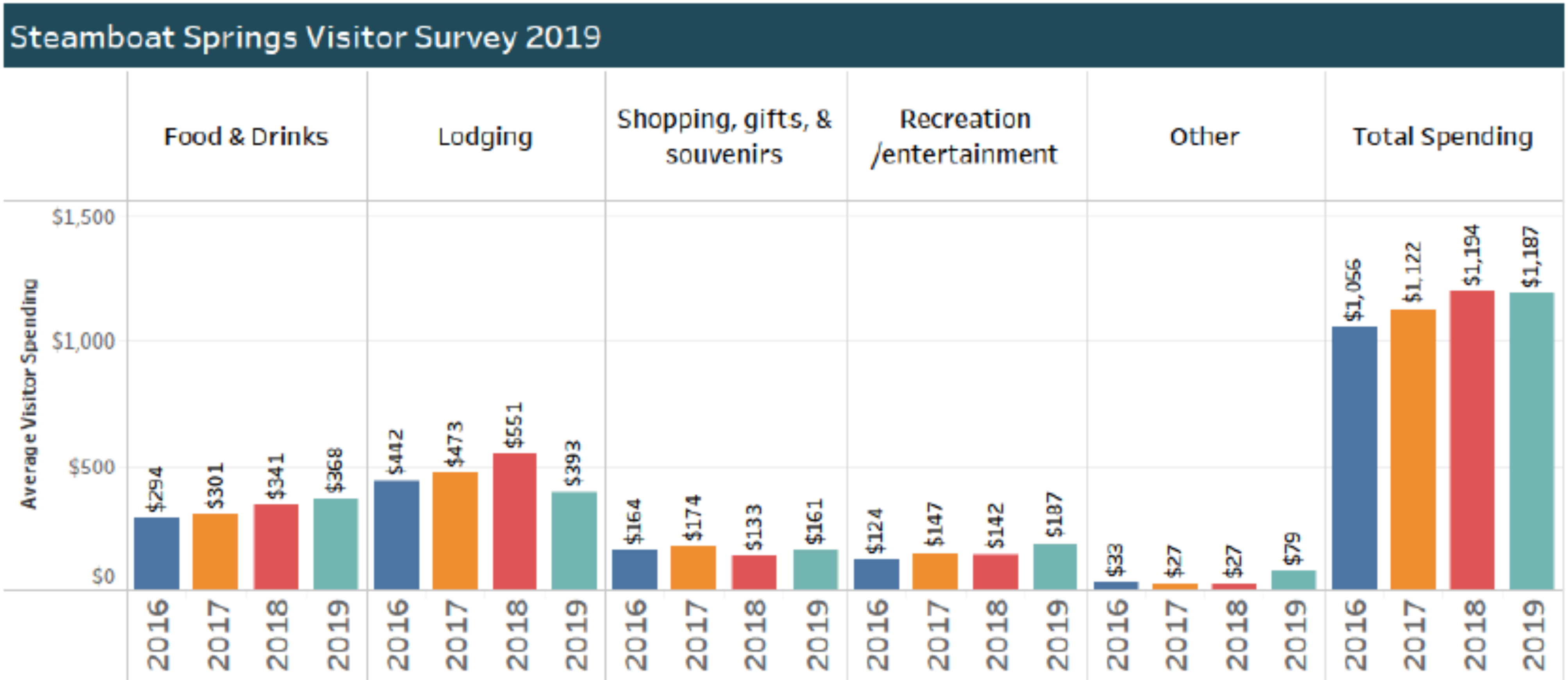
Summer Visitors

average spending



Average Trip Spending (per party):

- Lodging: $393
- Food & Drinks: $368
- Gifts, Souvenirs: $161
- Recreation & Entertainment: $187

TOTAL: $1,187 per party, per trip

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Market Capacity

overview

While predicting arts attendance is obviously impossible, national data on arts attendance allows us to reasonably estimate the size of the regional market for live performance.

The following slides detail national attendance rates in performing arts participation (2017) by educational attainment and the frequency of attendance (i.e. the number of times a ticket buyer attends offerings within the given genre per year).

These data are only available for adults ages 25 and older, so we also include average participation rates for adults age 18 to 24.

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Market Capacity

NEA's 2017 SPPA Attendance Rates

Arts Attendance Rates by Type of Performing Arts Activity*	Jazz	Classical Music	Opera	Musical Plays	Non-Musical Plays	Ballet	Other Dance^	Other Types of Music, Theater, or Dance#	Outdoor Performing Arts Festivals	All
Grade School	0%	0%	0%	2%	0%	0%	0%	6%	9%	19%
Some High School	3%	0%	0%	4%	2%	0%	3%	5%	10%	19%
High School Graduate or GED	5%	4%	5%	8%	4%	1%	4%	10%	16%	31%
Some College, No Degree	8%	7%	2%	16%	8%	3%	6%	16%	26%	46%
Associates or Bachelors Degree	14%	15%	4%	26%	16%	6%	10%	21%	34%	58%
Graduate or Professional Degree	18%	22%	6%	34%	22%	7%	11%	24%	38%	67%
Age 18-24	9%	8%	1%	16%	9%	1%	7%	18%	27%	48%
Frequency of Attendance (non-College Degree)	3.0	2.5	1.5	2.1	2.3	1.5	2.1	2.2	2.2	4.5

* National Endowment for the Arts' 2017 Survey for Public Participation in the Arts

^ A live dance performance other than ballet, such as modern, contemporary, folk, traditional, or tap dance

Any music, theater, or dance form not specifically referenced in the SPPA. This includes rock concerts, hip-hop shows, comedy, speaker-series, or other art forms.

Note that "Other Types of Music, Theater or Dance" includes rock/pop, hip-hop, comedy, speakers and other genres.

Market Capacity
methodology

Given the number of individuals within the 30-mile radius according to their educational attainment, we estimate the number of potential regional attendees for each performing arts genre by multiplying the relevant population figure (shown here) by the national attendance rate (prior slide) and then by the frequency of attendance.

Population Data, 30-mile Radius	
Educational Attainment (Age 25+)	
Grade School	329
Some High School	349
High School Graduate or GED	3,874
Some College, No Degree	3,118
Associates or Bachelors Degree	8,193
Graduate or Professional Degree	3,486
Total Population Age 25+	**19,349**
Total Population Age 18-24	**2,064**

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Market Capacity

demand estimate

Steamboat Springs Demand Estimate (30-mile Radius)	Jazz	Classical Music	Opera	Musical Plays	Non-Musical Plays	Ballet	Other Dance	Other Types of Music, Theater, or Dance	Outdoor Performing Arts Festivals	Total
Age 25+	6,443	5,909	1,242	8,832	5,654	1,270	3,194	7,549	11,963	52,056
Age 18-24	527	418	32	700	417	41	309	808	1,216	4,467
Total Potential Performing Arts Attendance	**6,970**	**6,327**	**1,274**	**9,533**	**6,071**	**1,310**	**3,503**	**8,357**	**13,179**	**56,523**

This analysis suggests that 56,000+ tickets per year could be sold or distributed in the region for live events of these genres.

This figure represents maximum potential market capacity and perfect conditions (timing, pricing, location/access, quality of offering, genre, etc.).

As a point of reference, the events mapped at the Strings Pavilion in 2019 had nearly 25,000 ticket buyers.

Comparable Markets

overview

Assessing the size and number of venues in comparable ‘Mountain Towns’ provides insights into Steamboat Springs’ potential to add new performing arts facilities into the market.

Background on the number of facilities, both year-round and seasonal, and their capacities was collected from 8 comparable markets, then each market’s total number of seats were calculated per capita and compared.

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Performing Arts Venues in Comparable 'Mountain Town' Markets

Market Characteristics

	Steamboat Springs, CO	Jackson Hole, WY	Aspen, CO	Sun Valley & Ketchum, ID	Telluride, CO
Total Population (30-mile Radius)	26,443	35,909	54,035	21,670	15,953
Hispanic/Latinx Population	7%	15%	22%	23%	9%
Median Household Income	$71,638.00	$75,626.00	$70,346.00	$62,431.00	$57,526.00

Venues Hosting Performing Arts Events (150 to 5,000 seats)

	Steamboat Springs, CO	Jackson Hole, WY	Aspen, CO	Sun Valley & Ketchum, ID	Telluride, CO
Total # of Venues	3	5	6	5	5
Largest Capacity Venue	560	750	2000	5100	850
Notes	-	Walk Music Tent Seasonal	Benedict Music Tent Seasonal	Sun Valley Pavilion Seasonal (1,600 covered seating)	Club Red Live Music Venue Connected to Conference Center
Total # Year-Round Venue Seats	1245	1775	2264	1540	2034
Total # Year-Round Venue Seats per capita	0.047	0.049	0.042	0.071	0.127
Total # Seasonal Venue Seats	0	750	2000	5100	0
Total # Seasonal Venue Seats per capita	0.000	0.021	0.037	0.235	0.000

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Theaters in Resort Communities	Steamboat Springs, CO	Jackson Hole, WY	Aspen, CO	Sun Valley & Ketchum, ID	Telluride, CO
Venue	Strings Pavillion	Walk Music Hall	Benedict Music Tent	Sun Valley Pavilion	Club Red
Capacity	560	750	2000	5100	850
Note		Seasonal	Seasonal	Seasonal (1,600 seats)	Live Music Venue Connected to Conference Center
Venue	Steamboat Springs HS	Jackson Hole Center for the Arts	Aspen School District Theater	Wood River High School Performing Arts Theater	Palm Theatre Complex
Capacity	535	500	550	496	587
Note	School-Limited Access		School-Limited Access	School-Limited Access	School-Limited Access
Venue	Chief Theater	Jackson Hole High School	Wheeler Opera House	Argyros Performing Arts Center	Sheridan Opera House
Capacity	150	500	504	460	240
Note		School-Limited Access			
Venue		Pink Garter Theater	Harris Concert Hall	Sun Valley Opera House	Nugget Theatre
Capacity		450	500	344	182
Note					Art Film House and Vaudeville Shows
Venue		Jackson Hole Playhouse	Paepcke Auditorium	Liberty Theatre	Bob Saunders Theater
Capacity		325	410	240	175
Note					School-Limited Access
Venue			Doerr-Hosier Center		
Capacity			300		
Note					

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Performing Arts Venues in Comparable 'Mountain Town' Markets

Market Characteristics	Steamboat Springs, CO	Crested Butte, CO	Vail & Beaver Creek, CO	Park City, UT	Breckenridge, CO
Total Population (30-mile Radius)	26,443	31,876	89,996	1,688,957	71,696
Hispanic/Latinx Population	7%	9%	24%	16%	18%
Median Household Income	$71,638.00	$61,794.00	$69,607.00	$75,664.00	$61,854.00

Venues Hosting Performing Arts Events (150 to 5,000 seats)	Steamboat Springs, CO	Crested Butte, CO	Vail & Beaver Creek, CO	Park City, UT	Breckenridge, CO
Total # of Venues	3	2	5	5	4
Largest Capacity Venue	560	305	2,565	1,269	750
Notes	-	-	Ford Amphitheater Seasonal (1,265 covered seating)	School - Limited Access	Riverwalk Center - Converted into Year-Round Venue
Total # Year-Round Venue Seats	1245	755	3740	2519	1272
Total # Year-Round Venue Seats per capita	0.047	0.024	0.042	0.001	0.018
Total # Seasonal Venue Seats	0	0	2565	0	0
Total # Seasonal Venue Seats per capita	0.000	0.000	0.029	0.000	0.000

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Theaters in Resort Communities	Steamboat Springs, CO	Crested Butte, CO	Vail & Beaver Creek, CO	Park City, UT	Breckenridge, CO
Venue	Strings Pavillion	Center for the Arts Crested Butte	Ford Amphitheater	Eccles Center Kearns Auditorium	Riverwalk Center
Capacity	560	305	2565	1269	750
Note		In-Development	Seasonal (1,265 seats)	School-Limited Access	Year round
Venue	Steamboat Springs HS	Crested Butte High School	Donovan Pavillion	Jim Santy Auditorium	Speakeasy Theatre
Capacity	535	300	2200	400	150
Note	School-Limited Access			Library - Limited Access	
Venue	Chief Theater	Mallardi Cabaret Theatre	Vilar	Egyptian Theatre	CMC Finkel Auditorium
Capacity	150	150	530	346	235
Note					
Venue			Eagle Valley High School	Prospect Square Theatre	Breckenridge Theater
Capacity			510	324	137
Note			School-Limited Access		
Venue			Battle Mountain High School	Egyptian Theatre Black Box	
Capacity			500	180	
Note			School-Limited Access		
Venue					
Capacity					
Note					

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Comparable Facilities

activity levels

Performing Arts Venue Utilization in Comparable 'Mountain Town' Markets

Facility & Market Characteristics	Center for the Arts | Jackson, WY	Vilar Performing Arts Center | Beaver Creek, CO	Riverwalk Center | Breckenridge, CO	Argyros Performing Arts Center | Ketchum, ID
Facility Capacity	500	530	750	460
Total Population (30-mile Radius)	35,909	89,996	71,696	21,670
Hispanic/Latinx Population	15%	24%	18%	23%
Median Household Income	$75,626	$69,607	$61,854	$62,431
Annual Activity Level				
Presenting Series	47	84	5	32
Resident/Local Use	68	12	45	55
Community Rentals	30	34	69	28
Total Activity Days	**145**	**130**	**119**	**115**

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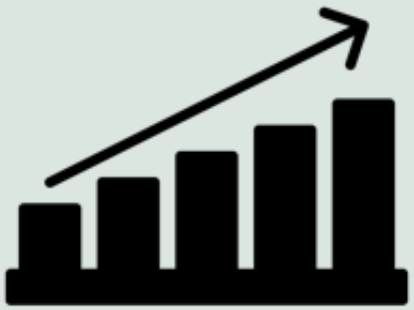
Market Takeaways



Growing

Population locally and regionally is expected to continue to grow

Visitorship has grown during the summer and 'shoulder' seasons in recent years

Large millennial population ages 25-34

Seasonal & Visitor Population

Double the population of Steamboat at various points throughout the year

While usually happy with Steamboat offerings, survey results reveal an interest in more night life activities and activities for adults

Capacity for Activity Growth

Steamboat has a comparable amount of theater seats in the market relative to other 'Mountain Towns"

Market Capacity estimates show room for increased activity, particularly in theater and some music

[Image Credits: roughen.glyph, Turkkub, & Yu Luck from the Noun Project]

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Competitive Analysis

— building creativity —

Review of existing facilities

overview

In order to assess the competitive situation for new facilities in Yampa Valley, we developed two inventories:

- **Performance Facilities**: Inventories indoor facilities used four or more times a year for live performance within a 30-mile radius.
- **Meeting & Event Facilities**: Inventories local meeting and event facilities.

This exercise allows us to analyze the current stock of facilities in the community (including their programming, features, amenities and availability) and identify any gaps.

Review of existing facilities
methodology

The performance facilities inventory considers the physical features and types of activities that take place in 19 local facilities and 1 regional facility. In addition, the condition and functionality of each facility has been rated using eight variables.

Variables are rated on a scale of 1 to 4, with the higher score being better. Some of these facilities have been visited by the consulting team, while other ratings are self-reported by facility managers or based on anecdotal information and interview input.

The exercise is somewhat subjective, but does provide a good basis for comparison.

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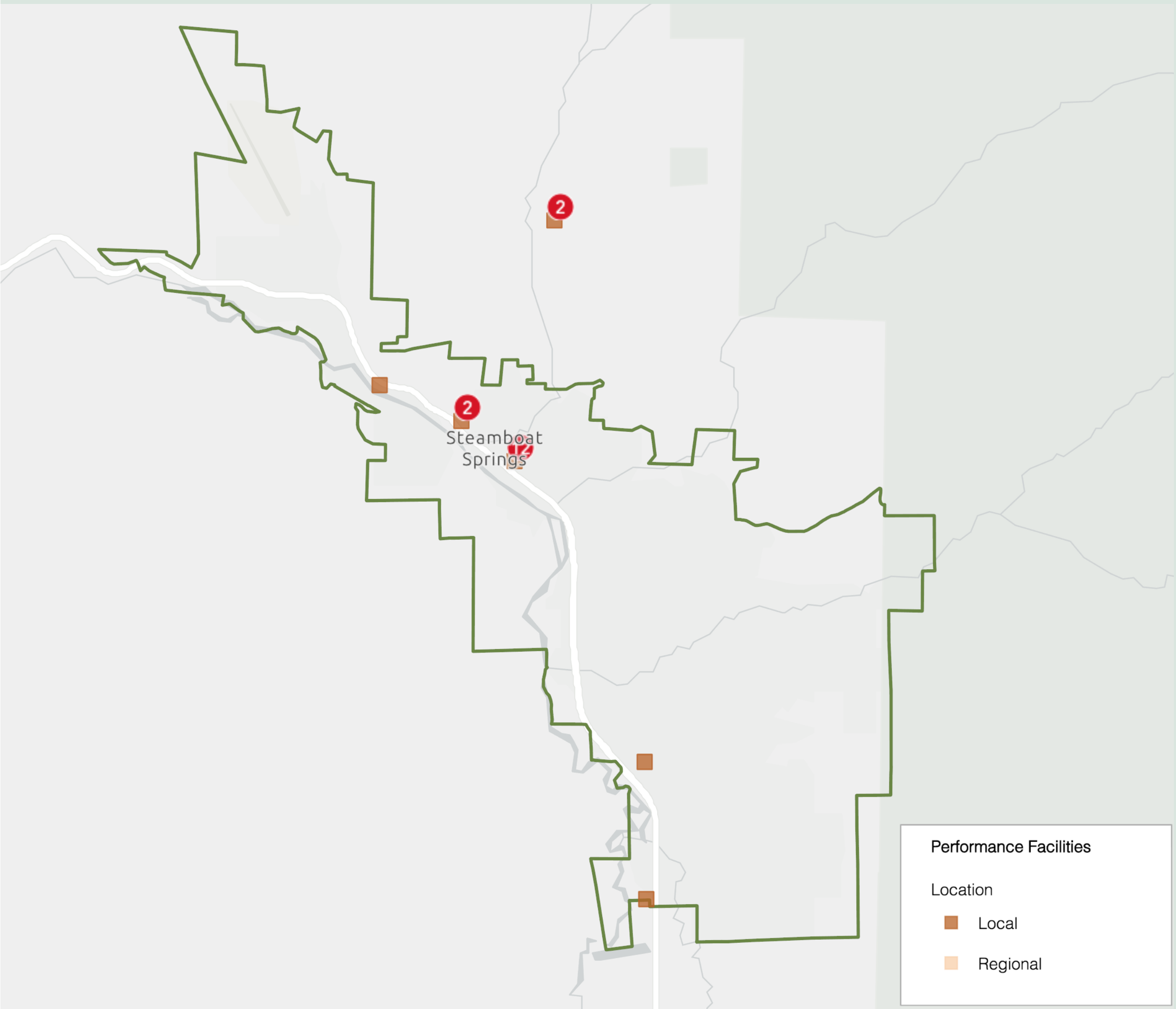
Indoor performance facilities

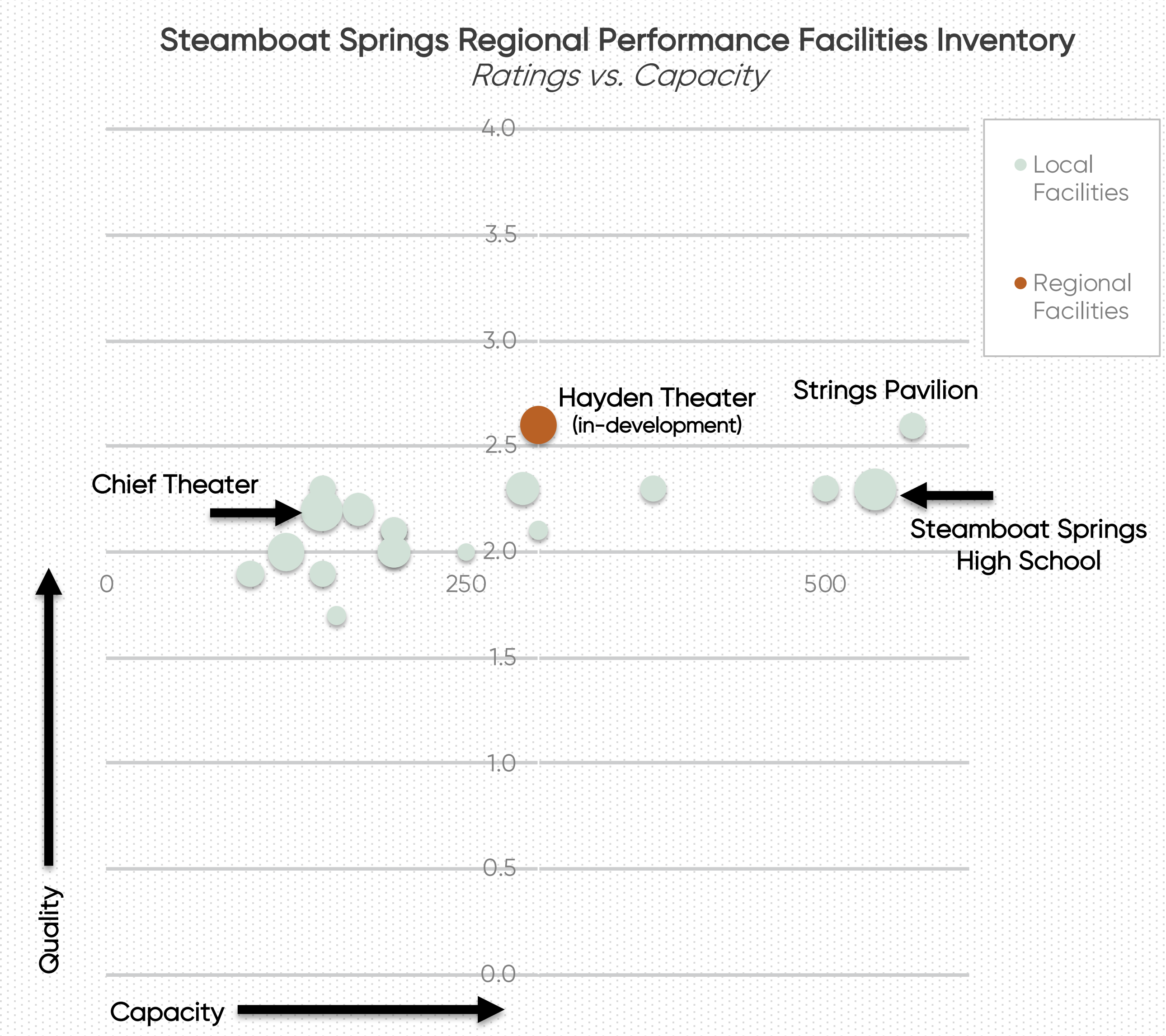


19 local facilities including the Strings Pavilion, Steamboat Springs High School and the Albright Family Auditorium at Colorado Mountain College

Regionally, there is only one facility, the City of Hayden's High School auditorium that is being developed into a 300-seat theater performance space for the community

A number above the square indicates multiple spaces within the area

Indoor performance facilities



The matrices in the following slides compare the quality (y-axis) and capacity (x-axis) of each inventoried facility

The size of each circle represents the number of activities supported by the venue—the larger the circle, the more activity types are supported

Overall, this matrix suggests that facilities in the market are primarily less than 250-seats and have a quality rating below 2.5

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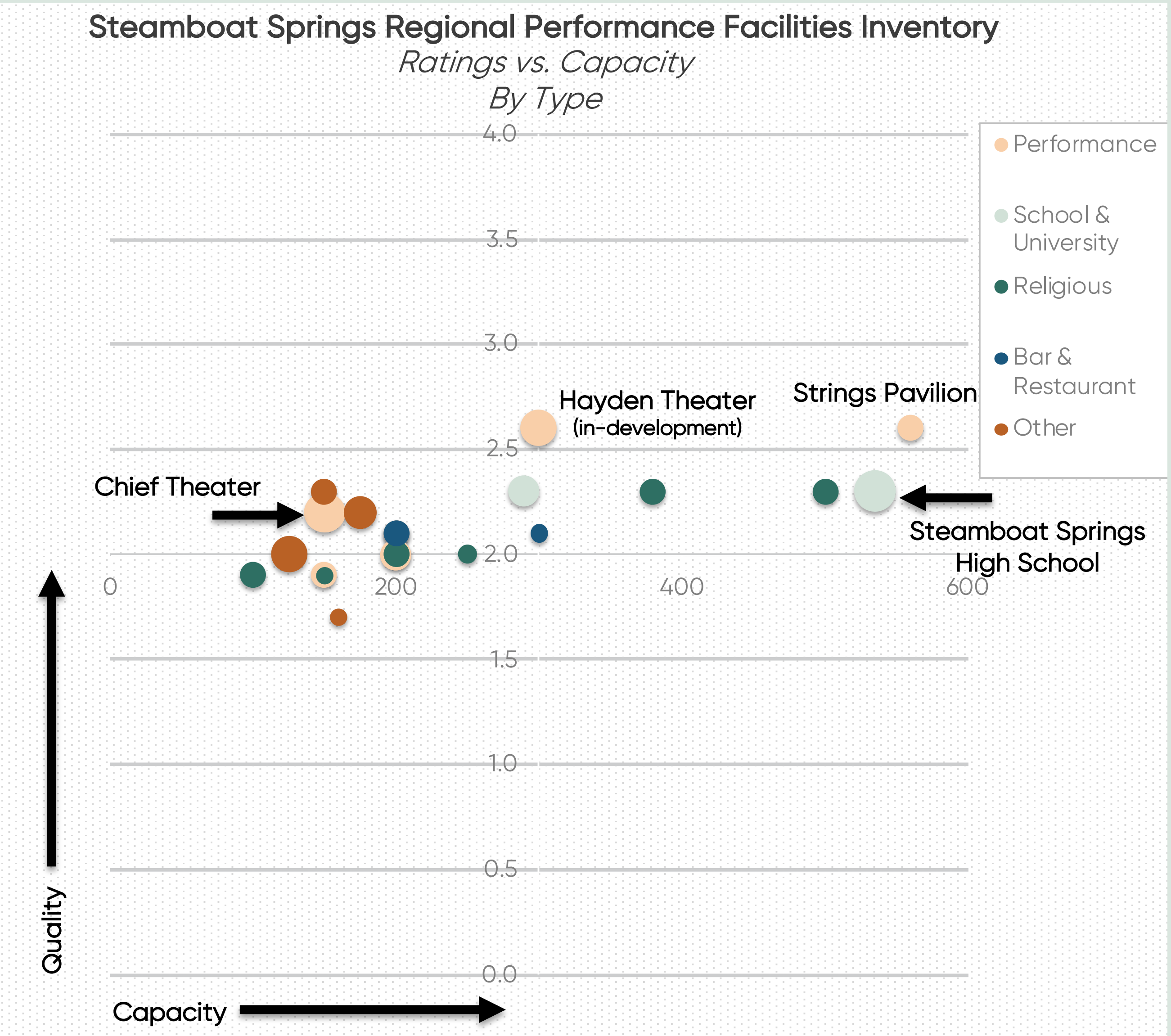
Indoor performance facilities



In this matrix, we have colored facilities according to their type

Currently, the Strings Pavilion is the only local performance space over 200-seats

Most facilities in the market are not purpose built for performing arts events, like the "Other" facilities (Bud Werner Memorial Library, Steamboat Art Museum and Community Center)

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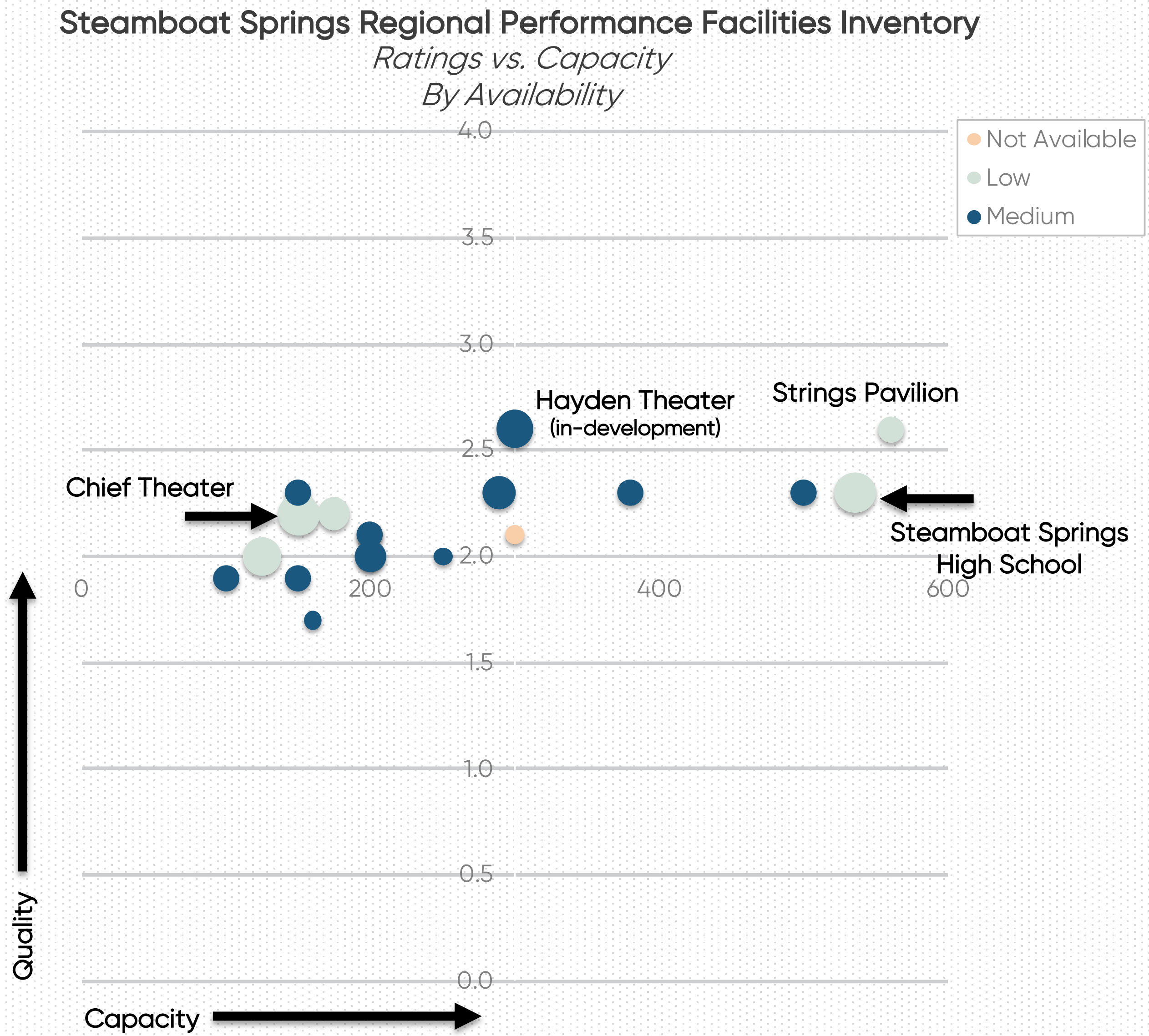
Indoor performance facilities



In this matrix, we have colored facilities according to their availability

This allows us to see that all facilities in the market have low or medium availability to potential users

Of the facilities over 400-seats, the High School has low availability for outside users due to the growth of their own programs

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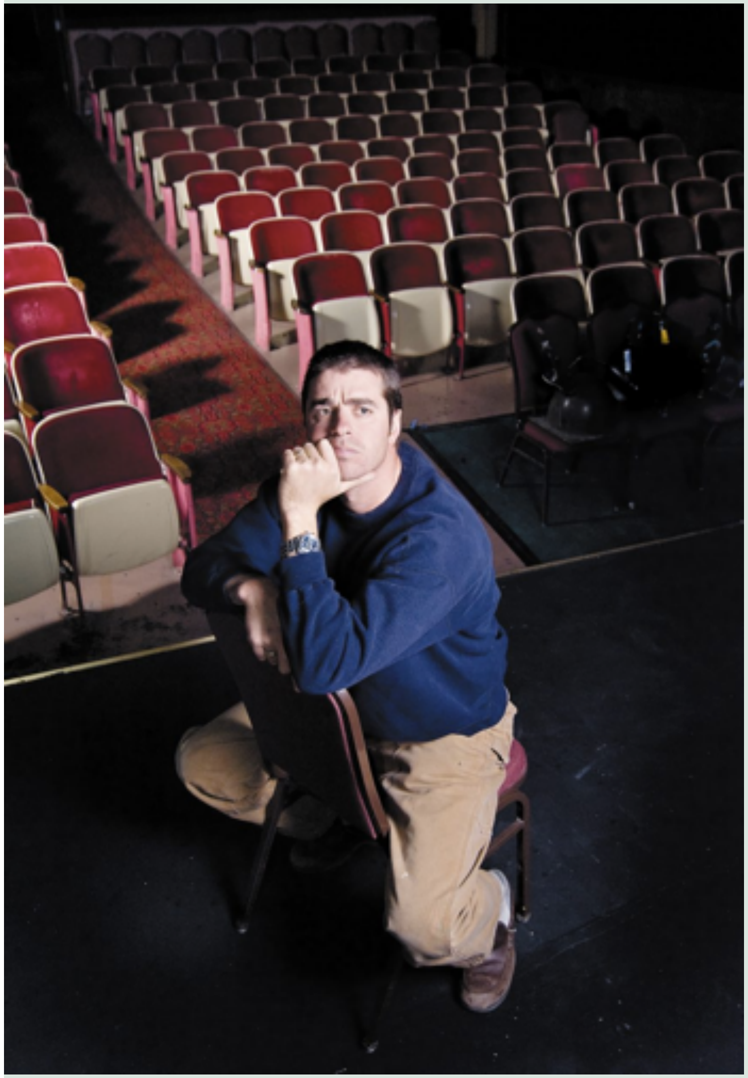
Closed performance facilities



Owner of the Steamboat Mountain Theater, Kelly Anzalone, sits on the stage, which was home to dozens of community theater productions in Steamboat

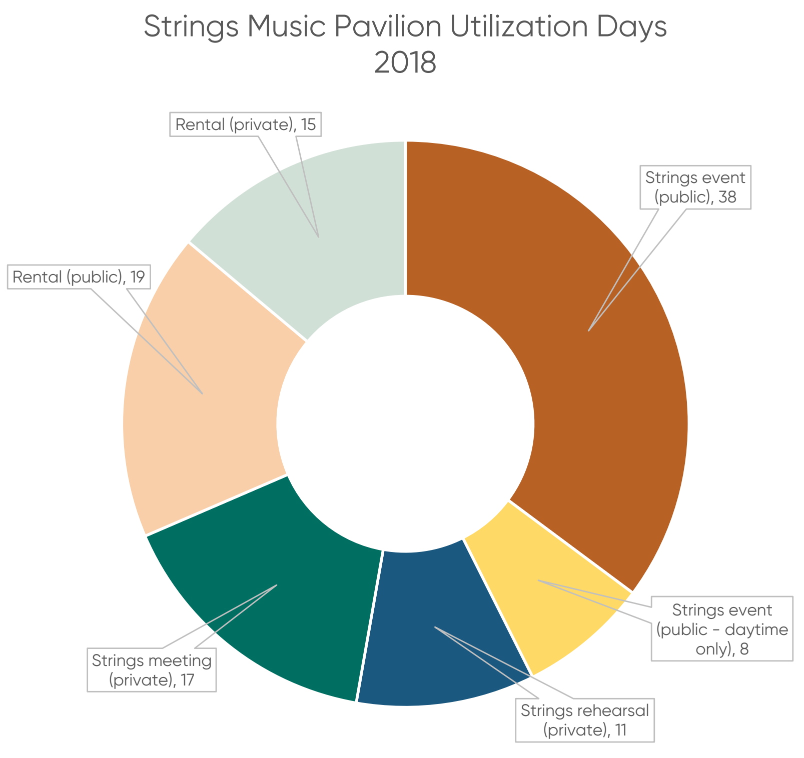
John F. Russell | Steamboat Pilot & Today

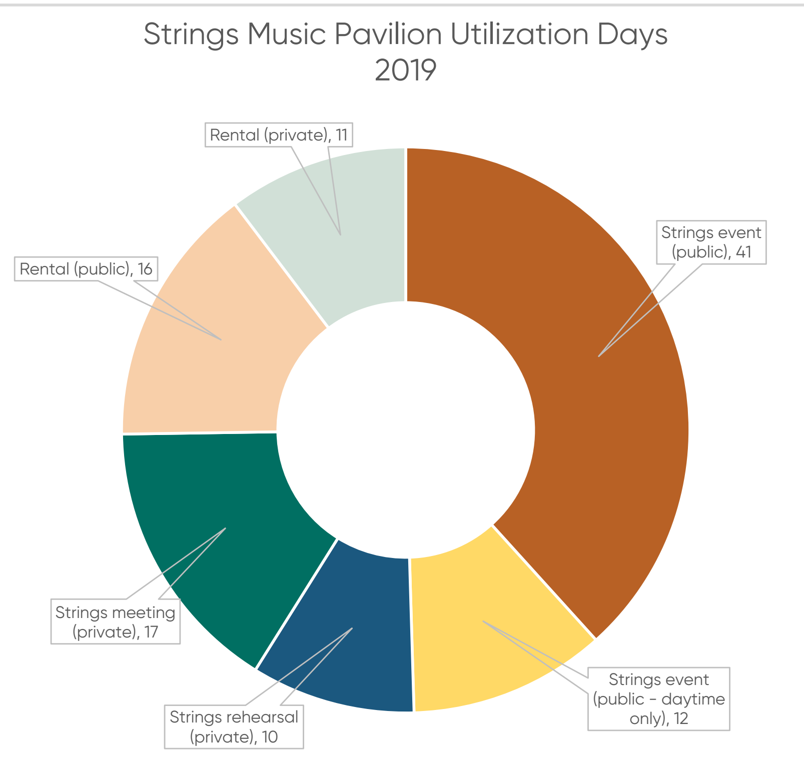
Over the past 15 years, two performing arts facilities closed and were demolished in Steamboat

The Steamboat Mountain Theater, 230-seats, was closed and demolished in 2008 as part of a larger redevelopment plan for Ski Time Square

The 7th Street Playhouse, 96-seats, was considered unsafe and a fire-risk, leading to its demolition in 2005


STEAMBOAT SPRINGS HIGH SCHOOL





Performance facility utilization

The Strings Pavilion has been utilized 108 and 107 days over the past two years

The majority of events in the Pavilion are Strings programming, whether that is an evening performance (35%-38%), a daytime educational program (7-11%), or a close—door rehearsal or meeting (10% and 16% respectively)

Outside users rent the Pavilion for performances between 15 and 20 times per year (15-18%)

The facility is rented for private use an additional 10 to 15 times per year (10-14%)

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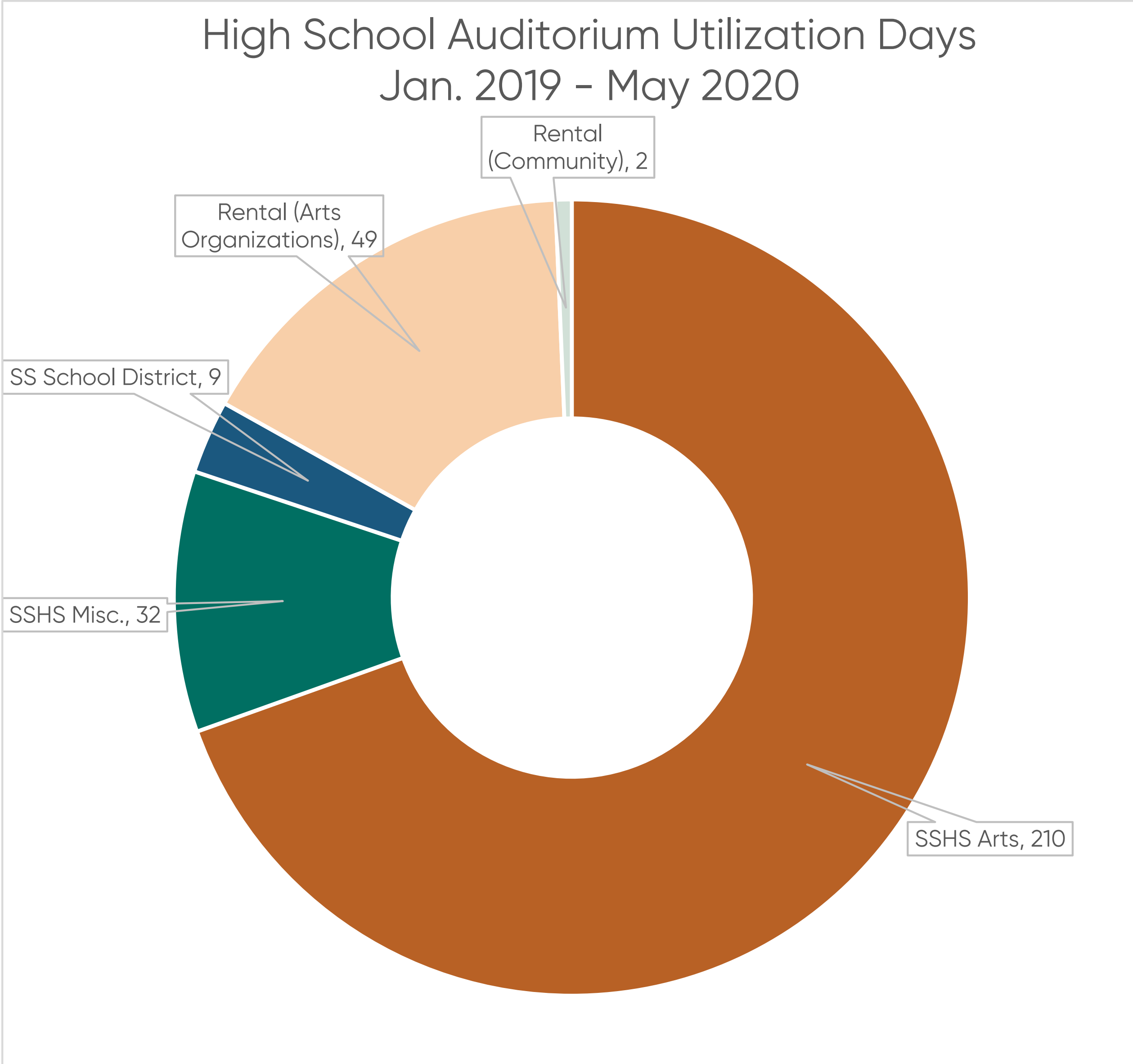
Performance facility utilization



From January '19 to May '20, the High School Auditorium was used 302 times

Recent growth of performing arts programs in the High School has led to major challenges between the School and local arts groups

Due to limited storage and spaces for set construction and rehearsal, a High School production occupies the stage for 6+ weeks before every performance

This has limited access by local arts groups and displaced long-time users of the space

Expanding the backstage facilities at the High School is being considered as part of a bond referendum, which could reduce the High School's utilization of the stage, potentially providing over 75 days of stage use by local arts groups

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Meeting & event facilities

A total of 42 unique facilities were identified in Steamboat's 22 facilities

Over 50% of facilities have a capacity under 100

3 facilities in the market can accommodate 400+ people, the largest being the Korbel Ballroom at the Steamboat Grand

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Closed meeting & event facilities

The Sheraton Steamboat Resort Villas no longer offers large-scale meeting and event space for conferences, corporate functions and private parties

The resort’s exit from the market has left a 37,000 sq. ft. conference and event gap in Steamboat

According to Sheraton leadership, the typical group size for meetings was between 50-200 seats

The largest space at the Sheraton could accommodate 300 people banquet style or 800 people standing

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Competitive Takeaways

Gaps in the Market

The region lacks a performance facility with the features and amenities to support most performing arts activities

Availability to access a space is a challenge, particularly since the High School's auditorium is frequently used for school productions

Lower Quality, Multi-Purpose Venues

No venue has an orchestra pit, fly tower or ample back-of-house space to accommodate large casts and crew

Most facilities within Steamboat are associated with a church or school/university

Meeting & Event Opportunities

Recent closures of conference/event facilities presents an opportunity in the market

Only the Steamboat Grand can accommodate groups larger than 400 people

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Uses & Users

Potential Use of New Facilities

overview

Over the course of this study, we worked to gather information on demand in Steamboat for performance and event space.

This effort helped us determine who needs space, what it is needed for, and, to an extent, how often it is needed.

To assess demand, we spoke with local arts organizations, local and regional touring artist promoters, and members of the Steamboat Springs Chamber and Main Street Association.

Leadership from these groups were interviewed either in-person or over the phone.

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User Demand

	Current Arrangement
Organization	Current Performance Venue(s)
Seminars	Strings Pavilion
Steamboat Dance Theater	Steamboat Springs High School
Elevation Dance Studio	Steamboat Springs High School
Steamboat Arts Academy	Steamboat Springs High School
Steamboat Springs Symphony Orchestra	Strings Pavilion, Holy Name Church
Fuchs-Wackowski Theater Co.	Organization In-Development
Opera Steamboat	Bud Werner Memorial Library Hall, Steamboat Christian Center, Chief Theater
Colorado New Plays Festival	Chief Theater
Forty106 Dance Project	The Depot Arts Center
Mountain Town Film Collective	The Ski Locker
Piknik Theater	St. Paul's Episcopal Church, Bud Werner Memorial Library Hall

Current performance spaces for users are located at the High School, local churches and the Strings Pavilion.

Rehearsals take place in churches, private studios or makeshift spaces throughout the community.

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User Demand

	Potential Performing Arts Center Utilization					
Organization	Minimum Seating Capacity	Maximum Seating Capacity	Ideal Seating Capacity	Estimated # of Performance Days	Estimated # of Tech Rehearsal Days (on-stage)	Estimated # of Rehearsal Days (off-stage)
Seminars	500	750	625	6	0	0
Steamboat Dance Theater	500	700	600	3	4	72
Elevation Dance Studio	500	700	600	10	3	0
Steamboat Arts Academy	500	700	600	2	2	0
Steamboat Springs Symphony Orchestra	400	600	500	15	12	0
Fuchs-Wackowski Theater Co.	400	500	450	6	12	72
Opera Steamboat	200	400	300	9	4	10
Colorado New Plays Festival	200	300	250	5	4	0
Forty106 Dance Project	100	200	150	2	4	0
Mountain Town Film Collective	100	150	125	12	0	0
Piknik Theater	80	150	115	6	2	0
			TOTAL	76	47	154

Potential users were asked their preferred seating capacity and potential utilization of desired space.

Half of the organizations are interested in a performance space between 400-700 seats, while the other half have a need for a space between 100-400 seats.

Currently, there is some demand for performance space, potentially 25 event days in a smaller space and 50 or so days in a medium-size space.

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Utilization by Local Arts Groups

summary

While the demand for performance and rehearsal space in Steamboat is relatively strong, a few things should be considered:

- Most of the utilization accounts for events *shifting* from one location in town, rather than *new or expanded* programming

- The Steamboat Springs Symphony Orchestra expressed an interest in expanding their programming in a new space and the Fuchs-Wackowski Theater Company is interested in a new performance space to establish their company

- Potential developments at the Chief Theater and/or the High School expansion could alter these utilization estimates

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Potential for Touring Activity

summary

Conversations with the Western Arts Alliance and local festival promoters informed the demand and opportunity to attract touring acts to Steamboat, the following are takeaways from those conversations:

- The market for performing arts activity is continuing to grow
- A space that distinguishes Steamboat from other Mountain Towns is critical for attracting artists between Salt Lake City and Denver
- Ample partnership, co-promoting and block-booking opportunities exist with the Rocky Mountain Consortium, AEG, Live Nation or other regional performance venues
- Booking 20-25 touring acts per year is feasible, presenting a mix of theater, music and dance that is distinct from the acts at the Strings Pavilion and the Chief Theater
- Recommend a highly flexible venue that can accommodate 700-seats or 1,200 standing, but with the design functionality to accommodate smaller acts needing an intimate 300-500 seat venue

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Potential for Touring Activity

touring activity in Steamboat performance facilities

	Chief Theater	Strings Pavilion	Potential PAC (estimates)
Presenting Days	80	Public Performance: 38 School Performance: 8	20-25
Local/Resident Company Performance Days	*60*	19	76
Rehearsal Days	*100*	11	47
Meeting/Event Days	*200**	32	N/A
Total Days	*440*	108	143-148

Currently, the Chief and Strings present between 40 and 80 events by touring artists

Note, the activity levels of the Potential PAC are estimates and the Local/Resident Company and Rehearsal days for the PAC ***may shift*** from the Chief and Strings

Approximately 150 of the Chief's 200 meeting event days are for Sunday Church Services, Friday Church meetings and a Thursday Prayer group

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Uses & Users Takeaways

Moderate Utilization

Potential utilization of a performance space is moderate, with potentially 48 use days in a smaller, 100-400 seat theater, and 75 days in a medium, 400-700 seat theater

A few local arts organizations emerged as possible anchor tenants

Interest in Touring Acts

Local and regional promoters considered 20-25 nights of touring activity reasonable, distinguishing the acts from those at Strings and the Chief Theater

Opportunities to partner with other promoters and facility managers in 'Mountain Towns'

Flexibility is Key

Promoters and local arts groups both expressed a desire for a flexible performance space

A space capable of accommodating audiences of various sizes will ensure its activation by touring artists and locals alike

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Community Benefits & Impacts

Community Benefits & Impacts
overview

To better understand the ways in which a performing arts center would impact Steamboat Springs, public planning documents from the City, Steamboat Creates and the Steamboat Ski & Resort Corporation have been reviewed

Plans include the City Downtown Plan (2019), Steamboat Creates Strategic Plan (2019) and the Ski Corp. Master Development Plan (2011)

These plans emphasize the following initiatives:

- Support & Promote Cultural Events that Benefit Locals & Visitors
- Preserve & Promote the Historic Downtown
- Enhance & Diversify the Artist Housing Opportunities
- Create More Recreational & Entertainment Options Near the Base

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Downtown Plan (2019)

arts, culture & heritage

Goals	Strategies
Preserve and protect the existing historic structures in Downtown	-Strengthen the City's historic preservation program for Downtown to ensure preservation of historic assets
Strengthen Downtown as a historic district	-Strengthen the visual queues of the district through signage and wayfinding, landscape, sidewalks and site furnishings
Support, promote and manage events in Downtown for the benefit of locals and visitors	-Consider additional winter programming to balance events throughout the year and attract additional Downtown visitors in the "off-seasons" -Evaluate existing events and programming for inclusion of children and youth
Support, enhance and diversify public art	-Provide support to the Steamboat Springs Creative District in the form of financial resources or organizational/capacity resources -As redevelopment occurs, evaluate public private partnerships to provide artist housing or artist in residence programs

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Downtown Plan (2019)

land use & housing

Goals	Strategies
Encourage a diversity of land uses that support locals and tourists	-Allow other types of complementary ground floor land uses east of 5th and west of 10th St. that contribute to local and visitor services as uses by-right. These might include; health and recreation centers, lodging, active offices, small-scale craft manufacturing, education or other uses which contribute to a pedestrian-active street frontage
Improve housing diversity	-Engage in public private partnerships between the City and Developers to provide attainable housing units on city-owned parcels and incorporate housing into City facility projects.

Steamboat Creates Strategic Plan (2019)

infrastructure

Community feedback from the Strategic Planning process indicated infrastructure as one of five key objectives for Steamboat Creates to focus on

The following are infrastructure strategies:

- Collaborate with current creative infrastructure projects and connect them with resources for success
- Create a community master plan for creative infrastructure to include affordable housing for creatives, studios and maker spaces, exhibition space, parking needs, lodging for visiting artists, etc.
- Continue to work with city regarding creative placemaking and wayfinding

During a March 2020 Steamboat Springs City Council work session, council members an expressed interest in pursuing a collaborative approach to affordable housing

There is an interest in exploring options to address the artist housing need in Steamboat and conversations are ongoing

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Master Development Plan (2011)

ski corporation objectives

Provide an expanded offering of other recreational activities for year-round utilization of the facilities, with focus on summer activities

Continue to increase the quality of the facilities to meet the ever-increasing expectations of the local, regional and destination skier markets

Promote & market the recreational events, festivals or specific events associated with regional festivals and gatherings taking place in Steamboat

- Community sentiment is that Ski Corp. has failed to implement this objective, with limited promotion to the broader community

Some of the activities associated with these events are anticipated to take place on the mountain, as well as in the base area

In March 2020, Ski Corp. announced a 355-acre expansion, likely limiting the funding capacity to invest in cultural facility investments

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Conclusions

Conclusions

- Market and visitor data shows Steamboat's population can reach nearly 30,000 residents and visitors during peak seasons
- Year-round residents have high levels of educational attainment and household income, suggesting individuals have the capacity and willingness to attend arts events
- The large number of residents between the ages of 25-34 suggests an opportunity for additional social spaces and places to enjoy cultural activities in the evening
- The region lacks a performance facility with the features and amenities to support most performing arts activities, no venue has an orchestra pit, fly tower or ample back-of-house space to accommodate large casts and crew
- Most facilities within Steamboat are associated with a church or school/university and are heavily used, limiting the availability for community groups

Conclusions

- Potential utilization of a performance space is moderate, with potentially 48 use days in a smaller venue (100-400 seats) and 75 days in a medium capacity venue (400-700 seats)
- Additionally, local and regional promoters consider 20-25 nights of touring activity reasonable, distinguishing the acts from those at Strings and the Chief Theater
- A few local arts organizations emerged as possible anchor tenants, representing a steady level of use and activation of the Center
- Local community planning documents prioritize historic preservation, drawing locals and visitors Downtown, and improving the diversity of housing in the community

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Public Input Meeting

Webb Mgmt

Public Input Meeting

overview

On Wednesday, March 18th, Steamboat Creates and Webb Mgmt hosted a webinar, presenting the findings from the Assessment and inviting comments and feedback from the public

A total of 77 unique 'attendees' took part in the webinar

The presentation lasted 40 minutes followed by 50 minutes of questions and comments submitted by attendees

A survey was distributed at the conclusion of the webinar, 12 individuals replied to the survey request

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Public Input Meeting

takeaways

The turnout for webinar was very encouraging, with dozens of good, insightful questions, covering the following topics:

- How to reach younger audiences (under 35) in Steamboat
- How a meeting/event space fits in with a PAC
- How a new PAC can be financially supported
- Partnership opportunities with Strings, Perry-Mansfield and the Colorado Mountain College
- How Steamboat can enhance the skilled technical labor pool to support the existing theaters and any recommended concept
- How can artist housing and affordability be incorporated in a PAC development

Comments from the survey echoed the same questions and provided positive feedback about using the Zoom Webinar platform for the presentation

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Recommendations & Next Steps

— building creativity —

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Recommendations


[Image courtesy of Kelly Arts Center & Hylton Center]

Based on the conclusions from the first phase of work, components of a performing arts facility in Steamboat Springs could include:

- •700 theater style seating; 1,100+ standing room
  - •Flexible in design, the space should be capable of a flat-floor configuration and reduction of seating capacity to 300-500 seats
  - •Good technology, adjustable acoustics to fit the performance type and high-quality sightlines for seated and standing events
  - •Large working stage with fly tower, pit, large wing-space and a large backstage area with performer support
- •Rehearsal hall and smaller programmable spaces for event functions and smaller, informal performances
- •Excellent public spaces throughout, offer high-quality food & beverage

From concept to project

While we are able to make a marginal case for these spaces, we do not believe that the concept is strong enough to proceed on its own

To proceed, this performing arts facility concept needs to be a part of a larger project.

We've identified a number of possibilities.

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The Performance, Meeting and Event Center

- Partner with Colorado Mountain College on the development of a conference center that includes our recommended performing arts pieces

- The key is having a main hall that can convert to flat floor and other configurations to support meetings and events

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Performance, Meeting & Event Center

Charles W. Eisemann Center for the Performing Arts & Corporate Presentations | Richardson, TX

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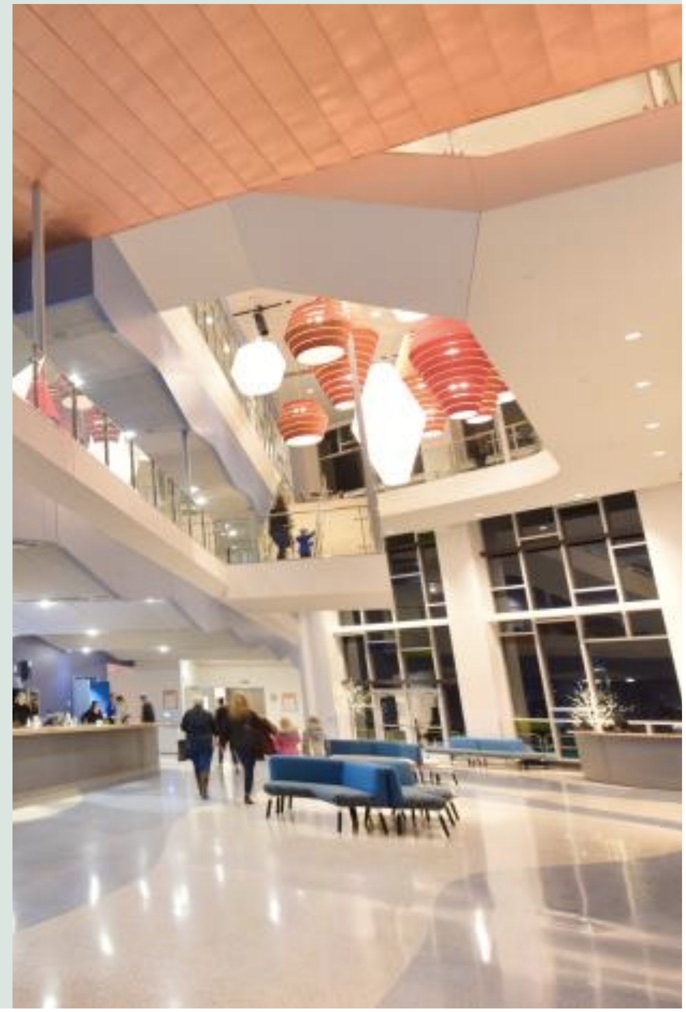
Performance, Meeting & Event Center

Pablo Center at the Confluence, U Wisconsin Eau Claire



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The Performance, Conference and Event Center

Pros:
- Conference business potentially adds 50-75 days of use to main hall
- Operating synergies
- Educational partner for fundraising, development and operations

Cons:
- The tail wagging the dog
- Site priorities different for the College

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Combine with Strings

- Develop new facilities at the Strings site, including new shared facilities that address the limitations of the Strings facilities, both in terms of public spaces and backstage spaces.
- The Strings Pavilion continues to function as a music hall, while the new facility is for theatre, dance, opera, film, etc.
- The two main spaces, plus new smaller spaces, create a PAC for Steamboat
- Or, replace the current Pavilion for one better multipurpose space.
- Could potentially add the conference and event space to this option

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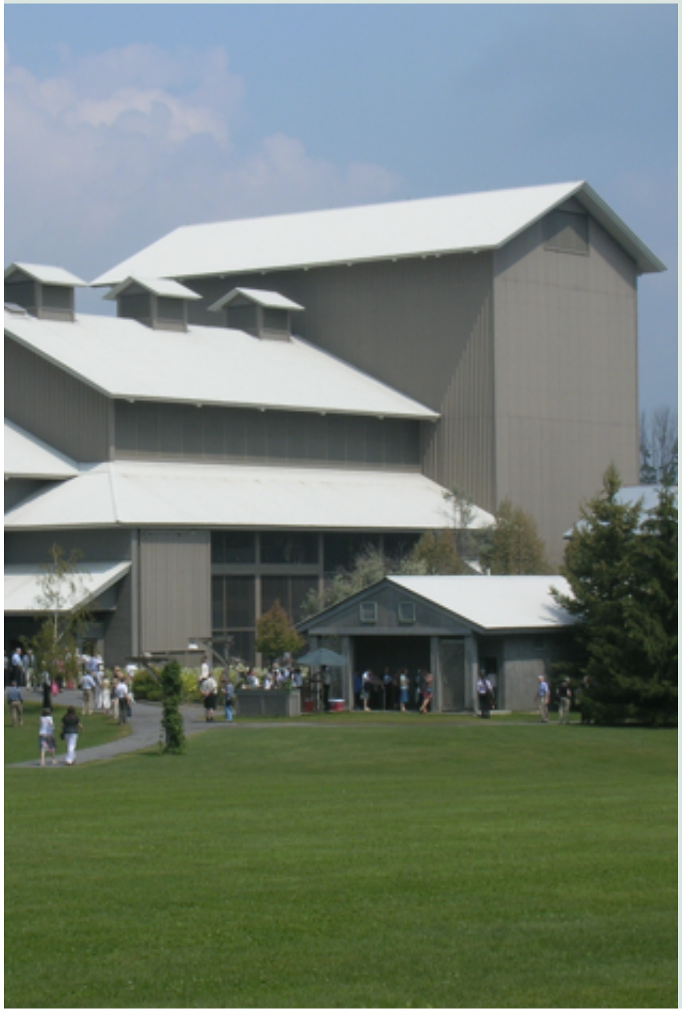
Combine with Strings

Glimmerglass Alice Busch Opera Theater | Cooperstown, NY



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Combine with Strings

Cowles Center for Dance and the Performing Arts | Minneapolis, MN


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Combine with Strings

Pros:

- Brings Strings into the project
- Strengthens Pavilion
- Huge impact on resort
- Potential for even greater scale with conference and event center

Cons:

- Capital cost
- Large site requirement
- A reluctant partner
- Increased capital budget to improve existing hall

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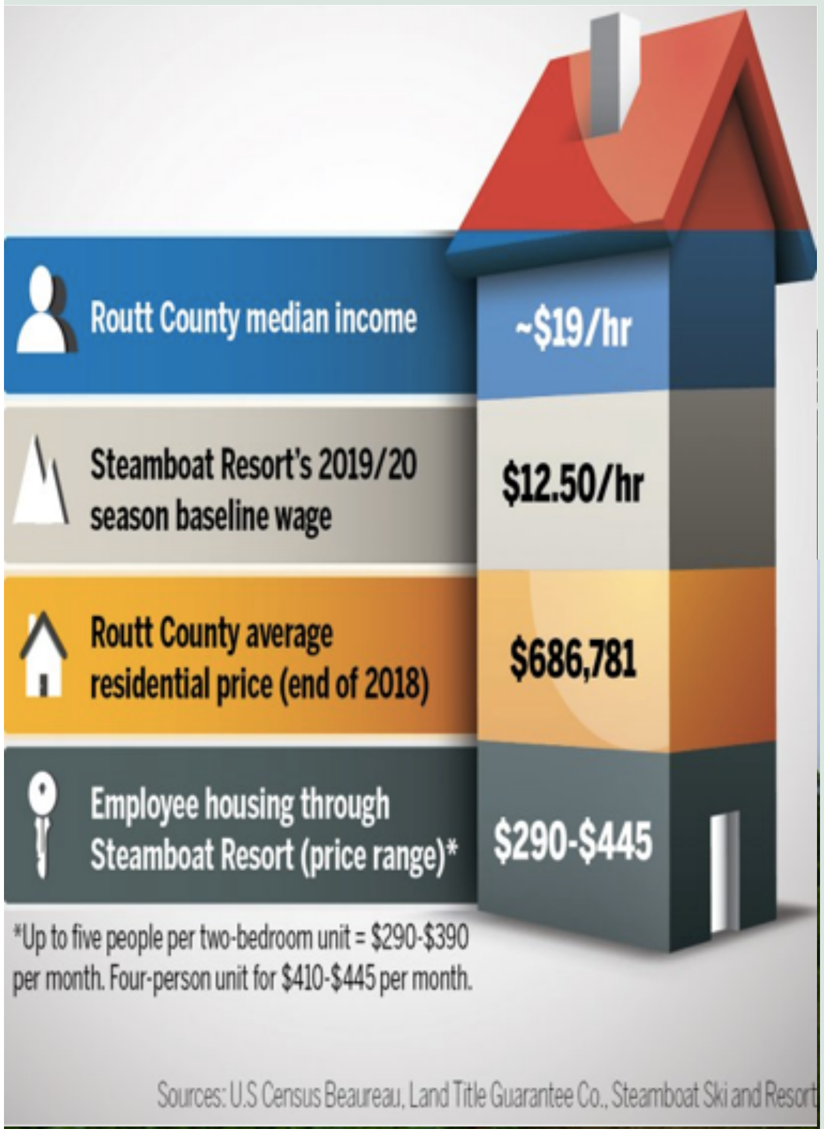

Performance Arts Facilities in a Housing Project

- Join in a large housing project with both affordable and artist housing components
- City Council is interested in exploring ways to assist the affordable housing demand in the community, including the needs from the artist community

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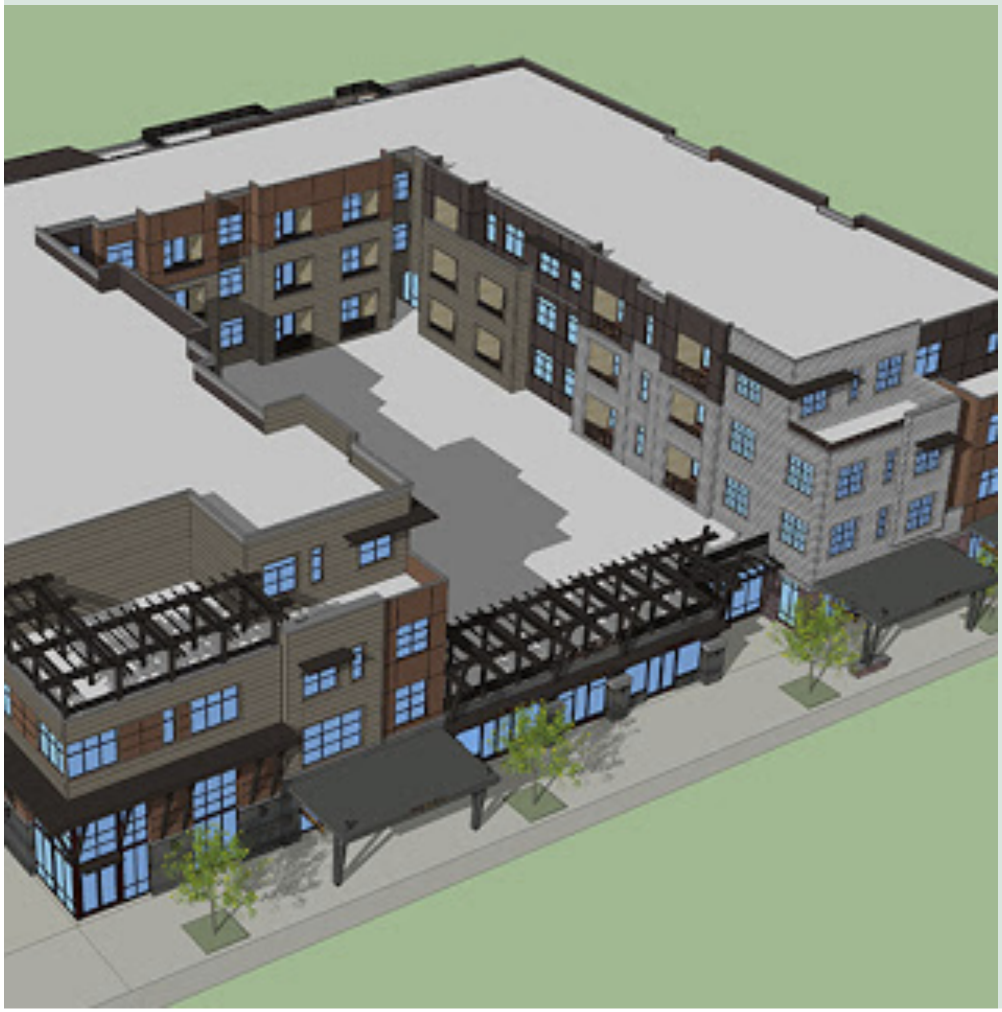
Performance Arts Facilities in a Housing Project

Truckee Artist Lofts | Truckee, CA



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Performance Arts Facilities in a Housing Project

Aurora Arts Center & Artesan Lofts | Aurora, IL

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Performance Arts Facilities in a Housing Project

Pros:

- Housing is important for community development
- Housing approach may provide a strong funding mechanism

Cons:

- Opens a whole new set of political challenges
- Large hall doesn't really fit with housing project
- Doesn't increase utilization of the large hall

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Anchor in a Creative District

- Develop a creative district and add a new venue. Joint management and programming and marketing with other venues

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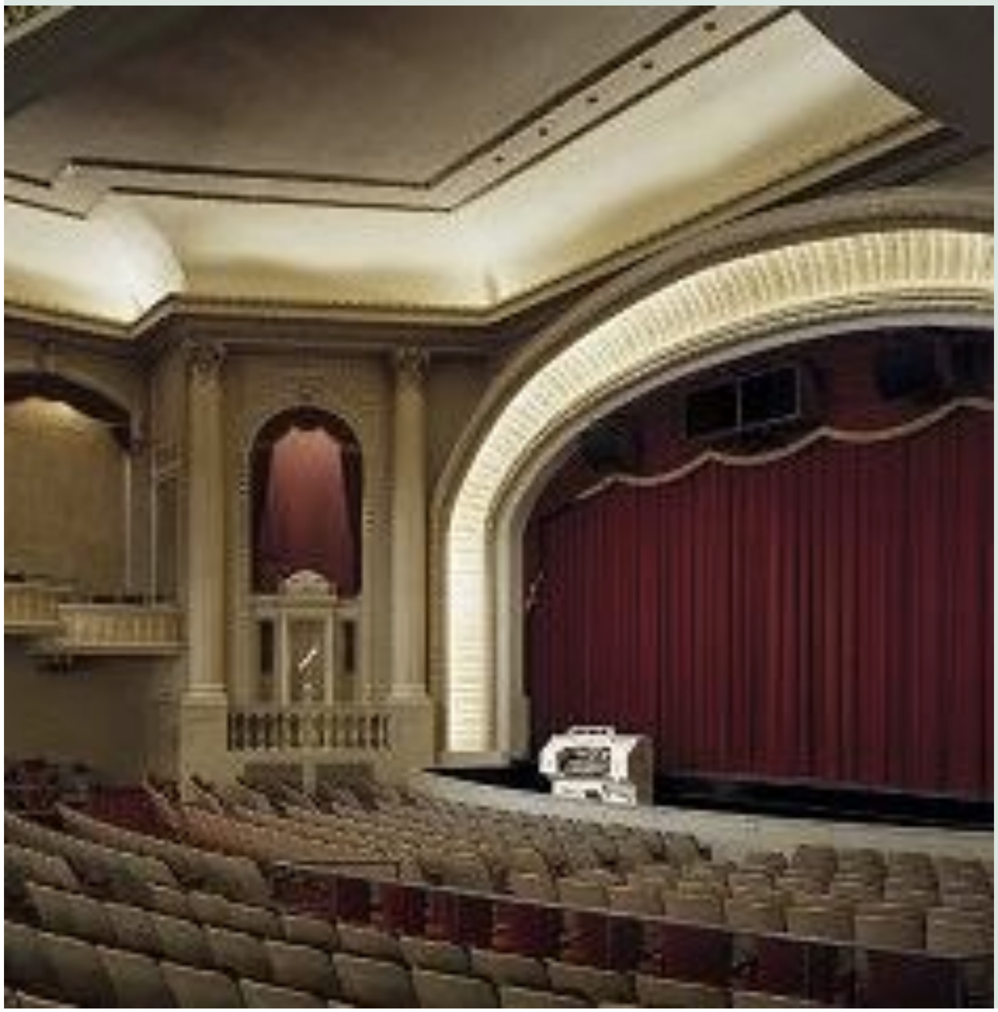
Anchor in a Creative District

Wausau Arts Block | Wausau, WI



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The Anchor of a Creative District

Pros:

- Potentially supports other spaces like the Chief
- Great potential to drive tourism
- Lifting all boats approach
- Big festival and event opportunity

Cons:

- Creative District has already been very difficult to advance
- Doesn't help the low level of utilization
- This is the role the Chief Theater can play

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A New Venue at Perry Mansfield

- Build new performing arts venues on the Perry Mansfield campus
- Including needed rehearsal and teaching spaces

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A New Venue at Perry Mansfield

Interlochen Center for the Arts | Interlochen, MI

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A New Venue at Perry Mansfield

Jacob's Pillow | Becket, MA


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A New Venue at Perry Mansfield

Pros:
- Solves their problems with current facilities
- Adds significant utilization
- Can be rustic

Cons:
- Are they strong enough to be a partner?
- Water issues
- Potential traffic problems
- Limited number of rental events currently allowed on site
- Childcare guidelines limit access to campus during Summer sessions

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The Industrial Arts Project

- Develop an industrial arts center, preferably in an existing structure like the Pilot building.
- The project might include spaces for arts production (glass sculpture, weaving), plus shops for producing groups like the Opera.
- Add whatever performance and rehearsal spaces are possible within the structure.

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The Industrial Arts Project

Torpedo Factory Art Center | Alexandria, VA

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The Industrial and Performing Arts Center

Pros:

- Strong community orientation
- Unique re-use of existing space

Cons:

- A large hall doesn't really fit with industrial arts
- Really calls for smaller and more flexible space

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Two big issues

1. Housing – has to be solved. A constraint for the further development of live arts in Steamboat, and a constraint on the future growth and development of Steamboat as a community.

2. City as partner – All of these projects bring substantial benefits to the City, which therefore has to be engaged. There can be no free ride for the City despite their own sustainability issues.

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Next Steps

In light of recent local and national developments surrounding the Covid-19 pandemic, members of the Performing Arts Center Steering Committee have agreed to suspend future planning and explorations for a performing arts center in Steamboat Springs until Summer 2020

At a time deemed appropriate by all parties, Committee members will reconvene to discuss the economic, political and social state of affairs.

If the Committee determines that business planning and initial physical planning may proceed, then Webb Mgmt and Semple Brown will return to Steamboat, initially focusing on conversations with potential partners, including Colorado Mountain College, Strings and Perry-Mansfield.