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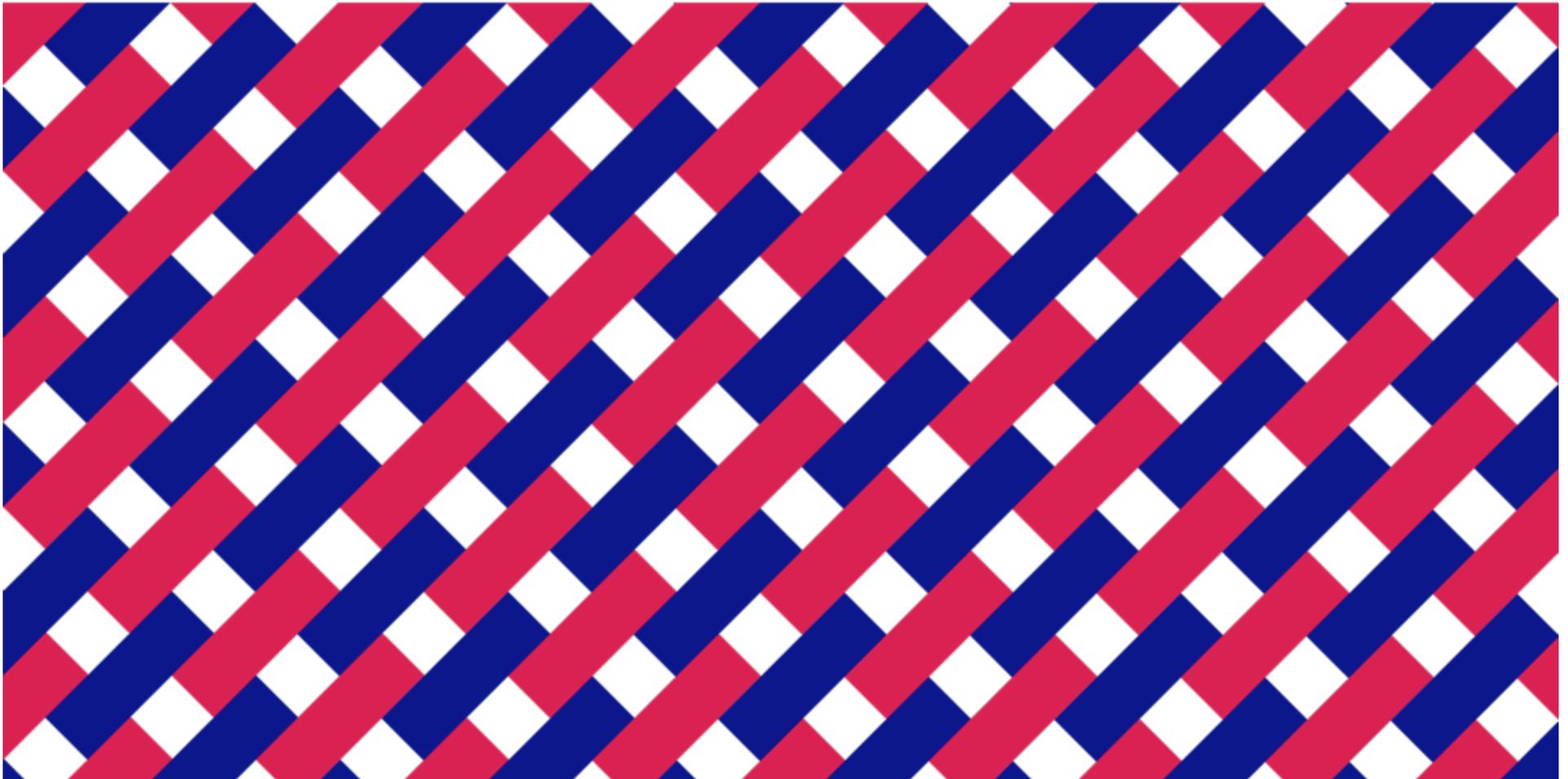
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building creativity

May 2016

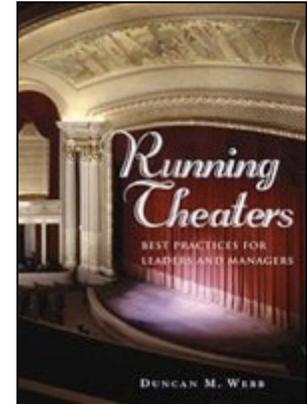
Nashua Performing Arts Center Feasibility Study

The City of Nashua



Webb Management Services

- * 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. Our practice was founded in 1997, and we just started our 356th assignment.
- * In 2001, we completed the original feasibility study for this project. Other regional experience includes projects in Gilford, Keene, Lowell (MA), Framingham (MA), Lynn (MA), Worcester (MA), and Fitchburg (MA).
- * Duncan Webb authored *Running Theaters* in 2005, a best practices guide to the operation of multi-user performing arts facilities in North America.
- * Our staff all have a combination of business training and professional experience working in the performing arts sector. In addition, Duncan Webb has been on the faculty of NYU's graduate program in performing arts administration for 20 years and is currently teaching finance and planning for the performing arts.



Study brief + background

- * The idea of building a performing arts center in Downtown Nashua has been under consideration for nearly 15 years.
- * Significant cultural development has been accomplished since the genesis of the idea.
- * While some community leaders and local residents think that a performing arts center would be another important catalyst for downtown development, there is much work to be done around the idea.
- * Webb Management Services has been hired to establish whether or not building a theater in downtown Nashua is feasible. Our work will assess the market for the arts in Nashua, demand for performance space, the current supply of performance facilities in the region, and the goals of the City for the future.



Study informants

To complete this study, we have conducted a series of confidential in-person and telephone interviews. We would like to take this opportunity to thank all of the people who have participated in the study to date.

- * Lauren Boss, Nashua Area Artists' Association
- * Craig Brennan, Actorsingers
- * Alec Buchanan, Alexander S. Buchanan, PLLC
- * Judy Carlson, City Arts Nashua
- * Karin Cevasco, Gate City Charter School for the Arts
- * Jim Donchess, Mayor of the City of Nashua
- * John Egan, Nashua Arts Commission
- * Carol Eyman, Nashua Public Library
- * Walter Freeman, Nashua School District
- * Jill Gage, Fortin Gage Flowers + Gifts
- * Peggy Gilmour, State Senator
- * David Gottesman, Gottesman + Hollis, PA
- * Jean Gottesman, Courier Art Museum
- * Meri Goyette, Community Member
- * Ken Grabeau, Monarch Instrument
- * Dave Grebowski, Fay's Fine Cabinetry
- * Bonnie Guercio, Artist
- * Jamison Hoff, NH Charitable Foundation
- * Morgan Hollis, Gottesman + Hollis, PA
- * Sheetal Kelkar, Mrs. India New England
- * Emerson Kelly, Peacock Players
- * John Koutsos, Alec's Shoe Store
- * Paul LaFlamme, Spartans Drum + Bugle Corps
- * Richard Lannan, The Lannan Company, Inc.
- * Amber Logue, Positive Street Art
- * Donnalee Lozeau, Former Mayor, City of Nashua



Study informants

- * Ginnie Lupi, New Hampshire State Council on the Arts
- * Latha Mangipudi, State Representative
- * Jonathan McPhee, Symphony New Hampshire
- * Mary Ann Melizzi-Golja, City of Nashua
- * Teresa Moler, Blue String Marionettes
- * Greg Newton, Symphony New Hampshire
- * Kristin Olsen, Symphony New Hampshire
- * Bob Oot, Symphony New Hampshire
- * Kathleen Palmer, The Telegraph
- * Rob Prunier, Harvey Construction Corporation
- * Liz Racioppi, Elizabeth Grady Salon
- * Manuel Ramirez, Positive Street Art
- * Susan Randazzo, Indian Hill Music
- * Lindsay Rinaldi, Nashua Community Music School
- * Sarah Roy, North Main Music
- * Steve Ruddock, Riverwalk Café + Music Bar
- * George Russell, WSMN 1590
- * Paul Shea, Great American Downtown
- * Jacqueline Shima O'Dowd, Nashua Chamber Orchestra
- * Jon Spira-Savett, Temple Beth Abraham
- * Daniel D.Rok Swain, Positive Street Art
- * Eric Valliere, Symphony New Hampshire
- * James Vayo, Renaissance Downtowns
- * Keith Weirich, Peacock Players
- * Chris Williams, Velocity Performance
- * Lori Wilshire, City of Nashua
- * Gary Wingate, Wingate's Pharmacy



Study context

- * There have been previous studies exploring the feasibility of developing arts facilities in Nashua, including the one Webb Management Services completed in collaboration with Hanbury Evans Architects in 2001.
- * We were hired to complete this study by Nashua's previous administration, which has since transitioned into new leadership.
- * Because this project has been talked about for so long, there are many strong opinions about it.
- * There are two pre-existing performance facilities in the community, Keefe Auditorium and the Court Street Theatre, both of which are in need of renovation.
- * There is anxiety about money.



Forces + trends



Forces + trends

- * Decline in traditional performing arts audiences
- * 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 the “value” of the arts



The improving value proposition

- * The arts and:
 - * Economic development
 - * Creative place-making
 - * Downtown revitalization
 - * Cultural tourism
 - * Quality of life
 - * Business and workforce development and retention
 - * Community development
 - * Arts in education
 - * Healing—physical, mental, spiritual, and community



Forces + trends: how facilities respond

- * Moving from “Friday Night Lights” to “the Community Living Room”
- * Enhancing the social experience
- * Including participatory programs and spaces
- * Providing low cost of access
- * Supporting a broad range of programs and audiences, integrating the traditional, the popular, the new, and the challenging
- * Responding to the particular needs, challenges, and opportunities of the community



Market analysis



Market analysis

While it might seem like a simple exercise, defining a market (or audience) can actually be a complicated issue for arts and cultural facilities.

Overview

This analysis will define the market and examine the potential for new performing arts facilities in Nashua to attract and serve additional audiences, paying close attention to key indicators for arts participation and attendance, such as educational attainment and household income.

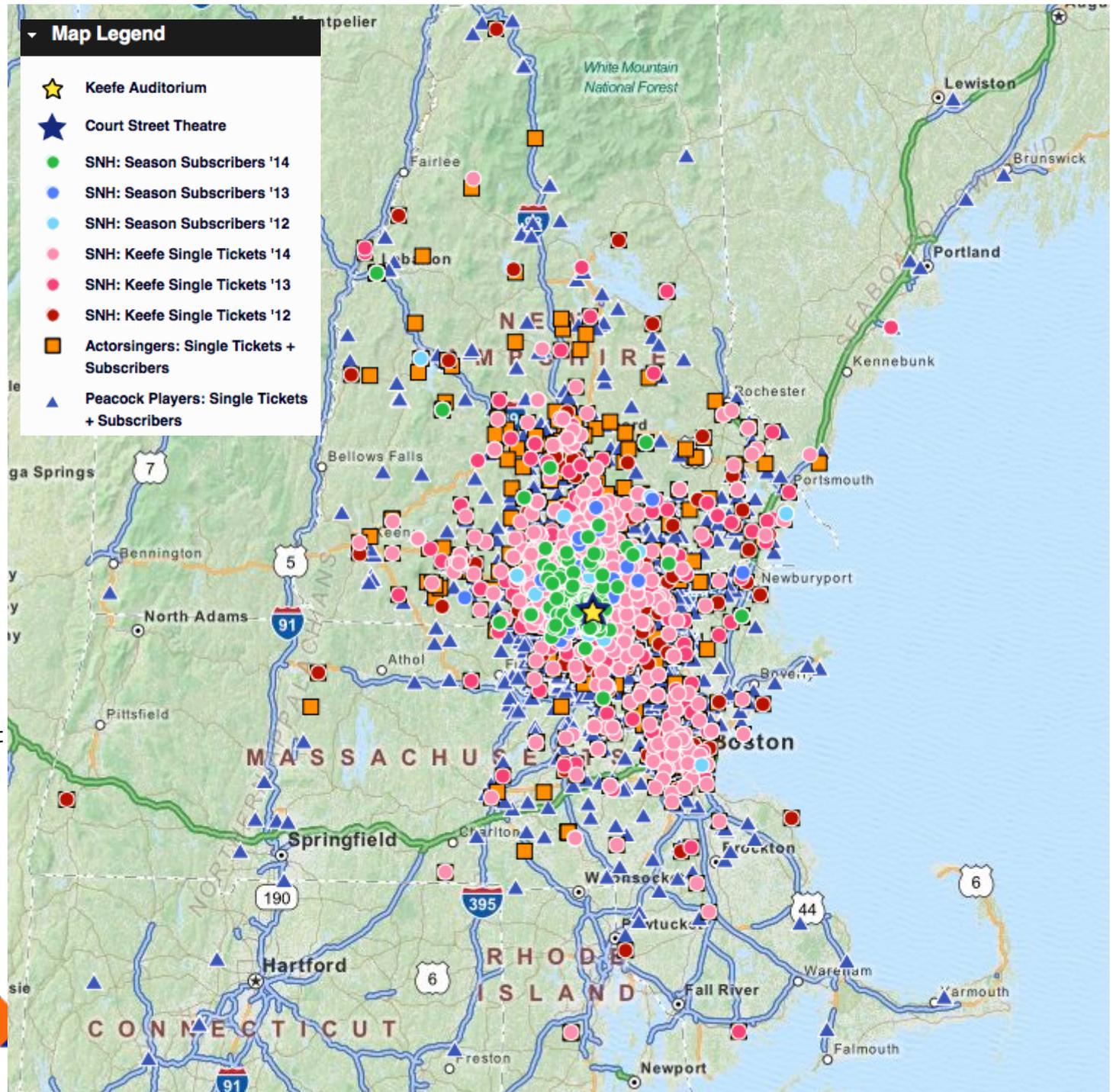
Methodology

To define the market, we looked to ticket buyer data from three local arts organizations: Symphony New Hampshire (SNH/Symphony NH), The Actorsingers (Actorsingers), and Peacock Players. We then collected demographic data from Nielsen, a marketing research resources company that expands and extrapolates Census data using a variety of inputs. Lastly, we examined state tourism data in order to assess the potential for attracting New Hampshire visitors to new facilities.



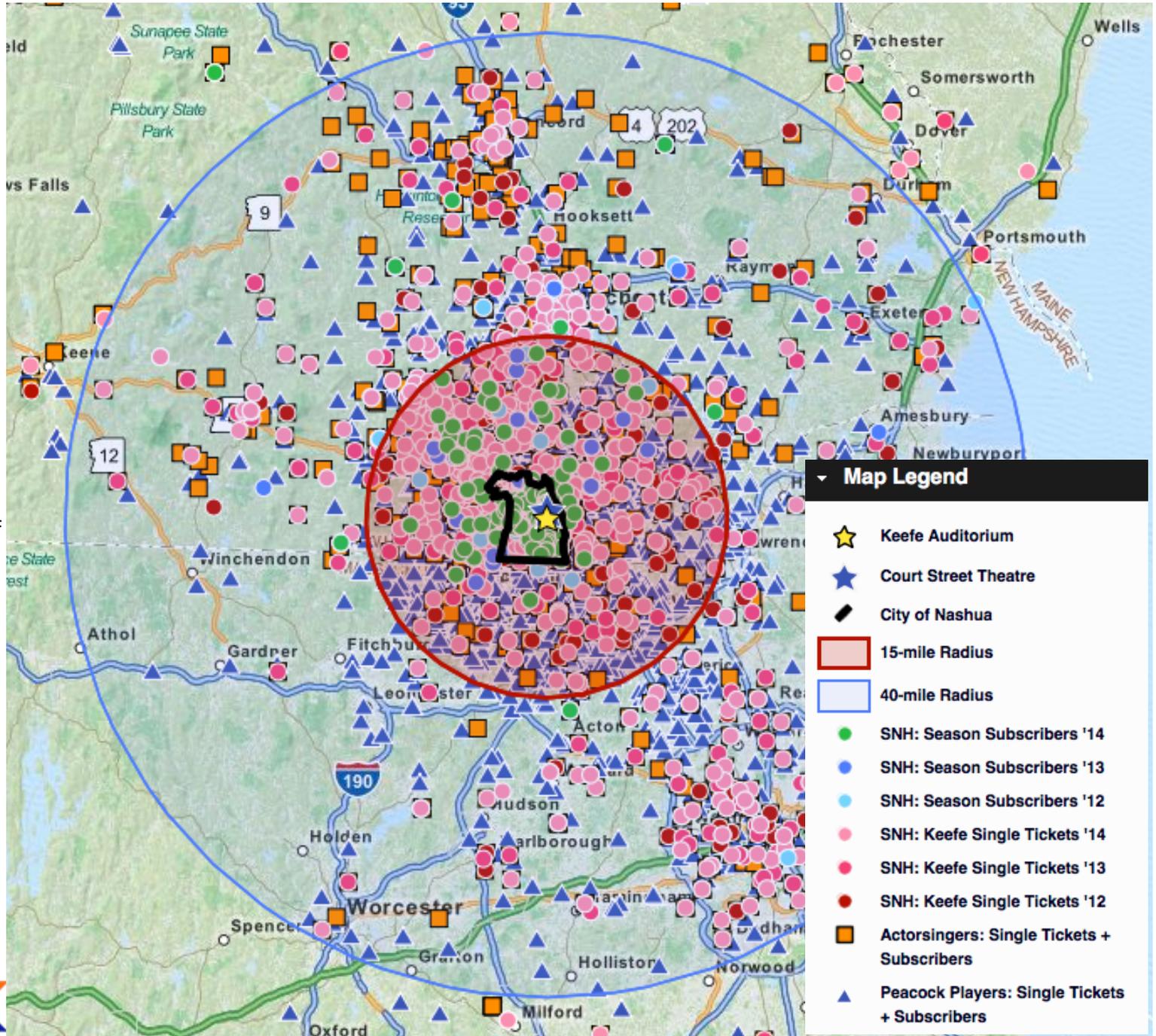
Market analysis: defining the market

- * 86% of Symphony NH season subscribers for the 2014-2015 season live within 15 miles of the Keefe Auditorium, while 73% Single Ticket Buyers live within 40 miles of the Keefe.
- * 61% of Actorsingers ticket buyers from the last three years live within a 40-mile radius of the Keefe.
- * 92% of Peacock Players ticket buyers live within 40 miles of the Court Street Theatre.

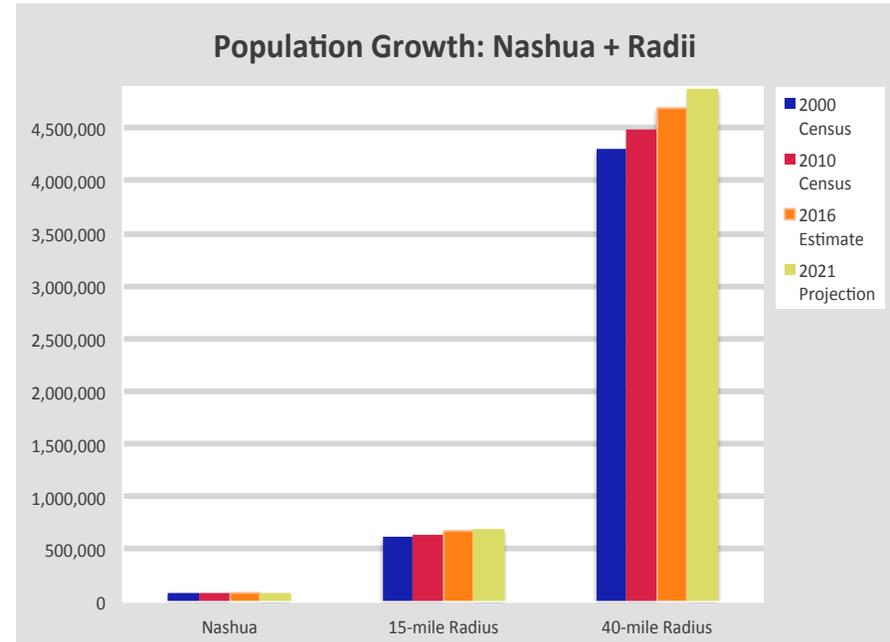
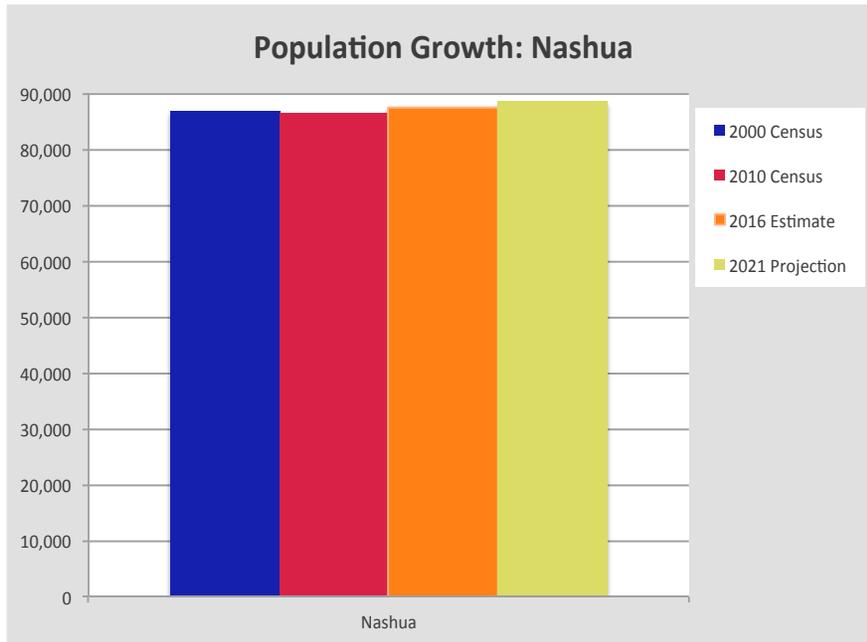


Market analysis: segments one, two + three

- * Market segment 1 is defined as the City of Nashua.
- * Market segment 2 is defined as the 15-mile radius surrounding the Keefe Auditorium.
- * Market segment 3 is defined as the 40-mile radius surrounding the Keefe Auditorium.



Market characteristics: growth

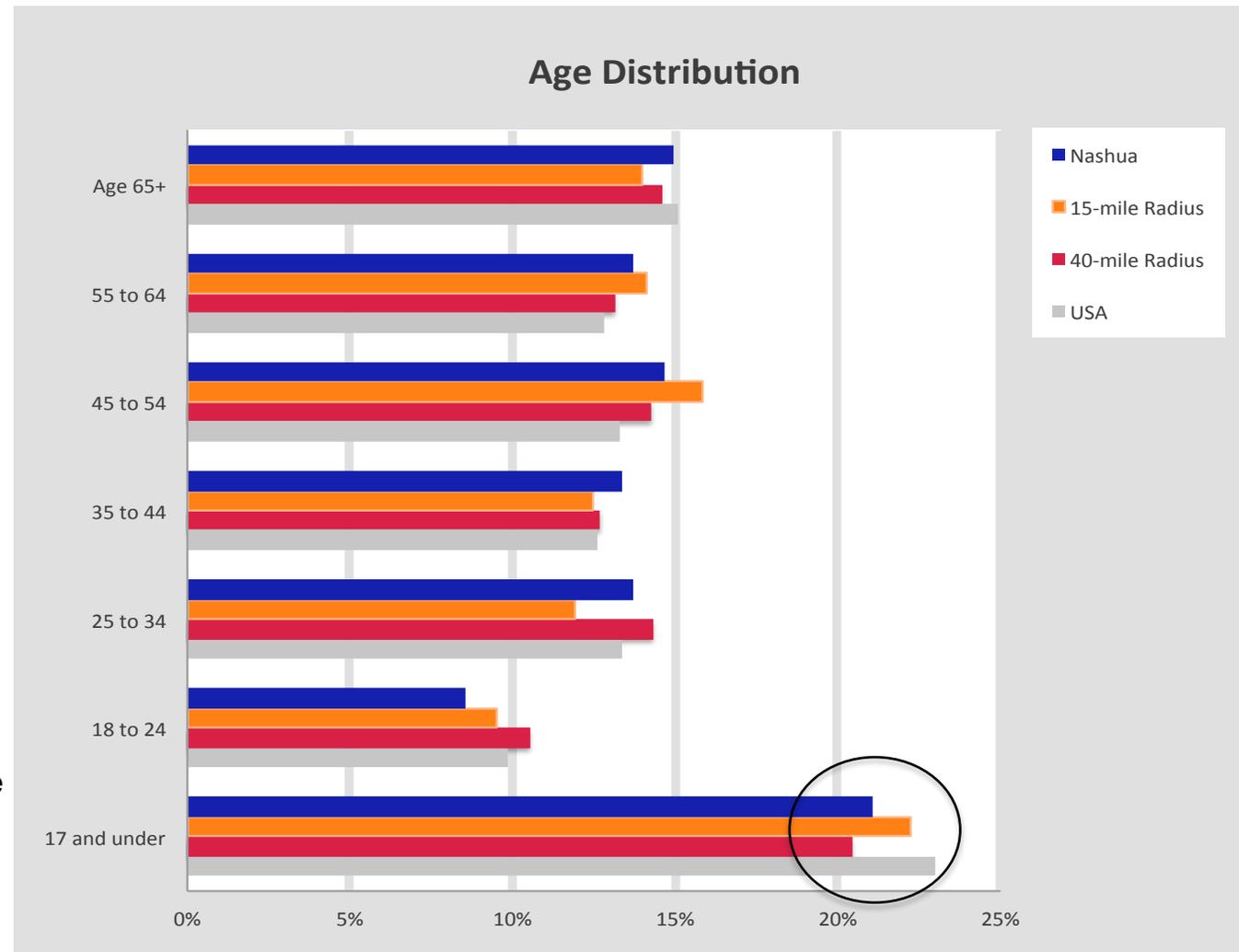


- * The population in all market segments is growing. In Nashua, the population is projected to reach 88,557 by 2021, an increase of 1.2% from 2016’s estimated 87, 477.
- * While the population is projected to continue growing in both radii, the rate of growth will slow. In the 15-mile radius, for example, the population is projected to grow by 3.1% between 2016 and 2021. Between 2010 and 2016, however, it is estimated to have increased by 3.8%.
- * In the 40-mile radius, the population is projected to reach 4.9 million by 2021.

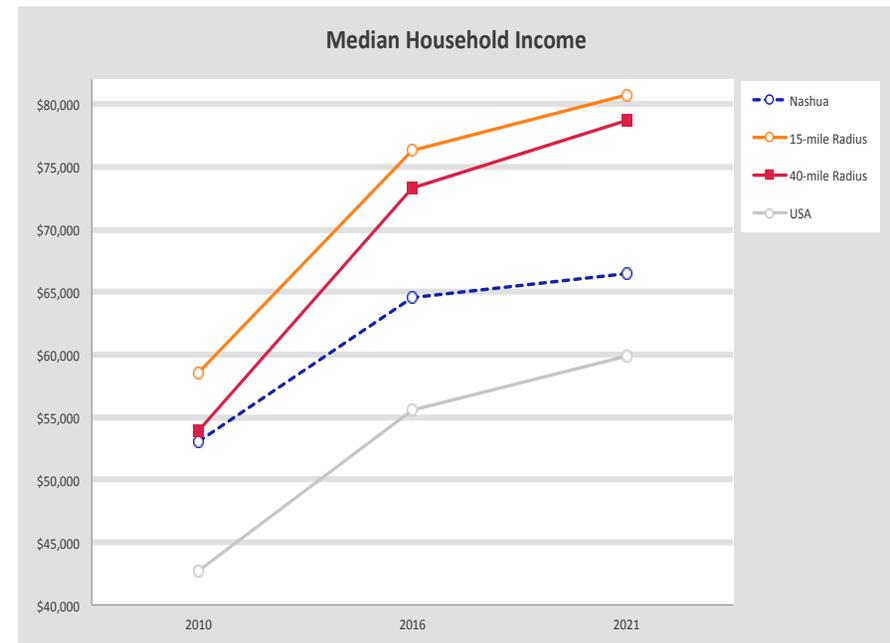
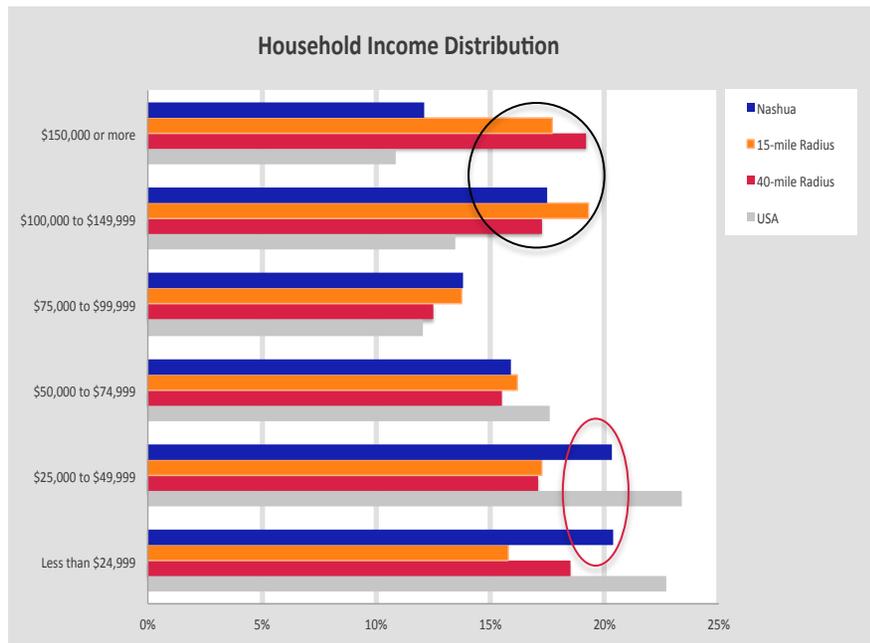


Market characteristics: age

- * Nashua and its surrounding region are diverse in age.
- * In all market segments, there are significant '17 and under' populations, indicating a large number of families.
- * Regionally, the 40-mile radius has the largest Millennial (between the ages of 18 and 34) population, while Nashua and the 15-mile radius have slightly larger 'Age 14 and younger' and 'Age 55+' populations.
- * All market segments are projected to age over the next five years.



Market characteristics: income

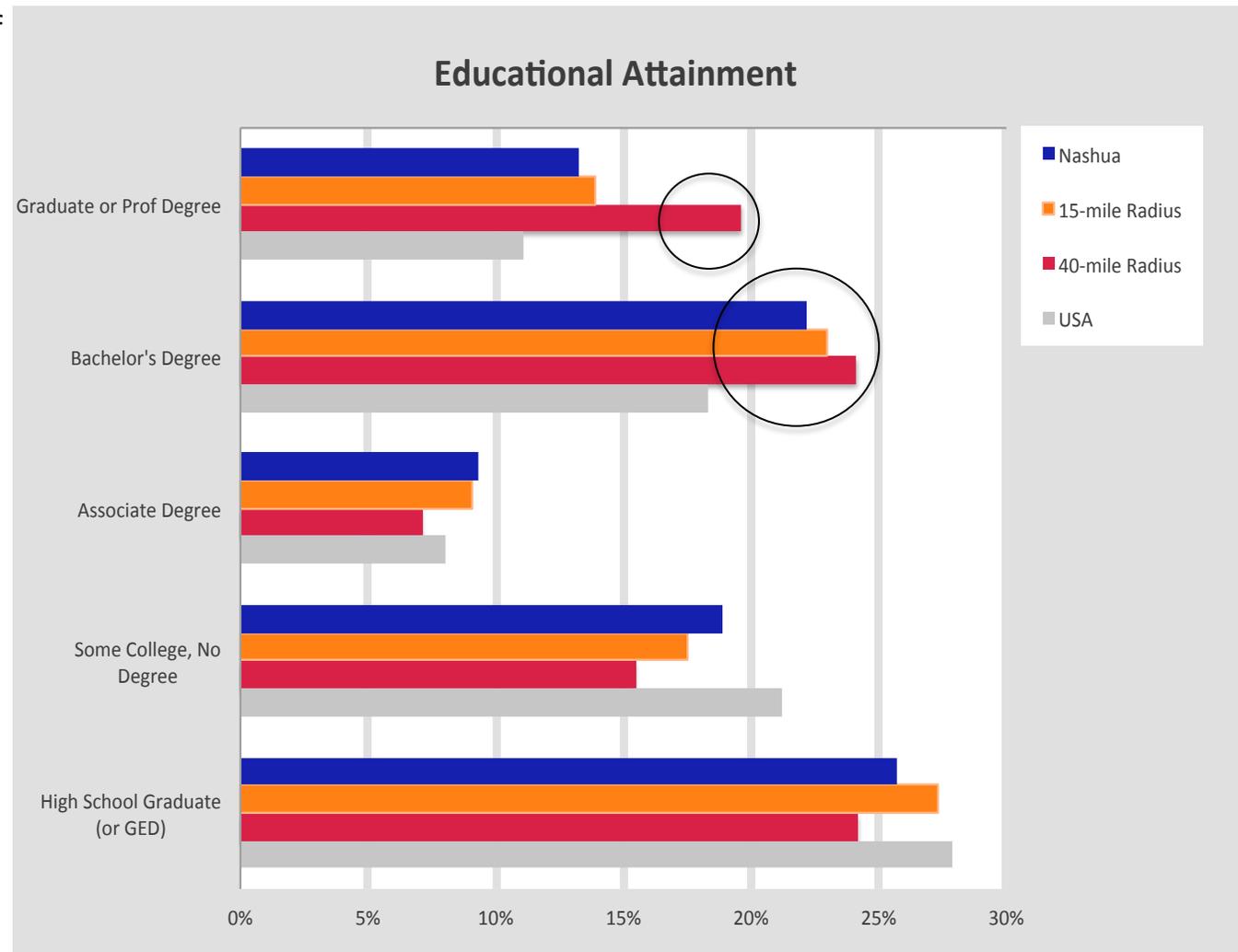


- * Household income distribution in each market segment varies. Regionally, the 15- and 40-mile radii populations are somewhat more affluent than in Nashua. In the 40-mile radius, for example, 19% of the population has an income of \$150,000 or more. In the 15-mile radius, 19% of the population has an income of \$100,000 to \$149,999.
- * In Nashua, although 17% of the population has a household income of \$100,000 to \$149,999, 20% of the population falls into the 'Less than \$24,999' household income bracket.
- * Although the median household income in the 15- and 40-mile radii is projected to grow between 2016 and 2021, in Nashua it will remain somewhat flat, increasing from \$64,605 in 2016 to \$66,415 in 2021.

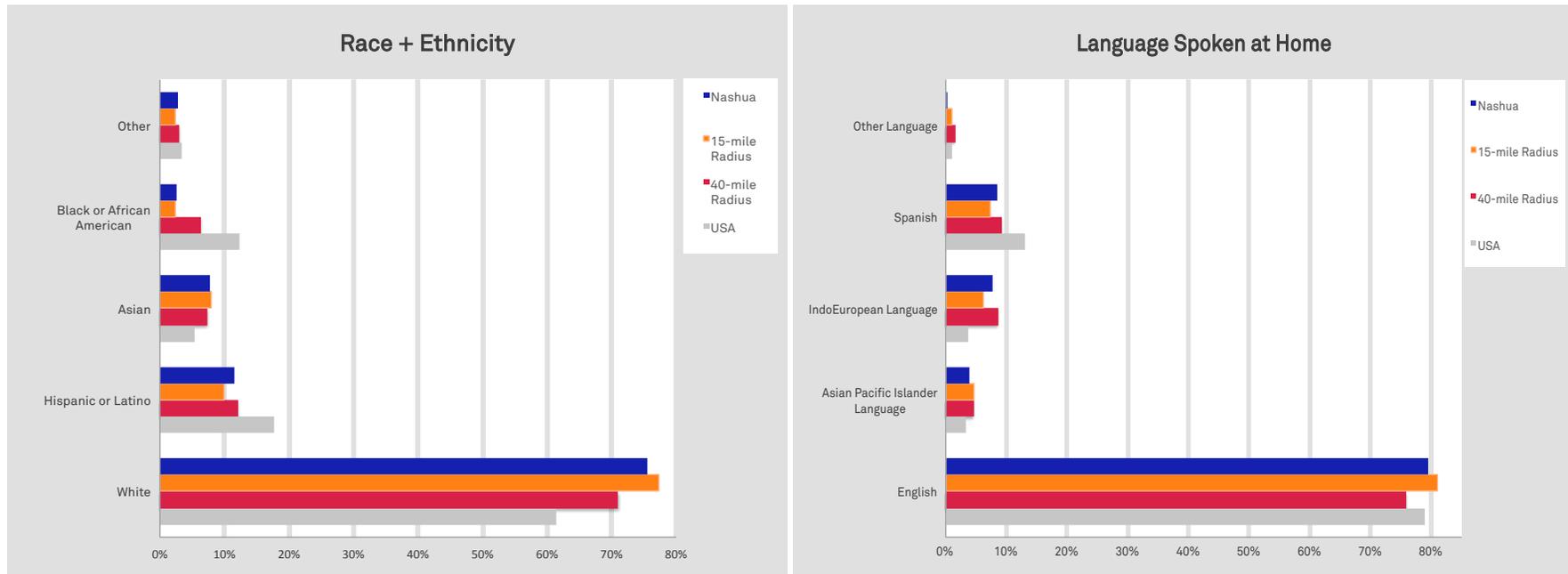


Market characteristics: education

- * There are high levels of educational attainment throughout the region, with the most advanced degrees being found within the 40-mile radius, where 'Graduate or Prof Degrees' are held by 20% of the population.
- * Both Nashua and the 15-mile radius, however, have significant 'High School Graduate (or GED)' and 'Some College, No Degree' populations, although the later could be attributed to the large number of regional colleges and universities.



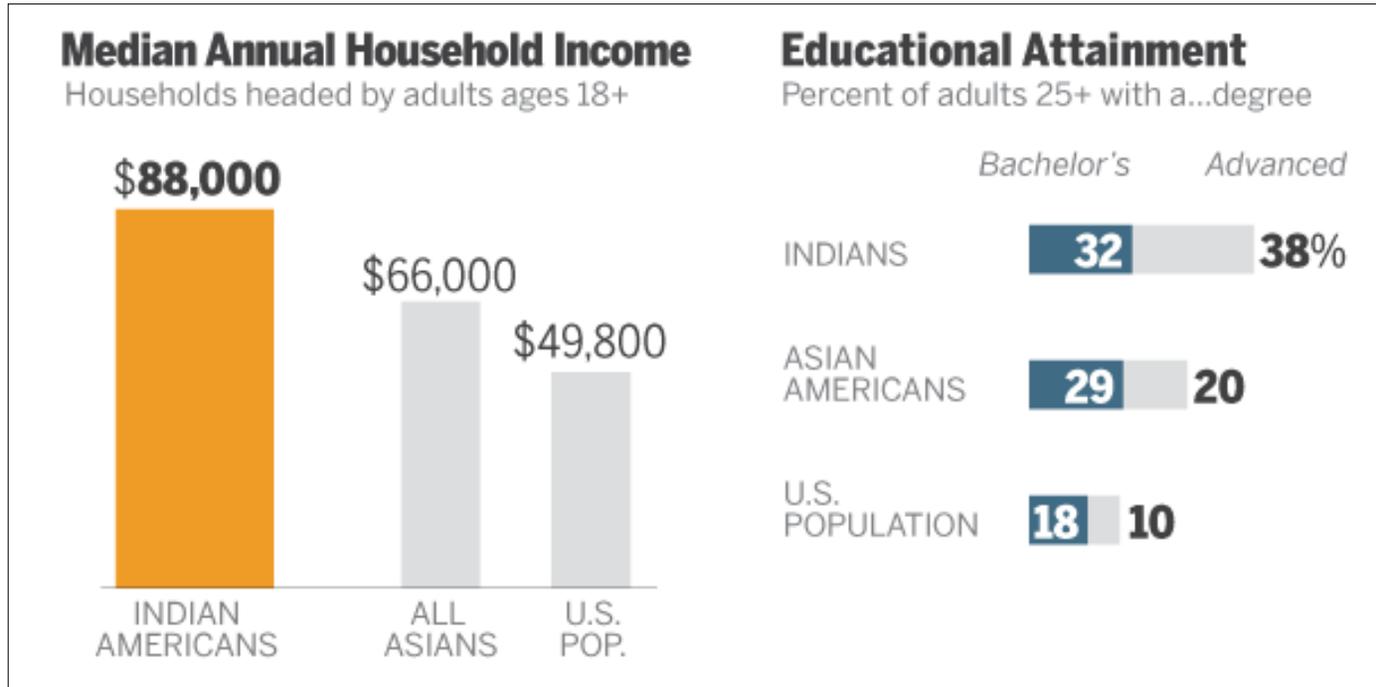
Market characteristics: race + ethnicity



- * All three market segments are diverse. Although each has a 'White' majority population, there are significant 'Hispanic or Latino' and 'Asian' populations.
- * The 40-mile radius has the largest 'Black or African American' population (12%) of all three market segments.
- * There is also linguistic diversity. In Nashua, 9% of the population speaks Spanish at home, 8% speaks an IndoEuropean language, and 4% speak an Asian Pacific Islander language.



Market characteristics: race + ethnicity *(continued)*



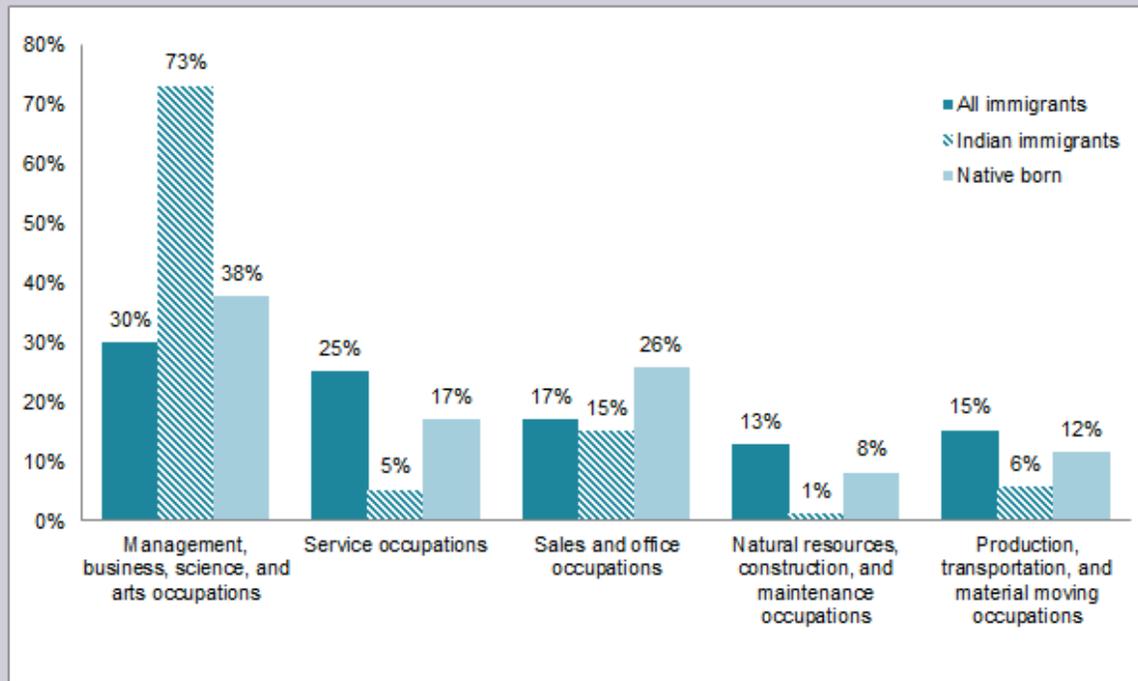
- * There are 6,000 Indian Americans living in Nashua. Locally, this cohort has launched more than 100 companies.
- * Additionally, 12% to 14% of Masters level students at Rivier University are Indian or Chinese.
- * Among immigrant groups in the United States, Indian communities are among the wealthiest and have high levels of educational attainment.

*Source: Pew Research Center: *The Rise of Asian Americans—Indian Americans*



Market characteristics: race + ethnicity *(continued)*

Figure 4. Employed Workers in the Civilian Labor Force (ages 16 and older) by Occupation and Origin, 2013



Source: MPI tabulation of data from the U.S. Census Bureau 2013 ACS.

- * As of 2013, 73% of Indian immigrants were employed in management, business, science, and arts occupations, compared to 30% of the native born population.



Non-resident market

- * Data on tourism in Nashua and Hillsborough County is limited. The state, however, does release an annual travel barometer. This document for 2015 showed the following:
 - * Travel in New Hampshire increased by 5.1% from 2014 to 2015, reaching 38.4 million visitor trips.
 - * Visitor spending per day was estimated at \$89.
 - * Hillsborough County Rooms and Meal Sales accounted for 26% (second in the state) of total Rooms and Meal Sales in the state.
 - * Attractions Attendance increased by 1.6% in 2015.
 - * Jobs in Arts, Entertainment + Recreation reached 11,200.
- * Anecdotal research indicates that Nashua does very little to promote tourism in the community.

Indicator	Value	% from prior year
Visitor Trips	38.40	5.1%
Visitor Days	60.16	5.2%
Visitor Spending	\$5,361	8.1%
Visitor Spending per Day	\$89	2.8%
Retail Spending	\$1,429	6.0%

**Source: Visit New Hampshire Travel Barometer, Fiscal Year 2015*



Market conclusions

Market Conclusions: By Segment				
	Size*	Growth	Characteristics	Conclusions
Nashua	87,477	↑	Slowly growing population; Diverse in age with a large number of families; Varying household incomes + levels of educational attainment; Racially + ethnically diverse with a large Indian American community	Opportunities for increased family, culturally specific + hands-on programming; Need for price-sensitive programs and facilities
15-mile Radius	668,901	↑	Growing population; Diverse in age with a large number of families + Millennials; Affluent; Varying levels of educational attainment; Racially + ethnically diverse	Opportunities for increased family, culturally specific + hands-on programming; Propensity for supporting traditional arts
40-mile Radius	4,693,531	↑	Growing population; Diverse in age with a large number of families; Affluent; Well-educated; Racially + ethnically diverse	Opportunities for increased family + culturally specific programming; Propensity for supporting traditional arts; Possible demand for jazz events and programs
Tourism	38.4M	↑	Outdoor recreation oriented with arts + entertainment participation	Recreation-based programs + events; Partnership development with Visit NH

*2026 Estimate

Existing facilities



Existing facilities: performance

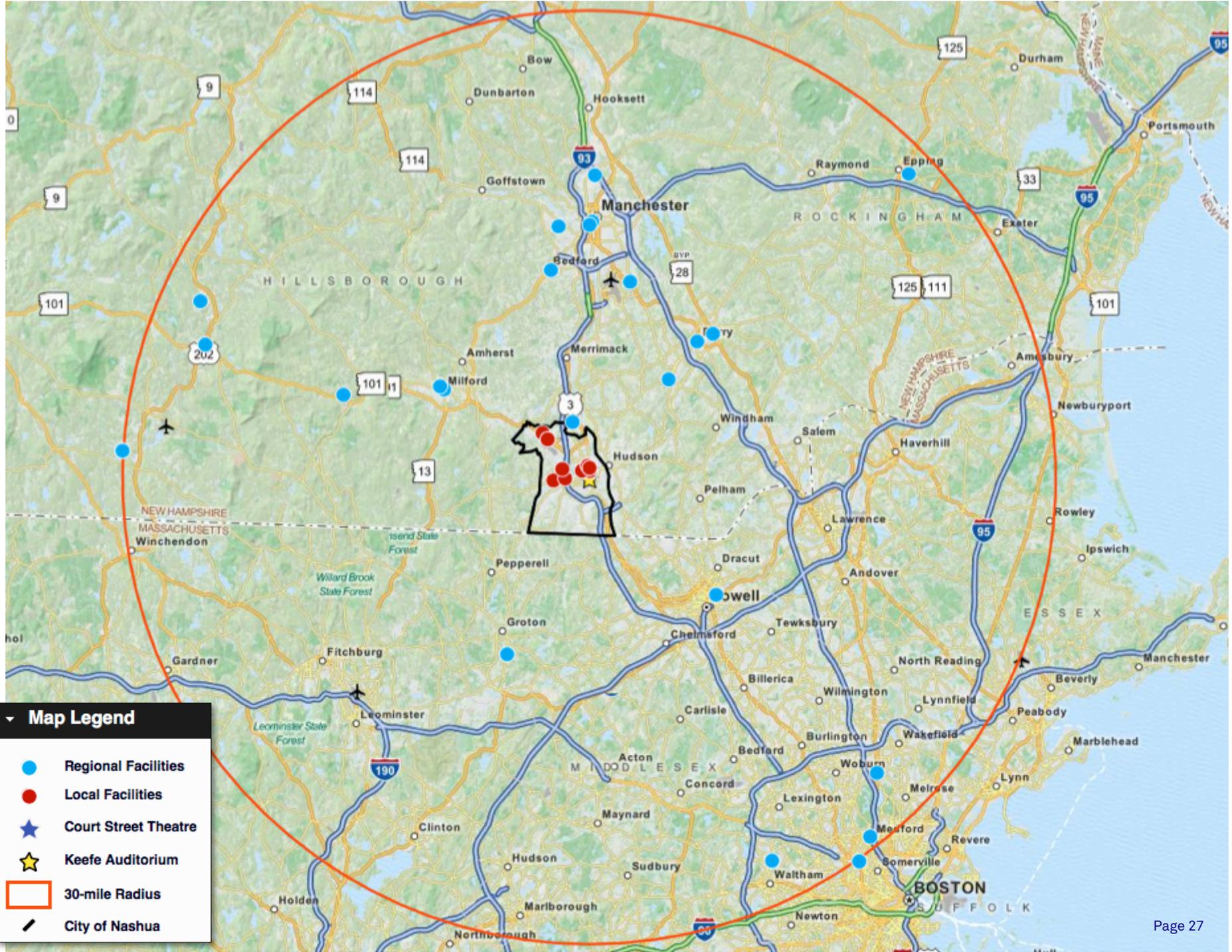
Overview

In order to assess the competitive situation for performing arts facilities in Nashua, we developed two inventories: the first, of local and regional facilities used on a regular basis (4 or more times per year) for live performance; the second, of Nashua's meeting and event spaces. This exercise allows us to analyze the current stock of facilities in the region, including their amenities, features, programming, and availability, in order to identify gaps.

Methodology

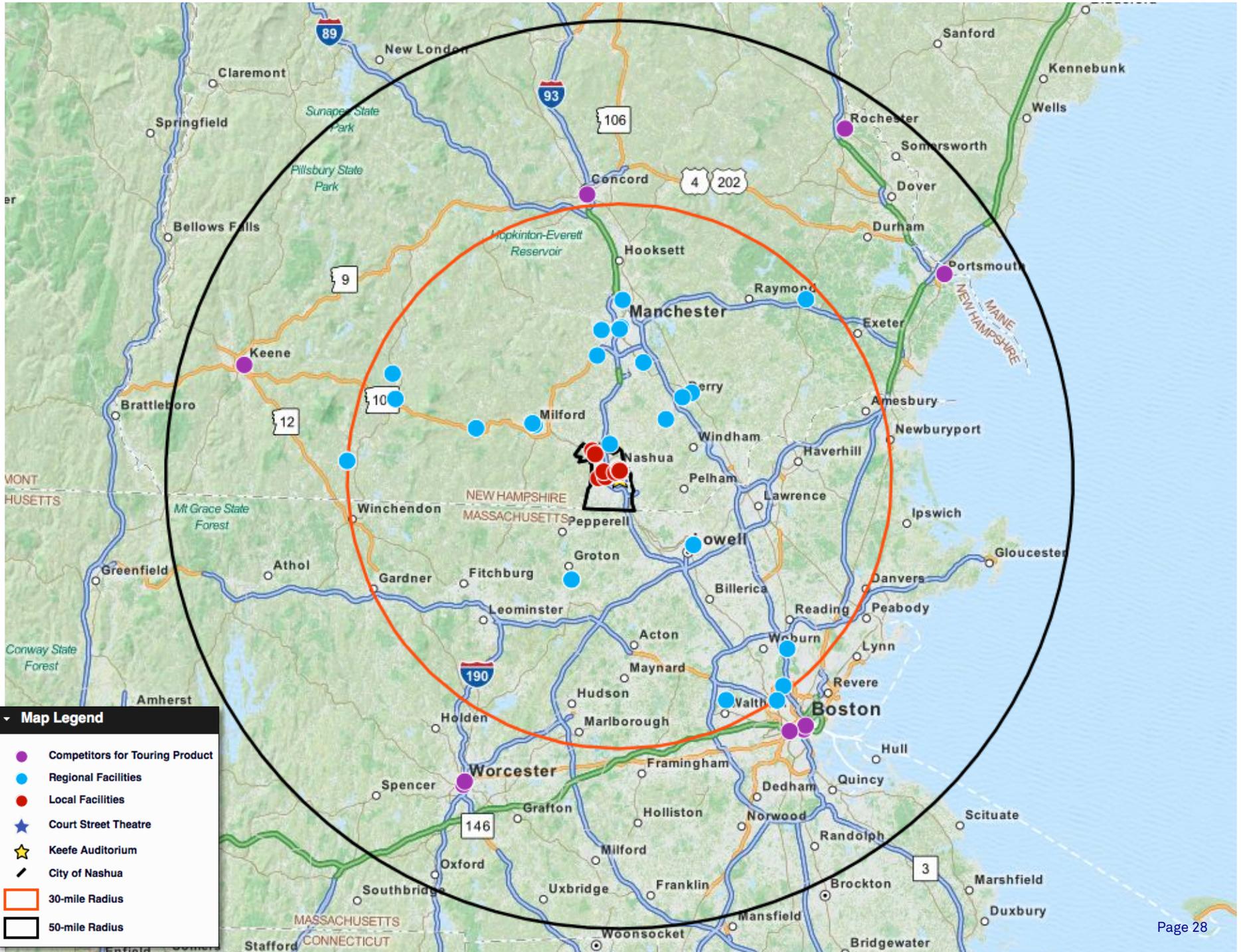
- * The first inventory, the Regional Performing Arts Facility Inventory, considers the physical features and types of activities hosted at indoor facilities with capacities ranging from 100 to 2,800 seats within a 30-mile radius of Nashua. Also included were potentially competitive large-capacity venues beyond the 30-mile radius, like The Hanover and Colonial Theaters.
- * In addition, the condition and functionality of each facility has been rated using 8 variables. They include:
 - * Facility condition
 - * Staff and support
 - * Theatrical functionality
 - * Acoustics
 - * Customer amenities
 - * User amenities
 - * Atmosphere/character
 - * Suitability for users
- * Variables are rated on a scale of 1 to 4, higher being better. The 'facility condition' and 'staff and support' categories carry the most weight.
- * Some facilities were visited in person, while information was gathered for others from City of Nashua staff and venue representatives.





Map Legend

- Regional Facilities
- Local Facilities
- ★ Court Street Theatre
- ★ Keefe Auditorium
- 30-mile Radius
- City of Nashua



Existing performance facilities: attributes

Programming + Activity

- * Presenting activity is music-centric: locally and regionally, 44% of facilities are used for presenting music. Other presented event types in the local market include film, family shows, comedy, and lecture events.
- * The Library is the most active presenter in Nashua. Regionally, there are multiple facilities presenting a mix of music, theatre, dance, touring Broadway, and so on.
- * One regional facility currently presents nationally touring Broadway productions. There are multiple Broadway presenters within a 50-mile radius of Nashua, however.
- * Twenty-eight percent of facilities in Nashua are used for producing cultural events. All of this activity takes place in school or other educational facilities.
- * Fifty-eight percent of the facilities inventoried are available for rent to outside organizations: eight facilities locally and 17 regionally. Of these, 30% (16 in total) have low availability for outside rentals.

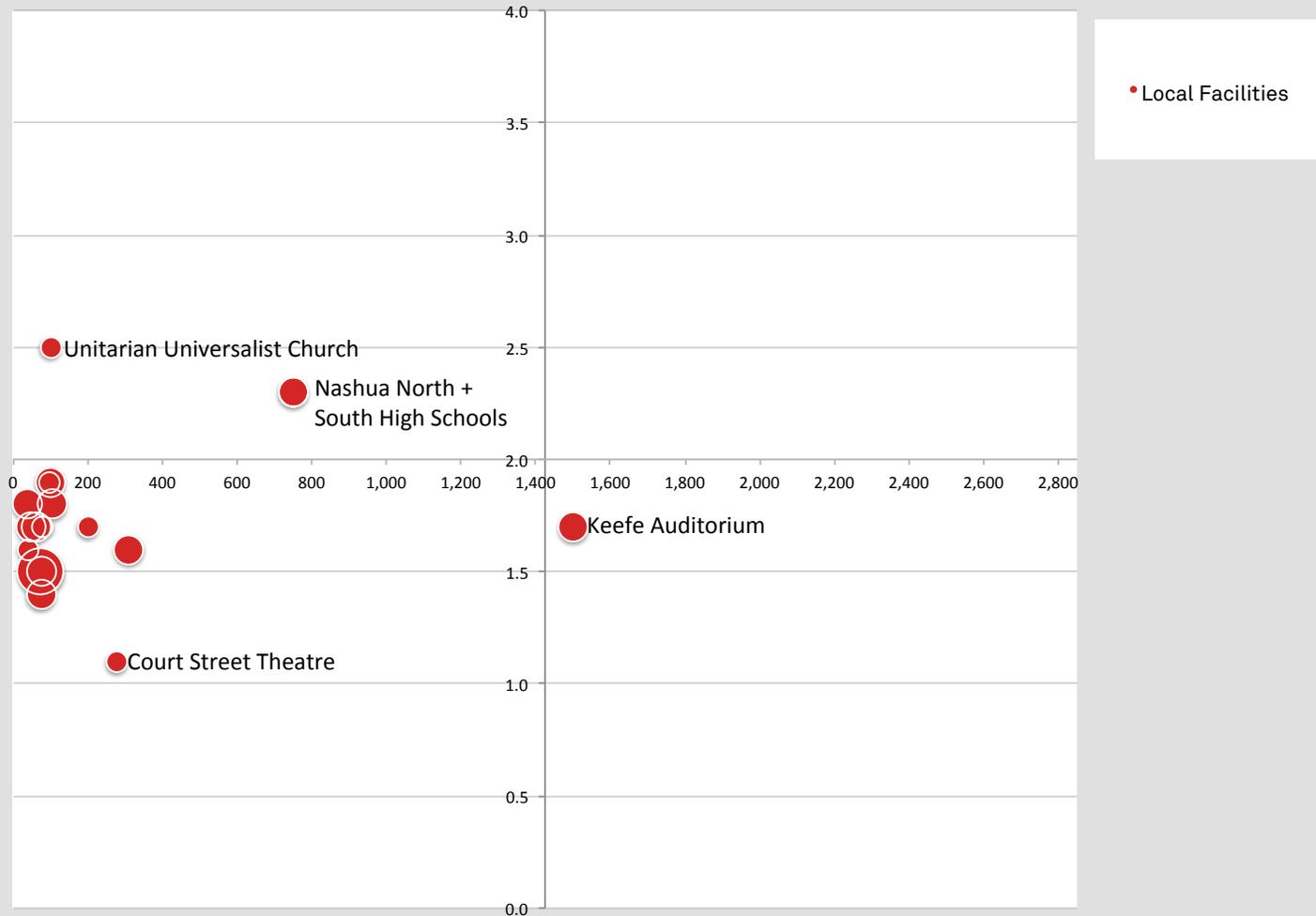
Facility Features

- * Of the 18 facilities inventoried in Nashua, 11 are categorized as 'Other' (bars, restaurants, the Library) and one is a church. These facilities are poorly equipped, lacking lighting, sound, and/or projection equipment.
- * Only one facility in Nashua, Keefe Auditorium, has fly space or an orchestra pit.
- * Regionally, the majority of facilities have lighting, sound, and projection equipment. Eight percent have wingspace, 24% have fly space, and 24% have an orchestra pit.
- * With the exception of bars and restaurants, none of Nashua's facilities allow the service of alcohol.
- * Only two facilities have any kind of ticketing service.



Existing performance facilities: capacity + quality

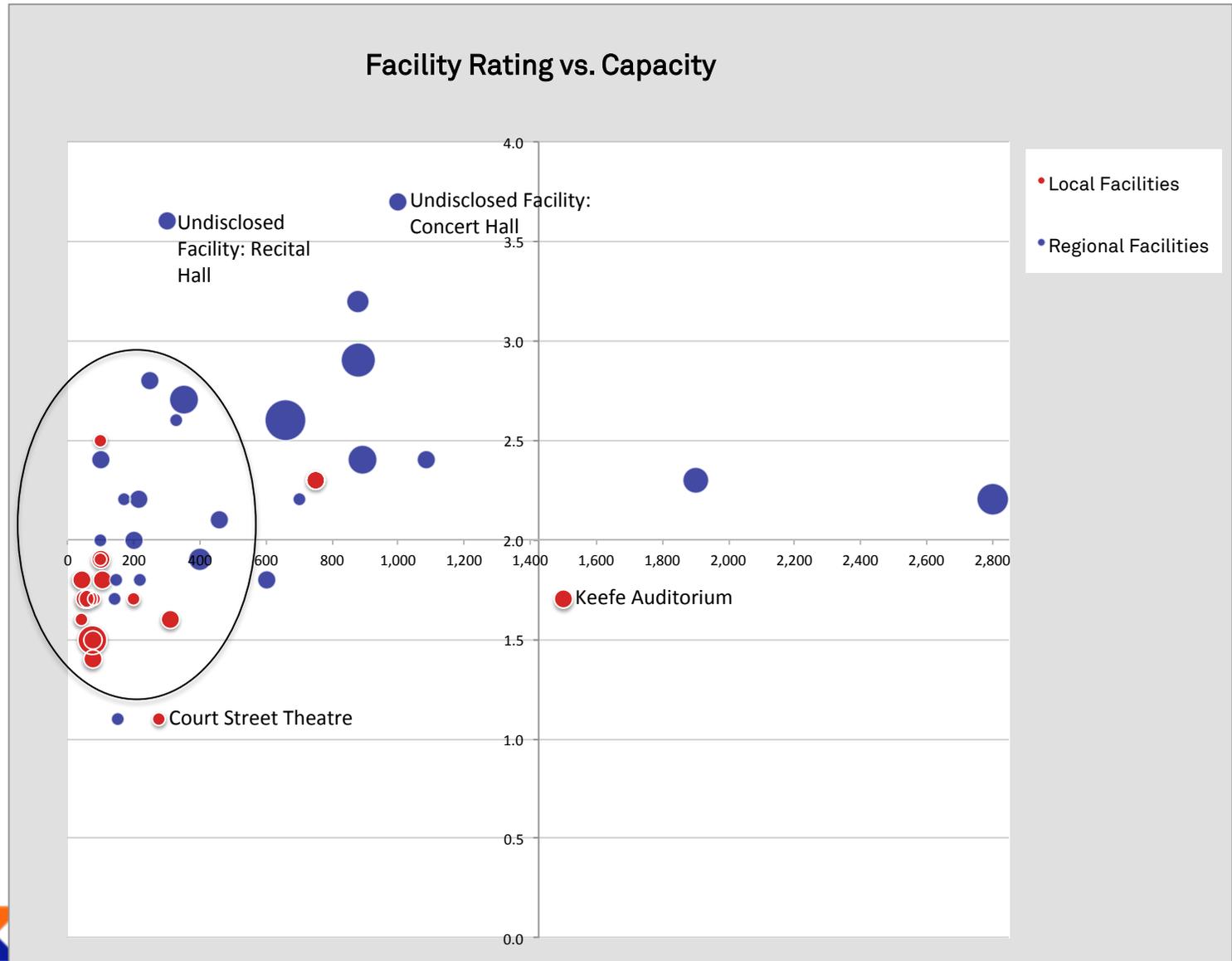
Facility Rating vs. Capacity



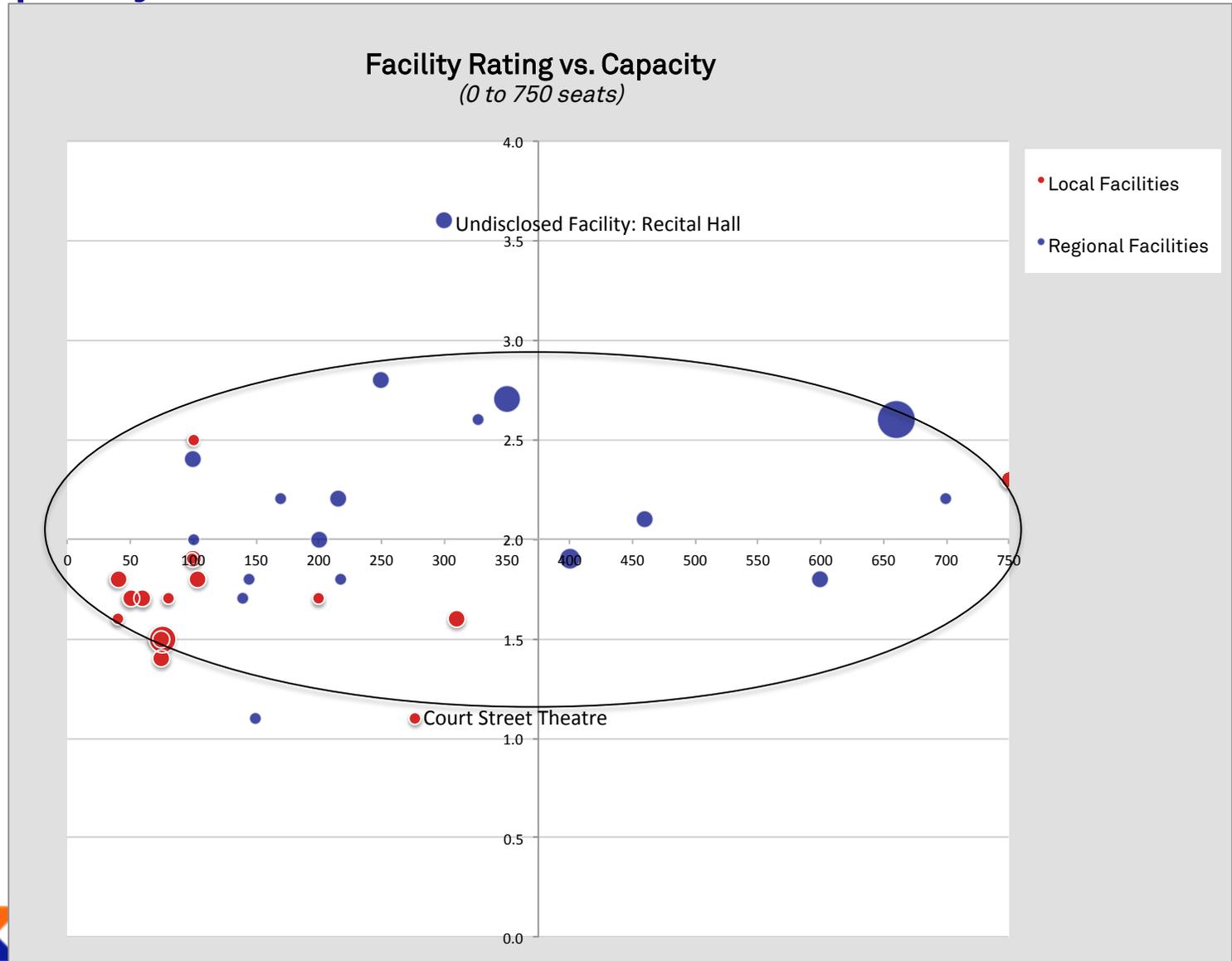
- Local Performance Facilities:**
- Keefe Auditorium
 - Nashua High School North
 - Nashua High School South
 - Nashua Community College: Gregg Hall Aud.
 - Court Street Theatre
 - The Peddler's Daughter
 - Stella Blu
 - Chunky's Cinema Pub
 - Unitarian Universalist Church: Auditorium
 - Hunt Building
 - Riverwalk Café + Music Bar
 - Public Library: NPL Theater
 - Nashua Community Music School: Recital Hall
 - Fody's
 - Country Tavern: Loft
 - Country Tavern: Tack Room
 - Public Library: Music/Art/Media Wing
 - Public Library: Children's Room



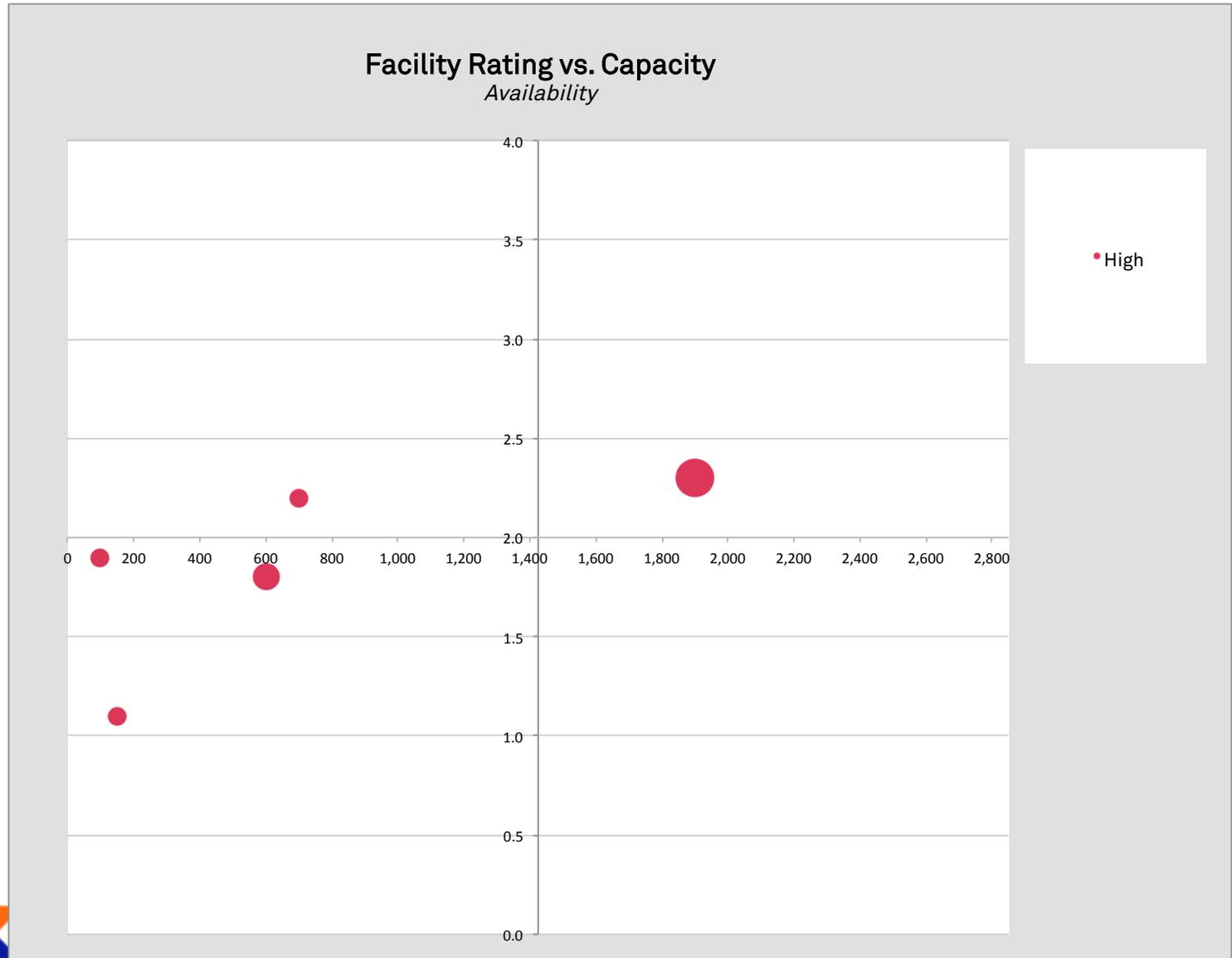
Existing performance facilities: capacity + quality



Existing performance facilities: capacity + quality



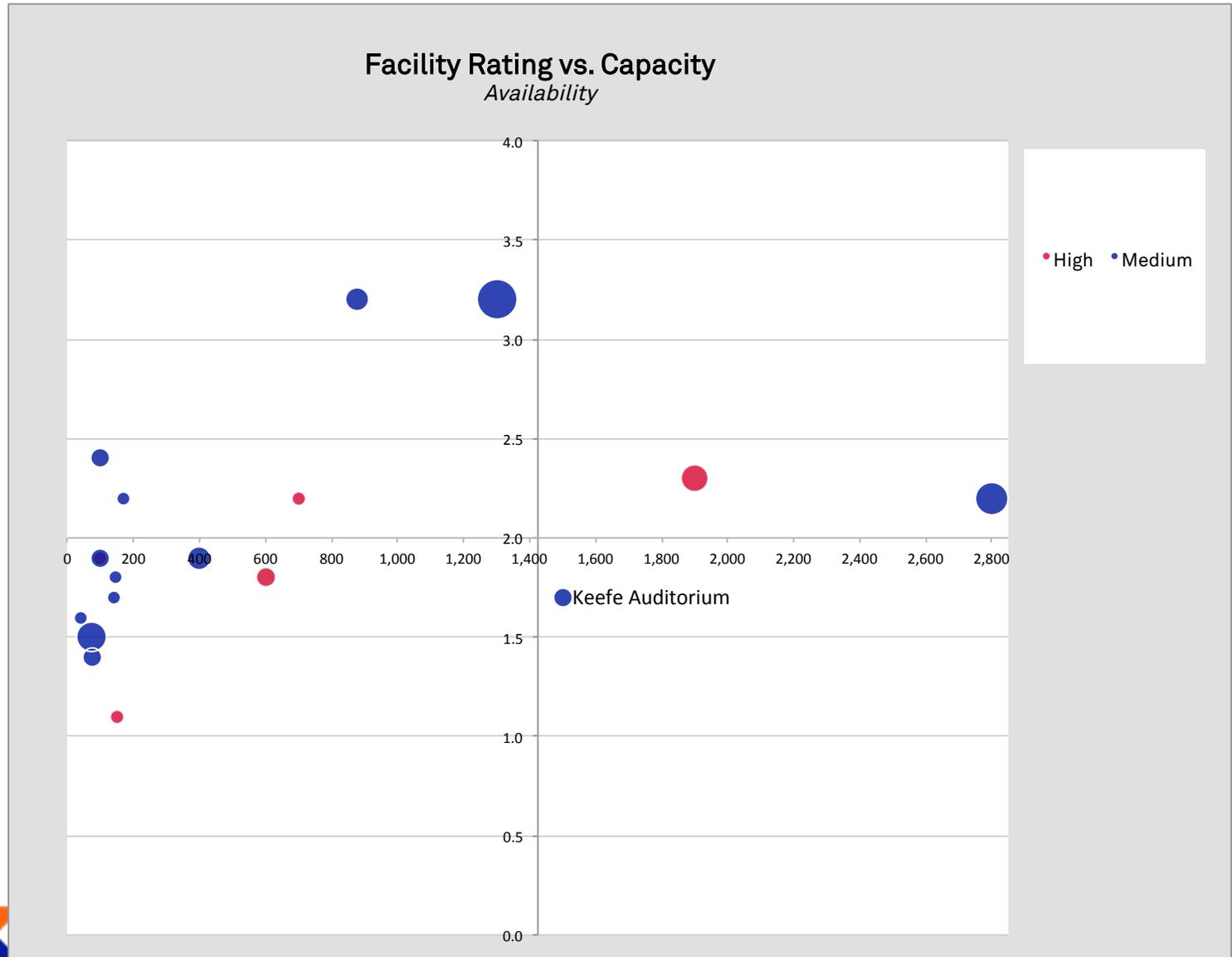
Existing performance facilities: availability



**Availability is determined by how open a facility's schedule is for outside groups to book on prime days (Thursday, Friday, and Saturday).*



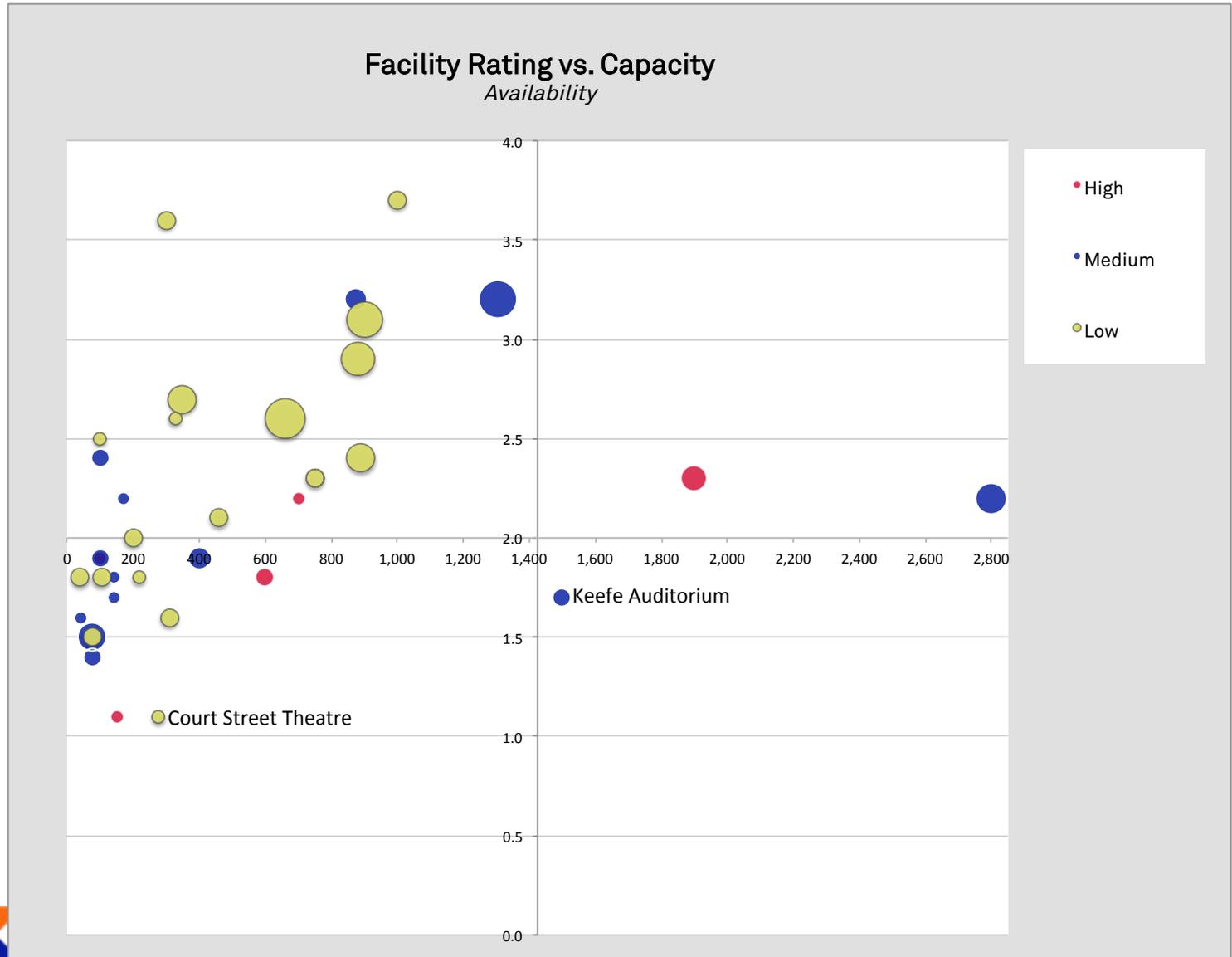
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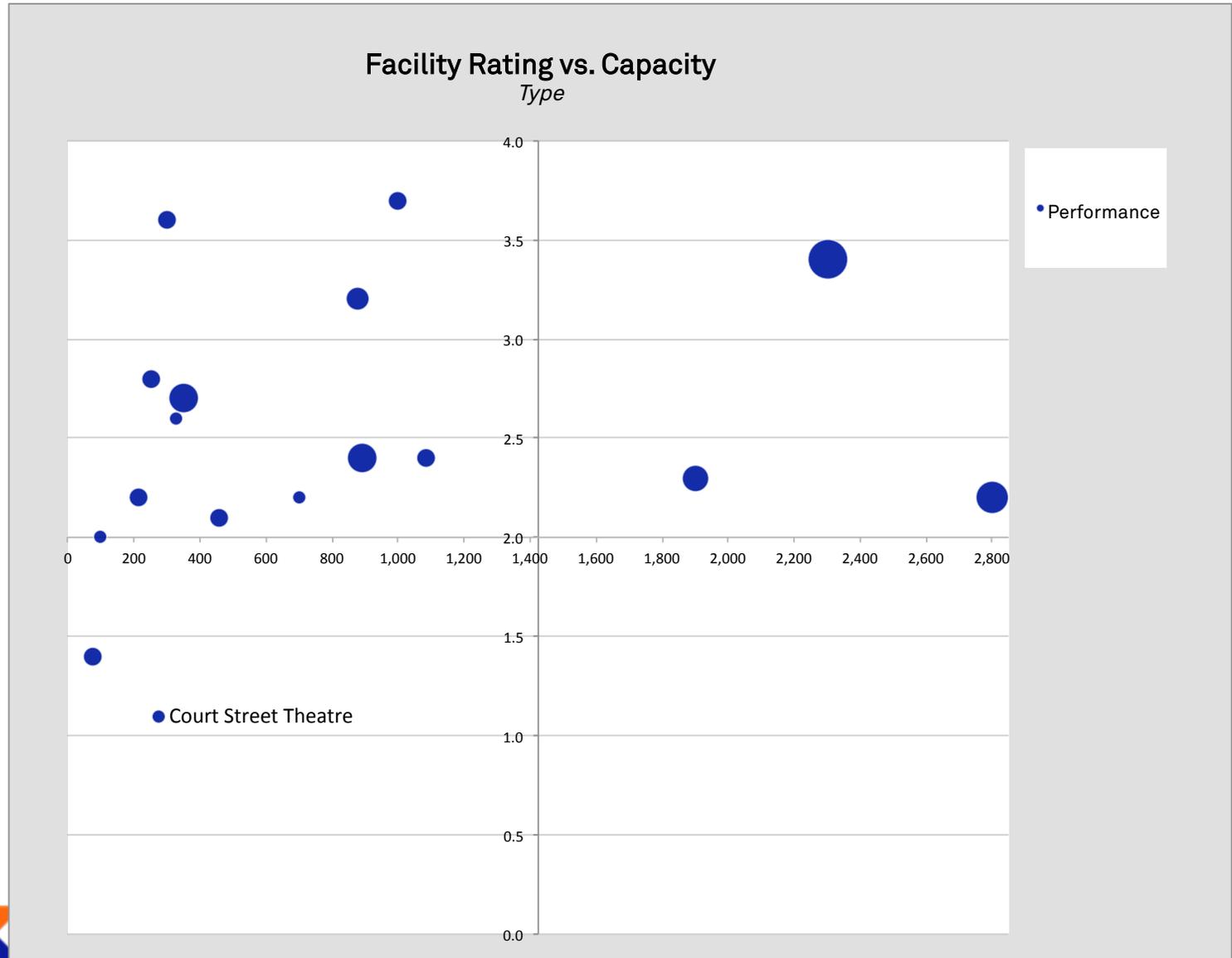
Existing performance facilities: availability



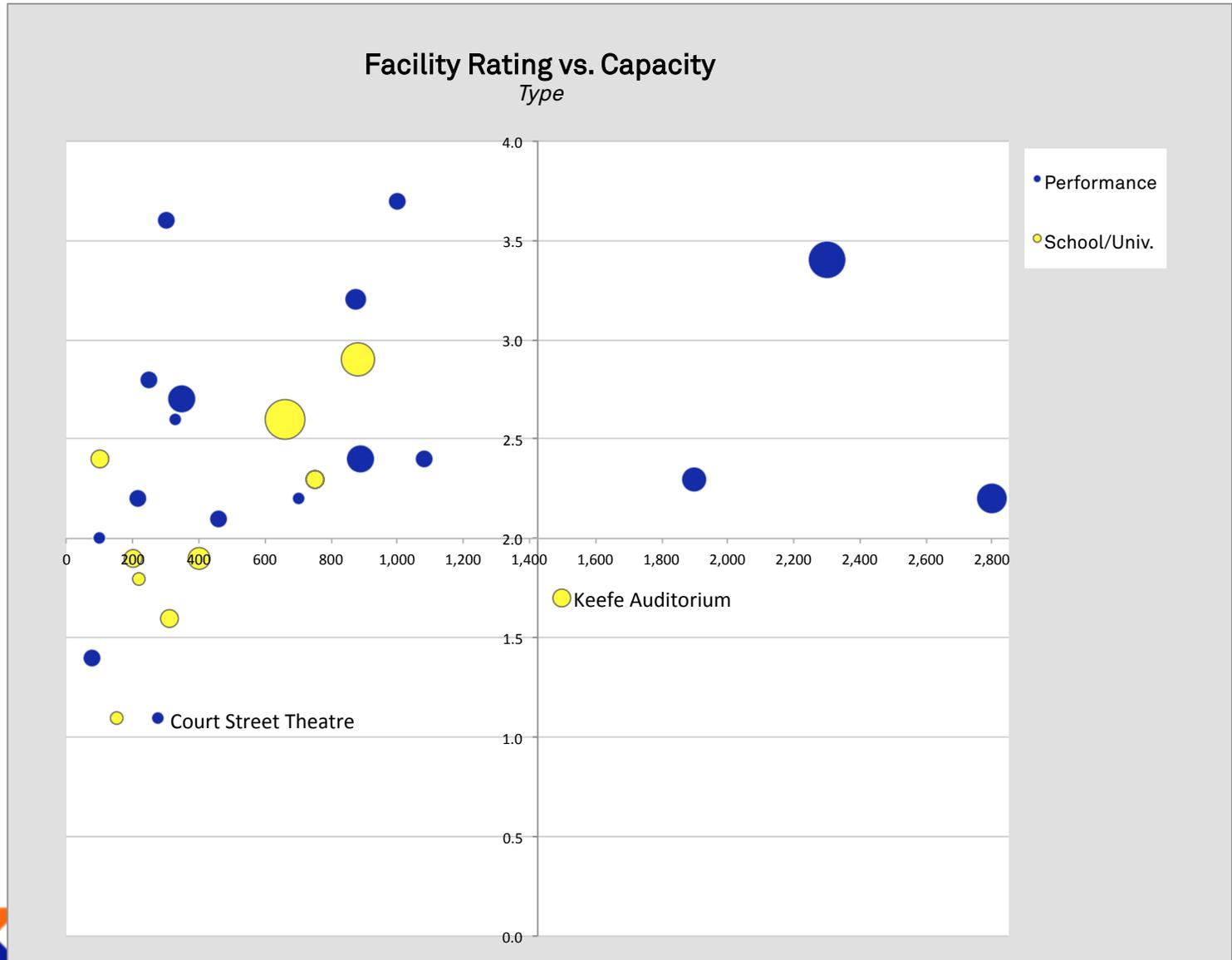
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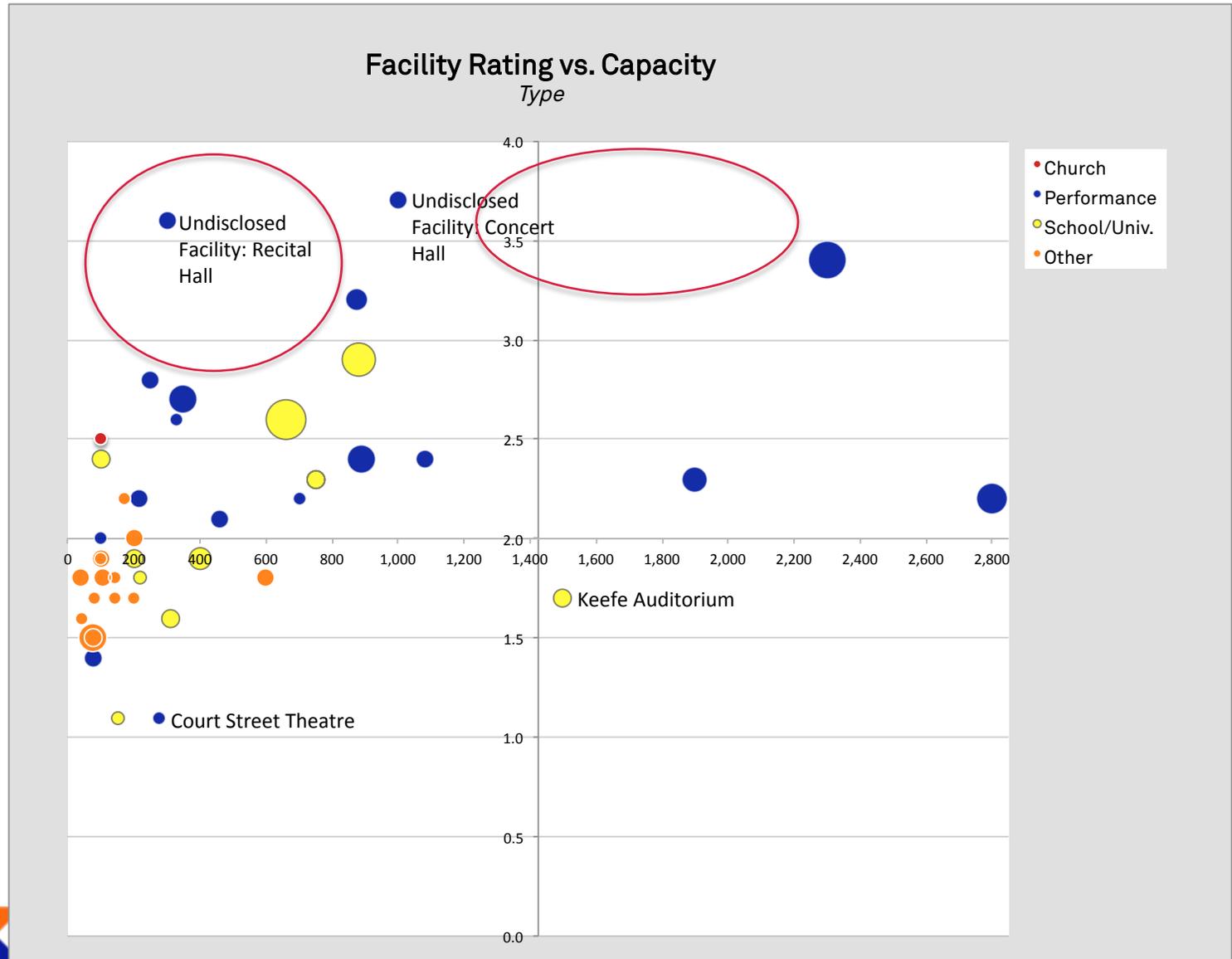
Existing performance facilities: venue type



Existing performance facilities: venue type



Existing performance facilities: venue type



Existing performance facilities: conclusions

- * In total, 43 facilities were inventoried: 18 locally and 25 regionally.
- * Locally, facilities have low quality ratings (scoring between 1.0 and 2.0) and are small in size: more than half have capacities below 100 and are categorized as 'other'.
- * Regionally, venues have much higher quality ratings (scoring between 2.0 and 4.0) and cover a variety of capacities.
- * When it comes to availability, more than half of the facilities inventoried have low or no availability. Those facilities with medium to high availability tend to be lower in quality and smaller in size.
- * Seventeen of the inventoried facilities are performance spaces, and an additional eleven are performance spaces associated with schools. These facilities tend to vary in capacity and have higher quality ratings.
- * A new arts complex is planned to enter the market in 2017. Proposed facilities include a 300-seat recital hall and a 1,000-seat concert hall. Programming will be music oriented and will include presenting. Even with these facilities in mind, we see a gap for new, or renovated, facilities that can accommodate dance and theatre in the 200-600 and 1,200 to 2,000 capacity ranges.



Existing facilities: meetings + events

- * For this inventory, Nashua-based meeting and event facilities that could accommodate between 40 and 1,000 people in a reception setting were included.
- * In total, the inventory accounts for 54 meeting and event facilities at 10 different venues.
- * Thirty-four of Nashua's meeting and event spaces are found in hotels and 10 are on university campuses. The remaining facilities are found at restaurants or country clubs.
- * Most facilities have free wireless internet. Less than half, however, have sound, lighting, or projection equipment.
- * Only 30% of meeting and event facilities have outdoor space.



Nashua, NH Meeting + Event Facilities

Spaces with capacities of 30-1,000

building creativity

Local Facilities

Type	Facilities	Score	Reception	Banquet	Conference	Theatre	Classroom	On-site Staff	Atmosphere	Divisible Space	Other Event/Meeting	Sound Equipment	Lighting Equipment	Projection Equipment	Equipment for Rent	Free Wireless/Internet	Business Center	On-site Catering	Preferred Caterers List	Restaurant/Cafe/Bar On-site	Hotel Rooms On-site	Outdoor Space
Hotel	Radisson Hotel Nashua: Nashua Grand Ballroom	8	###	700	-	1,000	500															
Other	Sky Meadow Country Club: Grand Ballroom	6	600	250	-	-	-															
Hotel	Crowne Plaza Nashua: Somerset Ballroom	11	500	400	-	600	275															
Hotel	Radisson Hotel Nashua: Wentworth Ballroom	8	400	300	70	450	200															
Hotel	Radisson Hotel Nashua: Ashwood Court	8	300	130	35	200	100															
Hotel	Courtyard Marriott Hotel Nashua: Grand Ballroom	11	280	380	-	500	275															
Hotel	Courtyard Marriott Hotel Nashua: Granite State Ballroom	11	250	200	-	240	150															
Hotel	Radisson Hotel Nashua: Balsam Room	8	250	170	60	225	120															
Hotel	Radisson Hotel Nashua: Windsor	8	250	15	-	-	-															
Hotel	Holiday Inn Hotel + Suites Nashua: Granite State Ballroom	10	220	220	-	350	200															
Other	Welcoming Light, Inc.: Small Meeting Room	4	200	-	-	125	-															
Hotel	Holiday Inn Hotel + Suites Nashua: Franklin Pierce Room	10	125	125	-	180	125															
Hotel	Holiday Inn Hotel + Suites Nashua: Hampshire Ballroom	10	120	120	-	175	75															
Hotel	Holiday Inn Hotel + Suites Nashua: Hillsborough Ballroom	10	120	120	-	150	75															
Hotel	Crowne Plaza Nashua: The Hunt Club	8	120	100	30	120	50															
Hotel	Crowne Plaza Nashua: Trafalgar Suite	11	100	80	35	120	70															
Hotel	Radisson Hotel Nashua: Northwood	8	90	80	35	120	60															
Hotel	Radisson Hotel Nashua: Chesterfield	8	60	50	25	70	40															
Hotel	Radisson Hotel Nashua: Bedford	8	60	50	25	70	40															
Hotel	Radisson Hotel Nashua: Hollis	8	60	50	25	70	40															
Hotel	Radisson Hotel Nashua: Amherst	8	60	50	25	70	40															
Restaurant	Country Tavern: The Loft	3	60	40	-	-	-															
Other	Nashua Country Club: The Lounge	7	60	20	-	-	-															
Hotel	Radisson Hotel Nashua: Berkeley	8	50	30	20	50	24															
Hotel	Radisson Hotel Nashua: Windham	8	50	30	20	50	24															
Hotel	Radisson Hotel Nashua: Hanover	8	50	30	20	50	24															
Hotel	Radisson Hotel Nashua: Bristol	8	50	30	20	50	24															
Hotel	Radisson Hotel Nashua: Portsmouth	8	50	30	20	50	24															
Hotel	Radisson Hotel Nashua: Hampton	8	50	30	20	50	24															
Hotel	Radisson Hotel Nashua: Conway	8	50	30	20	50	24															
Hotel	Crowne Plaza Nashua: Library	8	40	40	-	-	-															
Hotel	Holiday Inn Hotel + Suites Nashua: Robert Frost Room	9	40	40	-	70	50															
Hotel	Courtyard Marriott Hotel Nashua: Amherst Room	10	40	40	15	40	18															
Hotel	Courtyard Marriott Hotel Nashua: Merrimack Room	10	40	40	15	40	18															
Hotel	Courtyard Marriott Hotel Nashua: Portsmouth Room	10	40	40	15	35	18															
University	Daniel Webster College: Dining Hall	6	-	350	-	-	-															
Other	Nashua Country Club: Ballroom	9	-	200	-	200	-															
University	Rivier University: Dion Reception Room	5	-	120	36	225	66															
University	Rivier University: Memorial Event Hall	5	-	110	28	180	36															
University	Rivier University: DeMoulas Room	5	-	70	28	110	40															
Other	Nashua Country Club: Fairway Room	7	-	50	-	-	-															
Restaurant	Country Tavern: The Tack Room	3	-	50	-	-	-															
Restaurant	Country Tavern: East Private Dining Room	3	-	48	-	-	-															
Restaurant	Country Tavern: West Private Dining Room	3	-	48	-	-	-															
University	Rivier University: Perreault Room	5	-	42	24	50	36															
Hotel	Crowne Plaza Nashua: Board Room	8	-	30	20	-	-															
University	Rivier University: Dion Board Room	5	-	-	30	-	30															
University	Rivier University: Learning Commons (Large)	5	-	-	18	50	18															
University	Daniel Webster College: Auditorium	6	-	-	-	300	-															
Other	Welcoming Light, Inc.: Large Meeting Room	4	-	-	-	200	-															
University	Rivier University: Amphitheater 1	5	-	-	-	160	-															
University	Rivier University: Amphitheater 2	5	-	-	-	160	-															
Hotel	Crowne Plaza Nashua: Brookfield Room	8	-	-	-	20	12															
Hotel	Crowne Plaza Nashua: Amphitheater	8	-	-	-	-	50															

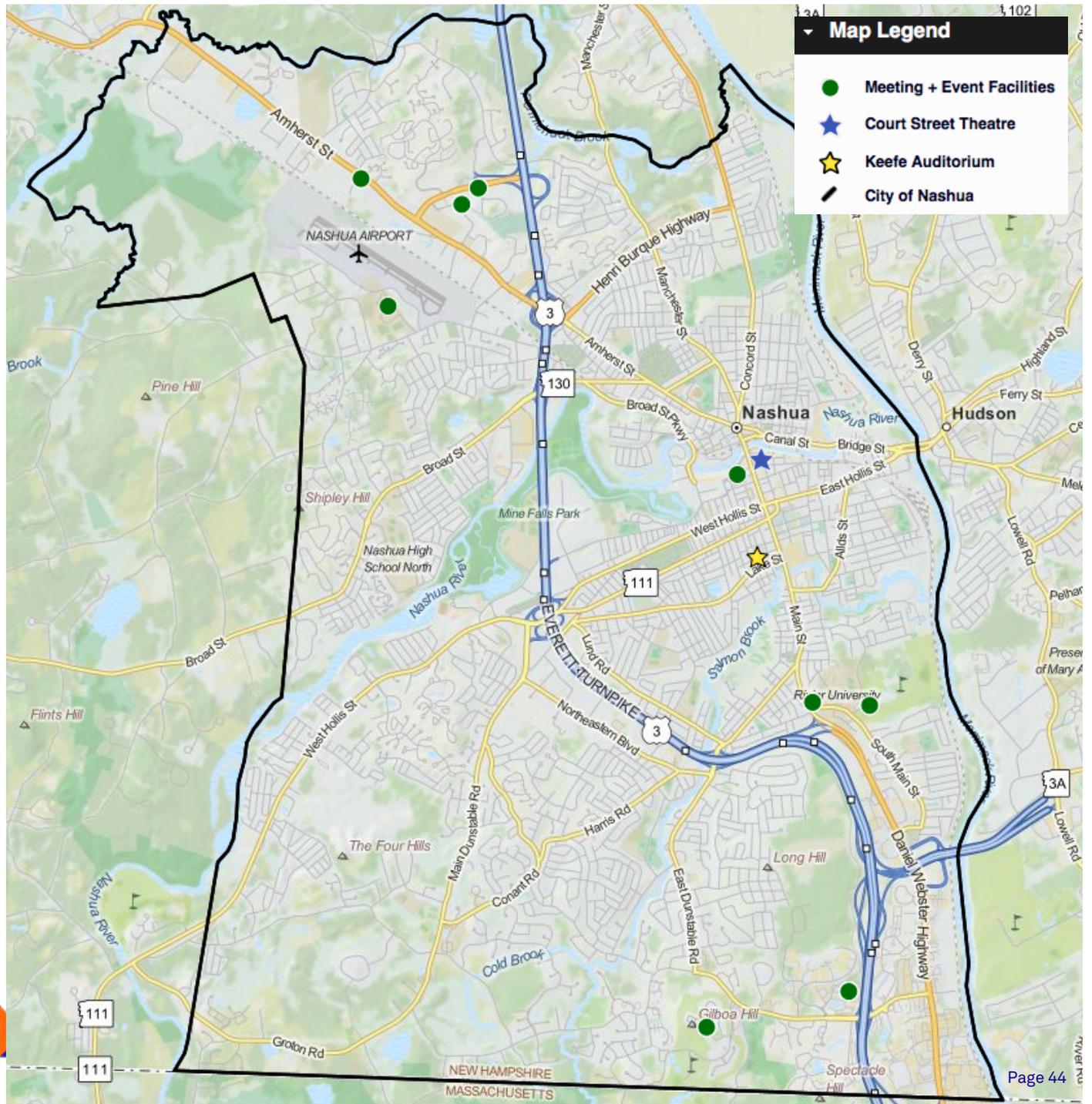
100% 7% 7% 85% 46% 9% 46% 33% 94% 63% 74% 6% 76% 63% 30%



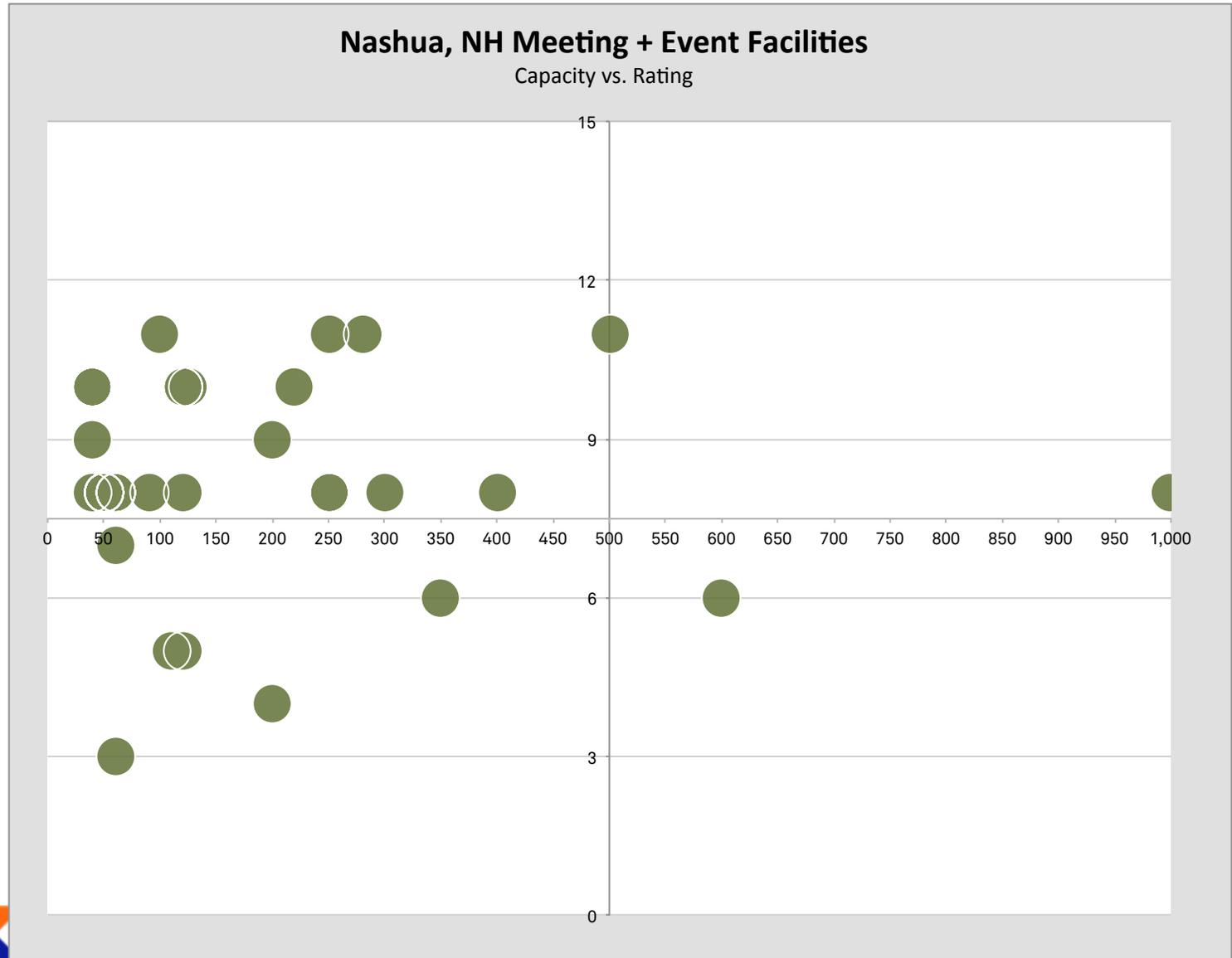
Existing meeting + event facilities

Local Meeting + Event Facilities:

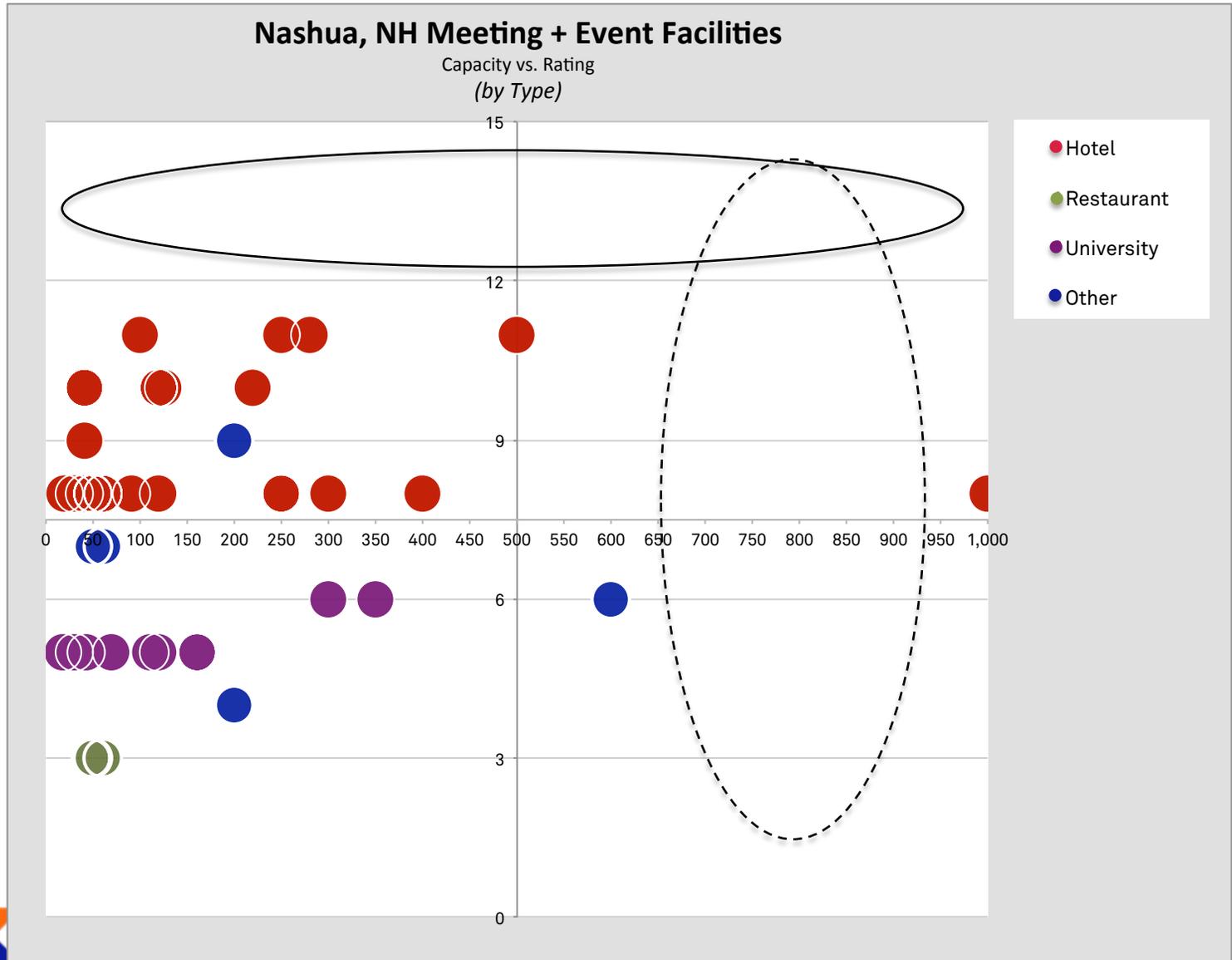
- Courtyard Marriott Hotel
- Crowne Plaza
- Holiday Inn Hotel + Suites
- Radisson Hotel
- Nashua Country Club
- Sky Meadow Country Club
- Welcoming Light, Inc.
- Country Tavern
- Daniel Webster College
- Rivier University



Existing meeting + event facilities: capacity + quality



Existing meeting + event facilities: type



Meeting + Event Facilities Conclusions:

* Based on the meeting and events inventory, we can say that there is a gap in the market for a high quality meeting and events facility with a unique atmosphere, outdoor space, and state-of-the-art tech and A/V equipment.



Utilization



Utilization: introduction

Overview

Over the course of this needs assessment, we gathered information on demand in Nashua and the surrounding region for new performance facilities. This helps us to determine who needs space, what it is needed for, and how often it is needed.

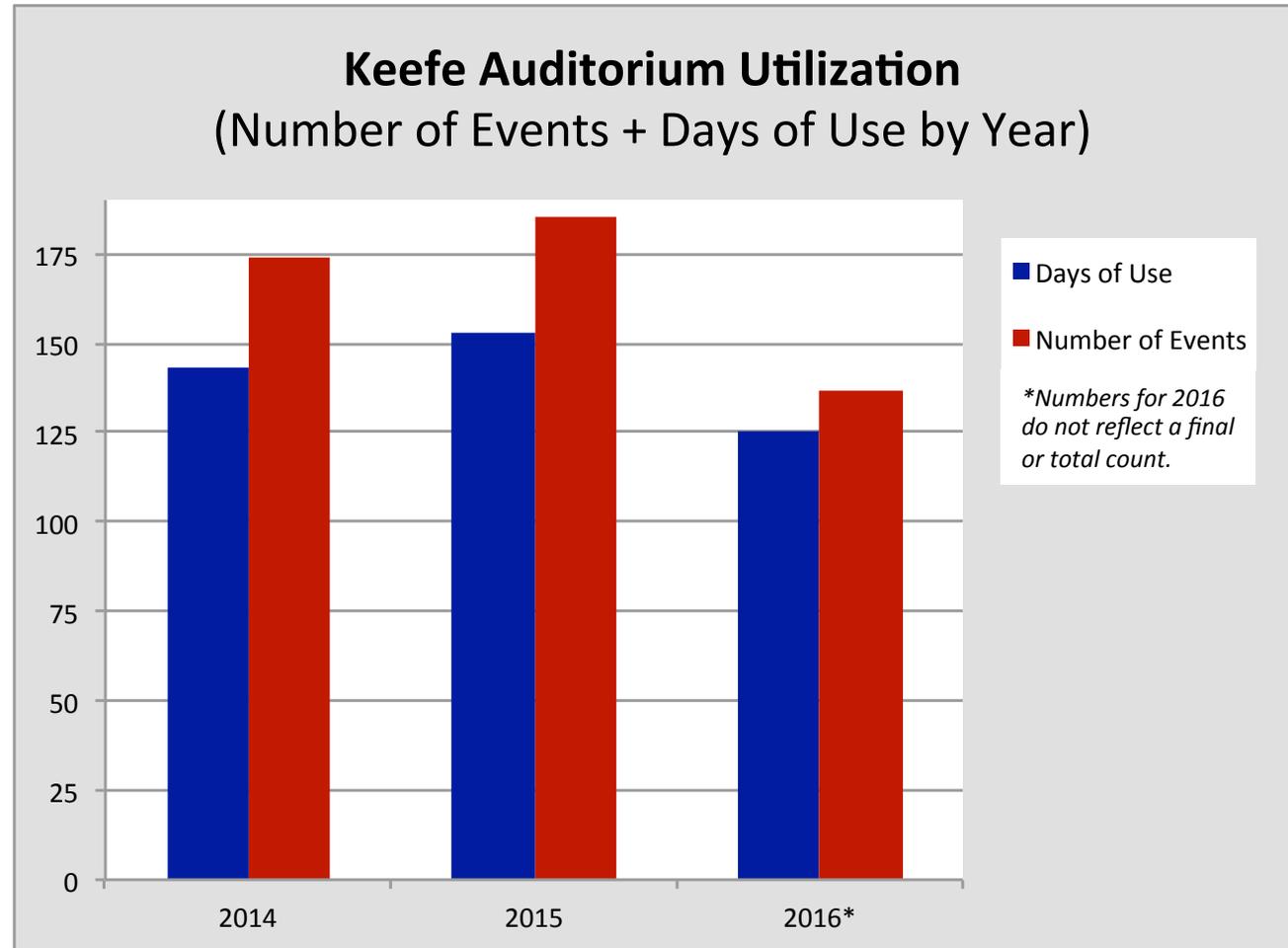
Methodology

We began this phase of the assessment by first looking at the current level of use at Nashua's Keefe Auditorium and Court Street Theatre. Then, we worked with the City of Nashua to identify a number of community groups and organizations that might have demand for space. Finally, having asked all parties to estimate the number of times they might use new arts facilities throughout the year for performances, rehearsals, classes, meetings, and/or events, we created a chart that quantifies demand.

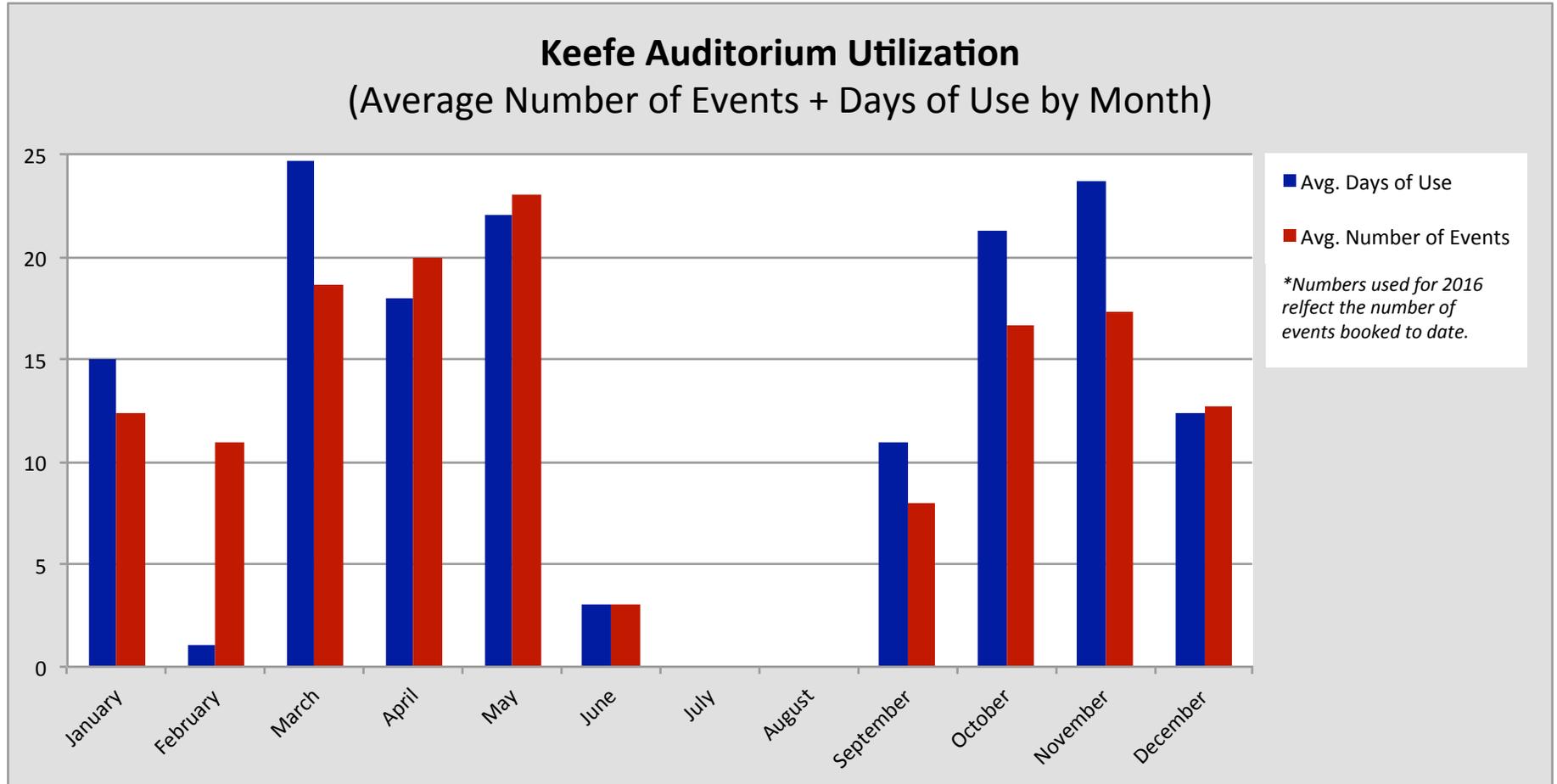


Utilization: keefe auditorium

- * Keefe Auditorium is a middle-school facility used by Symphony NH, Actorsingers, and other community entities.
- * In 2014, the system used by Nashua School District to book rentals in Keefe Auditorium changed, preventing us from collecting data on utilization in years prior.
- * The numbers used to quantify 2016 use reflect the events scheduled in Keefe Auditorium *to date* and could increase over the course of the year.
- * In 2015, Keefe Auditorium was used a total of 153 days for 185 different events.
- * In 2014, it was used a total of 143 days for 174 different events.



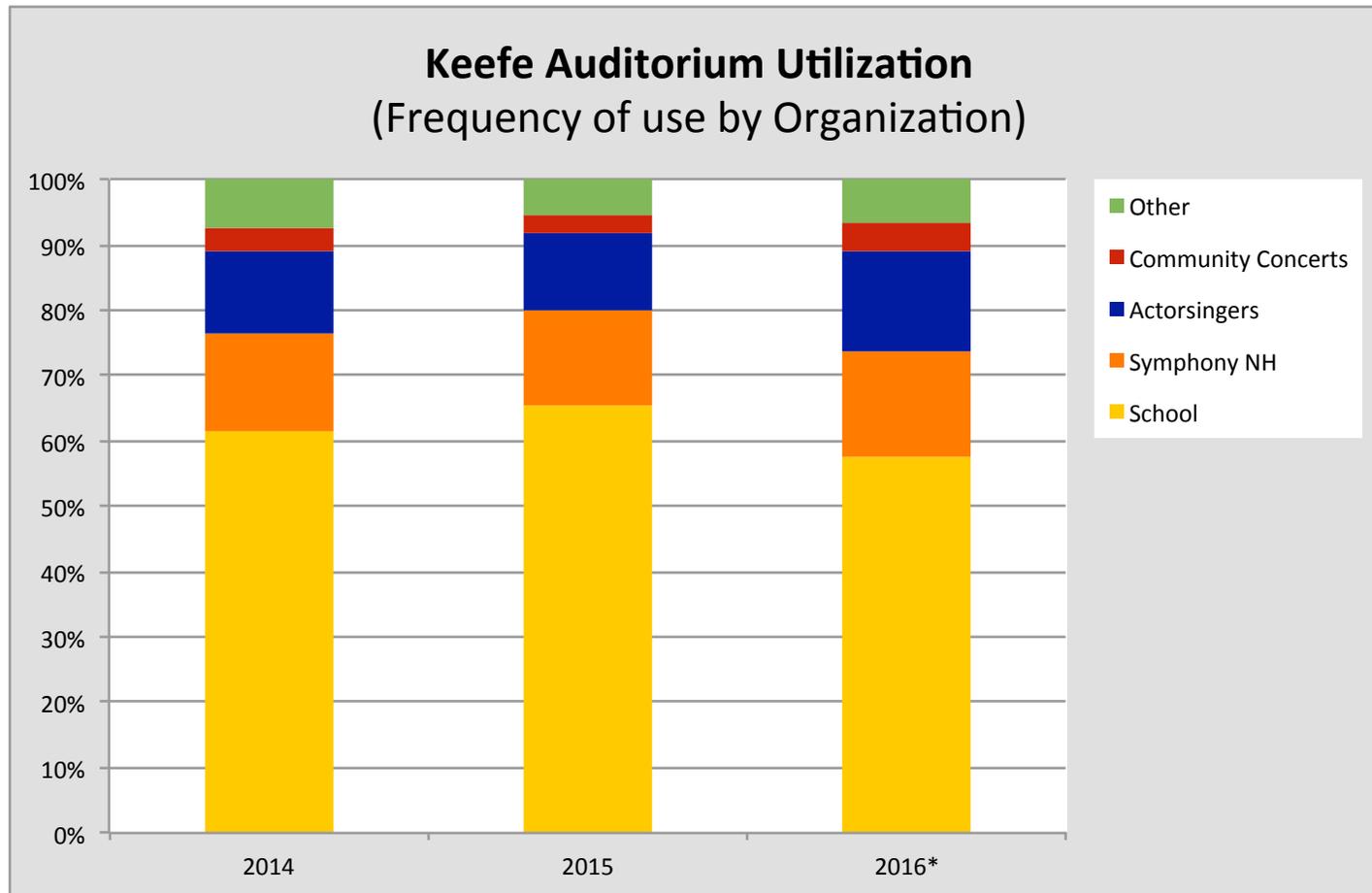
Utilization: keefe auditorium



* Looking at the average number of events and days of use per month, we can see that the Keefe tends to be busiest from March through May and in October and November.



Utilization: keefe auditorium

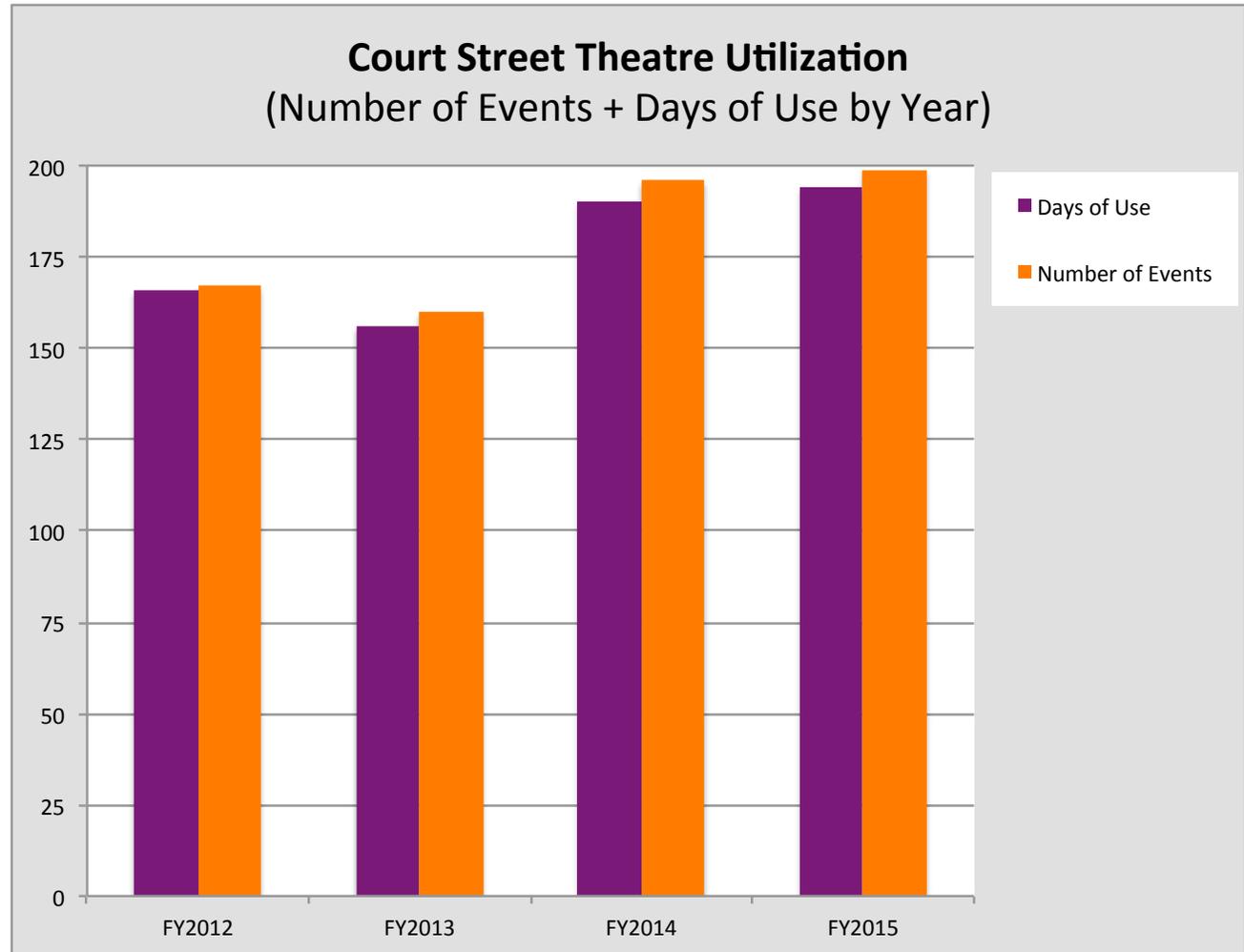


* This chart allows us to look at the Keefe’s utilization by organization. Nashua School District is the most frequent user of the space, followed by Symphony NH and Actorsingers, which use the space an almost equal amount.

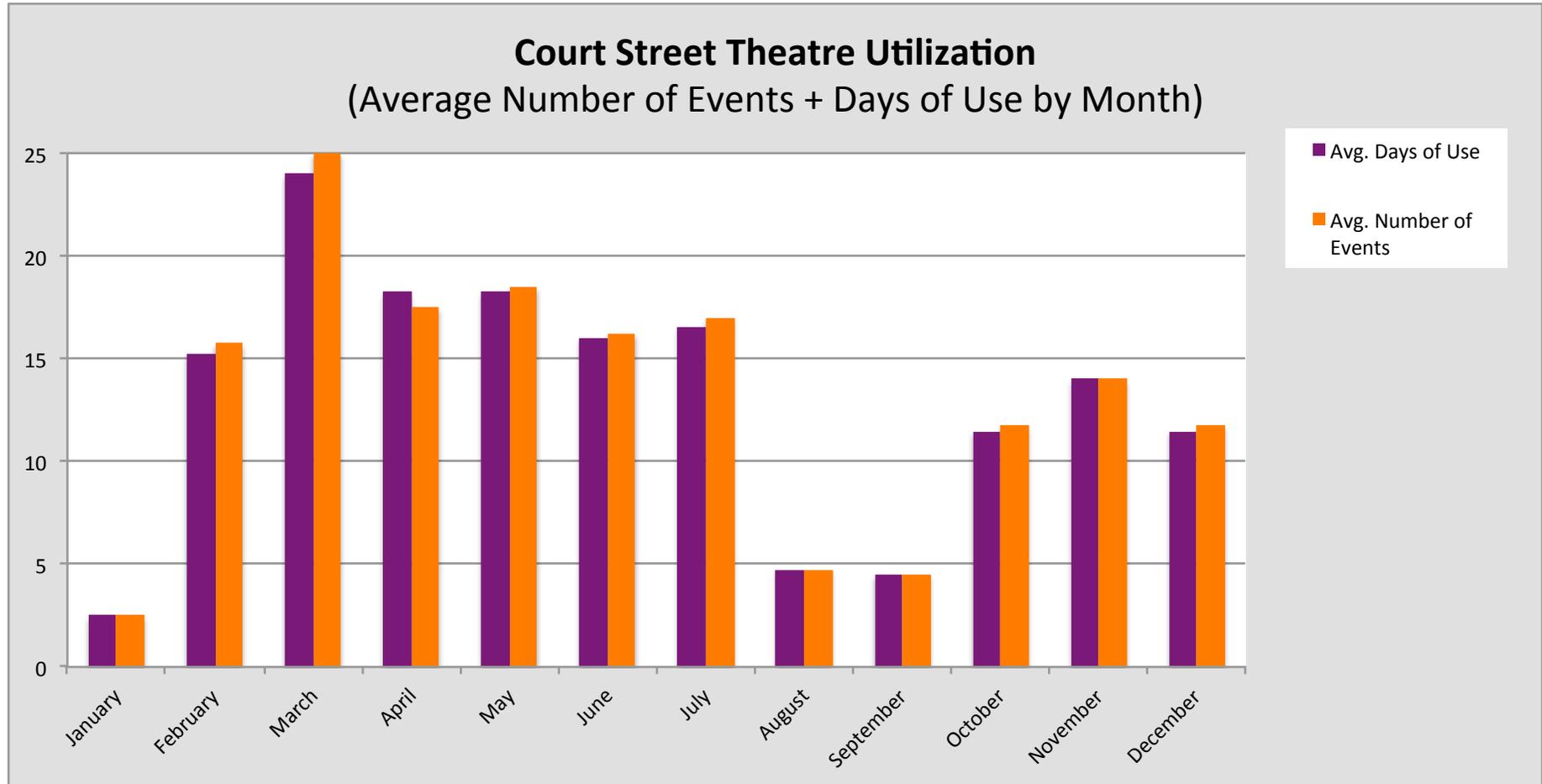


Utilization: court street theatre

- * Court Street Theatre is a 277-seat theater located in an old Nashua fire house.
- * The building also has a small black box theater in the basement, but it has been deemed unsuitable for use.
- * In FY2015, the Court Street Theatre was used a total of 194 days for 199 different events.
- * Over the last two years, use of the theater has increased, despite its lack of audience and user amenities and need for renovation.



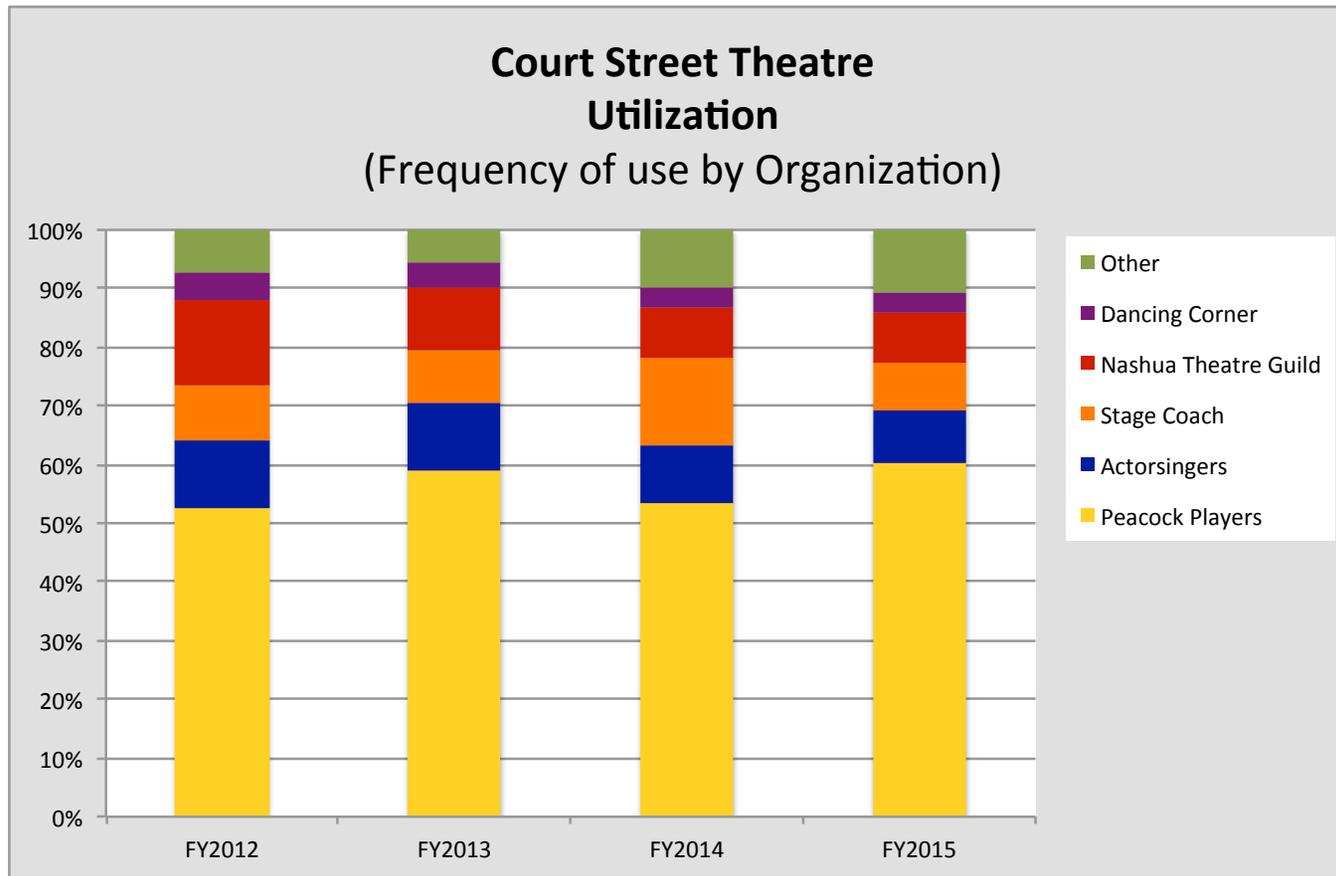
Utilization: court street theatre



* On average, March is the busiest month for the theater. However, there is relatively consistent use from February through July.



Utilization: court street theatre



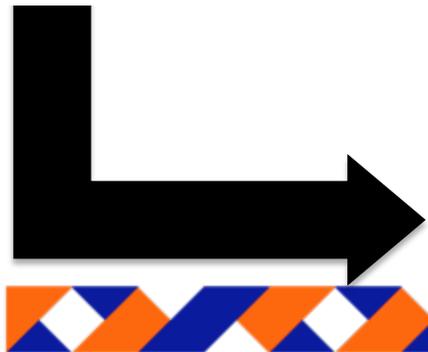
- * This chart allows us to look at Court Street’s utilization by organization. Peacock Players uses the space with the most frequency, followed by Actorsingers and Nashua Theatre Guild.
- * However, over the last two fiscal years, there have been a handful of new users, including M+M Productions, Ghostlight Theater Company, and solo artist presentations/recitals.



Utilization: user demand

User Demand: Performance + Classroom Space	Rehearsal/ Tech	Performances	Other	Total	Capacity	Classroom Space Demand
Symphony New Hampshire	7	15	1	23	1100	-
Actorsingers (Large Space)	16	6	-	22	750	-
Gate City Charter School for the Arts	-	2	45	47	500	-
Positive Street Art	4	4	-	8	500	-
Spartans Drum + Bugle Corps*	-	-	2	2	500	-
Steve Ruddock/Riverwalk Café	-	24	-	24	400	-
Peacock Players	30	36	166	232	350	166
Actorsingers (Small Space)	16	6	-	22	350	-
North Main Muisic School	2	2	-	4	300	2
Nashua Community Music School	10	10	-	20	250	312
Nashua Chamber Orchestra	-	9	-	9	200	-
Blue String Marionettes	-	4	-	4	200	-
Nashua North High School: Theatre Arts	8	6	-	14	100	-
Daniel D. Rok Swain (Dance Instructor)	-	-	-	0	-	208
Sheetal Kelkar (Indian Dance Instructor)	-	-	-	0	-	3
Total Days of Use:	93	124	214	431	-	691

*estimated capacity



User Demand Summary: Performance Facilities (13 Users)*	Rehearsal/ Tech	Performances	Other	Total
750+ seats (2 users)	23	21	1	45
351 to 500 seats (4 users)	4	30	47	81
350 seats or fewer (7 users)	66	73	166	305
Total Days of Use:	93	124	214	431

*Actorsingers is counted twice to account for demand for multiple facilities

Utilization: key potential partners

- * ***The Educational Sector:*** Nashua and the surrounding region are home to multiple educational institutions, including Rivier University, Nashua Community College, Daniel Webster College, the University of New Hampshire, and Southern New Hampshire University. A partnership with one or more of these entities would connect new arts spaces to an experienced facility operator, insure a certain level of use, and provide a certain amount of financial stability.
- * ***Local Developers:*** There are handful of active developers in Nashua working to repurpose the city's former warehouses. Some of these projects have been very arts-friendly (The Nashua Area Artists' Association Gallery is currently housed in a commercial building downtown, which also displays the work of local artists throughout the building).
- * ***The Tech + Business Communities:*** Nashua's tech and business communities are growing. New arts facilities could be used for product launches, retreats, customer appreciation events, and so on.



Utilization: conclusions

- * Nashua has two primary performance facilities: Keefe Auditorium and Court Street Theatre. Keefe Auditorium is regularly used by Symphony NH, Actorsingers, and Nashua Community Concert Association. At Court Street, Peacock Players dominate facility use, renting the theatre for 30 weeks each year. There are, however, opportunities for increased use, specifically at Keefe Auditorium, which is not used at all during the months of July and August.
- * Local demand for a facility with 750 seats or more is limited to 45 days a year. For a facility with 500 seats, there are only 81 days of demand.
- * There is significant demand (305 days) for a facility with 350 seats or fewer, as well as 691 days of demand for classroom space.
- * Peacock Players would be the primary user of a 350-seat facility, while Symphony NH and Actorsingers would be the primary users of a larger, 750-seat or more facility.



Benefits + impacts



Benefits + impacts

- ✦ The Nashua Arts Commission released the **Nashua Arts + Cultural Plan** in 2015. The plan outlined six primary goals for the arts in Nashua:

<p>Identity: Create a unique brand to represent Nashua’s culture that distinguishes the city within the region.</p>	<p>Centralization: Develop a collaborative citywide association of arts and culture by understanding and leveraging digital networks and existing venues and spaces within the city.</p>
<p>Education: Engage residents of all ages, backgrounds, and abilities in arts and culture by raising awareness from a young age and integrating culture into educational, recreational, and social activities.</p>	<p>Marketing: Attract visitors and residents to local events by publicizing the Nashua cultural brand through strategic outreach and promotion of the arts to both local and broader audiences.</p>
<p>Commerce: Produce new economic opportunities for the city by integrating the arts into public and business policies, stimulating Nashua to evolve as a sustainable, resilient, and livable community.</p>	<p>Growth: Encourage proliferation, prosperity, and visibility for both existing and emerging organizations in the arts.</p>

The development of new arts facilities is in line with many of these goals, particularly identity, centralization, education, and commerce.



Benefits + impacts

- * The City's **Consolidated Plan for Community Development Block Grant + HOME Investment Partnership Program** (2010) outlines the following goals:
 - * Strengthening Neighborhoods
 - * Improving Economic Opportunities
 - * Improve the Quality of Local Infrastructure
 - * Improve the Quality of Local Community Facilities
 - * Improve the Quality of Public Services

Cultural facilities can help the city achieve these goals in addition to a number of the specific objectives listed in the report, including: improving quality of life issues contributing to neighborhood blight, enhancing the vitality of Downtown Nashua, and improving the quality and increasing the quantity of facilities.



Benefits + impacts

* Other benefits and impacts include:

- * ***Sense of Place + Quality of Life:*** Spaces with programs that engage the public, particularly facilities for arts, education, and outreach programs, have potential to contribute to the character and identity of a community. These types of programs and facilities provide opportunities for cross-sectorial and cross-cultural collaboration, socialization, enhancing sense of community, and providing hands-on experiences attractive to regional residents—all contributing to the community's quality of life.
- * ***Quality of Workforce + Corporate Recruitment:*** Studies suggest that strong arts and cultural communities rank among the top factors for decision makers when considering relocation for employment opportunities as they indicate an educated workforce and high quality of life.
- * ***Neighborhood + Community Development:*** Research has shown that community arts programs have enhanced and improved community development. The arts enable individuals and groups to express themselves, and in the process, become more involved in contributing to the development of their community.
- * ***Teaching Innovation + Creativity:*** Finally, the teaching of the arts is now being recognized as a fundamental need for the North American economy and its workforce, given the automation of many jobs and growing competition from lesser-developed economies.



Conclusions + recommendations



Conclusions + recommendations

- * **The market:** The market is diverse. In all market segments, there are varying levels of educational attainment, household income, races and ethnicities, and ages. This indicates a need for programming that ranges from the hands-on to the traditional performing arts and facilities that are price sensitive to potential users and audiences.
- * **Existing facilities:** Nashua is located in a crowded arts market with a number of facilities that present national touring products. In addition, there are two new facilities planned for one of Nashua's neighboring communities, one of which will present touring musical acts. Even with these facilities, a gap remains for high-quality theatre and dance space. An additional gap exists for meetings and events.
- * **User demand:** There is significant demand for a performance facility with 350 seats or fewer, accounting for 305 days of use. An additional 691 days of demand exists for classroom space. Demand is limited for a venue with 500 or 750+ seats.
- * **Benefits + impacts:** New arts facilities align with many of the goals identified in the Arts Commission's Arts and Culture Plan, as well as with goals identified in the City's 2010 Consolidated Plan.



Conclusions + recommendations

- * The case for building a brand new, large-capacity performing arts venue in Nashua is challenged by the city's proximity to multiple large, presenting performing arts centers, the development of a new concert hall nearby, and limited demand on the part of local users for a venue with 750 or more seats.
- * Additionally, the city is already home to two performance venues that are regularly used by the community but that are greatly in need of renovation.
- * With that said, we see tremendous opportunity in Nashua. The organizations that are currently active in the community offer a diverse product, maintain busy schedules, and have demonstrated an ability to grow and develop programs over time. If we look to Positive Street Art as an example, Nashua can be seen as the type of environment that can allow an emerging organization the time, space, and support needed to flourish.
- * Our recommendations, then, are focused on harnessing the city and community's current arts-momentum and resources, directing them at four different options.



Options

1. Partner with a regional college or university on the development of a new downtown arts center
2. Develop a downtown meeting, events, and music center
3. Develop an arts district anchored by a renovated Keefe Auditorium and the Hunt Building



option 1: partner with a regional college/ university

What?

- * A partnership between the City of Nashua and one of the region's colleges or universities to create an arts hub along Nashua's Main Street.

Why?

- * Colleges and universities are skilled facility operators. And, with their many programs, departments, and student organizations, they have considerable demand for space.
- * A facility developed in partnership with a college or university would ensure that it is regularly active with programming, draw increased foot traffic to downtown (students, professors, and so on), and, depending on the partnership, take some or all of the pressures of operating a facility off of the City.
- * It would be an opportunity for a college or university to develop a downtown presence in Nashua and could lead to future partnerships between university arts departments and Nashua's performing arts groups.



option 1 example: The Core@Carolina Square | Chapel Hill, NC

- * An 8,500 square foot arts innovation lab planned as part of a larger downtown redevelopment project
- * A partnership between the Town of Chapel Hill, University of North Carolina, and two development firms
- * The facility's goal is to bring students and community members together with artists, scientists, and researchers
- * Will include an adaptable performance and creative space, a rehearsal space, and a studio space
- * As part of the larger development, the project will include retail, office, and residential space and a public green space
- * Programming will take two avenues: hosting artists in collaboration with scientists and technologists to collaborate and experiment on ideas; and, presenting an annual series of public performances
- * Capital costs for The Core are \$5 million; UNC has committed \$4 million in non-state funding
- * The Core is expected to open in 2017



option 2: develop a downtown meetings, events + music center

What?

- * A large, ballroom-like space that has the flexibility, functionality, and acoustics to host Symphony NH one night, a dj battle produced by Positive Street Art the next, and a State of the City address the following morning.

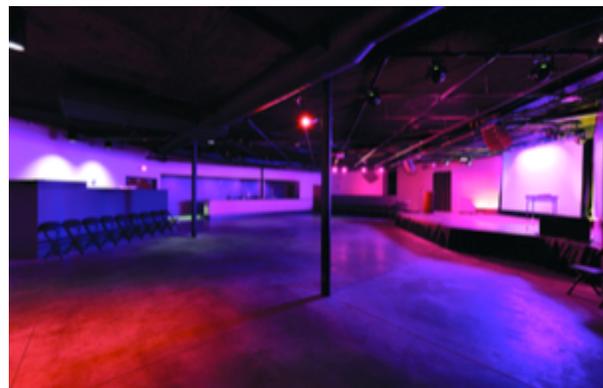
Why?

- * There is demand in the market for flexible arts spaces, as well as a gap for a non-hotel based meeting and event space with a Downtown location.
- * The Riverwalk Café can't accommodate all of the performance requests that are currently received and is interested in booking a larger venue.
- * Portsmouth's 3S Artspace has set a precedent for such a facility and was frequently cited during interviews as an aspirational arts space.



**option 2 example: 3S Artspace |
Portsmouth, NH**

- * Opened in 2009
- * Features a flexible performance space with a standing capacity of 400, a gallery with capacity for 150, and an on-site restaurant
- * Programming includes music, film, dance, family shows, spoken word, and events like 'Drink + Draw'
- * The restaurant, Block Six, has a local focus, purchasing ingredients from local farmers and vendors
- * 3S is a nonprofit and is currently engaged in a capital campaign to finish building-out their facility



option 2 example: World Café Live | Philadelphia, PA

- * Live music venue and restaurant converted from a former toilet factory
- * Features an upstairs restaurant/bar with a live music stage and downstairs music venue with a full restaurant
- * Designed with event-hosting capabilities in mind and is equipped with projection screens, camera mounts, and gobo projection capabilities
- * Programming is centered around the mission of the national radio show World Café, which works to bring “new music to people and new people to music”
- * Hosts numerous private and corporate rentals; staff work with corporate sponsors and those renting the hall to provide entertainment for events
- * The venue supports an education program called MusicLab; as part of the program, artists present a master class (which is recorded for later distribution to educators) in front of a student audience



option 3: develop a downtown cultural district anchored by a renovated keefe auditorium + the hunt building

What?

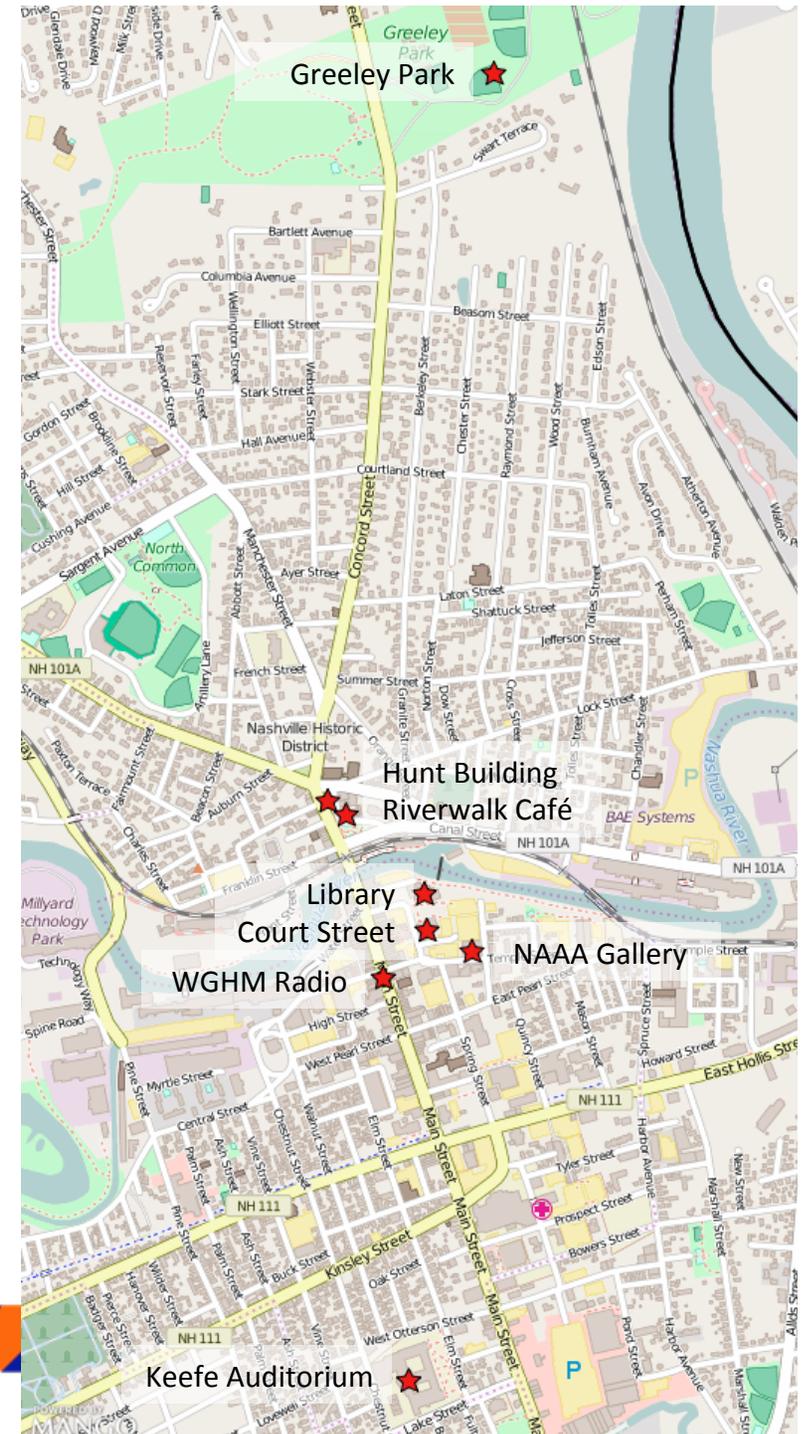
- * A collection of galleries, restaurants, shops, performance venues, and arts education facilities that stretch from a renovated Keefe Auditorium to the Hunt Building, and potentially Greeley Park.



option 3: develop a downtown cultural district anchored by a renovated keefe auditorium + the hunt building

Why?

- * Nashua already has the makings of a walk-able arts district along Main Street, including a number of culturally-active facilities, residential projects in the works, and a community that is used to traveling downtown to go to places like Alec's Shoe Store or attend events like the Holiday Stroll.
- * As part of this option, we would recommend renovating the Keefe Auditorium. This would mean improving the user and visitor experience (including improved concessions).
- * We would also recommend increasing utilization at the Hunt Building.



option 3 example: Downtown Bryan Cultural District | Bryan, TX

- * An overlay granted by the Texas Commission on the Arts' Cultural District Program that covers seven blocks of Bryan's Main Street
- * Includes 21 restaurants, dozens of shops, and galleries
- * Cultural spaces in the district include Carnegie Library History Center, Mounce Public Library, The Grand Stafford Theater, Palace Theater, StageCenter Theater, and artist studios
- * Programming and activities include Art Step First Fridays, artist demonstrations, live music, outdoor movie screenings, festivals, parades, and more
- * The Downtown Bryan Association, a nonprofit organization, oversees the District



Recommendations matrix

City of Nashua Feasibility Study Recommendations Matrix			
	Option 1: Educational Partner	Option 2: Downtown Meetings, Events + Music Center	Option 3: Arts District
Market	Multiple educational entities in the region, none with a downtown presence in Nashua	Growing business + tech communities	Inclusive of multiple types of facilities, programs + offerings that can appeal to the diverse local + regional market
Facilities	Colleges and universities are skilled building operators	No downtown meeting + event facilities	Takes advantage of existing infrastructure while creating opportunities for new facility uses
Uses + Users	An educational partner would guarantee a certain level of use throughout the year	A growing music market fueled by Riverwalk Café + Positive Street Art	The community-at-large
Benefits + Impacts	Goal #1: Increased arts education opportunities (Arts + Cultural Plan)	Goal #1: Encourage the presence of art in Downtown Nashua (Arts + Culture Plan)	Goal #1: Create a unique brand for Nashua's art and culture that distinguishes the city within the region (Arts + Culture Plan)
	Goal #2: Generate growth in the arts (Arts + Culture Plan)	Goal #2: Bring student music talent to Downtown to perform at events (Arts + Culture Plan)	Goal #2: Creation of a wayfinding system (Arts + Culture Plan)
	Goal #3: Improve economic opportunities (City of Nashua Consolidated Plan)	Goal #3: Bring a well-known artist with mainstream appeal to attract people to Nashua (Arts + Culture Plan)	Goal #3: Conducive to City's aspiration for increased public art (Arts + Culture Plan)
	Goal #4: Maintaining + increasing downtown pedestrian traffic (Anecdotal Research)	Goal #4: Strengthen the relationship between artists + Chamber of Commerce (Arts + Culture Plan)	Goal #4: Encourage the presence of art Downtown (Arts + Culture Plan)
		Goal #5: Have more varied open mic events or gallery shows to encourage emerging + amateur artists (Arts + Culture Plan)	Goal #5: Creation of a walking tour (Arts + Culture Plan)
		Goal #6: Improve economic opportunities (City of Nashua Consolidated Plan)	Goal #6: A centralized location for the arts (Arts + Culture Plan)
		Goal #7: Enhance the vitality of Downtown Nashua (City of Nashua Consolidated Plan)	Goal #7: Find office space for arts groups (Arts + Culture Plan)
			Goal #8: Improve Keefe Auditorium Facility: Appropriate lobby entrants, separate signage, bathrooms, backstage, ADA access (Arts + Culture Plan)
			Goal #9: Create an artist neighborhood where classes and public services could be used in lieu of rent and/or subsidized payments (Arts + Culture Plan)
			Goal #10: Review high cost of rent at the Hunt Building (Arts + Culture Plan)
			Goal #11: Have transportation between Elm Street garage/transit station + Keefe Auditorium for events (Arts + Culture Plan)
			Goal #12: Strengthening neighborhoods (City of Nashua Consolidated Plan)
			Goal #13: Improve the quality of local infrastructure (City of Nashua Consolidated Plan)
			Goal #14: In line with NH State Council on the Arts recent attention on creative placemaking (Anecdotal research)



Preferred option

- * Our preferred option is for an arts district that includes the renovation of Keefe Auditorium and/or the development of two new, flexible arts facilities, one at a smaller capacity and another at a larger capacity.



Discussion

Questions

- * Have we fairly described the situation and the opportunities for Nashua?
- * What additional input and information is needed?
- * Are our recommendations in line with your sense of needs?
- * How should we move forward?

