

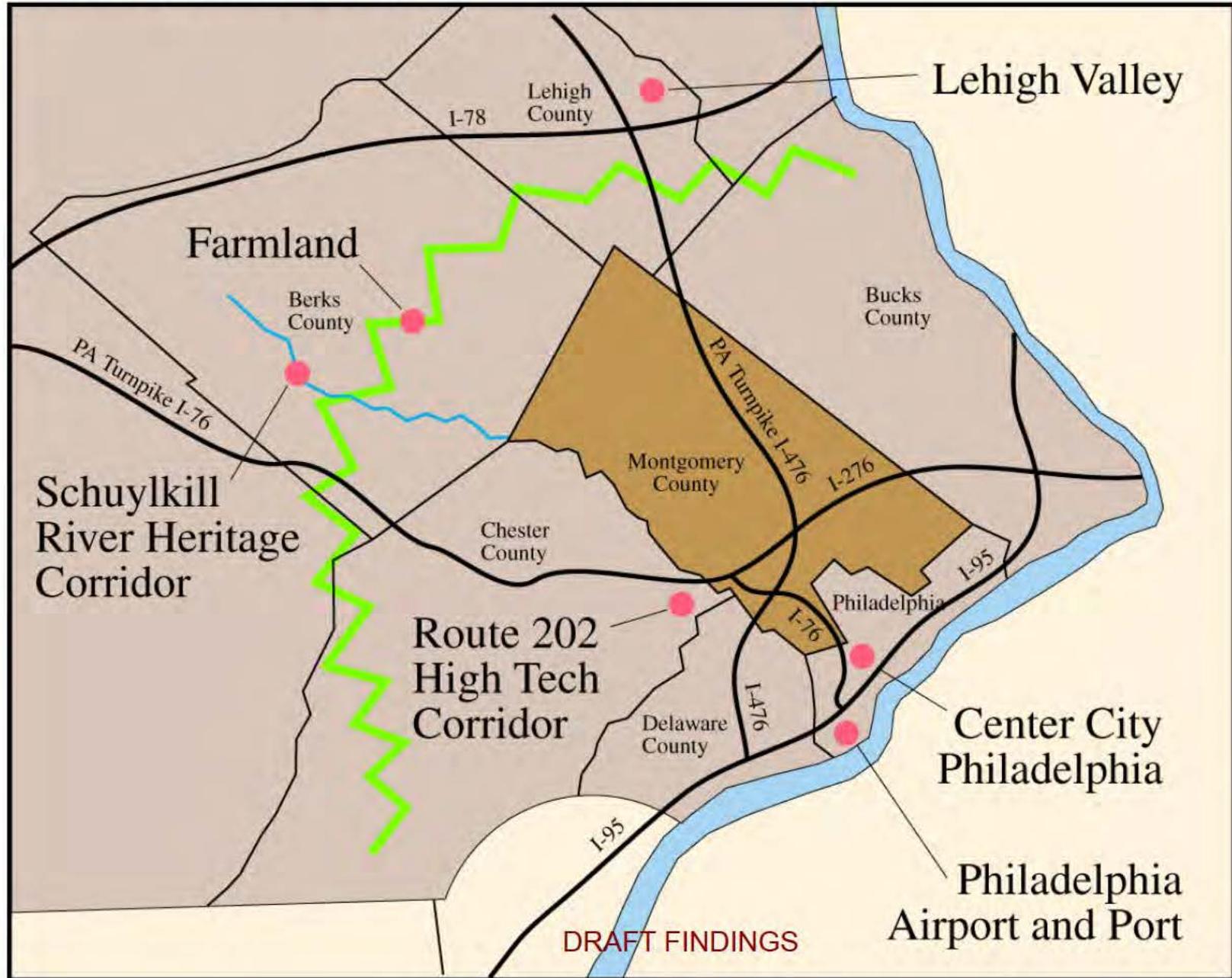
# Measuring the Supply and Demand for Arts and Culture Venues



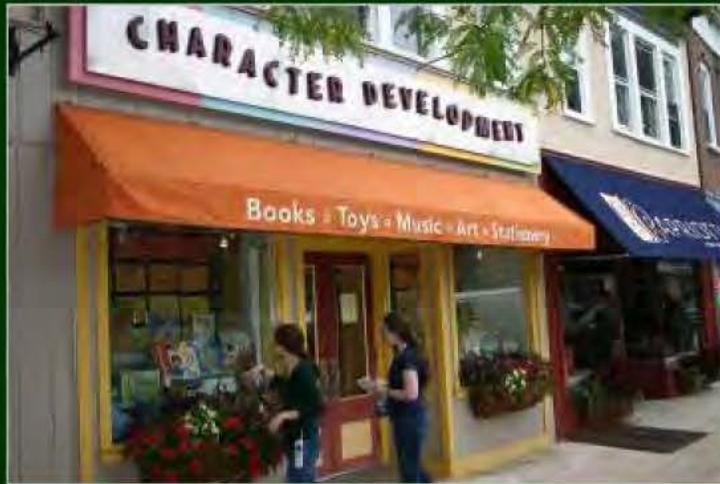
**Montgomery County Planning Commission**

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# REGIONAL POSITION AND INFLUENCES



# Revitalization of Montgomery County's Towns



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# Revitalization Approaches

- Bring in large new employment
- Encourage immigration
- Attract nearby wealth or a captive audience
- Bring in new residential development
- Capitalize on unique destination
- Coordinate property and business investment
- Develop arts and culture identity

# Revitalization through Arts and Culture



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# Market Analysis



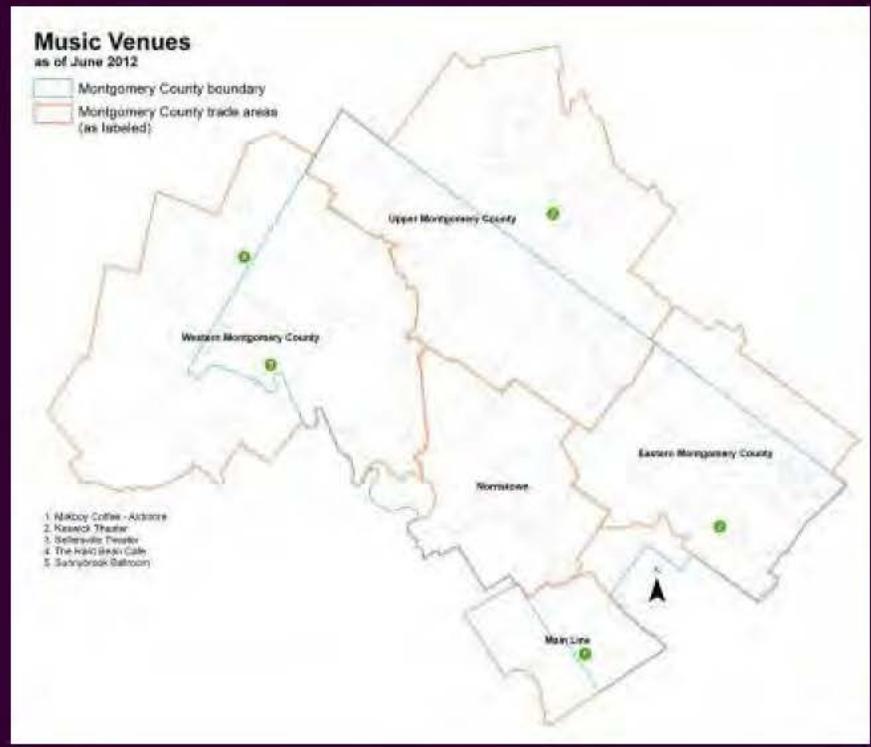
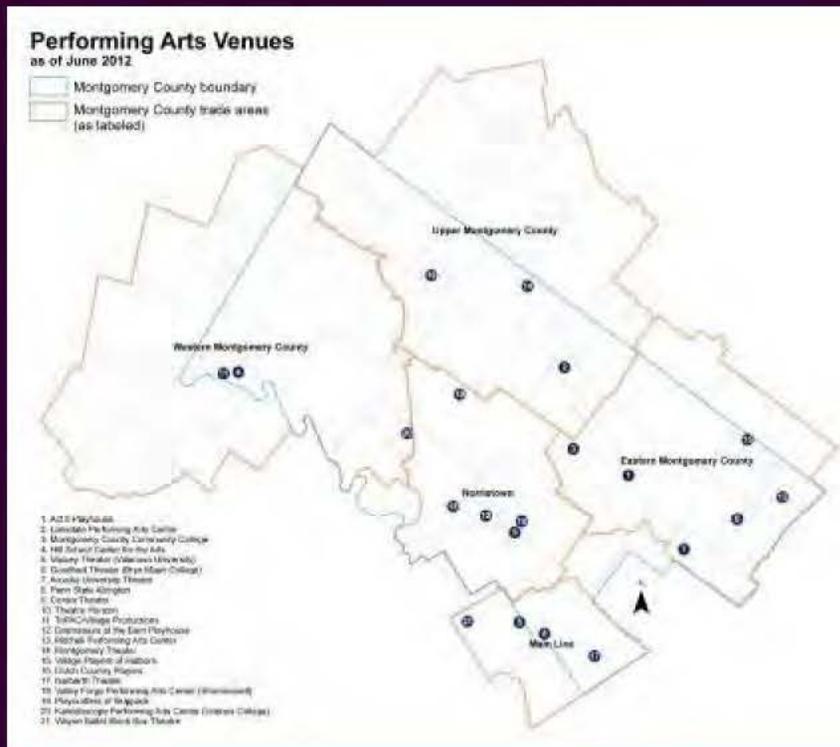
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# Trade Areas



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# Performing Arts Venues



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# Baseline Data – How much money might be spent on performing arts?

## Demand Analysis

- \$666 spent per household per year on entertainment and fees in Northeast
- Adjusted for Philadelphia area
- Adjusted for non-sport live entertainment portion
- Adjusted for out-of-town expenditures
- \$75 spent per household locally for performing arts

# Baseline Data – How much money might be spent on performing arts?

## Demand Analysis

- \$75 spent per household locally for performing arts
- Adjusted for household income ranges
- Multiplied by number of households by income
- Adjusted for Philadelphia share, which ranges between 80% to 91% of spending

	Eastern Montco Trade Area	Main Line Trade Area	Norristown Trade Area	Upper Montco Trade Area	Western Montco Trade Area
Potential Expenditures on Local Performing Arts	\$2,810,600	\$747,500	\$1,228,700	\$1,514,300	\$1,426,700

DETAILED FINDINGS

# Baseline Data – How much money might be spent on performing arts?

## Supply Analysis

- Existing venues and capacity identified
- Number of events and cost estimated
- Attendance estimated
- Total expenditures calculated

	Eastern Montco Trade Area	Main Line Trade Area	Norristown Trade Area	Upper Montco Trade Area	Western Montco Trade Area
Estimated Local Expenditures on Performing Arts	\$2,469,500	\$185,700	\$294,000	\$1,104,000	\$935,500

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# Baseline Data – How much money might be spent on performing arts?

## Supply and Demand Analysis

- All trade areas have some excess demand, although Eastern Montco is limited.

	Eastern Montco Trade Area	Main Line Trade Area	Norristown Trade Area	Upper Montco Trade Area	Western Montco Trade Area
Estimated Demand	\$2,810,600	\$747,500	\$1,228,700	\$1,514,300	\$1,426,700
Estimated Supply	\$2,469,500	\$185,700	\$294,000	\$1,104,000	\$935,500
Unmet Demand	\$341,100	\$561,800	\$934,700	\$410,300	\$935,500

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# Other Factors affecting Performing Arts Attendance

## Household Types

- Households in different parts of the county have different tastes. (Info from ESRI Tapestry Segment data.)

	Eastern Montco Trade Area	Main Line Trade Area	Norristown Trade Area	Upper Montco Trade Area	Western Montco Trade Area
Percent of Households Most Likely to Attend Arts and Culture Events	48%	82%	38%	31%	16%

# Other Factors affecting Performing Arts Attendance

## Arts and Culture Attendance

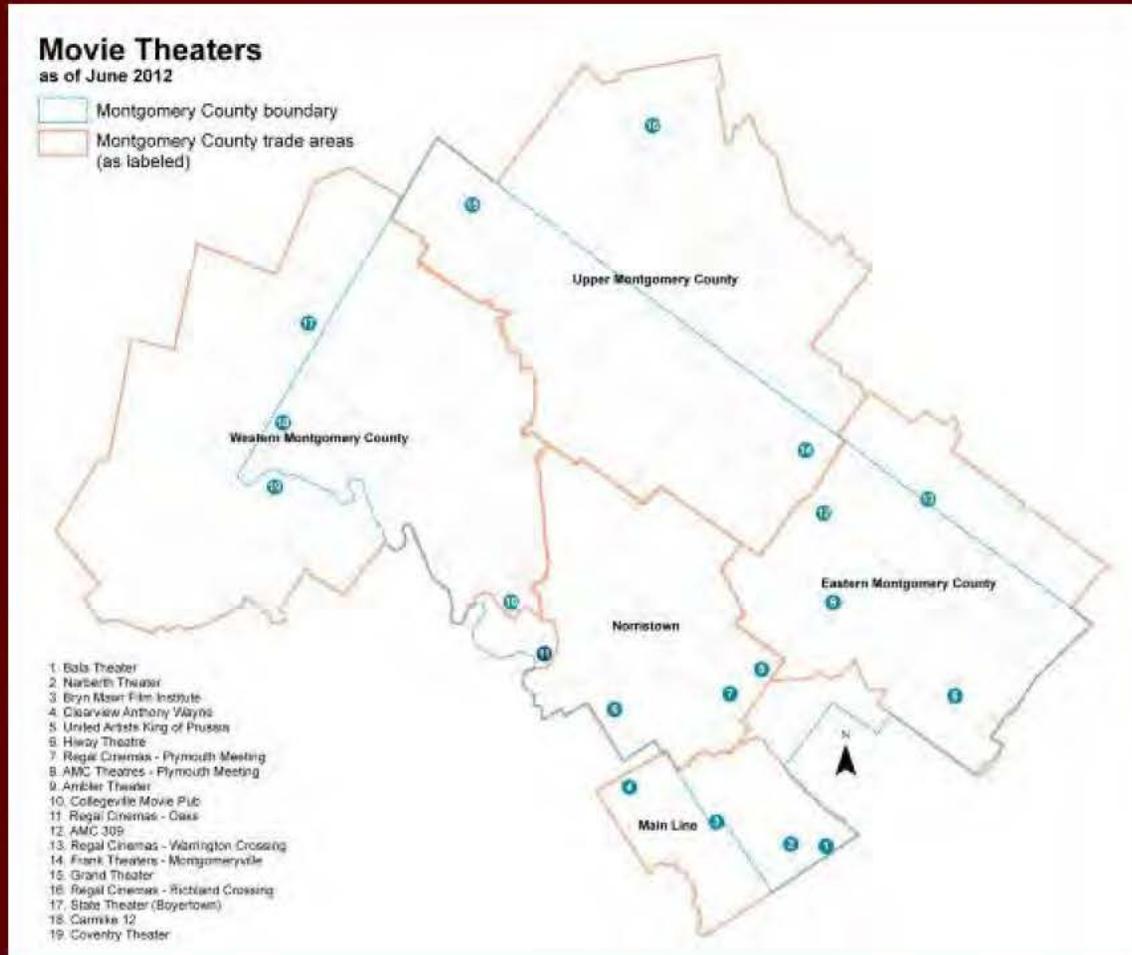
- Households in different parts of the county have different tastes and attendance histories, according to Mailing List Cooperative Data.

	Eastern Montco Trade Area	Main Line Trade Area	Norristown Trade Area	Upper Montco Trade Area	Western Montco Trade Area
Annual Attendances/ Affiliations per Household	1.9	2.1	.9	.4	.4

# Conclusion – Performing Arts Capacity

- Eastern Montco – Dominated by Keswick theater and has limited excess demand. Theater is possible in eastern half.
- Main Line – The money is there but will residents go to a local venue?
- Norristown – Excess demand and some household type support. Good possibilities here, particularly for music, although other barriers exist.
- Upper Montco – Limited excess demand and renovated Broad Theater will take some of this.
- Western Montco – Excess demand but household types not a natural fit. Growing and changing households may provide more support over time.

# Movie Theater Venues



# Baseline Data – How much money might be spent at movie theaters?

## Demand Analysis

- \$666 spent per household per year on entertainment and fees in Northeast
- Adjusted for Philadelphia area
- Adjusted for movie ticket portion
- Adjusted for out-of-town expenditures
- \$63 spent per household locally for movie tickets

# Baseline Data – How much money might be spent at movie theaters?

## Demand Analysis

- \$63 spent per household locally for movie tickets
- Multiplied by number of households

	Eastern Montco Trade Area	Main Line Trade Area	Norristown Trade Area	Upper Montco Trade Area	Western Montco Trade Area
Potential Expenditures on Movie Theater Tickets	\$7,692,300	\$3,281,800	\$4,274,200	\$5,819,800	\$4,306,300

# Baseline Data – How much money might be spent at movie theaters?

## Supply Analysis

- Existing theaters and screens identified
- Expenditures estimated based on national standards of 30,000 tickets per screen per year at \$8 each.

	Eastern Montco Trade Area	Main Line Trade Area	Norristown Trade Area	Upper Montco Trade Area	Western Montco Trade Area
Estimated Local Expenditures at Movie Theaters	\$8,288,700	\$4,427,100	\$6,100,800	\$4,702,100	\$5,980,800

# Baseline Data – How much money might be spent at movie theaters?

## Supply and Demand Analysis

- Most trade areas have excess supply.

	Eastern Montco Trade Area	Main Line Trade Area	Norristown Trade Area	Upper Montco Trade Area	Western Montco Trade Area
Estimated Demand	\$7,692,300	\$3,281,800	\$4,274,200	\$5,819,800	\$4,306,300
Estimated Supply	\$8,288,700	\$4,427,100	\$6,100,800	\$4,702,100	\$5,980,800
Unmet Demand	<b>(\$596,400)</b>	<b>(\$1,145,300)</b>	<b>(\$1,826,600)</b>	<b>\$1,117,700</b>	<b>(\$1,164,500)</b>

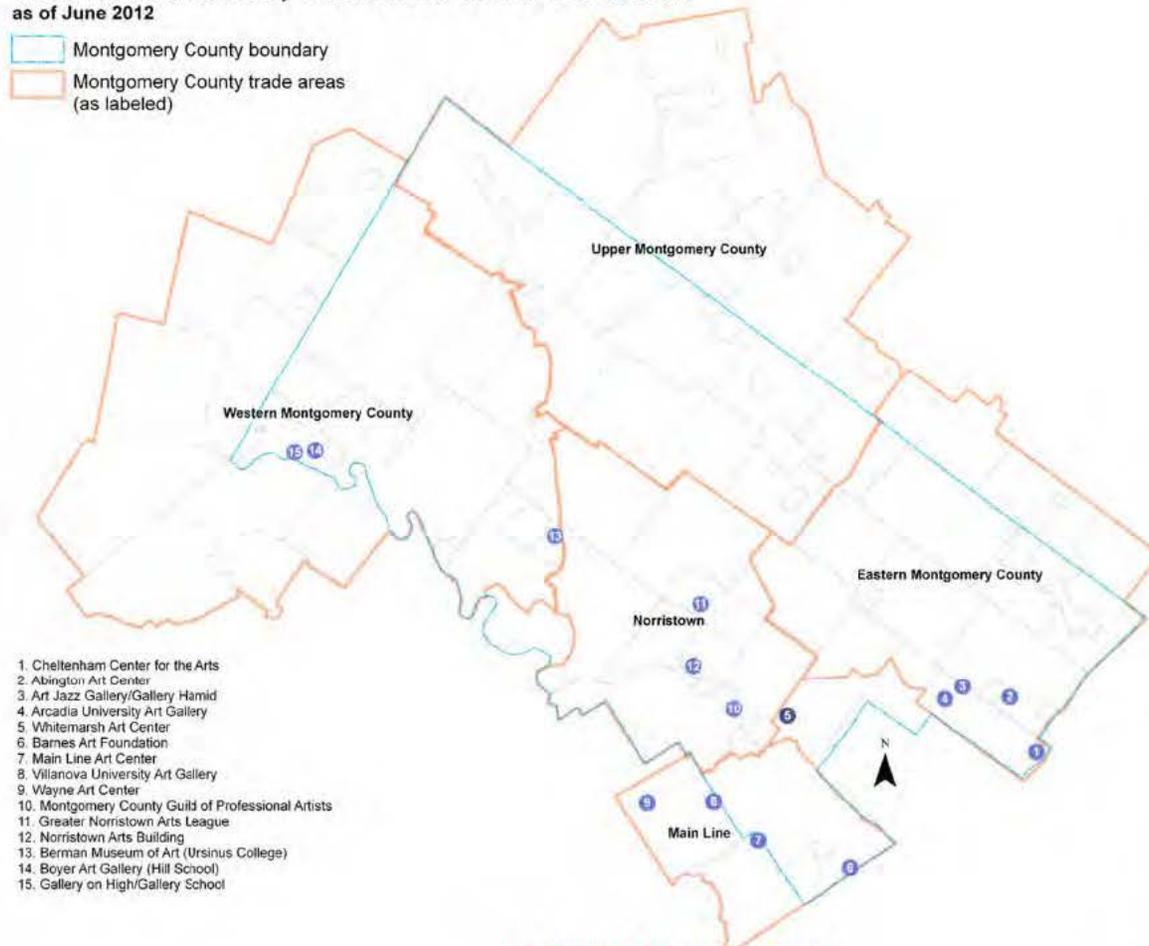
# Conclusion – Movie Theater Capacity

- Eastern Montco – Plenty of supply but core eastern area lacks screens. More screens at Hiway or Ambler might help.
- Main Line – Plenty of supply, though choice in core area can be limited.
- Norristown – Plenty of supply but might support specialized theater.
- Upper Montco – Excess demand will be partially met by new Broad Theater. May be opportunity for main stream or specialized theater.
- Western Montco – Plenty of new supply.

# Art Centers

## Fine Art Galleries, Museums and Instruction as of June 2012

- Montgomery County boundary
- Montgomery County trade areas  
(as labeled)



1. Cheltenham Center for the Arts
2. Abington Art Center
3. Art Jazz Gallery/Gallery Hamid
4. Arcadia University Art Gallery
5. Whitmarsh Art Center
6. Barnes Art Foundation
7. Main Line Art Center
8. Villanova University Art Gallery
9. Wayne Art Center
10. Montgomery County Guild of Professional Artists
11. Greater Norristown Arts League
12. Norristown Arts Building
13. Berman Museum of Art (Ursinus College)
14. Boyer Art Gallery (Hill School)
15. Gallery on High/Gallery School

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# Conclusion

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- Opportunities for Performing Arts venues exist but this is a challenging business.
- Except for Upper Montco, movie theater opportunities will have to find niches.
- Art center could evolve in Upper Montco.



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# Arts & Culture, A Tool for Community Revitalization

*When & Where?*

Nancy DeLucia  
Director of Policy & Community Engagement  
June 29, 2012



**“Cultural development and economic development...  
share one salient characteristic...  
they are both in the business of making reality  
rather than accepting reality.”**



--- Joseph Thompson, the Founding Director of MASS MoCA

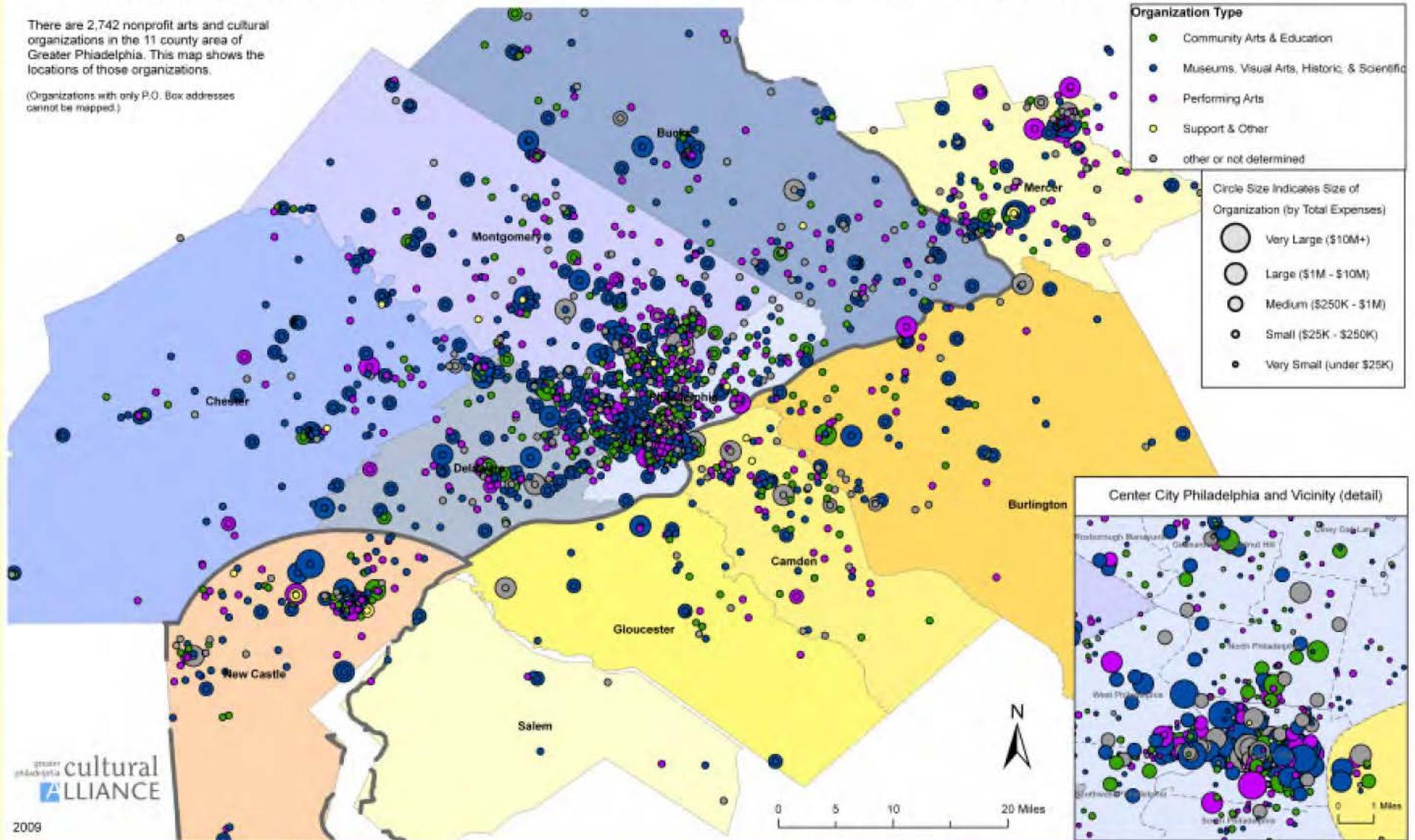
# Arts & Culture. It's How We **GROW**.™

- It's an engine for **economic growth**.
- It has the power to **elevate lives**.
  - It has the power to **educate**.
- We own it because **it comes from us**.
- It helps individuals come together and **grow as a community**.

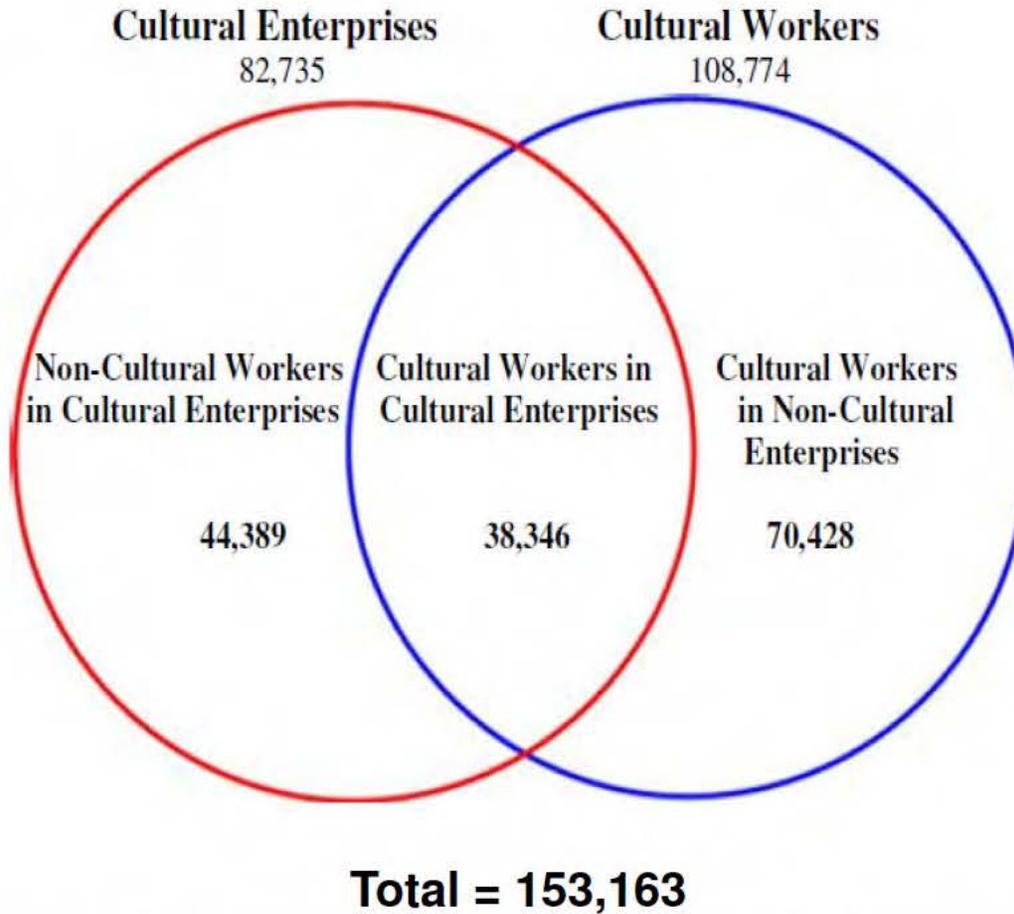
# Arts and Cultural Organizations in Greater Philadelphia by Organization Size

There are 2,742 nonprofit arts and cultural organizations in the 11 county area of Greater Philadelphia. This map shows the locations of those organizations.

(Organizations with only P.O. Box addresses cannot be mapped.)



# Cultural Economy in the 11- County Region



Arts-Based Community Development...  
Cultural-Asset Placemaking...  
Arts-Centered Community Revitalization...  
**Creative Placemaking**

## What is it?

- Activities that BUILD and IMPROVE community capacity and infrastructure
  - Activities that INSPIRE and MOBILIZE individuals and groups
  - Activities that NURTURE and HEAL people and communities
- Activities that EDUCATE and INFORM us about ourselves and the world

## Ingredients

- Manufacturing industries have left the city, inner-ring boroughs as well as older municipalities far from Center City.
- Retail districts of cities and small towns have lost business to regional shopping malls and big-box stores that now proliferate in the suburbs.
- Sprawl has filled the once rural areas of our counties with developments and sub-divisions. Lots of people...families living in townships that have no identifiable town center, no Main Streets.



## Tools Available for Encouraging Arts-Based Community Development

- Business Improvement Districts
- Community Development Block Grants
- Community Development Corporations
- Easement/Right of Way tradeoff
- Easements
- Empire Zones (New York State)
- Empowerment Zone - accelerated depreciation
- Enterprise Zones
- Federal Energy Credits
- Financing: Urban renewal, façade, etc. grants
- Historic preservation tax Credits
- Incentive Zoning - Density Bonus
- Incentive Zoning - Upzone bonus
- Income Tax abatement
- Innovation Zones
- Low Income Tax Credits - artists work/living space
- Low interest loans from municipalities
- Main Street Programs
- Marketing Campaigns
- Microfinancing
- New Development property tax abatement
- Overlay districts
- Property Tax Abatement
- Public/Private partnerships
- Reposition state funding mechanisms (e.g. bed tax)
- Sale of Municipally-owned stock (e.g. \$1 houses)
- Sales tax exemptions
- Small Business assistance
- Tax Increment Financing
- Zoning - overlays, technical assistance, relaxing standards

*Excerpted from list created at AFTA - Districts & Culture Conference  
December, 2008 Columbus, OH*



## Three Kinds of Stakeholders are needed for Arts-Based Community Development



- Arts - Artists & Organizations

- Local Government Officials



- Community – Residents & Business



# Lansdowne – Delaware



Photo credit Andrew Simcox



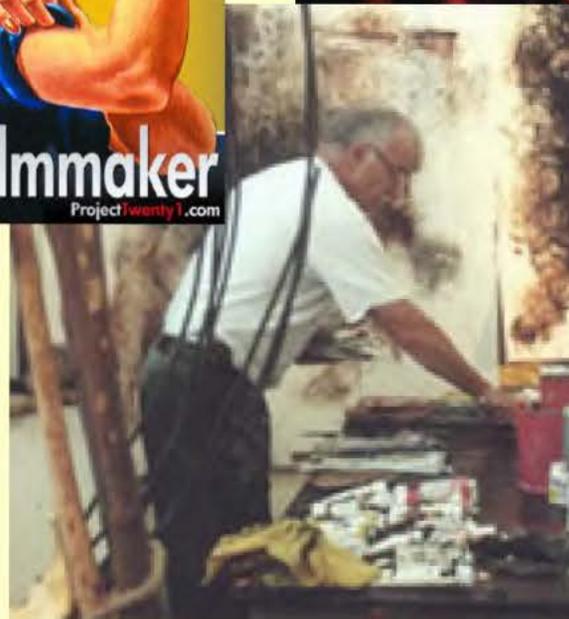


# Kennett Square – Chester County



# Norristown - Montgomery County







## Norristown Arts Hill – Launch Festival

## Lansdale Borough – Montgomery County





Rendering of the Lansdale Performing Arts Center

## City of Chester – Delaware County



## Measuring Success

- Employment data: overall, for specific neighborhood, for creative businesses
- Taxable sales receipts for the neighborhood district
- Property tax bases and property values
- Surveys of community perception
- Occupancy and vacancy rates
- Crime rates



*Source: National Assembly of State Arts Agencies*

## Measures of Success

Cultural activity on the community neighborhood level can

- Promote greater civic participation
- Lower truancy & delinquency rates
- Draw new residents into neighborhood – reducing poverty
- Promote gradual growth rather than rapid gentrification
- Build bridges across ethnic, socioeconomic and neighborhood divides



*Source: Social Impact of the Arts Project at the University of Pennsylvania*



Thank you!

