

# **Columbus Redevelopment Commission Mill Race Park Amphitheater**

Steering Committee Webinar  
February 2, 2015



for the Arts and  
Entertainment  
Industries

# Agenda

- I. Introductions**
- II. Review of Study Approach and Timeline**
- III. Interviews & Background Review**
  - i. Key Themes**
- IV. Market Analysis Report**
- V. Case Studies**
  - i. First Security Amphitheater, Little Rock, Arkansas**
  - ii. Artpark Amphitheater, Lewiston, New York**
  - iii. John C. Dunham Pavilion, Aurora, IL**
- VI. Content and Emerging Activity Profile**
- VII. Operating Model Options**
- VIII. Next Steps**

# Study Approach and Timeline

AMS

PLANNING & RESEARCH

for the Arts and  
Entertainment  
Industries

## Mill Race Park Amphitheatre Columbus, Indiana

	November				December					January				February			
	2	9	16	23	30	7	14	21	29	4	11	18	25	1	8	15	22
Background Research (Project Baseline)																	
Market Analysis																	
Leadership and Key User Priorities																	
Competitive Environment																	
Comparable Case Studies																	
Inventory of Operating Models																	
Business Model (pro forma)																	
Deliverable: Final Report																	

★ Meeting on Site

W Web Meeting

D Deliverable

# Interviews and Background Review Key Themes

AMS

PLANNING & RESEARCH

for the Arts and  
Entertainment  
Industries

# Key Themes

- Community ‘invite’ important
- Community used to “free” events
- Need for proactive programming
- Diverse programming desired
- Support for renovation
- Skilled, effective management needed

# Success Defined

- Proactive vs. reactive Programming
- Usable for all-accommodates small and large groups
- Flexible space
- Heavily Programmed in the summer
- Diversity of programming/small and large events
- Low cost for community users
- Venue is a regional draw
- Another jewel in the showcase of Columbus
- Meets community needs
- Revenue neutral from operations (without debt service)

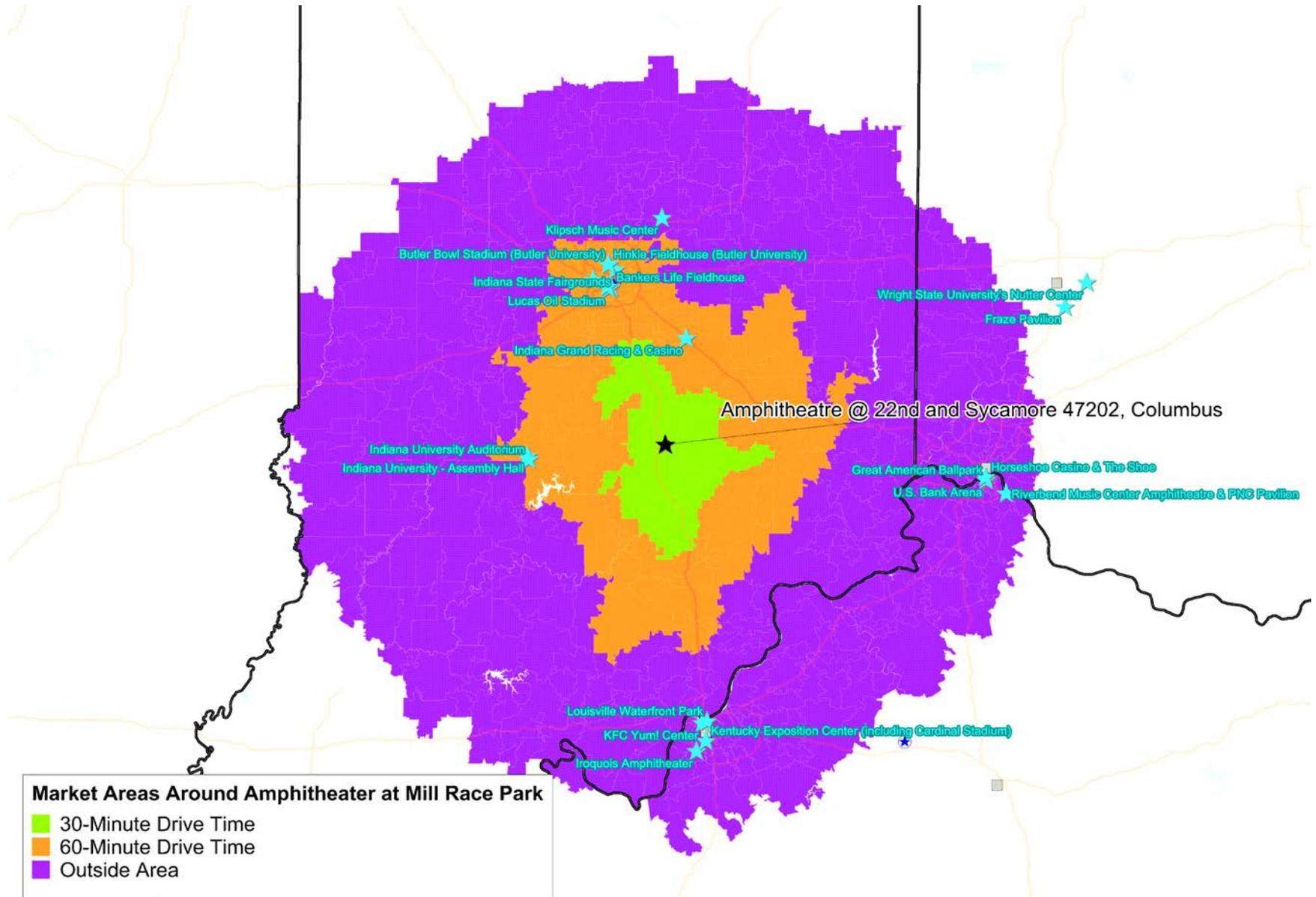
# Market Analysis Report

AMS

PLANNING & RESEARCH

for the Arts and  
Entertainment  
Industries

# Market Definition – Primary Market and Total Trade Area

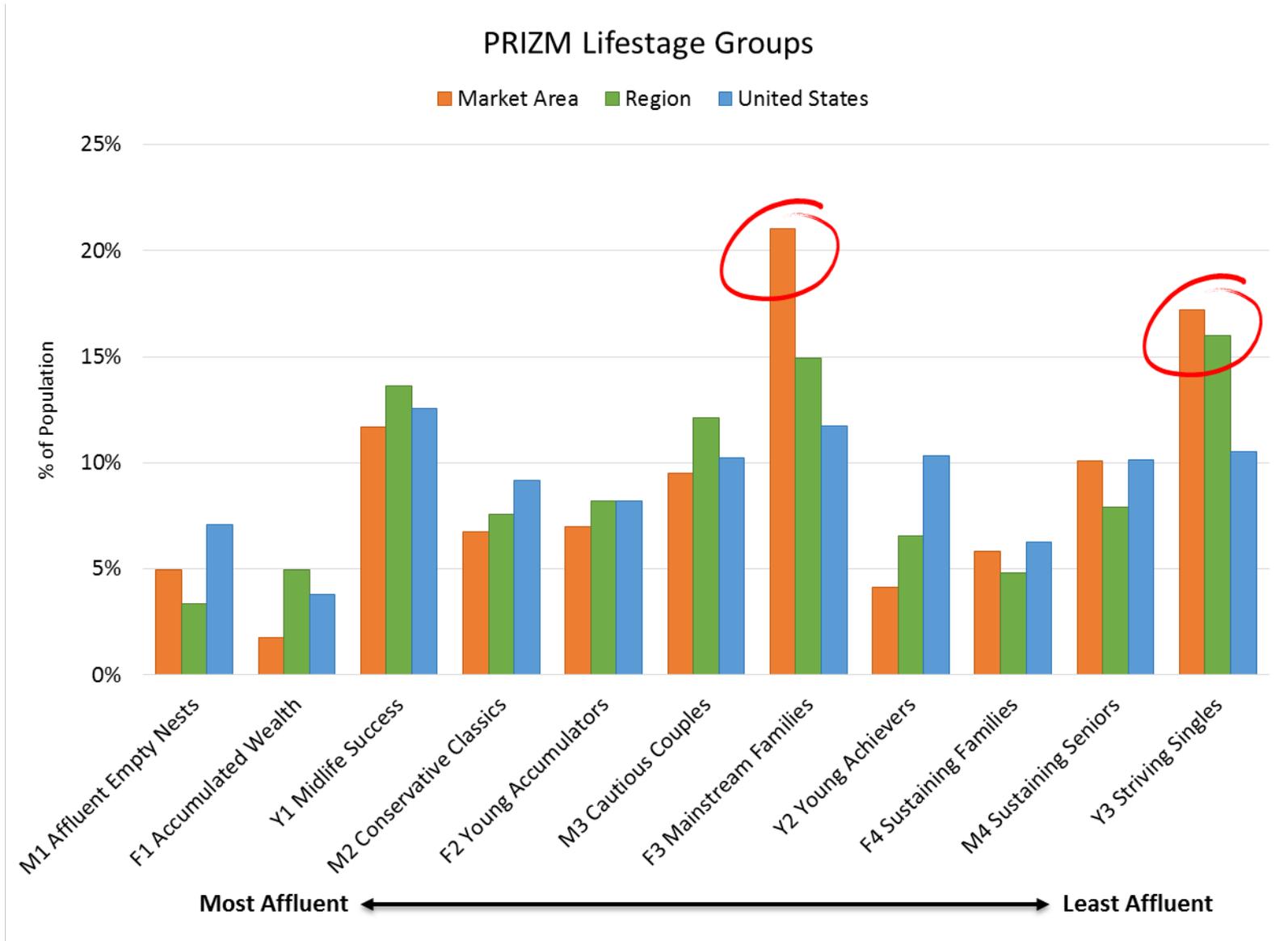


# 2015 Demographic Snapshot – Primary Market

	Market Area	Region	United States	
<b>Population</b>				
2015 Estimate	173,388	6,567,159	317,199,353	
2020 Projection	180,180	6,673,232	328,309,478	
<i>5-Year Est. Population % Growth</i>	3.9%	1.6%	3.5%	
<b>Households &amp; Families</b>				
2015 Household Estimate	66,289	2,537,304	120,163,323	
2020 Household Projection	69,035	2,581,446	124,622,797	
<i>5-Year Est. Household % Growth</i>	4.1%	1.7%	3.7%	
Households with People < 18	23,476	35.4%	33.4%	33.5%
<b>Population by Age</b>				
Under 5	11,312	6.5%	6.5%	6.4%
5 - 17	31,296	18.0%	17.6%	17.0%
18 - 24	15,557	9.0%	10.4%	10.0%
25 - 44	43,905	25.3%	24.9%	26.0%
45 - 64	45,810	26.4%	26.4%	26.5%
65 and Over	25,508	14.7%	14.1%	14.2%
2015 Est. Average Age	39	0%	38	39
2015 Est. Median Age	38	0%	37	38
<b>Population (Age 25+) by Education Attainment</b>				
Bachelor's Degree	15,977	13.9%	14.7%	17.8%
Master's Degree or Higher	9,601	8.3%	8.2%	10.6%
<b>Household Income</b>				
2015 Est. Average Household Income	\$66,580	0	\$61,175	\$71,319
2015 Est. Median Household Income	\$53,933	0	\$47,121	\$51,579
<b>Population Hispanic or Latino by Origin</b>				
Hispanic or Latino	9,949	5.7%	6.8%	17.6%
<b>Population Race Class</b>				
White	157,674	90.9%	83.5%	71.3%
Black or African American	3,230	1.9%	9.3%	12.7%
Amer. Indian and Alaska Native	509	0.3%	0.3%	1.0%
Asian	4,389	2.5%	1.8%	5.0%
Native Hawaiian and Other Pac. Isl.	81	0.0%	0.0%	0.2%
Some Other Race	7,505	4.3%	5.1%	9.8%

Primary Market: 30-Minute Drive Time  
Region: State of Indiana

# Market Segmentation – Primary Market



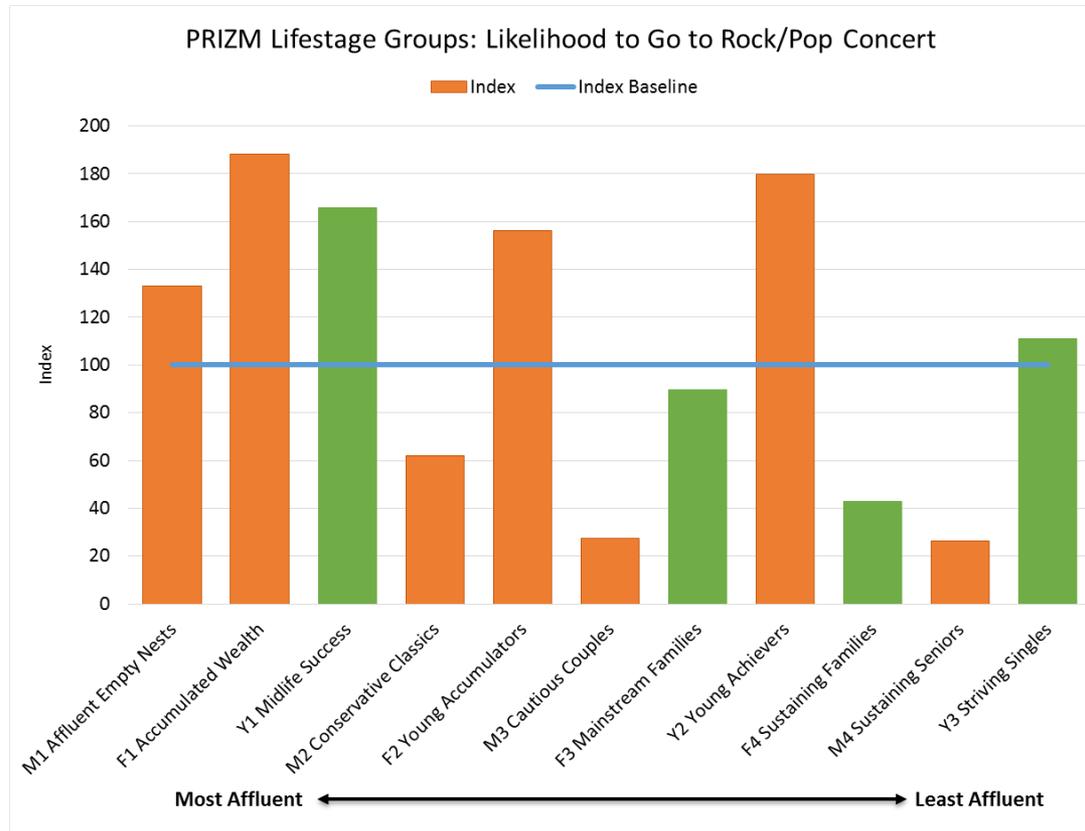
# Affinities – Primary Market

Affinities	Index
Country Radio, Net Audience	109
Own Rifle/Shotgun	110
Go Hunting	114
Watch History, American Pickers	106
Own Fishing Equipment	108
Buy Fishing Equipment	110
Fan of Truck Racing/Pulls	109
Fan of Rodeo	104
Go Fresh Water Fishing	110
Watch Ax Men	111
Do Woodworking/Furniture Refurnishing	108
Fan of NASCAR Racing	104
Do Bird Watching	104

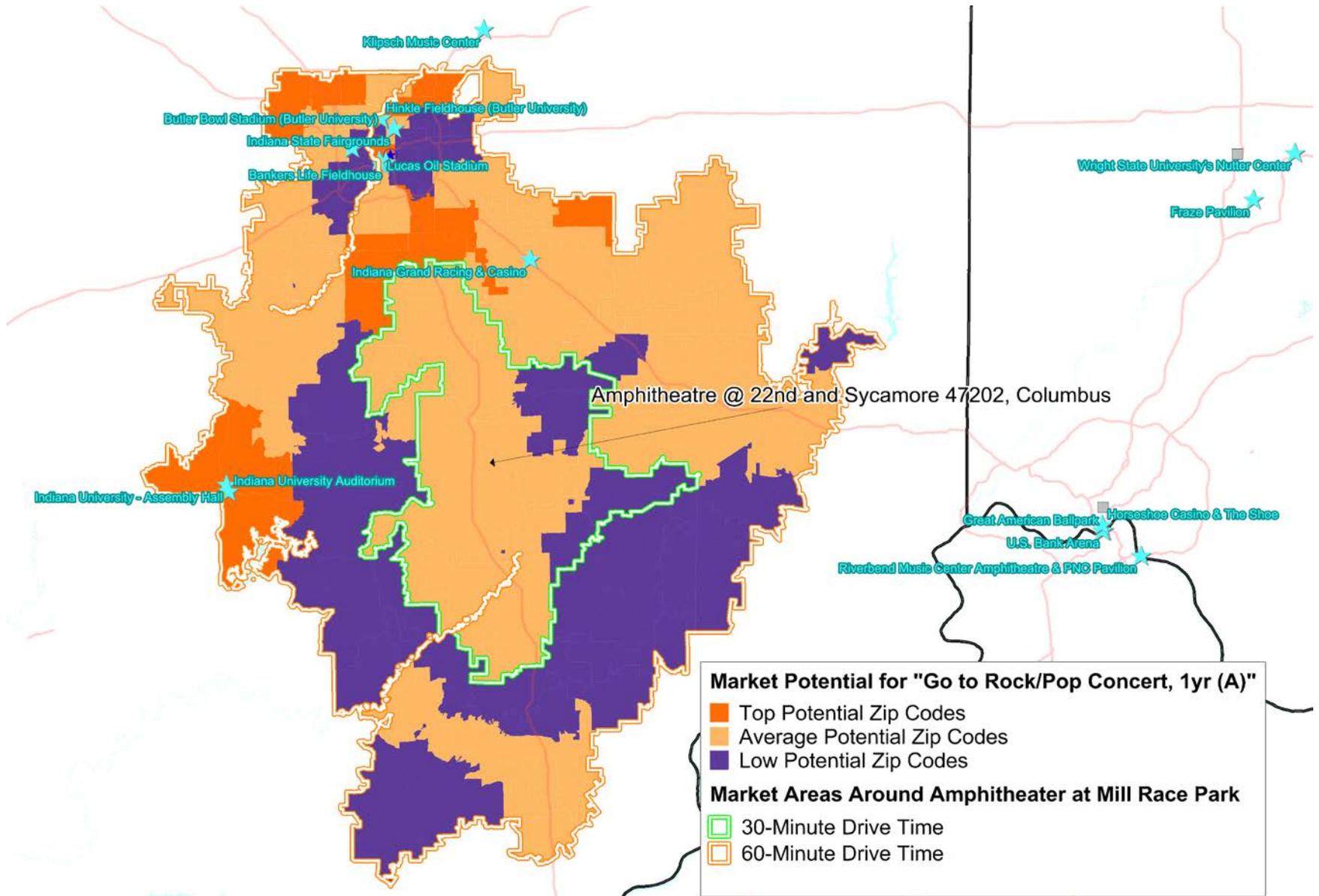
Affinities	Index
Go to Zoo	111
Play Musical Instrument	108
Do Painting/Drawing/Sculpting	107
Buy Latin Music	106
Do Photography	106
Go to Museum	104
Go to Music/Dance Performance	103
Music Is an Important Part of My Life	102
Interested in The Arts	101
Make Charitable Contribution	100
Go to Live Theater	95
Go to Classical Concert	94
Buy Classical Music	94
Contribute to PBS	93
Classical Radio	90
Belong to an Arts Association	89
Jazz Radio	89
Buy Jazz Music	89
Contribute to PBS,\$50+	79

# Affinities – Total Trade Area

Affinities	Index
Music Is an Important Part of My Life	97
Play Musical Instrument	95
Go to Zoo	94
Do Painting/Drawing/Sculpting	94
Interested in The Arts	91
Go to Music/Dance Performance	90
Make Charitable Contribution	90
Do Photography	88
Buy Latin Music	86
Buy Classical Music	85
Go to Classical Concert	82
Buy Jazz Music	82
Go to Museum	81
Go to Live Theater	81
Classical Radio	80
Jazz Radio	76
Contribute to PBS	75
Belong to an Arts Association	70
Contribute to PBS,\$50+	69



# Market Potential for Rock & Pop



# Competitive Venues

## Indianapolis

### **Dow Agro Sciences Celebration Park**

- 5,000
- Owner-State of Indiana/Indiana State Fair Commission
- Outdoor fixed stage
- Concert, Festivals

### **Hoosier Lottery Grand Stand**

- 13,921
- Owner-State of Indiana/Indiana State Fair Commission
- Outdoor Venue
- Motor sports, other events

### **Indiana Farmers Coliseum**

- 8,200
- Owner-State of Indiana/Indiana State Fair Commission
- Arena
- State Fair events, concerts, sports

## Blue Ribbon Pavilion

- 5,000
- Owner-State of Indiana/Indiana State Fair Commission
- Multi-purpose Venue
- Consumer events, exhibits, sports, adaptable for banquets, seminars, spectacular events

## West Pavilion

- 9,400 Seats
- Owner-State of Indiana/Indiana State Fair Commission
- Multi-purpose Venue
- Consumer events, exhibits, sports, trade shows, banquets

## Farm Bureau Insurance Lawn at White River State Park

- 7,500 Seats
- State of Indiana/Live Nation
- Outdoor with lawn seating
- Concerts

# Competitive Venues

## Evansville

### Ford Center

- 10,900 Seats
- City of Evansville/Venue Works
- Arena
- Sports, Concerts

## Louisville

### Big Four Lawn

- 10,000
- Operated by Waterfront Development Cooperation
- Amphitheatre
- Large lawn – concerts, festivals, walks/runs, weddings, galas

### Brown-Forman Amphitheatre

- 10,000
- Amphitheatre
- Operated by Waterfront Development Corporation
- 3 acres flat land accommodates from 250 to festivals of 10,000

## Festival Plaza

- 10,000
- Operated by Waterfront Development Corporation
- Outdoor Venue
- Accommodates up to 10,000 /adjacent to wharf-Concerts

## Cincinnati

### US Bank Arena

- 12,833
- Nederlander Organization
- Arena
- Disney on Ice, Concerts, Harlem Globetrotters

## Dayton

### Wright State University Nutter Center

- 11,000
- Wright State University
- Concerts

# Case Studies

AMIS

PLANNING & RESEARCH

for the Arts and  
Entertainment  
Industries

# First Security Amphitheater

## Little Rock, AK

### Capacity

- 7,875 (1,078 permanent seating)
- Other Spaces-Pavilions, Farmers Market, Multipurpose Room

### Operating Structure

- The River Market (and Amphitheater) owned by the City of Little Rock Parks & Recreation. The Little Rock Convention & Visitors Bureau entered into a management agreement with the City to manage Ottenheimer Market Hall, the Pavilions and the First Security Amphitheater (Formerly Riverfest Amphitheater)



# First Security Amphitheater

## Little Rock, AK

### Staff

- Director of Operations, Park and Rec staff (all staff work on/for all River Market facilities)

### Programming

- Concerts, (promoters take risk), movies, special events, Festivals; some free events

### Budget

- Rolled into the Market River Budget; \$71,620 in rental fees



# First Security Amphitheater

## Little Rock, AK

### **Policies**

- Concert rain or shine
- No re-entry
- Children of all ages must have a ticket

### **Rentals**

- Non-profit rate \$2,000 and includes the Pavilions. Commercial rates are \$3,000 plus 5% of gross ticket sales, whichever is greater, not to exceed \$5,000; commercial ticket sold \$2 facility fee and a percentage of concessions. For non-ticket events only the rental fee.



# First Security Amphitheater

## Little Rock, AK

### Ticket Prices

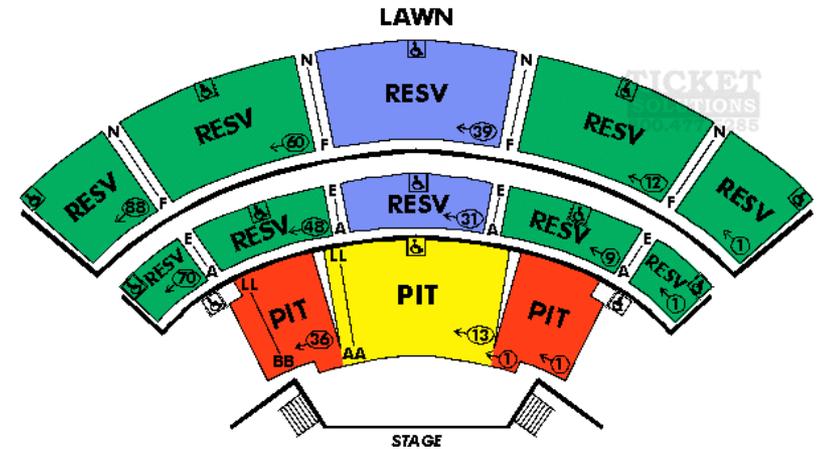
- Concerts-Market can bear \$40
- Promoters set price; \$100 tickets don't sell out

### Attendance

- Annual attendance in RiverMarket District is 325,000; 200,000 for Riverfest. Popular concert shows draw 7,000

### Parking

- Nearby, convenient parking available



First Midwest Bank Amphitheatre  
Tinley Park, IL



# First Security Amphitheater

## Little Rock, AK

### Challenges

- No ticketing system
- Competition with Verizon Arena (20,000)
- Security
- Noise complaints

### Lessons Learned

- Ongoing effort to determine ideal diverse programming mix



# Artpark Amphitheater

## Lewiston, New York

### Seating Capacity

- 10,000
- Other Spaces-Theatre (2,400), Visual Arts Installation areas

### Operating Structure

- Owned by State of New York and managed by Artpark & Company

### Staff

- Artpark & Company II

### Mission

*Artpark & Company produces and presents excellence in the performing and visual arts, and creates unique cultural experiences in a casual, natural setting. Artistic talent is nurtured and allowed to flourish in an atmosphere that is entertaining, educational and interactive for Artpark visitors.*



# Artpark Amphitheater

## Lewiston, New York

### Programming

- Tuesday in the Park Concerts, Coors Light Wednesday Concerts, (ArtPark & Company takes the risk), summer camps and workshop, free movie night:



### Policies

- Fence addresses Tuesday in the Park overcrowding (small fee for fence entry)

### Ticket Prices

- Tuesday in the Park \$5 in advance, \$10 the week of the concert, with select Tuesday concerts ticketed at \$10 in advance and \$15 the week of the concert. Group discounts for groups of over 20

# Artpark Amphitheater

## Lewiston, New York

### Attendance

- Concert total attendance 151,600; free event audience not tracked. Total park attendance 224,000

### Parking

- Parking fees Artpark lots Tuesday In The Park Concerts \$5 cars, \$3 motorcycles; Coors Light Wednesday (free concerts) \$10 for cars, \$6 for motorcycles.

### Challenges

- Sound
- Crowd Control



# The John C. Dunham Pavilion

## Aurora, IL

### Seating Capacity

- 8,500

### Operating Structure

- Pavilion publicly owned and operated by Aurora Civic Center Authority (ACCA), which is the owner and operator of the Paramount Theatre

### Staff

- 34 (work for Paramount and Pavilion)

### Programming

- Concerts, Festivals, Movies, Community Events (ACCA takes risk) Has some free events



# The John C. Dunham Pavilion

## Aurora, IL

### Budget

- \$2.5 to \$3 Million

### Policies

- Rain or shine concerts-no refunds (cancelled shows/ticket can be used for Paramount Theatre show)
- For large events-temporary fencing

### Rentals

- Non-profit \$5,000; commercial rate \$10,000.

### Ticket Prices

- Concerts \$55-\$80; local bands \$3; also free events



# The John C. Dunham Pavilion Aurora, IL

## Attendance

- 2014 was around 100,000; 12,000 of this number for free events. Number to double in next 3 to 4 years

## Parking

- No dedicated parking, but parking near by



# The John C. Dunham Pavilion

## Aurora, IL

### Challenges

- Competition from The Ravinia Festival and Lollapalooza
- No shade for the audience
- Concession only accommodates 2,000

### Lessons Learned

- Learning curve to manage/program facility has been necessary
- Determining risk to take is ongoing process



# Summary

- **Repercussions of risk taking front-of-mind**
- **Diverse, small and large scale programming important focus**
- **Low cost and free programming offered**
- **Community engagement a priority**
- **Only summer activity**

# Content and Emerging Activity Profile

AMS

PLANNING & RESEARCH

for the Arts and  
Entertainment  
Industries

# Emerging Activity Profile

## Sample Calendar

January						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

February						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

March						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

April						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

May						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

June						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

July						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

August						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

September						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

October						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

November						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

December						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

# Emerging Activity Profile

<b>Mill Race Park Amphitheatre Potential Uses and Users</b>		
<b>Festival Side</b>	<b>Rock the Park Hospice Philharmonic Drive-in Movies Other Presented Acts</b>	<b>12</b>
<b>Mound Side</b>	<b>First Fridays for Family Battle of the Bands Mill Race Players Columbus City Band Bluegrass Jamboree Other Presented Events</b>	<b>26</b>
<b>Community Use</b>	<b>Celebration of Light Music &amp; Arts Festival Parks &amp; Rec Foundation Ethnic Festivals</b>	<b>8</b>
<b>Private Use</b>	<b>Weddings; Church</b>	

# Emerging Activity Profile

## Sample Calendar

January						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

February						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

March						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

April						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

May						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

June						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

July						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

August						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

September						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

October						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

November						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

December						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

 Performance: Festival Side

 Performance: Mound Side

 Community Use

## Other Area Venues: Opportunity or Threat?

### Buskirk-Chumley Theater

Bloomington, IN

Capacity: 629

Managed by private, non-profit organization **BCT Management, Inc.**



### Klipsch Music Center

Noblesville, IN

Capacity: 24,000

Owned and operated by **Live Nation**



### Farm Bureau Insurance Lawn

### White River State Park

Indianapolis, IN

Capacity: 6,500 to 8,000

Operated by **Live Nation**

# Operating Model Options

AMS

PLANNING & RESEARCH

for the Arts and  
Entertainment  
Industries

# Operating Model Considerations

## The Players

City Council  
Redevelopment  
Commission  
Parks & Recreation  
Arts Council  
Potential new entity

## The Roles:

Ownership  
Facility Operation  
Leasing / Rental  
Agreements  
Co-promotion &  
Presenting at risk

## The Responsibilities:

Payroll  
Operating Expenses  
Facility Maintenance  
Capital  
Repair/Replacement

# Alternate Operational Models

- Several factors figure into the decision about how arts centers are operated. These include:
  - Ownership
    - Public or Private
  - Risk Tolerance
    - Largely centers on exposure to programming costs
  - Mission
    - Landlord, Host, Presenter, Producer
    - Education Content
  - Sources of capital and operating funding
    - Public sector, contributions

# Three Operating Models

**LANDLORD**

**HOST**

**PRESENTER**

Landlord

**Earned revenue-driven**

**Low risk**

**Passive**

**“Facility operation”**

Host

**Operations-driven**

**Resident Companies  
dominate programming**

**Low-risk self-presentation**

**Opportunity for contributed  
revenue**

Presenter

**Activity-driven**

**Program diversity**

**Primary programmer**

**“At-risk”**

**Attractive to donors**

# Ownership / Operations

<b>PUBLIC / PUBLIC</b>	<b>PROS</b>	<b>CONS</b>
	<ul style="list-style-type: none"><li>• Access to public resources</li><li>• Facility management expertise</li></ul>	<ul style="list-style-type: none"><li>• Budget subject to appropriation</li><li>• Lack of relevant experience</li></ul>
	<ul style="list-style-type: none"><li>• Economies of scale</li></ul>	<ul style="list-style-type: none"><li>• No ability to generate philanthropy</li><li>• Highly risk-averse</li><li>• Lower standards of care</li><li>• Procedural limitations</li></ul>

# Ownership / Operations

<b>PUBLIC / PUBLIC (AUTHORITY)</b>	<b>PROS</b>	<b>CONS</b>
	<ul style="list-style-type: none"><li>• Access to public resources</li><li>• Some capacity to take risk</li></ul>	<ul style="list-style-type: none"><li>• Appointed governing board; rotation &amp; politics</li><li>• Lack of relevant experience</li></ul>
	<ul style="list-style-type: none"><li>• Degree of autonomy</li></ul>	<ul style="list-style-type: none"><li>• Limited ability to generate philanthropy</li><li>• Procedural limitations</li></ul>

# Ownership / Operations

<b>PUBLIC / PRIVATE NON-PROFIT</b>	<b>PROS</b>	<b>CONS</b>
	<ul style="list-style-type: none"><li>• Access to public resources for asset maintenance</li><li>• “Mission-driven”</li><li>• Some capacity to take risk</li><li>• Fundraising opportunity</li><li>• High standards of care</li><li>• Public sector backstop</li><li>• Semi-autonomous</li></ul>	<ul style="list-style-type: none"><li>• Increased earned revenue pressure</li><li>• Management may compete with designated “community” users</li></ul>

# Ownership / Operations

<b>PUBLIC / COMMERCIAL</b>	<b>PROS</b>	<b>CONS</b>
	<ul style="list-style-type: none"><li>• “Outsourced” expertise</li><li>• Influence with and knowledge of touring product</li></ul>	<ul style="list-style-type: none"><li>• Cost</li><li>• Limited capacity to take risk</li><li>• Distance from implementation of mission-based goals</li></ul>

# Next Steps

AMIS

PLANNING & RESEARCH

for the Arts and  
Entertainment  
Industries

**Thank you!**

**AMS**

PLANNING & RESEARCH

for the Arts and  
Entertainment  
Industries