

OSWEGO CANAL CORRIDOR BOA

APPENDIX I: PERFORMING ARTS FACILITY FEASIBILITY ANALYSIS

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PERFORMING ARTS FACILITY MARKET RESEARCH

CITY OF OSWEGO, NY

SEPTEMBER 2019

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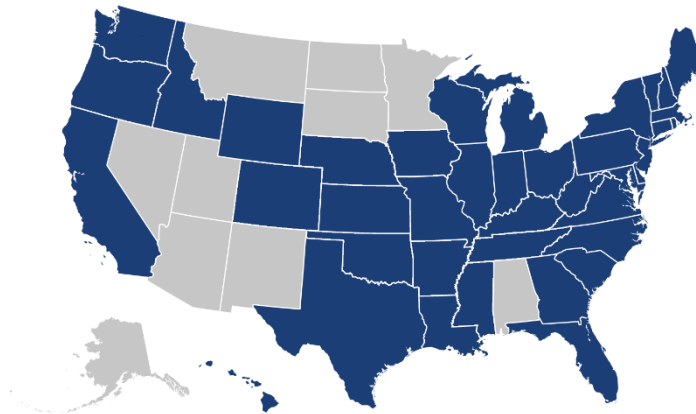
ABOUT CAMOIN 310

Camoin 310 has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin 310 has had the opportunity to serve EDOs and local and state governments from Maine to California; corporations and organizations that include Lowes Home Improvement, FedEx, Amazon, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of \$6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to projects in over 40 states and garnered attention from national media outlets including Marketplace (NPR), Forbes magazine, The New York Times and The Wall Street Journal. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Portland, ME; Boston, MA; Richmond, VA and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at www.camoinassociates.com. You can also find us on Twitter [@camoinassociate](https://twitter.com/camoinassociate) and on **Facebook**.

THE PROJECT TEAM

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Introduction & Findings

As part of the Bergmann team, Camoin 310 was engaged to conduct market research to help answer the question: Is a 500-seat amphitheater/performing arts center an appropriate size for the Oswego market?

To achieve this answer, Camoin 310 gathered market information for 15 comparable performing arts facilities (i.e. the "Study Group"), compared Oswego's market demographics to the Study Group, and identified success factors for an amphitheater/performing arts center.

Based on the market research, we believe that an amphitheater/performing arts center with a seating capacity of 500 is likely larger than the City of Oswego market can bare.

A more feasible size for the City of Oswego market area would be between 250 and 350 seats.

It should be noted that the City of Oswego hosts several different facilities, events, and organizations that reside in the performing arts space. This includes community performance groups, members of theater and other entertainment groups at SUNY Oswego, and multiple concert series to name a few (see keys to success matrix for more detail on community stakeholders). These community stakeholders could be leveraged to help enhance the overall success of a new facility.

However, a variety of obstacles should also be addressed which may pose as challenges to the success of a new facility. Compared to the Study Group, the City of Oswego's market area (delineated as a 45-minute drive time) generally has a smaller consumer base that a new facility could draw from. In addition, the City of Oswego market has low figures when it comes to consumer spending traits of the resident

population. There are a number of existing facilities in the Oswego Study Area that would pose as direct competition to the proposed facility, including Ralph M Faust Theater of Performing Arts, Frances Marion Brown Theater, Theatre DeJour, Oswego Opera Theater, Waterman Theatre at SUNY Oswego, Oswego Music Hall, and Fulton Community Theater.

To address and overcome these potential challenges, key factors for success have been identified to help support decision-making as this project advances.



Methodology

Oswego's Market Area, a 45-minute drive time from downtown Oswego, was benchmarked against market areas for 15 existing amphitheaters and performing arts centers, referred to in this report as the 'Study Group'. These facilities were chosen for a variety of reasons: similarities in size and/or seating capacity compared to the proposed City of Oswego facility, similarities in the facilities' location regarding its proximity to natural amenities such as a lake, and/or the facilities similarity regarding the market demographics. This methodology in selecting the theaters in the Study Group lead to a diverse mix of both outdoor amphitheaters and indoor theaters that together represent an assorted mix of facilities to draw insights and key success factors from. Of the 15 facilities, 6 were identified as top performers and highly successful. In addition, general facility and demographic data analysis were performed comparing averages of the Study Group to the Oswego Study Area. These metrics were chosen based on their nexus to the operations and consumers that are typically linked to a facility such as the one being proposed in the City of Oswego:

- ◆ **Households** (Oswego: Lagging) The average number of households in the Oswego Study Area is 108,526, which is less compared to the average number of households in the Study Group (256,598). The average number of households in facilities that were categorized of highly successful is 142,259.
- ◆ **Daytime Population** (Oswego: Lagging) The average daytime population in the Study Group is 782,893, which is significantly larger than in the Oswego Study Area (238,198). The average daytime population in facilities that are categorized as highly successful is 389,973.
- ◆ **Median Household Income** (Oswego: Lagging) The average median household income in the Study Group is \$65,198, compared to \$60,353 in the Oswego Study Area. The average in facilities categorized as highly successful is \$63,369.
- ◆ **Median Age** (Oswego: Similar) The average age in the Study Group (40 years), is slightly lower than that in the Oswego Study Area (42 years).
- ◆ **Educational Attainment** (Oswego: Lagging) The percentage of the population in the Oswego Study Area with a bachelor's degree or higher is 28%, compared to an average of 38% in the Study Group. The average of facilities that were categorized as highly successful is 39%.
- ◆ **Spending Potential Index (Tickets to Theatre/Opera/Concerts)** (Oswego: Lagging) The average spending potential index on tickets to theater, opera, and concerts in the Oswego Study Area is 82, compared with the average of the Study Group which is 101. This indicates that spending in the Oswego Study Area is almost twenty percent less than national averages. The average in facilities that are categorized as highly successful is 101.
- ◆ **Average Amount Spent (Tickets to Theatre/Opera/Concerts)** (Oswego: Lagging) The average amount spent on tickets to theater, opera, and concerts in the Oswego Study Area is \$62, which is lower than the average amount seen in the Study Group (\$76). The average in facilities that are categorized as highly successful is \$76.
- ◆ **Tapestry Segmentation** (Oswego: Similar) The Oswego study area shares similar tapestry segmentation categories with amphitheaters in the Study Area Group. The most common is the "In Style" tapestry segmentation, followed by the "Parks and Rec" tapestry segmentation. (See Tapestry Segment definitions attached)
- ◆ **Jobs** (Oswego: Similar) The total number of jobs in the Accommodation and Food Services; Arts, Entertainment, and Recreation; and Retail Trade industries in the Oswego Study Area is 3,903, which is higher than the average of the Study Group (3,282).

- ♦ **Average Annual Events:** The average number of events annually in the Study Area Group is 58. The average for facilities that are categorized as highly successful is 84.
- ♦ **Seating Capacity:** The average seating capacity in the Study Area Group is 877 seats. The average seating capacity in facilities categorized as highly successful is 835 seats. It's important to note that seating capacity could indicate a mix of fixed and lawn seating.

Seating Capacity Analysis and Conclusions

The benchmarking exercise above tells us that the Oswego market is smaller and has less spending power than the benchmark communities, which means a 500-seat facility might be too large for the market.

So, the next question is "What is the appropriate size amphitheater/performing arts center for the Oswego Market?". To answer this question, we compared the average number of households, daytime population, and entertainment industry jobs within the Study Group to Oswego's market area. This allows us to estimate the number of seats Oswego could support. This calculation was completed for three groups, the Study Group as a whole, the high-performing facilities group segment, and the facilities with 400-600 seats segment.

This analysis resulted in nine data points that represent a wide range for the size of a theater that the Oswego market could potentially support, from about 100 based on the limited daytime population to over 1,000 based on the high concentration of jobs in the entertainment industry. The average is about 320 seats, and the media is about 220 seats. The detailed analysis is provided in the following tables:

Table 1: Number of Seats Oswego's Market Can Support

Number of Seats Oswego's Market Can Support			
	Seats per Households	Seats per Daytime Population	Seats per Entertainment Industry Jobs
Study Group Facilities	181	151	398
High Performing Facilities	130	106	222
400-600 Seat Facilities	311	261	1,126

Table 2: Facility Metrics

Facility Metrics								
Facility Name	Categorization	Seating Capacity	Households (2019)	Households Per Seat	Daytime Population (2019)	Daytime Population Per Seat	Total Jobs (2019)	Jobs Per Seat
Northern Sky Amphitheater	Highly Successful	1,000	9,616	10	21,963	22	531	0.5
Lake Dillon Amphitheater	Highly Successful	3,000	20,480	7	56,648	19	2,349	0.8
Main Street Landing Performing Arts Center	Highly Successful	120	80,848	674	218,298	1,819	7,238	60.3
Forest Theater	Highly Successful	540	129,332	240	409,578	758	2,380	4.4
Redhouse Arts Center	Highly Successful	100	271,711	2,717	713,906	7,139	2,186	21.9
Hanifl Performing Arts Center	Highly Successful	250	341,566	1,366	919,447	3,678	4,373	17.5
Lake Placid Center for the Arts	Successful	400	10,808	27	26,901	67	2,524	6.3
The Seaside Pavilion Amphitheater	Successful	1,400	167,246	119	425,517	304	1,111	0.8
Westbrook Performing Arts Center	Successful	1,000	209,360	209	533,284	533	2,064	2.1
Davis Amphitheater at Glenwood Park	Successful	750	318,239	424	853,333	1,138	24	0.0
Jean C. Smith Amphitheater	Successful	500	534,398	1,069	1,329,755	2,660	136	0.3
Wildwood Amphitheater	Successful	2,500	1,078,573	431	2,818,298	1,127	13,339	5.3
Cope Amphitheater	Weak	500	30,582	61	82,458	165	1,435	2.9
Lucy B. Hamilton Amphitheater	Weak	100	43,265	433	106,381	1,064	1,627	16.3
Hughes Amphitheater	Weak	1,000	1,202,942	1,203	3,227,633	3,228	7,906	7.9
Study Group Average			296,598	599	782,893	1,581	2,186	9.8
High Performing Average			142,259	836	389,973	2,239	3,176	17.6
Facilities 400-600 Seating Capacity Average			176,280	349	462,173	913	1,619	3.0
Oswego Study Area			108,526	217	238,198	476	3,903	7.8

Note: The Oswego Study Area estimates assume a 500-seat facility.

Keys to Success

The following matrix represents strategies for success to be considered for the proposed City of Oswego facility. Those items that are bolded represent items that currently exist in regard to their presence in the Oswego Study Area market, or as they pertain to the contemplated City of Oswego facility itself:

Facility Location Characteristics	Facility Characteristics
<ul style="list-style-type: none"> ♦ Walking distance to other amenities such as restaurants, other theater/music event facilities, housing, marina, and/or a park. ♦ Proximity to a natural amenity (Lake Ontario) so that the natural aesthetics highlight the facility and encourage rentals. Other natural aesthetics to consider are trees and open grassy areas. ♦ In proximity to parking that could be utilized for events and for event staging. ♦ Close to but not directly adjacent to a main arterial street to encourage efficient traffic flow in and out of events. Additional access to walking trails, bike lanes, and other multi-modal amenities also a plus. 	<ul style="list-style-type: none"> ♦ Facility design integrates with the landscape and highlights the natural beauty of the lake or natural surroundings. ♦ A core theater space mixed with other spaces that could be easily modified to adhere to different types of rental activities. Integration of flexible walls and staging are examples of facility features that could be used. ♦ A screen or wall that could be used to project movies or other entertainment that is not performed live at the theater. Preferably outside if possible. ♦ If stage is outdoors, include an indoor facility that could be used as a rental space in addition to the amphitheater stage for events or used as a staging area for other amphitheater users. If indoor, include another space that could be used as a classroom or for additional event.
Facility Programming	Organizational Structure/Stakeholders/Funding
<ul style="list-style-type: none"> ♦ Core anchor user (such as a theater company) that produces most of the live theater content shown. ♦ Regular concert or other series offered at reduced prices or for free. Current series that could consider moving to a new amphitheater include the City of Oswego's free Summer Sunset Band Concerts at Breitbeck Park and/or the Oswego Summer Concert Series at Veterans Park Stage. ♦ A variety of programming that would appeal to a broad demographic group. This could include live music, live theater, a farmer's market, showings of movies, etc. A majority of content should be family friendly. ♦ Food options that compliment programming and drive visitation (food trucks or more permanent options on-site). ♦ Multi-use space that could be used for a variety of different fee based rental activities. Examples of activities include: banquets, classrooms, an art gallery, corporate and/or community meetings, various trainings, etc. 	<ul style="list-style-type: none"> ♦ Diverse board of directors comprised of leaders in the community who are focused on arts, entertainment, community building, cultural events, or other applicable disciplines. ♦ Owned and operated by a public municipality (City of Oswego), or a non-profit organization formed by the City of Oswego. ♦ Partnerships with live theater groups (ARTSwego, Oswego Players) or partnerships with other arts venues in the area (Ralph M Faust Theater of Performing Arts, Frances Marion Brown Theater, Theatre DeJour, Oswego 7 Cinema, Oswego Opera Theater, Waterman Theatre at SUNY Oswego, Oswego Music Hall). ♦ Dedicated donors or sponsors who have a connection to the amphitheater and who may utilize the space for programming events or for rental purposes. ♦ Consistent annual revenue source to fund theater operations and annual maintenance. Sources could include: Annual rental fees; parking fees; and/or dedicated annual funding from one or more public or quasi-public entities ♦ Multi-use space that could be used to host free community-based meetings and/or events.

Attachments: Detailed Data & Information

COMPARABLE FACILITIES MATRIX

The comparable facilities matrix is comprised of fifteen (15) different facilities located across the US. Given the likelihood of the proposed facility in the City of Oswego to attract consumers from a 45-minute drive-time radius, the demographic data associated with each facility in the matrix is also representative of a customized geographic area reflecting the geography within a 45-minute drive of each facility (referred to in this report as the facility's 'trade area').

The matrix has multiple sections, which include:

- ◆ **General Facility Information:** Includes the facility name, location, a description of the location/facility characteristics, facility seating capacity, a description of the events held at and programming at the facility, and the average number of annual events at the facility.
- ◆ **Organization Structure:** Includes information on the facilities organizational/ownership structure and other local partners and/or stakeholders relevant to the facility's operations.
- ◆ **Facility Categorization:** Ranks each facility in regard to its overall success (weak, successful, or highly successful)¹.
- ◆ **Demographic Information:** Includes a variety of key demographic data representative of the trade area surrounding each facility. Information in this section includes: total 2019 households; 2019 daytime population²; 2019 median household income; 2019 median age; the percent of the population with a bachelor's degree or higher; the spending potential index (SPI)³; the average annual amount spent on tickets to theatre, opera, and concerts; and the top three (3) tapestry segments⁴ in each trade area.
- ◆ **Employment Information:** Includes the total 2019 jobs in each trade area in the following industries: accommodation and food services; arts, entertainment and recreation; and retail trade.

¹ -The facility characterizations are primarily based on characteristics such as average number of annual events, if the theater has a core anchor user (such as a theater company) and/or other local partners/stakeholders who support its operations, and/or if the spending performance index on the higher end of the spectrum.

² Daytime population data from ESRI includes the SUNY Oswego student population,. <https://www.arcgis.com/home/item.html?id=e0094426f3af4826830ae0943b2e259f>

³ The SPI compares average local spending to the average spent nationally. An index of 100 is average. An SPI of 120 indicates that average spending by local consumers is 20 percent higher than the national average. Esri uses Consumer Expenditure Survey data from the Bureau of Labor Statistics in its estimates.

⁴ Esri's Tapestry Market Segmentation is a geodemographic system that identifies 68 distinctive markets in the US based on socioeconomic and demographic characteristics to provide an accurate, comprehensive profile of US consumers.

COMPARABLE FACILITIES MATRIX – GENERAL INFORMATION/ORG STRUCTURE/FACILITY CATEGORIZATION

General Facility Information								Organizational Structure		Facility Categorization
Facility Name	City	State	Location/Facility Characteristics	Indoor/Outdoor	Seating Capacity	Type of Events/Programming	Average Number of Annual Events	Organizational Structure	Local Partners/ Stakeholders	(Weak, Successful, Highly Successful)
Lucy B. Hamilton Amphitheater	Cooperstown	NY	The Lucy B. Hamilton Amphitheater is located on the Fenimore Art Museum campus and is adjacent to Otsego Lake. The amphitheater offers concrete bench seating as well as additional lawn seating to audiences.	Outdoor	100	The Lucy B. Hamilton Amphitheater is used as a multi-functional space for a variety of different events and programming activities including educational lectures to students visiting the Fenimore Art Museum, educational performances highlighting and complementing the American Indian Heritage collection at the Fenimore Art Museum, musical performances hosted by the Fenimore Art Museum, and live theater productions hosted by the Glimmer Globe Theater Group. Events are primarily hosted during the summer/fall months and a majority of programming is geared toward family audiences.	60	Owned by the Fenimore Art Museum (Non-Profit)	Fenimore Art Museum, Glimmer Globe Theater Group.	Weak
Jean C. Smith Amphitheater	Triangle	VA	The Jean C. Smith Amphitheater is located within Locust Shade Park (35 miles southwest of Washington D.C) and adjacent to a eight acre pond. The park offers a number of different amenities to audiences including a golf course, running/walking trails, a batting cage, and fishing/boating. The amphitheater offers concrete bench seating as well as additional lawn seating to audiences.	Outdoor	500	The Jean C. Smith Amphitheater is used as a performing arts stage for a variety of different theater and music productions, magic shows, and educational lectures. Events are primarily hosted during the spring/summer/fall months and a majority of programming is geared toward family audiences.	30	Owned by Prince William County, VA	Prince William County, VA	Successful
Cope Amphitheater	Kearny	NE	The Cope Amphitheater is located adjacent to the Platte River. It offers wooden bench seating as well as additional lawn seating to audiences.	Outdoor	500	The Cope Amphitheater is used as a rental facility for the City of Kearney, NE for events such as weddings, wedding receptions, and educational seminars. Events are permitted year round as long as weather permits.	Unknown	Owned by the City of Kearney, NE	City of Kearney, NE	Weak
Forest Theater	Carmel-By-The-Sea	CA	The Forest theater is an historic amphitheater that is framed by towering pine trees and large open fireplaces. The amphitheater is adjacent to Mission Trail Park and a mile from Carmel Bay which leads to the Pacific Ocean. The amphitheater offers concrete bench seating to audiences.	Outdoor	540	The Forest Theater is used as a performing arts stage for a variety of live theater productions, as well as a limited number of musical productions throughout the year. Events are permitted year round as long as weather permits and the programming is geared towards primarily adult audiences (although numerous productions could also be considered family friendly).	80	Owned by the City of Carmel-by-the-Sea	The Forest Theater Guild, Pacific Repertory Theater, the City of Carmel-by-the-Sea.	Highly Successful

COMPARABLE FACILITIES MATRIX – GENERAL INFORMATION/ORG STRUCTURE/FACILITY CATEGORIZATION

General Facility Information								Organizational Structure		Facility Categorization
Facility Name	City	State	Location/Facility Characteristics	Indoor/ Outdoor	Seating Capacity	Type of Events/Programming	Average Number of Annual	Organizational Structure	Local Partners/ Stakeholders	(Weak, Successful, Highly)
Davis Amphitheater at Glenwood Park	Glenwood	IA	The Davis Amphitheater is located within Glenwood Lake Park. The park offers a number of different amenities to audiences including boating/fishing on a small pond and various running/walking trails. The amphitheater offers wooden/metal bench seating to audiences.	Outdoor	750	The Davis Amphitheater at Glenwood Park primarily hosts music events in addition to various community events. The amphitheater is also available as a rental space for performances, weddings, worship services, and other special events. A majority of hosted during the summer months, and events are geared towards family friendly audiences.	16	Non-profit Arts Organization	City of Glenwood, IA	Successful
Northern Sky Amphitheater	Fish Creek	WI	The Northern Sky Amphitheater is located within Peninsula State Park (bordered by Tension Bay and Nicolet Bay of Lake Michigan) and is framed by towering pine trees with one tree extending through the stage itself. The amphitheater offers wooden seating to audiences.	Outdoor	1000	The Northern Sky Amphitheater primarily hosts live musical and live theater productions. The amphitheater hosts events only during summer months, and a majority of productions are family friendly with a select number geared primarily towards adults every year.	70	Non-profit Theater Organization	American Folklore Theatre	Highly Successful
Hughes Amphitheater	Edina	MN	The Hughes Amphitheater is located within Centennial Lakes Park (11 miles southwest of Minneapolis, MN) and is adjacent to a 10 acre lake in the middle of the park. The park offers a variety of different amenities to audiences including a golf course, paddle boats, and various running and walking trails. The amphitheater offers concrete bench seating and additional lawn space to audiences.	Outdoor	1000	The Hughes Amphitheater is primarily used as a rental facility for the City of Edina, MN for events such as weddings, wedding receptions, community, and corporate events. Events are primarily hosted during the summer and fall months.	Unknown	Owned by the City of Edina, MN	City of Edina, MN	Weak
The Seaside Pavilion Amphitheater	Orchard Beach	ME	The Seaside Pavilion Amphitheater is located less than a half a mile away from the Saco Bay, which leads out into the Atlantic Ocean. The amphitheater offers plastic/metal seating to audiences.	Outdoor	1400	The Seaside Pavilion Amphitheater is used primarily for live music productions in addition to various lectures by speakers focusing on topics related to the arts. Events are primarily held during the summer and fall months, with a mix of events being geared towards both adult and family audiences.	15	The Salvation Army (Non-profit)	The Salvation Army	Successful

COMPARABLE FACILITIES MATRIX – GENERAL INFORMATION/ORG STRUCTURE/FACILITY CATEGORIZATION

General Facility Information								Organizational Structure		Facility Categorization
Facility Name	City	State	Location/Facility Characteristics	Indoor/ Outdoor	Seating Capacity	Type of Events/Programming	Average Number of Annual Events	Organizational Structure	Local Partners/ Stakeholders	(Weak, Successful, Highly Successful)
Wildwood Amphitheater	Orion	MI	The Wildwood Amphitheater is located within Civic Center Park and less than a half mile from Voorheis Lake. The amphitheater offers lawn seating only to audiences.	Outdoor	2500	The Wildwood Amphitheater is hosts a concert in the park series that takes place during the summer months, and also hosts outdoor film festivals, music festivals, outdoor movies and other public events. The Wildwood Amphitheater is available for private rentals for events which may include weddings, lectures, or worship services. Events are primarily held during the summer and fall months.	20	Owned by the Town of Orion, MI	Town of Orion, MI	Successful
Lake Dillon Amphitheater	Dillon	CO	The Lake Dillon Amphitheater is located in a marina adjacent to Lake Dillon with views of the surrounding mountain ranges. The amphitheater offers concrete bench seating and additional lawn seating to audiences.	Outdoor	3000	The Lake Dillon Amphitheater primarily hosts musical performances, but also offers additional programming such as yoga classes, showings of movies, and a farmer's market. Events are held primarily during the summer and fall months, with an equal mix of programming being geared towards adult and family friendly audiences.	15	Owned by the Town of Dillon, CO	Town of Dillon, CO	Highly Successful
Redhouse Arts Center	Syracuse	NY	The Redhouse Arts Center is located in downtown Syracuse, and also about two miles southwest of Onondaga Lake. The theater offers a tiered seating structure with metal/cushioned chair style seating on the various platforms.	Indoor	100	The Redhouse Theater is a year-round performing arts theater dedicated to the production and presentation of interdisciplinary works, theatre, music, and visual art. The Redhouse Theater is a regional provider of community based arts education, with an emphasis on providing artistic experience for youth at risk and individuals with disabilities. Events are held year-round, with a majority of events being geared towards family friendly audiences.	130	Non-profit Arts Organization	Red House Theater Company	Highly Successful
Main Street Landing Performing Arts Center	Burlington	VT	The Main Street Landing PAC is located in downtown Burlington along the lakefront of Burlington Bay. The theater is a mixed use building, offering a few different small venues for different types of events. The main performance theater area offers cinema style chair seating to audiences that can be adjusted based on the type of event and audience size.	Indoor	120	The Main Street Landing Performing Arts Center is a year-round performing arts center that primarily hosts musical and theater performances in addition to film screenings, with space also available for private rentals for various types of events. In regard to content shown at the theater, it generally focuses on a mix of adult and family friendly content.	60	Non-profit Arts Organization	None	Highly Successful

COMPARABLE FACILITIES MATRIX – GENERAL INFORMATION/ORG STRUCTURE/FACILITY CATEGORIZATION

General Facility Information								Organizational Structure		Facility Categorization
Facility Name	City	State	Location/Facility Characteristics	Indoor/ Outdoor	Seating Capacity	Type of Events/Programming	Average Number of Annual Events	Organizational Structure	Local Partners/ Stakeholders	(Weak, Successful, Highly Successful)
Westbrook Performing Arts Center	Westbrook	ME	The Westbrook Performing Arts Center is located along the I-95 corridor, 5 miles southwest of the town of Portland, ME and 15 miles from the Fore River which leads out into the Atlantic Ocean. The theater offers tiered cinema style chair seating to audiences.	Indoor	1000	The Westbrook Performing Arts Center is a year-round performing arts center that provides a multi-faceted, self-sustaining educational and cultural enrichment space for the local and regional performing arts community. The theater primarily hosts musical and theater performances, which generally focus on family friendly content.	30	Non-profit Arts Organization	None	Successful
Lake Placid Center for the Arts	Lake Placid	NY	The Lake Placid Center for the Arts is located 1 mile northwest of downtown Lake Placid, and a mile from Paradox Bay which leads into Lake Placid. The theater offers tiered cinema style chaired seating to audiences.	Indoor	400	The Lake Placid Center for the Arts is a year-round performing and visual Arts Facility. Located in the Adirondack Park of Northern New York, the LPCA consistently presents arts of the highest caliber in music, dance and theatre performances, film exhibitions and visual arts presentations	80	Non-profit Arts Organization	Lake Placid School of Ballet, LPCA Children's Theatre, Community Theatre Players, as well as the Summer home of the Lake Placid Sinfonietta.	Successful
Hanifl Performing Arts Center	White Bear Lake	MN	The Hanifl Performing Arts Center is located in downtown White Bear Lake (20miles northwest of Minneapolis, MN), and is immediately adjacent to White Bear Lake. The theater offers tiered cinema styled chaired seating to audiences and also has two different classrooms in the facility that generally seat about 75 people each.	Indoor	250	The Hanifl Performing Arts Center is a year-round performing arts center that hosts live theater, children's theater, live music, and educational lectures. The programming hosted at the theater is a mix of both adult and family oriented content and the theater also hosts a major educational component in addition to its regular performances.	150	Non-profit Arts Organization	The Lakeshore Players	Highly Successful
Average					877		58			

COMPARABLE FACILITIES MATRIX – DEMOGRAPHIC AND TRADE AREA EMPLOYMENT

Demographic Information											Employment
Facility Name	City	State	Households (2019)	Daytime Population (2019)	Median Household Income (2019)	Median Age (2019)	% of Population with Bachelors Degree or Higher (2019)	Spending Potential Index (Tickets to Theatre/Opera/Concerts)	Average Amount Spent (Tickets to Theatre/Opera/Concerts)	Top 3 Tapestry Segments	Total 2019 Jobs: - Accommodation & Food Services - Arts, Entertainment, & Recreation - Retail Trade
Lucy B. Hamilton Amphitheater	Cooperstown	NY	43,265	106,381	\$ 50,819	41.7	26%	69	\$ 51.59	1. The Great Outdoors 2. Heartland Communities 3. Small Town Simplicity	1,627
Jean C. Smith Amphitheater	Triangle	VA	534,398	1,329,755	\$ 103,877	36.7	50%	167	\$ 125.53	1. Enterprising Professionals 2. Savvy Suburbanites 3. Top Tier	136
Cope Amphitheater	Kearny	NE	30,582	82,458	\$ 56,222	36.1	30%	71	\$ 53.43	1. Prairie Living 2. In Style 3. Heartland Communities	1,435
Forest Theater	Carmel-By-The-Sea	CA	129,332	409,578	\$ 71,947	34	27%	117	\$ 88.25	1. Urban Villages 2. Valley Growers 3. Las Casas	2,380
Davis Amphitheater at Glenwood Park	Glenwood	IA	318,239	853,333	\$ 62,115	35.9	35%	91	\$ 68.77	1. Rustbelt Traditions 2. Traditional Living 3. Soccer Moms	24
Northern Sky Amphitheater	Fish Creek	WI	9,616	21,963	\$ 57,028	53	39%	78	\$ 58.69	1. Rural Resort Dwellers 2. Old and Newcomers 3. Salt of the Earth	531
Hughes Amphitheater	Edina	MN	1,202,942	3,227,633	\$ 78,639	37.4	46%	127	\$ 95.56	1. Parks and Rec 2. Soccer Moms 3. In Style	7,906
The Seaside Pavilion Amphitheater	Orchard Beach	ME	167,246	425,517	\$ 67,981	43.3	43%	108	\$ 80.96	1. Green Acres 2. In Style 3. Parks and Rec	1,111
Wildwood Amphitheater	Orion	MI	1,078,573	2,818,298	\$ 58,578	41.2	33%	97	\$ 72.67	1. Modest Income Homes 2. Rustbelt Traditions 3. Traditional Living	13,339
Lake Dillon Amphitheater	Dillon	CO	20,480	56,648	\$ 62,369	37.9	49%	101	\$ 76.27	1. Emerald City 2. Enterprising Professionals 3. In Style	2,349
Redhouse Arts Center	Syracuse	NY	271,711	713,906	\$ 56,687	40.3	32%	87	\$ 65.35	1. Comfortable Empty Nesters 2. Rustbelt Traditions 3. Salt of the Earth	2,186
Main Street Landing Performing Arts Center	Burlington	VT	80,848	218,298	\$ 64,827	38.7	49%	109	\$ 82.30	1. In Style 2. Emerald City 3. Green Acres	7,238

COMPARABLE FACILITIES MATRIX – DEMOGRAPHIC AND TRADE AREA EMPLOYMENT

Demographic Information											Employment
Facility Name	City	State	Households (2019)	Daytime Population (2019)	Median Household Income (2019)	Median Age (2019)	% of Population with Bachelors Degree or Higher (2019)	Spending Potential Index (Tickets to Theatre/Opera/Concerts)	Average Amount Spent (Tickets to Theatre/Opera/Concerts)	Top 3 Tapestry Segments	Total 2019 Jobs: - Accommodation & Food Services - Arts, Entertainment, & Recreation - Retail Trade
Westbrook Performing Arts Center	Westbrook	ME	209,360	533,284	\$ 63,384	42.8	41%	100	\$ 75.22	1. Green Acres 2. In Style 3. Parks and Rec	2,064
Lake Placid Center for the Arts	Lake Placid	NY	10,808	26,901	\$ 56,142	43.9	32%	79	\$ 59.15	1. The Great Outdoors 2. In Style 3. Old and Newcomers	2,524
Hanifl Performing Arts Center	White Bear Lake	MN	341,566	919,447	\$ 67,353	36.8	42%	111	\$ 83.18	1. Parks and Rec 2. In Style 3. Front Porches	4,373
Average:			296,598	782,893	\$ 65,198	40	38%	101	\$ 75.79		3,282

OSWEGO STUDY AREA – DEMOGRAPHIC AND TRADE AREA EMPLOYMENT

Demographic Information											Employment
Facility Name	City	State	Households (2019)	Daytime Population (2019)	Median Household Income (2019)	Median Age (2019)	% of Population with Bachelors Degree or Higher (2019)	Spending Potential Index (Tickets to Theatre/Opera/Concerts)	Average Amount Spent (Tickets to Theatre/Opera/Concerts)	Top 3 Tapestry Segments	Total 2019 Jobs: - Accommodation & Food Services - Arts, Entertainment, & Recreation - Retail Trade
Proposed Oswego Facility	Oswego	NY	108,526	238,198	\$ 60,353	42	28%	82	\$ 61.93	1. Parks and Rec 2. Soccer Moms 3. In Style	3,903

TAPESTRY SEGMENTS

The following is an overview of the top 3 tapestry segments in the Oswego Study Area. Tapestry segmentation data provides insights into local spending patterns and consumer preferences for residents of a community. By identifying the top tapestry segments in Oswego's market area, and comparing those to the top segments in the other market areas, we can begin to understand if Oswego's consumers have similar interests and preferences to the other communities and, therefore, the likelihood that the local consumer market would patronize a new performing arts center in Oswego. As noted below, the "In Style" segment is among the top segments in Oswego, as well as many of the other communities. This segment is described as an active support of the arts, theater, concerts, and museums, which suggests that there is a significant portion of the population in Oswego's 45-minute market area that would be potentially interested.

A complete list of all tapestry segment descriptions can be found here: <https://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation.htm>

Parks and Rec

Average Household Size: 2.51 | Median Age: 40.9 | Median Household Income: \$60,000

Pass time at home watching documentaries on Animal Planet, Discovery, or History channels. For an outing, they choose to dine out at family-style restaurants and attend movies. Between trips to the casinos, they gamble on lottery tickets and practice their blackjack and poker skills online. Residents here take advantage of local parks and recreational activities. Their exercise routine is a balance of home-based exercise; a session at their local community gym; or a quick jog, swim, or run.

In Style

Average Household Size: 2.35 | Median Age: 42 | Median Household Income: \$73,000

In Style denizens embrace an urbane lifestyle that includes support of the arts, travel, and extensive reading. They are connected and make full use of the advantages of mobile devices. Professional couples or single households without children, they have the time to focus on their homes and their interests. The population is slightly older and already planning for their retirement. The actively support the arts, theater, concerts, and museums.

Soccer Moms

Average Household Size: 2.97 | Median Age: 37 | Median Household Income: \$90,500

Soccer Moms is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.

COMPARABLE FACILITIES

Lucy B. Hamilton Amphitheater – Cooperstown, NY



Jean C. Smith Amphitheater – Triangle, VA



Cope Amphitheater – Kearny, NE



Forest Theater - Carmel-By-The-Sea, CA



COMPARABLE FACILITIES (CONTINUED)

Davis Amphitheater at Glenwood Park - Glenwood, IA



Northern Sky Amphitheater - Fish Creek, WI



Hughes Amphitheater – Edina, MN



The Seaside Pavilion Amphitheater - Orchard Beach, ME



COMPARABLE FACILITIES (CONTINUED)

Wildwood Amphitheater – Orion, MI



Lake Dillon Amphitheater – Dillon, CO



Redhouse Arts Center – Syracuse, NY



Main Street Landing Performing Arts Center – Burlington, VT



COMPARABLE FACILITIES (CONTINUED)

Westbrook Performing Arts Center – Westbrook, ME



Lake Placid Center for the Arts – Lake Placid, NY



Hanifl Performing Arts Center – White Bear Lake, MN



DATA SOURCES

ECONOMIC MODELING SPECIALISTS INTERNATIONAL (EMSI)

To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) is assessed. Camoin Associates subscribes to Economic Modeling Specialists Intl. (EMSI), a proprietary data provider that aggregates economic data from approximately 90 sources. EMSI industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on EMSI, please see www.economicmodeling.com). This is because local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.

ESRI BUSINESS ANALYST ONLINE (BAO)

ESRI is the leading provider of location-driven market insights. It combines demographic, lifestyle, and spending data with map-based analytics to provide market intelligence for strategic decision-making. ESRI uses proprietary statistical models and data from the U.S. Census Bureau, the U.S. Postal Service, and various other sources to present current conditions and project future trends. Esri data are used by developers to maximize their portfolio, retailers to understand growth opportunities, and by economic developers to attract business that fit their community. For more information, visit www.esri.com.



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