

Prince George Regional Performing Arts Centre Needs Assessment

Progress Report

March 31, 2008

background

- ★ We are a management consulting practice for the development and operation of performing art facilities
- ★ A small and focused company with a staff of four and additional associates around the country
- ★ In our 11th year, now starting our 205th project
- ★ Our Canadian content

services

- ★ Services are feasibility studies, business plans and strategic plans for performing arts projects, large and small

consulting partners

- ★ Theatre Consultants Collaborative
- ★ LEC Quantity Surveying Inc.

Needs Assessment Objectives

- ★ Evaluate, propose and plan for new cultural facilities in Prince George based on:
 - ★ Local and regional audiences
 - ★ Uses and users
 - ★ Existing facilities
 - ★ City goals and facility roles

- ★ Met with local and regional arts and cultural organizations, presenters, and arts leaders
- ★ Spoke with staff and leadership of various stakeholders
- ★ Toured existing local and regional facilities and spoke with facility operators
- ★ Studied the size and characteristics of the local and regional market, including population trends
- ★ Toured comparable facilities in and around Toronto as well as Nanaimo

Facility Inventory

Prince George Performing Arts Facilities

Performing Arts Facility	Capacity	Condition	Availability
College of New Caledonia Auditorium	100	Fair	High
Artspace at Books & Company	150	Fair	Moderate
St. Andrews united Church	200	Fair	Moderate
Theatre NorthWest	232	Fair	None
Treasure Cove Show Room	250	Good	High
St. Michael and All Angels Church	250	Fair	Low
Prince George Playhouse	295	Good	Low
Canfor Lecture Theatre	350	Fair	Low
Vanier Hall	788	Fair	Low
Prince George Civic Centre	2,000	Good	Moderate
Fort George Park Band Shell	2,000	Poor	High
CN Centre	6,000	Good	Moderate

Potential Users

Performing Arts Groups	Total Uses	Capacity	Type
Prince George Conservatory of Music	300	<10	Music Lessons
Prince George Conservatory of Music	100	20	Large Group Music Lessons
Prince George Community Band	50	40	Music Rehearsals
Prince George Celtic Club	4	50	Music, Dance Gatherings
Prince George Conservatory of Music	80	80	Music Rehearsals
Prince George Cantata Singers	100	80	Choir Rehearsals
Prince George Symphony Orchestra	60	80-100	Music Rehearsals
	694	<100	
Serious Moonlight Productions	70	150	Blackbox for Theater Performances
School District #57	10	200	Blackbox for workshops
Speech Arts and Drama Festival	1	200-300	
Prince George Folkfest Society	14	200	Music Performances
Prince George Symphony Orchestra	2	200-300	Chamber music
Prince George Conservatory of Music	15	200-300	Music Recitals
Prince George Theatre Workshop	6	300	Theater Performances
Theatre Northwest	100	250	Theater Performances
	218	150-300	
Prince George Dance Festival	7	400	Small Dance Performances
The Blues Underground Network	12	400	Dancing
College of New Caledonia Film Festival	25	300-500	Film
School District #57	20	500	Performances
Prince George Cantata Singers	4	500	Choir Concerts
	68	400-600	
Prince George Symphony Orchestra	10	800	Music Concerts
Prince George Dance Festival	1	800	Large Dance Performance
Prince George Folkfest Society	8	800	Music Performances
Excalibur Theatre Arts Co	20	700 - 1,000	Theater Performances
Enchainement Productions	15	1,000 - 1,200	Theater Recitals and Performances
	54	600-1,200	
	1034	Total Uses	

Touring Product

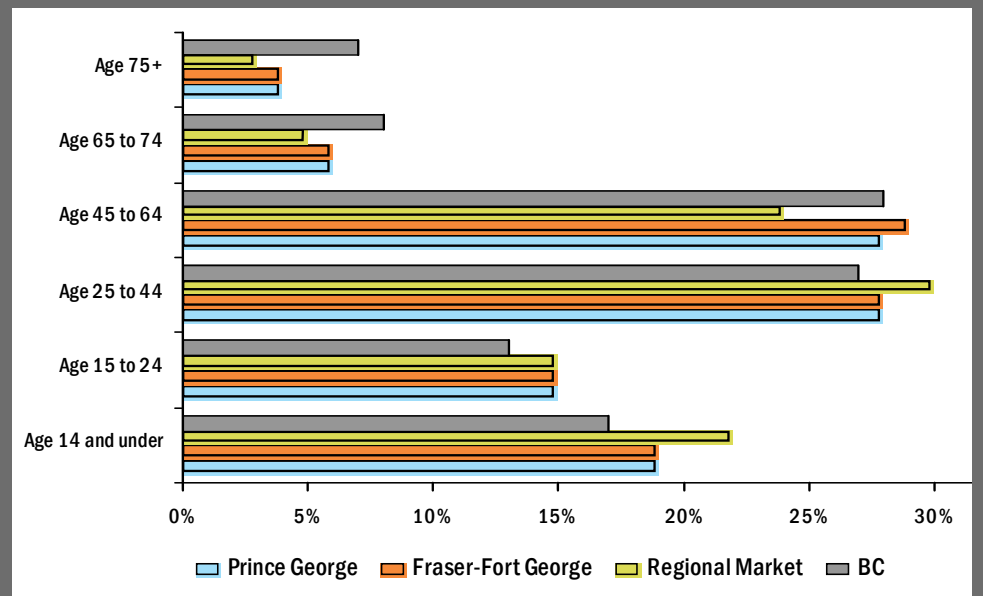
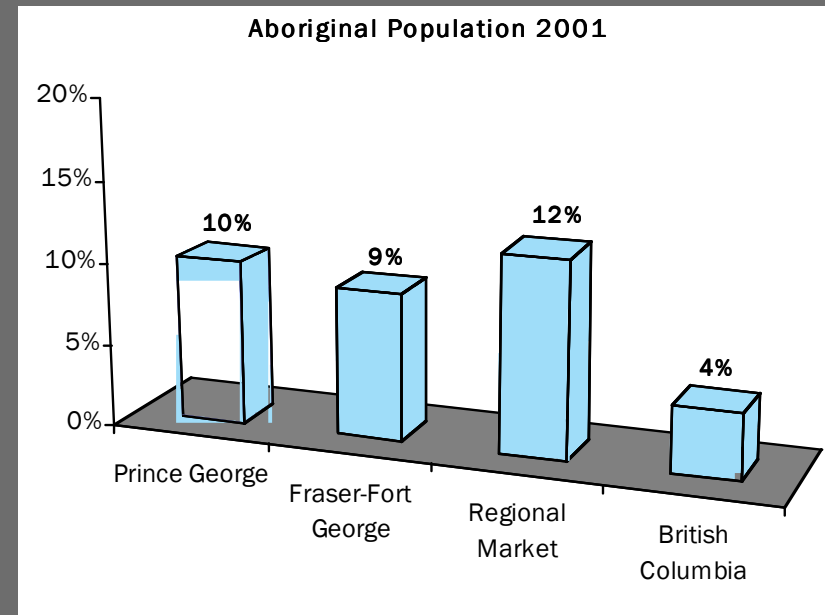
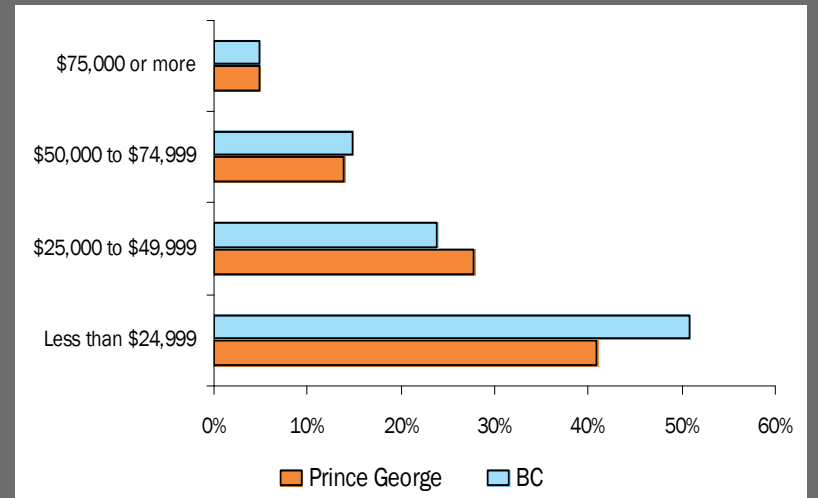
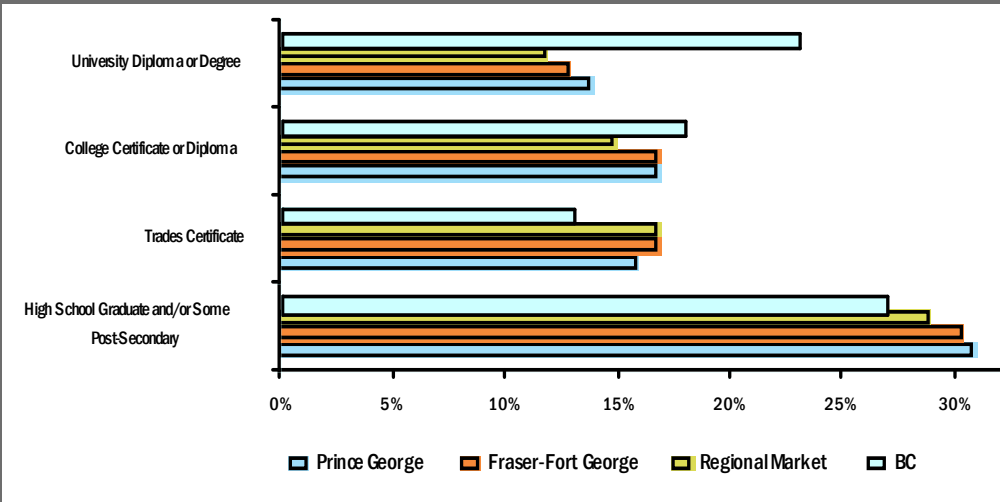
- ★ Active touring market in Western Canada and BC
- ★ Current route is Vancouver -> Kelowna -> Kamloops -> Calgary -> Edmonton
- ★ Smaller productions could route via Prince George
- ★ Should act as regional hub; block booking
- ★ Need 500 to 800 seats to make it work; would do multiple nights (might compete with CN Centre which could do one night)
- ★ Have reached out to BC Touring Council ,Queen Elizabeth/Orpheum etc (Vancouver), Live Nation (Broadway), Jeff Parry Productions, Canada Council and operators of comparable facilities

- ★ The catchment area
 - ★ Map shows 100, 200 and 300km radius circles
- ★ Population base
 - ★ Prince George CA 83,225
 - ★ By College (CNC) region 154,871
 - ★ By Regional Districts
 - ★ Fraser Fort George 92,264
 - ★ Cariboo 62,190
 - ★ Bulkley Nechako 38,243
 - ★ Total = 192,697
 - ★ Peace River 58,264
 - ★ Total with Peace = 250,961



Source: BCSTATS 2006

Market Characteristics



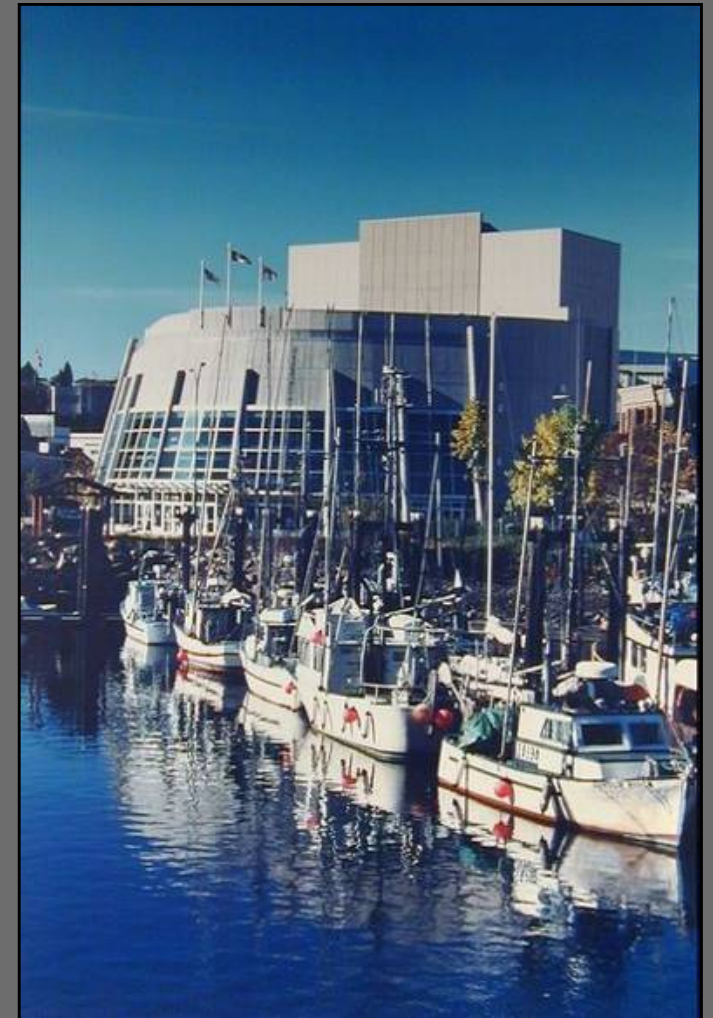
Comparable Markets

<u>Community</u>	<u>Performance Venues</u>	<u>Capacity</u>	<u>Quality</u>	<u>Programming</u>
Prince George	Vanier Hall	788	Fair	School & community rentals
	Prince George Playhouse	295	Good	Community rentals
	CN Centre	6,000	Fair	Ice hockey, major concerts
	Total Capacity	7,083		
Nanaimo	Malaspina University College	294	Fair	University & community rentals
	The Port Theatre	804	Excellent	Tours, resident theatre & community rentals
	Total Capacity	1,098		
Victoria	The Philip Young Recital Hall	220	Good	rentals
	Alix Goolden Performance Hall	800	Fair	Music (not suitable for theatre)
	McPherson Playhouse	818	Good	Professional & community groups rentals
	University Centre Fanquhar Auditorium	1,300	Good	University & rentals
	The Royal Theatre	1,434	Excellent	Tours & resident groups
	Save-on-Foods Memorial Centre	7,000	Fair	Ice Hockey, major concerts
Total Capacity	11,572			
Kamloops	Pavilion Theatre	165	Excellent	Resident theatre
	Sagebrush Theatre	706	Excellent	Resident groups & community rentals
	Interior Savings Centre	6,400	Good	Ice Hockey, major concerts
	Total Capacity	7,271		
Kelowna	Rotary Centre fo the Arts/Mary Irwin Theatre	328	Good	Community rentals
	Kelowna Community Theatre	860	Good	Tours, resident groups & community rentals
	Prospera Place	6,000	Good	Ice Hockey, major concerts
	Total Capacity	7,188		

Comparable Facilities

The Port Theatre, Nanaimo, BC (1998)

- ★ \$13.1 M, with \$8.6 M from Infrastructure Works program and \$4.5 M from individuals, corporations, the City and Regional Districts A, B, C, D & E
- ★ Owned by City, operated by The Port Theatre Society
- ★ Multi-purpose facility with 804-seat theater, 700-capacity lobby and 75-capacity reception room
- ★ 250 events pa attracts 100,000 people
- ★ \$2 M annual operating budget supported by Management Fee from City and Regional District (30%), Society memberships & other grants (7%), Rental & other earned income (35%) and revenue from presenting (28%).
- ★ Phase 2 underway to add 200-seat studio theatre.



Comparable Facilities

- ★ The Sagebrush Theatre, Kamloops, BC
 - ★ Built in 1970s with renovations in 1999 & 2004
 - ★ Jointly owned by City and Kamloops/Thompson School District; operated by resident company Western Canada Theatre
 - ★ Multi-purpose facility:
 - ★ 706-seat theater
 - ★ Large lobby for events
 - ★ Resident theater and community use
 - ★ \$2 M annual operating budget
 - ★ \$132,000 grant from City



Comparable Facilities

- ★ **Kelowna Community Theatre, Kelowna , BC**
 - ★ Multi-purpose facility with 869-seat theater, 1,200 square-foot black box theatre and 236-capacity lobby
 - ★ Opened in 1962; renovations in 2000
 - ★ Owned and operated by City, with 310 events p.a.
 - ★ \$400,000 operating budget:, with 50% earned
- ★ **Rotary Center for the Arts (2002)**
 - ★ Multi-disciplinary art centre with 328-seat theater, set-building workshop, 8 artist studios and painting/drawing room, dance studio, pottery studio, rehearsal hall, music room, multi-purpose meeting room, two art galleries, café and large atrium for events
 - ★ \$6.8 M; Government grants and \$300,000 from local Rotary clubs
 - ★ Owned by City and operated as a charitable organization
 - ★ 365 days of use; 3,000 rentals per year, 300 in the theater
 - ★ \$2 M annual operating budget: \$160k from City, mostly rental revenue



Comparable Facilities

The River Run Centre, Guelph, ON (1997)

- ★ \$15 M from City, Province, Ottawa and private sector
- ★ 785-seat multi-purpose hall, 225-seat flexible theatre and large lobby for special events
- ★ 525 events in the building last year
- ★ 53 public presentations
- ★ 38 school presentations
- ★ City owner & operator
- ★ \$2.1 M operating budget
- ★ 64% earned



Select BC Facility Overview

Theatre Seats by Facility Condition										
			Excellent		Good		Fair		Total	
<u>Community</u>	<u>CMA pop</u>		<u>seats</u>	<u>/1000</u>	<u>seats</u>	<u>/1000</u>	<u>seats</u>	<u>/1000</u>	<u>seats</u>	<u>/1000</u>
Prince George	83,225			0	295	4	788	9	1,083	13
Nanaimo	92,361		804	9		0	294	3	1,098	12
Victoria	330,088		1,434	4	2,338	7	800	2	4,572	14
Kamloops	92,882		871	9		0		0	871	9
Kelowna	162,276			0	1,188	7		0	1,188	7
							Data based on 2006 stats			

City Goals and Facility Roles

City Goals

- ★ Smart Growth principles
- ★ Downtown investment
- ★ Cultural tourism

Cultural Facility Roles

- ★ Pedestrian friendly, mixed-use developments that centralize arts to become community gathering place
- ★ Catalyst for downtown revitalization
- ★ Create new educational opportunities
- ★ Cultural tourism destination

- ★ The audience in the region is large and growing
- ★ There is demand for additional and better programs and facilities
- ★ There is a limited inventory of quality and accessible facilities
- ★ The future of the city and region depends on initiatives that drive economic development, cultural tourism and quality of life
- ★ There is a need for new and better facilities

Recommendations

- ★ Develop the following facilities in one or more locations:
 - ★ 600 to 800-seat multi-purpose venue for touring shows and community groups
 - ★ 200 to 300-seat studio theater or recital hall
 - ★ Visual arts studios and galleries
 - ★ Space for programs and teaching
 - ★ Support and production facilities for local arts organizations
 - ★ Outdoor component for performances and special events
 - ★ Food service capabilities

Players and Potential Partners

Many groups can play an important role in facility choices and how new facilities are developed and operated. These include:

- ★ First Nations Communities
- ★ UNBC
- ★ College of New Caledonia
- ★ Theatre Northwest
- ★ Prince George Symphony
- ★ Prince George Conservatory of Music
- ★ Regional government
- ★ Commercial tourist, retail and other businesses

- ★ **Community Consultations on Needs Assessment**
- ★ **Phase One: Component Two - Preliminary Facility Programs and Capital Cost Estimates**
- ★ **Phase Two: Site Selection**
- ★ **Phase Three: Business Plan**