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final report

to: Village of Pinehurst Performing Arts Facilities Task Force
from: Webb Management Services
regarding: Needs Assessment for Performing Arts Facilities in Pinehurst
date: May 17, 2012

The Village of Pinehurst has hired Webb Management Services to consider the idea of developing a new performing arts facility in the area, in terms of the market, potential users and uses, the existing inventory of performance facilities in the region, and the benefits of such a project to Pinehurst and the region.

To complete this work, we also interviewed and surveyed local and regional performing arts organizations, educators, political and business leadership, Village staff and residents. A complete list of individuals who participated in our initial interviews is appended to this memo as Appendix A. We would like to thank everyone who participated in this effort, particularly Jeff Batton and other members of the Steering Committee for their significant assistance.

1. Study Context

Understanding the contextual issues around this work is key to developing realistic and viable recommendations. The following section reviews planning efforts to date, the state of the arts in the Sandhills Region, and national trends and forces affecting arts and culture.

1.1 The Vision for a Performing Arts Center

The idea for a performing arts center first started when pianist and conductor David Michael Wolff noted the lack of a local professional orchestra and performing arts center as well as the need for a new economic driver in the region. He envisioned positioning Pinehurst as the 'Arts Capital of North Carolina' and conceived a plan that included a professional orchestra, music conservatory, and performing arts center to realize this vision. In 2009, he formed the Carolina Philharmonic and, shortly thereafter, established Conservatory International.

In the spring of 2010, David Michael Wolff began speaking privately with community members about his vision. The idea of the performing arts center quickly began to gain momentum among community leaders concerned about Pinehurst's economy and interested in the potential to develop new facilities at Village Place (formerly the New Core area). Particularly notable was the potential for cultural

building creativity

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development to diversify a regional economy largely dependent upon golf and healthcare and to become a “third leg” of Pinehurst’s economic stool.

Informal conversations began between the Village and the Pinehurst Performing Arts Center (PPAC) supporters about the potential to fund a feasibility study. As conversations progressed, the PPAC supporters formed a formal Advisory Board called the Pinehurst Performing Arts Center Advisory Board. In the fall of 2011, as the Village began to seriously investigate funding a Needs Assessment, a Steering Committee composed of Village Representatives and PPAC Advisory Board members was formed to advance planning and consideration.

In January 2012, the Pinehurst Village Council voted to hire Webb Management Services to complete a Needs Assessment considering the need for performing arts facilities in Pinehurst.

1.2 The State of the Arts in Pinehurst and the Sandhills Region

Presently, the performing arts community in Pinehurst and the Sandhills Region is fragile and loosely organized. The primary arts service organization in the area is the Arts Council of Moore County, which promotes the arts through a variety of programs and re-granting activities. Most of the region’s producing arts organizations are small and non-professional, and have historically struggled for support in terms of ticket sales, participation, and fundraising. Additionally, performing arts organizations in the area have faced very difficult times in the past five years. The following details several challenges that these groups have encountered.

- * The Sunrise Theatre, a historic theatre in Southern Pines that presents film and music events, has struggled to raise the \$50,000 necessary to repair its roof in the last year.
- * The Temple Theater in Sanford has also suffered a notable drop in earned and contributed revenue since 2008, has had to reduce its level programming and has also struggled to fund several capital improvements.
- * Moore OnStage, the local producing theatre, announced it would close in March after the final performance of its 7th season.
- * In 2008, the Sandhills Theatre Company ceased operations.

The one exception has been the Carolina Philharmonic, which has experienced growth in ticket sales since it was founded in 2009.

Additionally, one of the most popular performing arts programs in Moore County is the North Carolina Symphony concert series. In addition to its Raleigh series, the North Carolina Symphony performs in communities across North Carolina including Moore County, where it has been performing for nearly sixty years. Since the late 1980s their concerts have taken place in Lee Auditorium at Pinecrest High School, which was fitted in 2000 with an acoustical shell specifically for these performances. Although the concerts sold very well for many years, utilizing as much as 89% of the auditorium’s capacity a decade ago, subscription ticket sales have declined over this 10-year period, dropping from a high of

approximately 1,200 subscribers in 2001 to 634 subscribers in the fiscal 12 season. During this period there has also been an increase in single tickets purchased.

In terms of existing performance facilities, arts organizations rely very heavily on educational institutions like Pinecrest High School and Sandhills Community College. These educational institutions are very supportive, providing discounted or free access to rehearsal space, performance space, and equipment.

1.3 National Trends

There have been profound changes in the arts sector nationwide over the past twenty years. Here are some of these forces and trends, then some suggestions as to how future facilities must respond.

The challenges:

- * **Economic and Political:** The national economy may finally be improving, but it will likely be years before ticket sales and fundraising return to 2008 levels. And these last few years have caused lasting damage to many organizations in the sector. Their balance sheets are much shakier than before. Their boards tend to be weaker as many have been forced to focus on their own careers and other priorities. And the conversations about the value of the arts resonate much less. Also, we are now operating in a political environment generally more hostile to the arts, particularly around the question of how and why government should provide financial support to the arts.
- * **Technology and Boundaries in the Arts:** The advent of new technologies and their affect on the arts and cultural sector has dramatically changed the size and shape of the general cultural climate. Arts consumers don't clearly separate art, culture and entertainment anymore, and fewer institutions use a narrow definition of what is art. The lines between traditional, participatory, media and other art forms and creative industries are becoming blurred. At the same time, younger consumers are acclimated to multi-sensory engagement—they are used to watching, hearing and reading simultaneously. And they have higher satisfaction thresholds with expectation for immediate rewards and validation.
- * **Changing Consumer Behavior:** There is an increased premium on flexibility as people's lives become more complicated and we keep our options open until the last minute. As a result, arts organizations across the country are experiencing later and later sales patterns and are learning to rely less on advance ticket sales. In addition, people today have less free time, are less willing to spend time in their cars and are becoming more accustomed to an on-demand lifestyle. Finally, arts and entertainment experiences are increasingly constructed around social groups and outings with friends, co-workers, alumni groups, families, church groups and more. In fact, the absence of social context has become a major barrier to

participation. Arts groups are now in the business of creating arts-centered social experiences for people.

- * **Changing Patterns of Participation:** All of these trends are changing the ways that arts groups attract and engage audiences and participants, and in turn, the ways that people personally participate in the arts. More recently, there has been a rise in self-directed, home-based living arts participation, including everyday creativity like gardening, writing, crafting, photography, film production, cooking, and decorating through fashion, home décor, and art collection. Access to online communities with international reach has supported this growth, leading to expansive blog networks, websites, social networks (i.e. Kickstarter, Flickr and Etsy) connecting professional and amateur artists alike, providing instructions and how-to's, advice, product reviews, buyer to buyer platforms, user generated feedback and even financing for projects. However, as most of this activity occurs in personal time and space, there is a huge disconnect between this type of participation and arts organizations and funders. Also, consumers are demanding more intense, "hands-on" arts experiences. This is evidenced by higher rates of personal and 'amateur' participation in community theatre groups, choirs, dance and movement classes, art and music classes and more.
- * **Declining Youth Participation:** Participation in the traditional performing and visual arts amongst adults under the age of 40 has been on the decline for over 20 years for many of the reasons stated above.
- * **Baumol and Bowen:** These two NYU economists published "The Economic Dilemma of the Performing Arts" in 1965, positing that the lack of productivity gains in the creation of art, plus the inevitability of cost increases, would essentially force all organizations (and facilities) to raise more contributed income every year. Though there have been marginal improvements in the administration of buildings and organizations, there is ample evidence of this cost squeeze, and increasing pressure on all arts organizations to raise more money to sustain operations.

How to respond:

- * **From Friday Night Lights to Community Living Rooms:** The old image of the theater - where the lights come on at 7PM on a Friday night so that fancy people wearing formal attire could attend a performance - is gone. The new image is that of a community living room - a place that is always open and always active - with informal programming and an atmosphere that is buzzing and welcoming. New spaces have enlarged lobbies where high quality food and drink are available for sale over longer periods of time. These spaces are informal but physically attractive in the ways they are designed and animated. They are warm and inspirational, rather than cold and institutional. And they facilitate and promote the interaction of artists and audiences.

- * **Facilitating Active Participation:** New facilities must support a culture of more active participation in the arts and arts experiences, including audience engagement before, during, and after the experience. This suggests open rehearsals, hands-on training, elevating the patron to the critic and even invitations to formally document an experience. Buildings must also provide more opportunities for everyone in the community to express creativity - whether that means joining a choir, learning to paint, or volunteering to build sets.
- * **Control of the Experience:** Cultural norms of behavior around performances must change. Audiences (particularly younger ones) must be given more opportunities to decide how they would like to experience a performance, without disturbing those around them. Expecting younger patrons to give up all control of their experience of coming to a performance will only drive them away.
- * **Community Engagement:** Fundamentally, arts facilities must become deeply engaged and connected to the life of their communities. They cannot be seen as palaces or temples of the arts, but rather the literal or figurative center of the community. Whatever an arts facility can and should do to connect with life of the community should be done - whether that means hosting community meetings or acting as emergency response centers.

2. The Market for Arts and Culture

One of our first tasks in understanding the need for performing arts facilities in Pinehurst is to consider the market. Who are the people who will attend and participate in the programs and do their characteristics suggest the propensity to attend arts and cultural programs and activities?

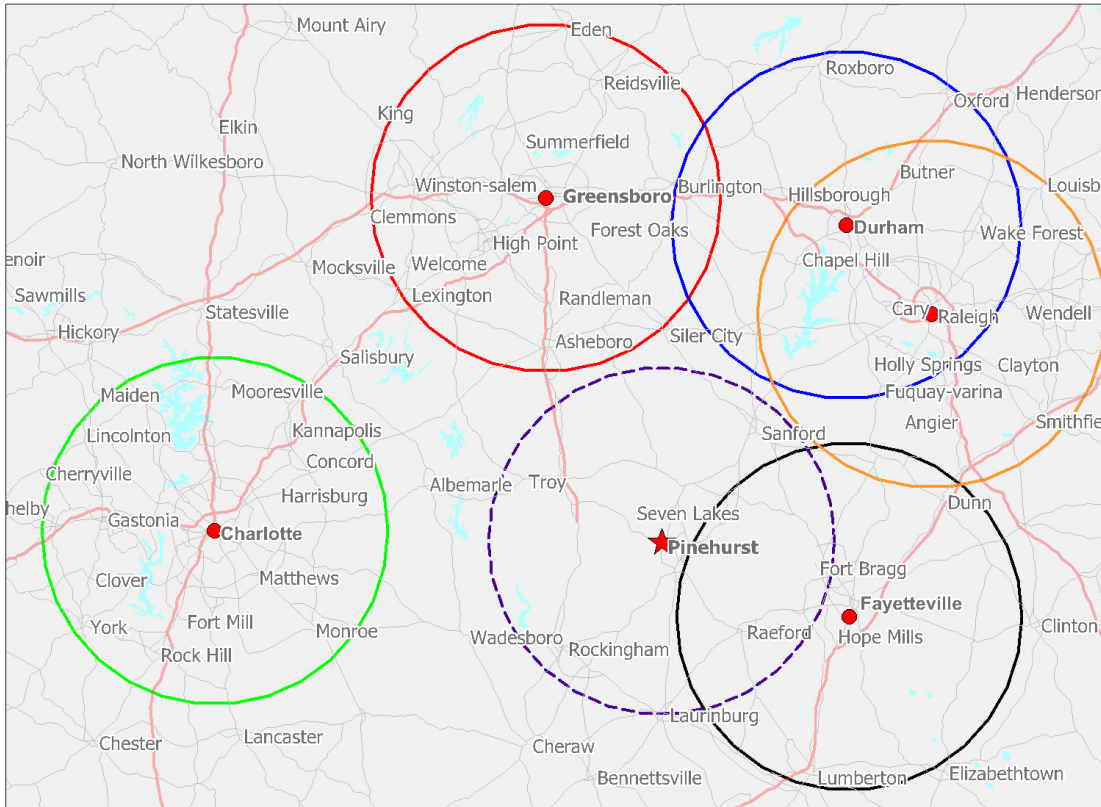
2.1 Market Definition and Size

We have considered the local and regional market using the following geographical definitions:

1. The Village of Pinehurst
2. Southern Moore County (defined as Pinehurst, Southern Pines and Aberdeen)
3. The 30-mile Radius
4. Moore County
5. US (when applicable for context)

We came to this definition by gathering information on attendance from representatives of local arts organizations and discussions with Village leadership and staff. We also based our market definition on our experience working in comparable markets, which indicates that 80% of the market for a performing arts facility comes from within a 30-mile radius of that facility. Data used for this analysis comes from Nielsen Claritas, a marketing research resource company that provides up-to-date

demographic data as well as future estimates based on Census data. The following map illustrates the market by showing the 30-mile radius around Pinehurst, as well as similar radii around other markets with established or proposed performing arts centers, including Durham, Raleigh, Greensboro, Charlotte and Fayetteville.



While Pinehurst is clear of four of these other rings, the proximity of these other market regions and the overlap with the fifth should give us pause as to the size of the regional market.

2.2 Market Characteristics

Appendix B is a series of charts and graphs that describe the market per the definition above. This analysis indicates that the market is composed of populations with the following demographic and socioeconomic characteristics.

- * **Small Communities with Slowing Growth:** The Village of Pinehurst has a population of around 13,500, however there are nearly 450,000 people within the 30-mile radius. The Village’s population increased 59% between 1990 and 2000 and increased another 39%

between 2000 and 2012. That growth rate is projected to slow to 10% between 2012 and 2017. This pattern of slowing growth is also evident within Moore County and the 30-mile radius.

- * **Disparate Education Levels:** The populations of Pinehurst and Southern Moore County have educational attainment levels well above the US average, with 42% of the population (Pinehurst) and 37% (Southern Moore County) of the population having attained a bachelor's degree or higher as compared to 28% in the US. The larger regional population, however, has lower levels of educational attainment, with only 20% of the population in the 30-mile radius having attained a bachelor's degree or higher.
- * **Disparate Income Levels:** Similar to educational attainment, Pinehurst and Southern Moore County have household income levels significantly higher than the US average, but regional income levels are below the US average. In Pinehurst, 11% of the population has a household income of \$150,000 or more as compared to 7% in the US and 3% in the 30-mile radius. This income gap is slowly narrowing though, as regional median income levels grew between 2000 and 2012 and are projected to continue growing, while the median income level in Pinehurst remained virtually the same between 2000 and 2012 and is not expected to change significantly between 2012 and 2017.
- * **Significant Presence of Retirees:** Both the age distribution and the employment status of local and regional populations confirm that Pinehurst is home to a large number of retirees. Nearly 36% of Pinehurst's population is aged 65 or older, as compared to 13% in the US, and 55% of Pinehurst residents are classified as not in the labor force, as compared to 35% in the US.
- * **Home to a Growing Number of Families:** Although the total percentage of family (73%) versus non-family (27%) households has been stable over the last twelve years, the composition of family households is changing. The percentage of 2-person family households is gradually decreasing and the percentage of 3 and 4-person family households is growing.

We were also able to collect additional insight about Pinehurst through the interview process, which indicated that the market:

- * **Is a Golfer's Paradise:** Initially established as a resort community in 1895, Pinehurst has a national reputation as a destination, particularly for golf enthusiasts. According to the Pinehurst, Southern Pines, Aberdeen Area Convention & Visitors Bureau, Moore County has an estimated 1.15 million total visits on an annual basis. The typical visitor to Pinehurst is an affluent (71% HHI \$60,000+) college graduate with a professional/executive/managerial background. Most visitors travel from the East Coast of the United States, and 73% are male. At the center of it all is Pinehurst Resort, the world's largest golf resort, with roughly 50,000 to

60,000 overnight guests a year. Approximately 55% of these guests come for corporate travel and 45% are leisure travelers.

- * **Accommodates Seasonal Residents:** In addition to researching the number of visitors to Pinehurst, we wanted to understand if there are a significant number of vacation homes in Pinehurst. This information is very difficult to track as this information is often underreported, but the housing occupancy status data from the US Census can create at least a general picture. According to 2010 Census data, 11% of Pinehurst’s housing units are categorized as homes for seasonal, recreational, or occasional use as compared to roughly 4% of the housing units in Moore County and the US. These percentages did not change significantly between 2000 and 2010.
- * **Has a Military Presence:** Fort Bragg, a U.S. Army military installation, is located in Fayetteville. A US Census Designated Place, Fort Bragg had a population of 18,754 in 2012. In addition to residents living on base, there are a number of military families that live in Southern Pines, Pinehurst, and Aberdeen.

2.3 Performing Arts Centers with Small Local Markets

We also searched the United States to find examples of performing arts centers that had a large-capacity performance space as well as some degree of presenting activity located in small communities. The chart below shows large facilities in four relatively smaller markets. But two of these are university towns, and none are as small as Pinehurst.

Performing Arts Centers in Small Communities

	Fox Cities Performing Arts Center Appleton, WI	Stephens Auditorium, Ames, IA	Peace Center for the Performing Arts Greenville, SC	Walton Arts Center, Fayetteville, AR	Pinehurst, NC
Population (Local Market)	71,927	56,920	69,236	72,394	13,469
Population (Local Market): % with Bachelors Degree or higher (age 25+)	29%	56%	33%	39%	25%
Population (30-mile Radius)	671,745	443,711	1,029,357	467,061	449,582
Population (30-mile Radius): % with Bachelors Degree (age 25+)	24%	32%	25%	26%	13%
Large Theater Capacity	2,072	2,747	2,100	1,156	
Smaller Theater Capacities	350	--	439	300, 130	
Other Public Spaces	Lobbies (2), Founders Room	Lobby	Outdoor amphitheater, Huguenot Loft/Mill, Conference Room, Wyche Pavilion, Coach Factory	Rose Garden, outdoor amphitheater, Lobbies(2), McBride Studio	
Number of Resident Companies	1	0	4	2	
Number of Presenting Broadway Performances in the Large Theater	48	5	32	62	
Number of Concerts (Presenting) in the Large Theater	14	16	17	15	
Resident Organizations/University Affiliation	Fox Valley Symphony	Iowa State University	Greenville Symphony, Carolina Ballet Theatre, International Ballet, South Carolina Children’s Theatre	TheatreSquared, Symphony of Northwest Arkansas, University of Arkansas	

2.4 Comparable Resort Communities

Pinehurst is a unique community that developed as a destination resort and has now become a seasonal and retirement community. As a result, we decided to look more closely at other resort communities and the role that culture and cultural facilities play there.

Large Performing Arts Facilities in Resort Communities					
	Pinehurst, NC	Jackson, WY	Park City, UT	Aspen, CO	Lenox, MA
Local Population	13,469	9,593	7,635	6,180	1,648
Local Population: % with Bachelors Degree (age 25+)	25%	35%	34%	32%	26%
Local Median Household Income	\$61,956	\$65,140	\$76,374	\$64,031	\$41,707
Annual Visitation	1.15 million annual visits		515,000 visitors in 2010		2.5 million annual visitation (Berkshire County)
% of Housing for Seasonal, Vacation, and Recreational Use	11%	5%	59%	32%	9%
Largest Indoor Performing Arts Facility	Pinecrest HS Auditorium	Jackson Hole Center for the Arts	Eccles Center for the Performing Arts	District Theatre at Aspen Schools	Tanglewood Music Center (Ozawa Concert Hall)
Large Hall Capacity	1,300	500	1,260	550	1,180
Resident Companies		17 local arts organizations	Park City Performing Arts Foundation	School District, Aspen Sante Fe Ballet, Aspen Community Theatre	Boston Symphony, Tanglewood Music Center
Outdoor Facility 1	None	Snow King Amphitheater	Snow Park Outdoor Amphitheater	Benedict Music Tent	Tanglewood Music Center (Music Shed)
Capacity		5,000	5,000	2,050	15,000
Resident Groups		Programmed by an outside promoter	Park City Performing Arts Foundation, Deer Valley Music Festival	Aspen Music Festival	Boston Symphony, Tanglewood Music Center
Outdoor Facility 2			The Forum at the Canyons		
Capacity			5,000		
Resident Groups			Spring and Summer Concert Series Programmed by the Resort		

We chose this particular set of communities because they support a combination of recreation and culture. Following are highlights from the research:

- * All of the communities researched have a higher % of bachelor's degrees than the US average (18%). With the exception of Lenox, Massachusetts, all of the communities have higher median incomes than the US (\$49, 581).
- * Two of the communities, Aspen and Park City, have a significantly higher percentage of housing units categorized as second homes.
- * None of the communities had a large indoor performance hall with a seating capacity larger than Pinecrest High School Auditorium.
- * All of the other communities researched have at least one formal outdoor performance venue.
- * All of the venues, whether indoor or outdoor, have at least one organization primarily responsible for the programming content. These resident organizations include non-profit

arts groups (the Boston Symphony), educational arts organizations (Aspen Music Festival, Tanglewood), educational institutions (the Aspen School District), arts festivals (Deer Valley Music Festival), and resorts or promoters hired by resorts.

2.5 Market Potential

This analysis suggests that local market and Pinehurst have good propensity to participate in the arts and to respond to performing arts programs and activities. However, the overall quality and size of the regional market suggests limited potential to support large-scale performance facilities. Specifically, this analysis indicated that:

- * According to research from the National Endowment for the Arts, because Pinehurst and Southern Moore County's populations are affluent and educated, they are very likely to attend arts events, as educational attainment is by far the best predictor of arts attendance. The propensity to attend arts events among those who have completed college is at least three times greater than for those who have finished only high school; with each advanced level of education there is an increased probability of attendance. Also, people with higher incomes are more likely to attend and participate in arts activities.
- * Pinehurst already has a strong tourism infrastructure in place, but in the experience of those in the local tourism industry, the types of visitors who currently travel to Pinehurst (men traveling in groups with the purpose of golfing) are unlikely to attend arts events. Their trips are structured around golf activities and they tend to stay on the golf course or on/close to the Resort. Efforts would have to be made to attract cultural tourists, a different segment of the tourism market.
- * Locally, key segments to target include seniors and the growing number of young families.
- * Despite the concentration of older, educated, and affluent people in Pinehurst, there is a segment of the regional population that is notably less educated, affluent, and more racially diverse in the 30-mile radius. Different types of programs at a lower price point will likely best serve these residents.
- * There are small communities in the United States that can support large-scale performing arts centers that have regular presenting activity, but these facilities rely on some combination of a larger local population than Pinehurst or the presence of a University.
- * There are comparable resort communities that support large-capacity indoor and outdoor performance facilities, but these facilities have at least one robust organization that is responsible for a significant amount of programming.

3. User Demand for New or Better Performing Arts Facilities

An essential part of our work has involved testing demand for arts and cultural facilities on the part of local artists and organizations. Information on these potential users was gathered through a series of one-on-one interviews and phone calls with representatives of local and regional arts organizations. This exercise intended to understand the desired seating capacity and other characteristics of performance and support facilities needed by local and regional performing arts groups for both existing activities and new activities that might be introduced in the near future. The chart below summarizes the findings of that work:

Annual User Demand: Performance Facilities by Seating Capacity								
		Performance Days	Rehearsal Days	Other	Total	Desired Seating Capacity	New or Existing Activity	Desired Amenities and Additional Needs
SMALL								
	Moore County Choral Society (Small Ensemble)	1	1		2	100	New	Rehearsal, Music and Riser Storage
	Arts Council of Moore County	4			4	350	Existing	
	TOTAL	5	1		6			
MID-SIZE								
	Moore County Concert Band	4			4	500	Existing	
	Judson Theatre Company	20	14		34	700	Existing+New	
	Arts Council of Moore County	1			1	700	Existing	
	TOTAL	25	14		39			
LARGE								
	Moore Philharmonic	2	2		4	1,000	Existing	
	Regional Educational Event (All County Orchestra, Band, or Chorus)*	1	3		4	1,000+	Existing	Adequate break-out space for sectionals
	Moore County Choral Society (Large Ensemble)	3	2		5	1,200	Existing	
	Local Dance Company Recitals**	4	4		8	1,200	Existing	
	Arts Council of Moore County	3			3	1,200	Existing	
	North Carolina Symphony	7			7	1,350	Existing	
	Carolina Ballet	3			3	1,200-1,800	New	Large stage, adequate dressing space, fly tower
	Carolina Philharmonic					1,600		Rehearsal and Educational Facilities
	Symphonic	8	16		24		Existing+New	
	Chamber Music and Jazz	6			6		Existing+New	
	Special Events	1			1		Existing	
	Educational Events	4			4		New	
	Youth Orchestra	3	6		9		Existing+New	
	Junior Symphony	3	6		9		New	
	Summer Music Festival			14	14		New	
	Opera/Musical/Ballet Partnership	1			1		New	
	Palustrus Festival	4			4		Existing	
	TOTAL	53	39	14	106			

* By definition, these event rotate around the region on an annual basis. This estimate assumes one event rotating to Pinehurst a year.
 **Estimated

From Local Organizations: With the exception of the Carolina Philharmonic and Conservatory International, there is limited demand on the part of local users, as the existing facilities (with continued improvements) can accommodate their present needs. Overall, users are satisfied with the facilities available to them and some even expressed concern about a new performing arts center taking away rental business from existing facilities. The following issues came up during our interviews:

- * **Affordability:** Most local groups are accustomed to paying nominal rent and receiving minimal amenities in exchange. Many organizations receive access to rehearsal space, performance space and equipment for free. Several groups expressed that they did not expect to be able to pay significantly higher rental prices regardless of the benefits of the new spaces.
- * **Calendar Clustering:** The biggest issue local arts groups face right now is not lack of facilities, but lack of access, specifically related to Pinecrest Auditorium. Many community users tend to schedule performances during the end-of-year holiday season and the spring season, right around the time that the school programs need facilities.
- * **Pinehurst versus Moore County:** Several groups voiced concerns about booking priority. The most commonly expressed concern involved whether Pinehurst-based users groups would have booking priority over groups from Moore County.
- * **Carolina Philharmonic and Conservatory International:** Approximately two thirds of estimated demand for large-scale performance space came from the Carolina Philharmonic and the Conservatory International. Of the demand from the Carolina Philharmonic and Conservatory International, nearly 75% represents new activity.
- * **Regional Organizations:** Two regional organizations expressed interest in bringing touring programs to new facilities: the North Carolina Philharmonic and the Carolina Ballet. The North Carolina Philharmonic would likely move existing activity to new facilities, but the overall level of satisfaction is unlikely to increase activity levels given the recent decline in subscription sales. The Carolina Ballet expressed interest in bringing two or three performances to new facilities on an annual basis. This would be contingent upon having a fly tower and a large enough stage and dressing facilities to accommodate the ensemble.

4. Existing and Planned Cultural Facilities

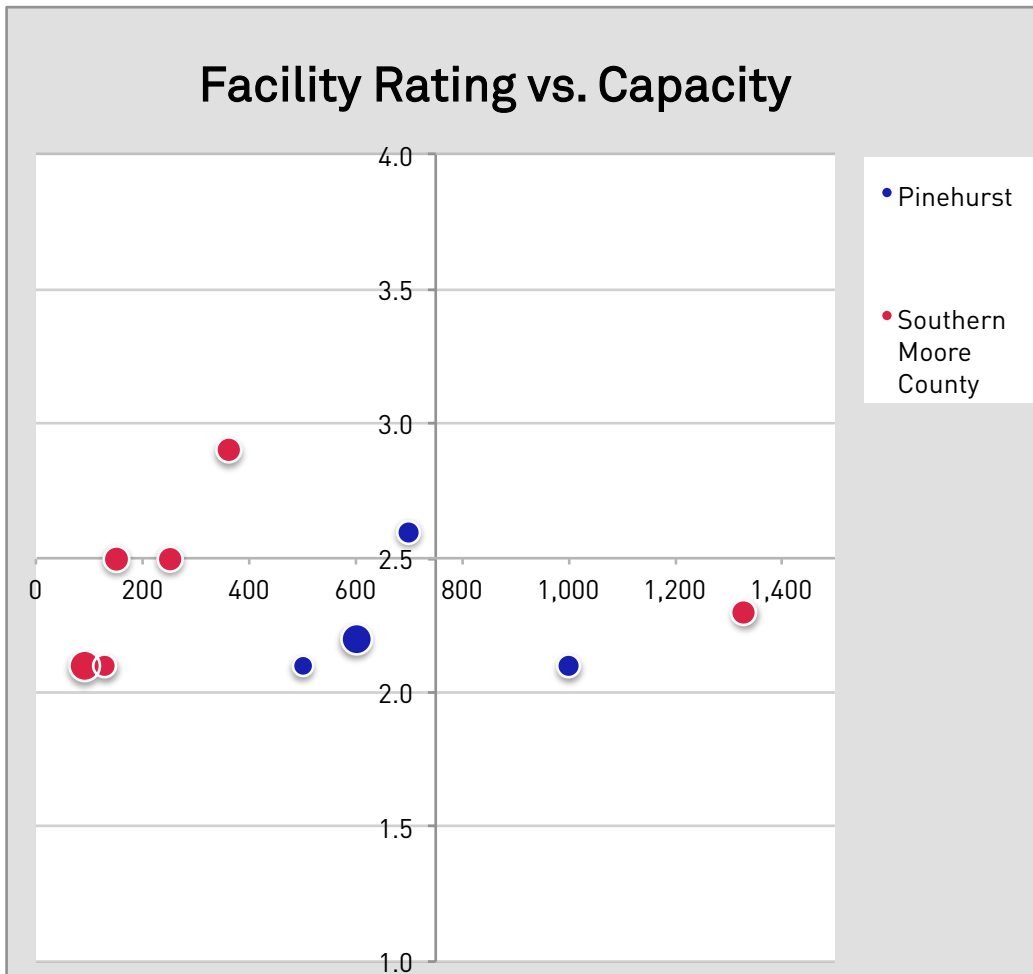
4.1 Sandhills Region Facilities

In considering the potential for new performing arts facilities, it is also important to gain an understanding of the quality and characteristics of existing facilities in order to identify opportunities, gaps, and needs. To do this, we toured existing facilities, gathered information online and through phone interviews with facility operators, and compiled a facility inventory of facilities in Pinehurst and in Southern Moore County (Southern Pines and Aberdeen).

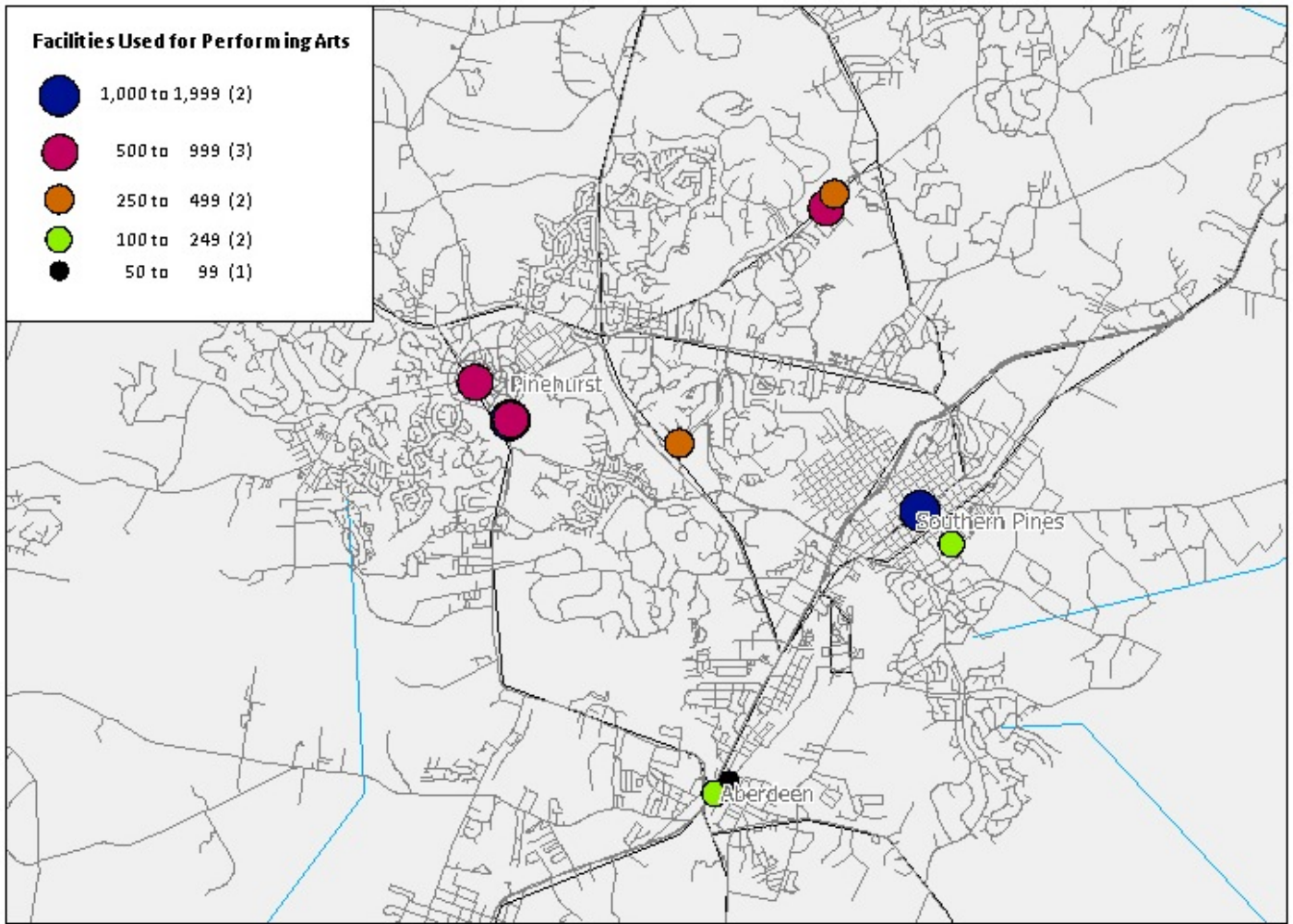
This inventory, included as Appendix C, considers the physical features and types of activity hosted within each space. The condition and functionality of each facility has been rated using eight variables. These include:

1. Facility condition
2. Staff and support
3. Theatrical functionality
4. Room acoustics
5. Customer amenities
6. Performer amenities
7. Atmosphere and character
8. Suitability for users

Variables are rated on a scale of 1 to 4, higher being best. Building condition and staff and support categories carry the most weight. In addition to facility tours, these ratings are established based on conversations with facility managers, anecdotal information, and interview input. The following matrix charts the overall rating (quality of space) versus the capacity. The size of the bubble corresponds to the number of activity types accommodated in each space.



The following map details performance facilities in Pinehurst and the Sandhills Region:



In all, we identified ten facilities in the region that are used on a regular basis for performance, four in Pinehurst and six in Southern Moore County. Note that we excluded school facilities unless these facilities receive regular outside use.

A review of these facilities indicates the following:

- * Facilities range in size from the 90-seat Great Room at the Weymouth Center for the Arts & Humanities to the 1,330-seat auditorium in Pinecrest High School. There is a fairly equal distribution of small, mid-sized, and large capacity facilities.
- * The facilities are owned and operated by a variety of organizations, including educational institutions, non-profit organizations, and government entities.
- * Facilities either have historic character and charm and minimal theatrical functionality (the Fair Barn, the Weymouth Center) or good theatrical functionality, but have limited aesthetics (Pinecrest Auditorium, Owens Auditorium). Theatrical functionality is defined by characteristics such as fly space and multiple dressing rooms.
- * Five regional facilities have their own presenting series, and tend to present small-scale music performances like chamber music recitals or blues bands.
- * All facilities are open and available for rent, though facilities owned and operated by educational institutions are often dominated by the school calendar.
- * Audience amenities are mixed. Most facilities have plentiful and convenient parking, but few facilities have formal box offices, full concession stands, and coat checks.
- * Rental rates are very affordable, with many facilities offering rates as low as \$250 a day for non-profits.

Fundamentally, the existing set of mid-size to large facilities is bigger and better than other communities of this size, even some other resort communities. And while there are limitations with all of these facilities, they are functional enough and available enough to support the further development of arts and cultural programs and organizations.

5. Community Benefits & Impacts

The reason that the initial vision for the PPAC garnered so much interest so quickly is that community leaders and residents in Pinehurst already have an understanding of the many positive impacts that investments in cultural infrastructure and programs can have on a community.

To further understand how the development of new cultural facilities might support community visions and goals, we reviewed a number of local and regional planning documents, including the 2011 Comprehensive Long-Range Village Plan (both the Strategic and Implementation Elements), the Village of Pinehurst New Core Master Plan, the Comprehensive Parks and Recreation Master Plan, the Given Memorial Library & Tufts Archives Building Expansion Program Analysis and Special Needs Assessment, the Market Demand Study for New Event Facilities conducted by CS&L in 2006, and the

SmART Initiative Report recently released by the North Carolina Arts Council and the North Carolina Department of Cultural Resources.

Following are some specific ways that the development of arts and cultural programming and facilities could benefit Pinehurst and the Sandhills Region.

- * **Direct Economic Impact:** Arts facilities and programs could support Pinehurst by driving spending, appealing to cultural tourists, and making Pinehurst a more attractive place for workers and businesses to relocate.

Regarding the direct economic impacts of arts and cultural activities, in 2007, Americans for the Arts released *Arts and Economic Prosperity III: The Economic Impact of Nonprofit Arts and Culture Organizations and Their Audiences*. This research estimates the direct impacts of

Economic Impact of Nonprofit Arts & Culture Organizations and their Audiences

	Resident Audiences	Non-Resident Audiences	All Audiences
Meals + Refreshments	\$10.77	\$16.35	\$13.00
Souvenirs + Gifts	\$3.32	\$4.78	\$3.90
Lodging	\$1.08	\$10.91	\$5.01
Child Care	\$0.34	\$0.33	\$0.34
Transportation	\$1.62	\$4.37	\$2.72
Other	\$2.40	\$3.45	\$2.82
Total	\$19.53	\$40.19	\$27.79

*Residents are attendees who live within the county in which the cultural event occurred; nonresidents live outside of the county

audiences on communities, estimating that non-profit arts and culture attendees spend \$27.79 (on average) in addition to the cost of admission.

Additionally, the presence of arts and culture can be a draw for workers and businesses looking to relocate to an area that has a high quality of life. Research conducted by the North Carolina Department of Cultural Affairs indicates that counties with higher proportions of workers in arts-related occupations are more likely to retain current residents and attract new ones.

- * **Diversifying Tourism:** As previously mentioned, Pinehurst already has a robust tourism business, but cultural tourists, visitors who rank arts and heritage within their top reasons for traveling, would represent a new segment of that market. If Pinehurst and Southern Moore County could build and organize arts and cultural efforts to tap into the cultural tourism market, not only would the area gain access to new visitors, but these visitors might also be attracted during times of the year that are currently non-peak travel times.
- * **Creating Vitality:** One of the major issues facing the Village of Pinehurst right now is the waning activity levels and resulting impacts on businesses in the Village Center. As the Master Plan observes, "In recent years, the Village Center has been challenged by its location, small

size, and competition from businesses in other areas, the loss of traffic generators (ABC store), and other factors. Even though residents are quick to show visitors (due to its character and ambience), they seem to visit it sparingly...and do not seem to make it a part of their daily lives.” With these challenges in mind, the Village of Pinehurst has set out to find ways to increase activity levels both in the existing Village Center and in the area identified as Village Place (formerly the New Core area). Arts programs and activities could boost traffic to any given area by giving audiences and program participants a reason to come to the Village Center or Village Place on a regular basis both during the day and at night. Village residents have even articulated these needs already as part of a phone survey conducted in support of the Village Master Plan. In the survey, participants expressed interest in having more theater, entertainment, and community activities in the Village Center.

- * **Sense of Place and Quality of Life:** Pinehurst already has a very strong sense of community identity. The relaxed atmosphere, pleasant climate, quiet setting, distinctive history, and amenities have drawn people from all over the country to relocate to the Village. Because of many residents have specifically chosen to live in Pinehurst, the sense of community pride and investment is very strong. Arts and cultural facilities and programs could support and grow that sense of community pride by providing opportunities socialization, and helping Pinehurst residents learn, create, and tell the Pinehurst story together.

6. Conclusions

This analysis and research has lead us to the following conclusions on the need for new arts and cultural facilities and programs in Pinehurst:

- * The market in Pinehurst and the surrounding area is challenged because it is small and is located in close proximity to larger markets with strong arts and cultural offerings. Not only is it unlikely for residents of either of these cities to drive to Pinehurst frequently enough sell substantial numbers of tickets, but it is standard industry practice for presenting organizations to insert a “radius clause” in contracts with performers. This radius clause is a geographical restriction that prevents performers from playing again within a specified radius (sometimes up to 300 miles away) within a given time period. These clauses benefit both the presenting organization and the performer because they guarantee that the performance will receive the full attention of the fans throughout the region. Instead of playing for two half-full houses, the performer plays one sold-out performance. Currently, DPAC’s standard radius clause involves a 60-mile area of exclusivity. This would technically exclude the Village of Pinehurst, but it would not be difficult or even surprising for DPAC to extend the area of exclusivity, essentially restricting the PPAC’s access to these top performers when they are on tour. Should Greensboro succeed in building its own performing arts enter, PPAC would have to compete with a series of major presenting organizations for touring product.

- * Current and historic demographic characteristics, particularly those related to educational attainment and income levels, suggest that Pinehurst residents have a propensity to support arts and cultural programs and activities. But the market opportunities seem to us to be more about culture “closer to home,” opportunities for active arts participation, and special events that can drive resort business.
- * With the influx of new families and the growth of Fort Bragg, there may be segments of the local population that are currently underserved by the existing arts and cultural opportunities. But here again, this is more about family and active programming rather than large-scale performances.
- * Pinehurst has a strong tourism infrastructure, but the tourists currently attracted to Pinehurst are focused on golf and are unlikely to take advantage of increased cultural offerings.
- * There is limited demand on the part of potential users for new arts and cultural facilities. Local users by and large are satisfied with the facilities they have access to and have limited ability to pay for access to improved facilities. The Carolina Philharmonic and Conservatory International represent most of the predicted demand for new facilities and the majority of the predicted demand from these two organizations is dependent upon rapid program growth.
- * Southern Moore County has a good inventory of existing facilities with a range of capacities and amenities. Although these facilities could benefit from improvements designed to enhance the audience and performer experience, with the exception of the calendar crunch during the holiday season and spring, these facilities serve the needs of the existing arts and cultural users fairly well.
- * There is still significant potential for arts and culture to play a role in building the quality of life for existing residents, advancing and supporting the goals of the Village of Pinehurst, and becoming a significant economic driver for Pinehurst in the future, but this need not take the form of a new large-capacity venue.

7. Recommendations

7.1 A Large Capacity Performing Arts Center

We would not recommend the development of a large new venue the reasons outlined above. The market is not large enough, demand is not strong enough, current facilities are reasonable, and there are other ways for cultural development to support economic and community development.

7.2 Other Opportunities

Having established that a large-capacity performing arts center would not be sustainable in Pinehurst, we then come back to the question of whether some of the goals of the PPAC project can be accomplished using a different approach. The goals for the PPAC project as we understand them are as follows:

- * Enhance and grow arts and cultural educational opportunities for local and regional children and youth.
- * Build vitality in the Village Place (formerly New Core) neighborhood by giving Pinehurst and regional residents a reason to make this area part of their regular routine.
- * Build a strong base of cultural tourists to drive the local economy.
- * Improve the quality of life for local residents and give young families and professionals another reason to want to relocate to Southern Moore County.
- * Support existing arts and cultural organizations.

Investment in arts and cultural programs, organizations, and facilities can accomplish these goals for Pinehurst and the region, but the focus needs to move away from a single building. Instead, there must be an organized community-wide effort to identify and prioritize projects, organizations, and opportunities that can put the arts and culture in the forefront of the regional identity, making Pinehurst (and Southern Moore County) a community where people interested in arts and culture want to live, work, and visit.

The key to this approach will be to support the activities and organizations currently in Pinehurst and Southern Moore County, and to cultivate creative opportunities that represent a natural outgrowth of the region's goals, amenities, and character.

As the research and analysis established, despite market characteristics that suggest a propensity to support the arts, presently the arts and cultural community is weak and fractured. The communities in Southern Moore County have strong core identities, but arts and culture have not historically been part of those identities. The region does, however, have many amenities that if coordinated properly could lead to a stronger and more organized base of artistic and cultural heritage base.

As plans are made and options discussed, there are three criteria to be kept in mind. They are as follows:

- * **Distinctive:** As the SmART report states, "Arts driven development is most sustainable when it builds on the existing activities of artists and arts organizations." The goal should not be to make Pinehurst "the next" anything. Investment and growth should focus on accomplishing the goals stated above in ways that meet community needs and complement the unique history, character, assets, and identity of Pinehurst and Southern Moore County.

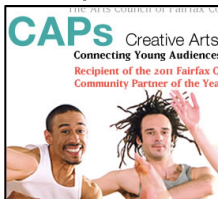
- * **Gradual:** Expectations also have to be managed regarding the speed of development for building cultural amenities to serve local residents and visitors alike. In many of our interviews, people cited examples of small communities with significant artistic and cultural amenities such as Chautauqua and the Interlochen Center for the Arts. These successful communities are excellent aspirational stories to keep in mind and to stay motivated, but it must be remembered that these successes came out of decades of slow, careful, and natural growth. There may be some efforts that can be launched before the US Open and US Women’s Open in 2014, but overall planning efforts must take a much longer view.
- * **Community-wide:** To be truly successful in terms of sustainability, the development of arts and cultural programs and facilities must be a community-wide effort driven by local residents and institutions individually and in partnership with each other. These individuals and organizations should be pursuing projects that further their individual goals while at the same time helping make Southern Moore County an environment that celebrates, nurtures, and shares its arts, culture, and history. Key partners should include the Pinehurst Resort, the Moore County School System, Sandhills Community College, Fort Bragg and the Fort Bragg Regional Alliance, the PILOT, and the governments of the Village of Pinehurst and the Towns of Southern Pines and Aberdeen.

7.3 Action Steps

Below we’ve listed some suggested steps to give a sense of how an organized creative place-making effort might get started. For each recommendation, we’ve provided an example that describes how other communities around the US have approached similar projects.

1. **Organize the Existing Arts and Cultural Community with a re-focused Arts Council:** One of the first issues that must be addressed is the fractured nature of the arts and cultural community right now. Although the Moore County Arts Council does provide some marketing support for area organizations, there have historically few coordinated advocacy, partnership, or scheduling efforts. We recommend that the Moore County Arts Council take a leadership role in helping connect the arts and cultural community through informal networking gatherings and/or more formal programs focusing on advocacy, joint marketing, professional development, and more.

Example: Arts Council of Fairfax County, Fairfax, VA



Founded in 1964, the Arts Council of Fairfax County is a nonprofit organization and the designated arts agency for Fairfax County. The Arts Council oversees arts policy and advocacy for Fairfax County by taking on efforts such as providing a leadership role for the County’s Master Arts Plan. Additionally, the Arts Council provides a range of education programs, including professional development workshops and lectures,

and Video Fairfax, a partnership between the County, Arts Council, Cox Communications and Fairfax Public Access that provides students with access to film and media equipment and includes a juried competition. The Arts Council also produces Creative Arts Programs (CAPs), a service that connects local schools with arts educators, teaching artists and performers. Finally, the Arts Council also oversees the disbursements of grants totaling \$500,000 annually.

2. **Develop Conservatory International:** The community is fortunate to have had David Michael Wolff arrive and advance a vision for Pinehurst as a cultural center. He is talented, articulate and well intentioned, and it is now important to capture and direct his energy in positive directions. In our minds, the key is the Conservatory concept, as it represents an opportunity to respond to local residents, seasonal residents and visitors. Teaching programs can be developed over time in ways that are regionally distinctive, leading (over time) to the development (or redevelopment) of teaching, rehearsal and performance facilities.

Example: New Hampshire Music Festival, Meredith, NH



Founded in 1952, the New Hampshire Music Festival is a nonprofit and summer music festival in residence at the Silver Center of the Arts at Plymouth State University. Live programming during July and August includes a Classic Series, Pops Series, Chamber Music Series and pre-concert lectures. The Festival also provides statewide education programs for public school children during the academic year. Education programs include Music in Our Schools, which provides students with both hands-on activities and concerts in an intimate setting. Since 1994, the Festival has worked with public schools in Laconia, NH to operate the Visiting Artist program. The Visiting Artist program works with artists early in their professional career who are placed in-residence at a school. Activities include lectures and demonstrations, concerts and master classes.

3. **Grow the Palustrus Festival:** The annual Palustrus Festival, the weekend-long, community-wide project of the arts is off to a great start, with more than 100 events in 30 venues in 2012. This festival embodies all of the characteristics essential to growing the arts and culture in Southern Moore County. It encompasses partnerships and participation from all kinds of community organizations, it embraces multiple disciplines and genres, and many of the events celebrate local heritage and character. We recommend investment and planning around how to increase the size and impact of the Palustrus Festival in a way that is sustainable and beneficial to Pinehurst.

Example: The Scottsdale Arts Festival, Scottsdale, AZ



Founded in 1971, the Scottsdale Arts Festival is a 3-day festival that occurs each year in March. The Scottsdale Arts Festival, which is located adjacent to the Scottsdale Center for the Performing Arts and the Scottsdale Museum of Contemporary Art, attracts nearly 40,000 visitors

each year. The juried festival features the work of nearly 200 artists in disciplines that include painting, sculpture, glass, ceramics, jewelry and photography. Art is available for purchase both online and directly through artists at the festival. The Festival is also popular for families, providing workshops for children, a kid’s area, and food trucks. There are also a number of activities to experience, including 22 bands performing on 2 stages and artists-in-residence at the festival creating art and demonstrating techniques.

4. **Tufts Archives at Given Memorial Library:** Expansion plans for the Given Memorial Library already include a flexible presentation hall that could be used for performance or other activities. Combining arts and library facilities is mutually beneficial, creating possibilities for programming partnerships, community access, and presented lectures, literary events and other programs. To that end, we endorse the inclusion of performance facilities into the expansion plans for the Given Memorial Library, and encourage thinking around how these facilities could serve the library and community, creating opportunities for both audiences and local arts organizations.

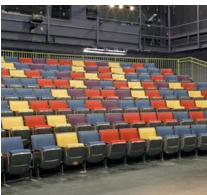
Example: Canyon Theater at Boulder Public Library, Boulder, CO



The Canyon Theatre is located in the former Main Boulder Public Library, which was constructed in 1961. In 1992, the old Main Boulder Public Library was renovated into the Canyon Theater and administrative facilities and a new main branch was constructed. The Canyon Theater is an intimate 213-seat venue. Additional components include the Canyon Gallery and the Boulder Creek Meeting Room. The Boulder Public Library Commission and the City of Boulder operate the Theater. Programs and activities include a free library concert series, exhibitions, a library cinema program, storytelling and theater events and performances, and rentals from government, neighborhood and community group rentals.

5. **Adaptive Re-use of the Historic Firehouse in Pinehurst:** This facility has great potential for adaptive reuse for the Carolina Philharmonic and Conservatory International or another cultural purpose. Its geographic location could drive traffic to Village Place while putting an arts or cultural organization in the heart of the Village. Nationally, there are a number of examples of successful adaptive reuse of vacant firehouses into performing and visual arts facilities.

Example: Firehouse Theater, Louise Hopkins Underwood Center for the Arts (LHUCA), Lubbock, TX



Founded in 1997, LHUCA is a nonprofit arts organization, arts campus and regional arts center. One of LHUCA’s first acquisitions was a vacant fire station donated by the City in 1997. The Firehouse Theatre occupies one of the former engine bays and is a 159-seat black box theater. The other

engine bay was transformed into exhibition space. Physical characteristics of the Firehouse Theatre include flexible seating configuration, projection capabilities and an acoustically superb facility for amplified and unamplified performances.

6. **Enhance High School Performance Facilities:** We are seeing a number of projects across the US where school systems and public or private entities partner to fund enhanced performance facilities in exchange for a certain amount of community access. We already put forth the idea of making improvements to Pinecrest High School Auditorium. Also, the Moore County School System has identified the need for a new high school, though there are several other capital projects that have priority before planning for a new high school moves forward. If large-scale presenting activity is still a priority for the community, it may be possible to launch a project to enhance one or both of these facilities to allow high-quality, large-scale presenting activity to happen. It is important to acknowledge that scheduling will be a key issue in planning for this facility. Available times in the auditorium may not correspond with the times that community organizations want to use the space, so this arrangement will likely be most appropriate for presenting or programming activity that happens during off-peak times.

Example: Glens Falls High School, Glens Falls, NY



Renovated in 2008, the Auditorium in Glens Falls High School is a 1,400-seat proscenium theater. The renovation was managed by the Glens Falls City School District. A steering committee, composed of resident arts organizations such as the Glens Falls Symphony Orchestra and the Lake George Opera Company, also provided input. The renovations included the installation of electrical acoustical enhancement systems, motorized rigging and theatrical lighting upgrades and improvements to the stage floor and auditorium carpeting and house lighting.

Example: Palm Theatre for the Performing Arts at Telluride High School, Telluride, CO



Operated by the Telluride R-1 School District, the Palm Theatre is a 597-seat proscenium theatre that has both a fly tower and an acoustic shell. The Palm Theatre is very much a community space, with programming that includes the Palm Presents Series, the Artists in the Schools Program and community rentals. Telluride High School uses the facility frequently for band and choral concerts, renowned speakers, science fairs, poetry readings and student productions and presentations.

7. **Incorporate Arts Spaces Into New Community Facilities:** As and when the Community Center in Cannon Park project progresses, support space for performing arts organizations could be built into the design for the center. Specifically, Conservatory

International has expressed a need for practice rooms and rehearsal rooms to support its planned activities. Rather than build an entirely new building for these purposes, the community center could include flexible, multi-purpose spaces designed both for use by Conservatory International, but also for community use.

Example: McLean Community Center, McLean, VA



Constructed in 1975, the McLean Community Center houses a range of spaces, including meeting and conference space, a commercial kitchen (that is also a teaching space), performance and rehearsal facilities, arts workspaces, and exhibition space. The 386-seat Alden Theatre is home to the Live! the Alden Presenting Series and is used by local organizations for performances and event rentals. Additionally, the Community Center offers a variety of exhibitions and all-ages arts programming and instruction.

8. **Enhance Existing Performance Facilities:** Although there are no major gaps in the inventory of performance facilities in Southern Moore County, the existing facilities could certainly benefit from some additional capital investment to maintain the buildings and improve the audience and performer experiences. Specific suggestions include funding the Sunrise Theatre roof repair campaign, investing in amenities like a box office at Owens Auditorium, and repairing/improving Pinecrest Auditorium by refurbishing the lobby and adding a concessions booth.

Example: South Florida Community College Theatre for the Performing Arts, Avon Park, FL



The Theatre for the Performing Arts at South Florida Community College was developed out South Florida Community College's old auditorium, which was originally constructed in 1978. The transformation of the auditorium to the new Theatre for the Performing Arts was completed in February 2010. South Florida Community College and the College's private foundation, which led a capital campaign to offset the construction costs, funded the project. The renovation improved sound and lighting systems but also reconfigured the space, adding balcony level seating, which increased the seat capacity of the venue to 1,460. Three large lobbies, which also function as gallery spaces, were created and balcony level patron amenities such as restrooms were added. Notably, the renovation added 20 feet to the fly space and upgraded stage rigging. Finally, the number of seats in the orchestra level was reduced to make room for a new orchestra pit.

9. **Weymouth Center for the Arts & Humanities:** The Weymouth Center has the fundamental mission to celebrate cultural heritage that is unique to Pinehurst and the region. The Center's exhibits and programs should be supported and publicized as much as possible. We recommend further consideration around ways to publicize the rich heritage of the

Weymouth Center and to open the house up to the public for community and educational events and experiences.

Example: Smith-McDowell House Museum, Asheville, NC



Originally constructed in the 1840's, the Smith-McDowell House Museum was saved from demolition by the Western North Carolina Historical Association in 1974 and converted into a museum in 1981. The Museum offers a number of public programs and activity, including permanent and rotating exhibits, children's programming, living history days and birthday parties, field trips and other school programming and a lecture series.

The Smith-McDowell House is also home to the Tar Hell Junior Historians Association.

8. Next Steps

We believe that the next steps for this study effort are to strategize as to how to move forward and implement these recommendations, which might include the identification of priorities, exploration of partnership opportunities and the development of a fundraising strategy.

We look forward to the final presentation of this report, incorporating feedback and reviewing next steps with the Steering Committee.

appendix a: study interview participants

Study Interview Participants

Becky	Anliker	Moore Philharmonic Orchestra
Paul	Barnes	Moore Philharmonic Orchestra
Cinny	Beggs	Moore OnStage
Larry	Best	
Dick	Bisbe	
Harris	Blake	North Carolina Senate
Glenn	Bower	Pinehurst Civic Group
Stanley	Bradshaw*	Bradshaw Capital Management
John	Cashion	Village of Pinehurst Council
Marian	Caso	Pinehurst Business Guild
Patrick	Corso*	Moore County Partners in Progress
Patrick	Coughlin	Moore County Chamber of Commerce
Joe	Currie	Moore County Choral Society
Brian	Deaton	Pinehurst Civic Group
John	Dempsey*	Sandhills Community College
Marijanet	Doonan	North Carolina Symphony, Moore County Chapter
Paul	Dunn	
Chris	Dunn	Arts Council of Moore County
Jack	Farrell	
Joyce	Franke*	
Robert	Hawkins	
Robert	Hayter*	The Hayter Firm
Patrick	Henry	Pinehurst Civic Group
Norris	Hogdkins	
Caroline	Ivey	Moore County Choral Society
Robert	Kinelski	
Joe	Koontz	Pinehurst Civic Group
Eric	Kopecky	Moore Philharmonic Orchestra
Katherine	Liles	Town of Aberdeen
Sandi	Macdonald	North Carolina Symphony
Katherine	MacRae	Arts Council of Moore County
Rob	Maddrey	North Carolina Symphony
John	May*	Robbins May & Rich, Attorneys at Law
Doug	Middaugh	
Caleb	Miles	Pinehurst, Southern Pines, Aberdeen Area Convention & Visitors Bureau
Audrey	Moriarty	Tufts Archives
Reagan	Parsons	Town of Southern Pines
Thomas	Pashley	Pinehurst Resort
Hope	Price	Weymouth Center for the Arts & Humanities
Mary	Robosson*	Fundraising Consultant
Joel	Shriberg*	
Gary	Southard	Arts Council of Moore County
Alan	Stagaard*+	Stagaard & Chao Architects
Joe	Stevenson	North Carolina Symphony, Moore County Chapter
John	Strickland*+	Village of Pinehurst Council
Diana	Turner-Forte	Carolina Performing Arts Center
Andy	Wilkison*+	Village of Pinehurst
David Michael	Wolff*+	Carolina Philharmonic
Paula	Womack	Carolina Performing Arts Center
David	Woronoff*	The Pilot
Dick	Wright	

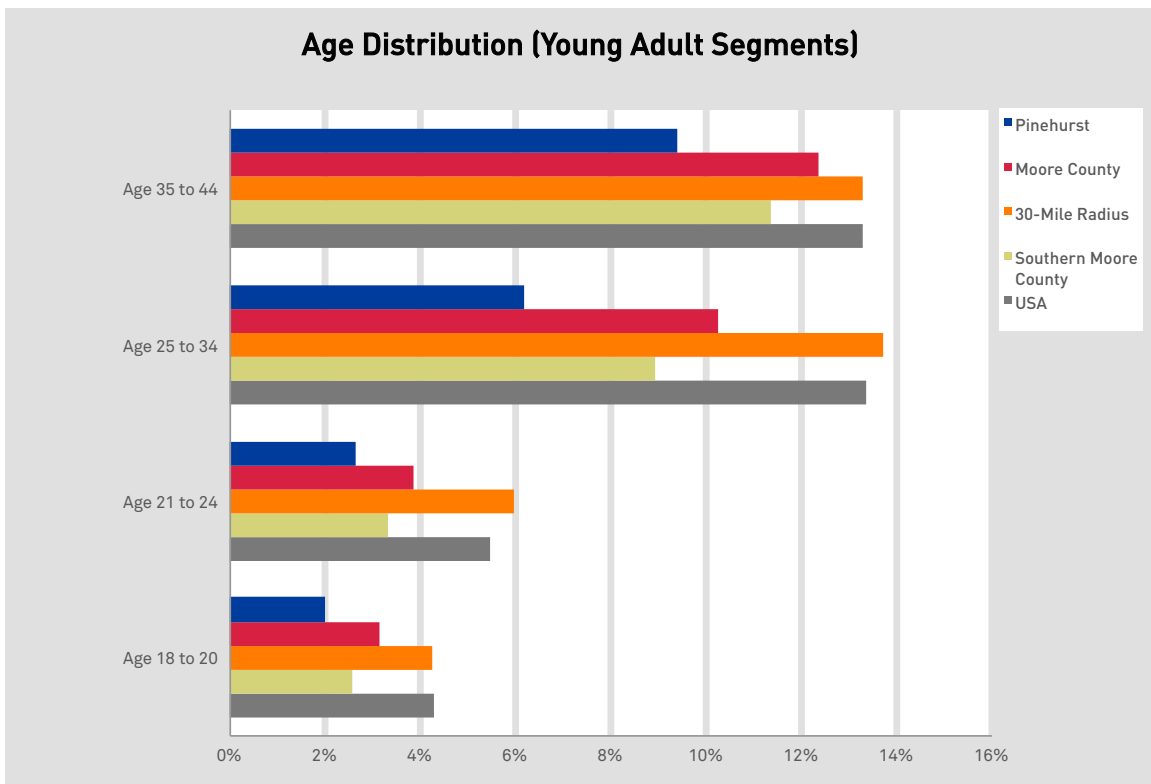
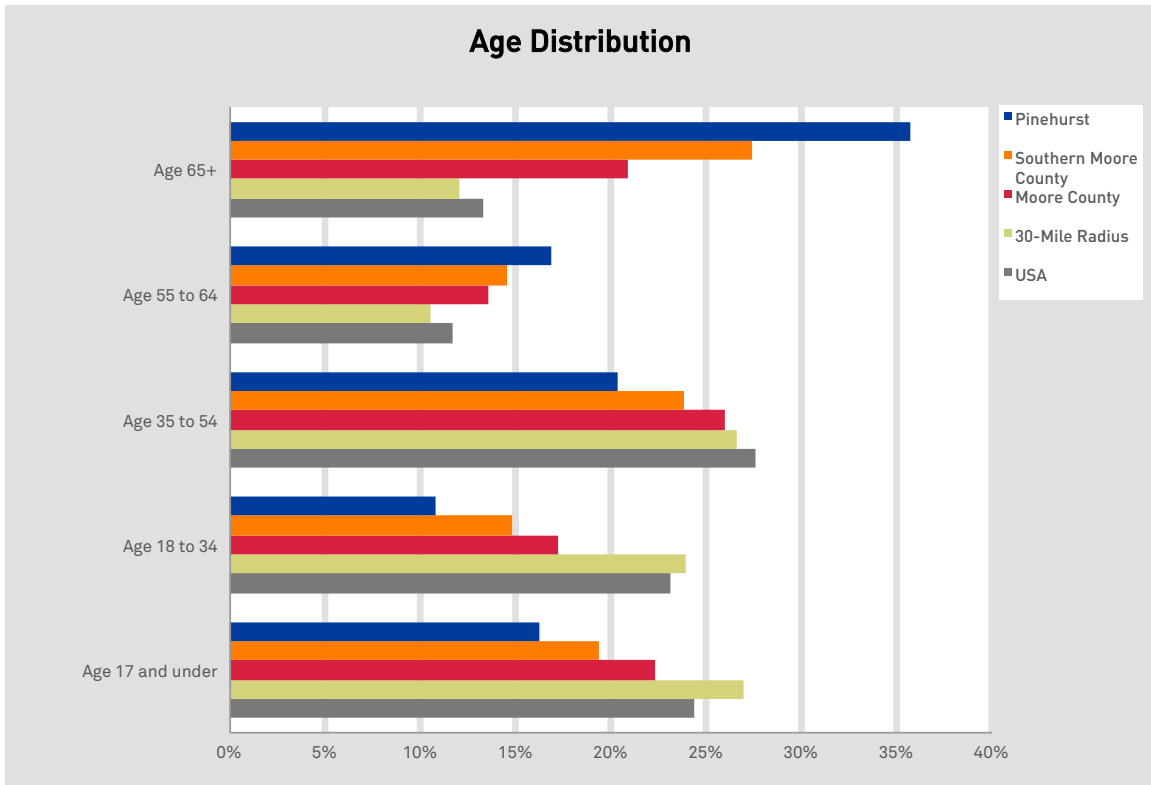
* Denotes a member of the Pinehurst Performing Arts Center Advisory Board

+ Denotes a member of the Study Steering Committee

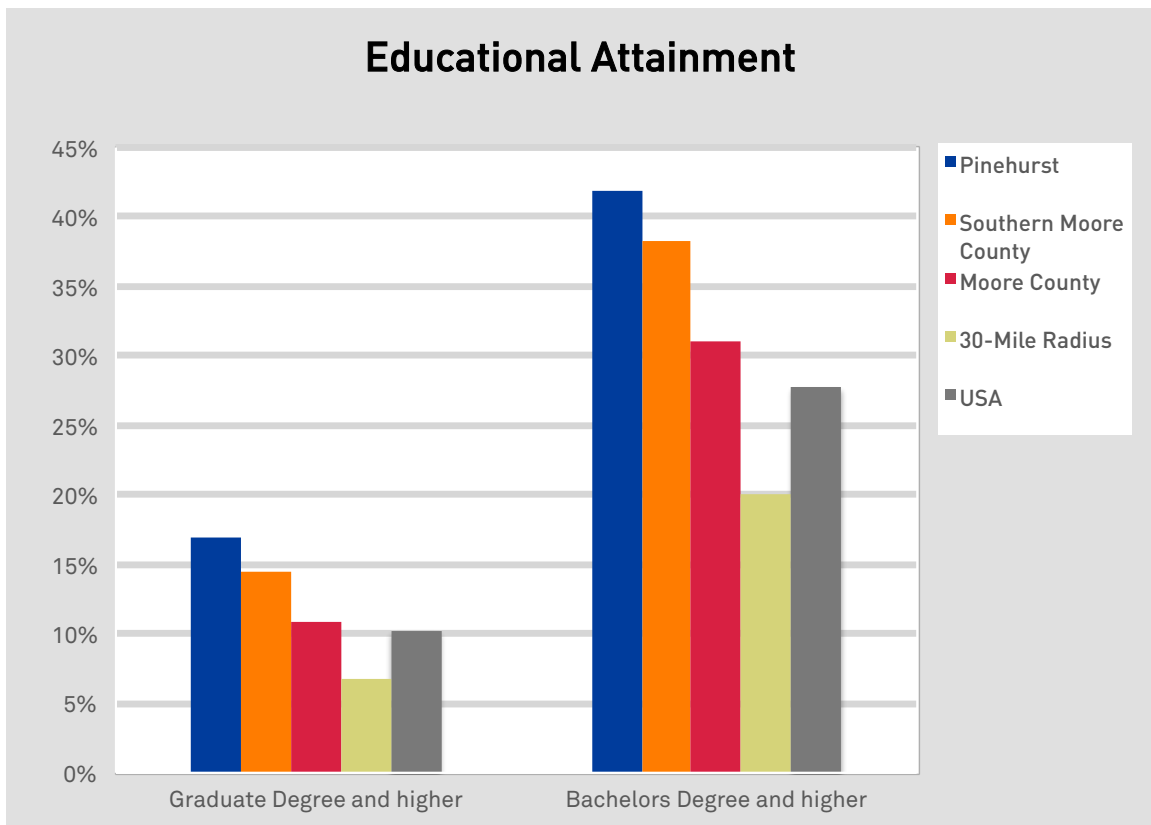
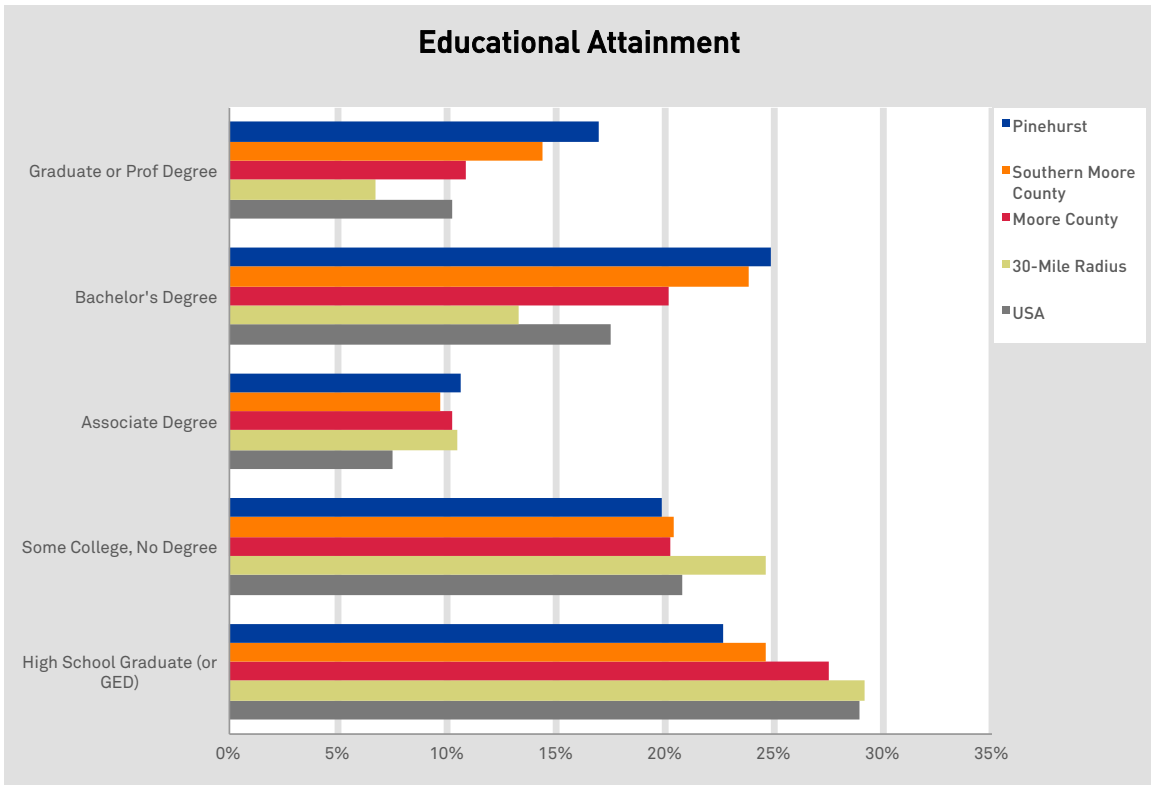
appendix b: market analysis

1. Market Characteristics

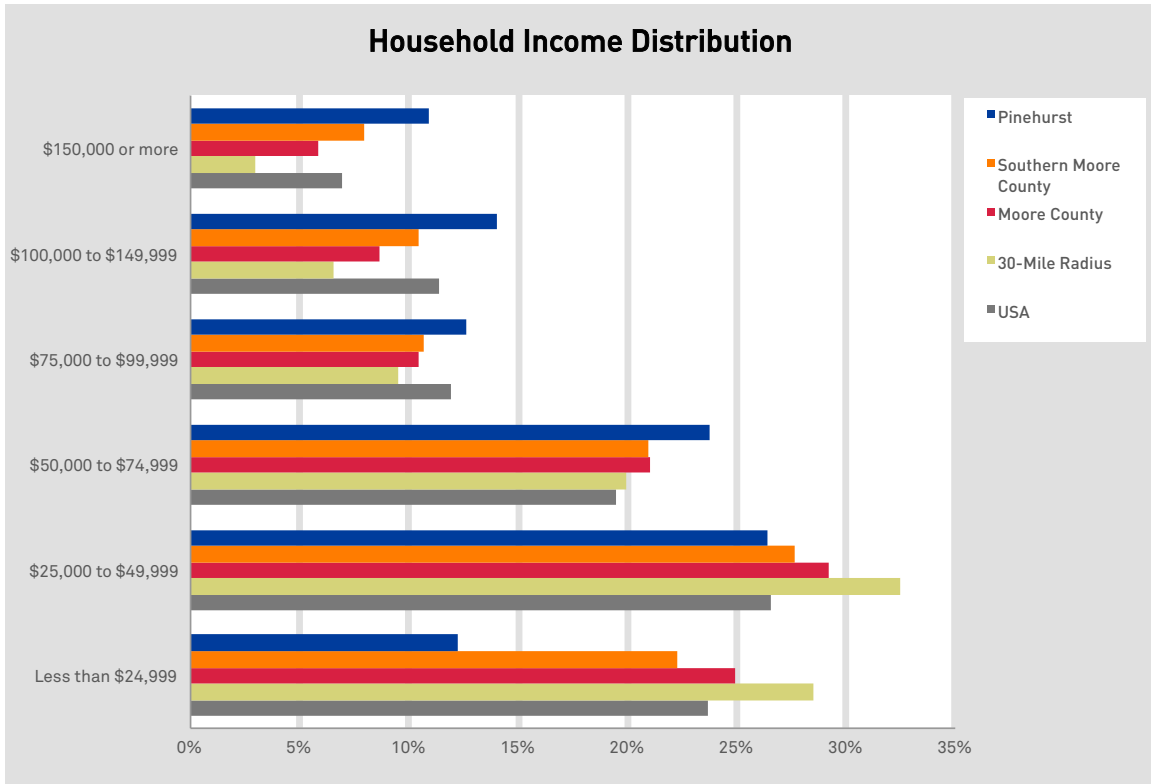
A. Age



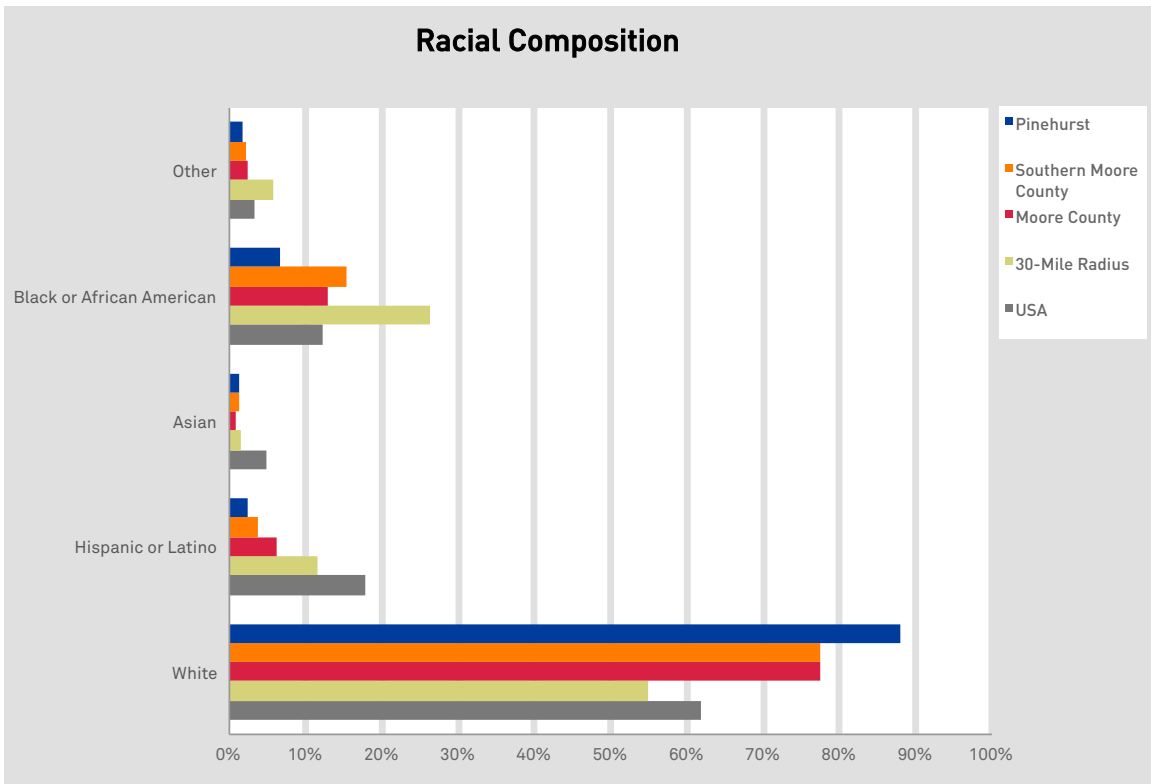
B. Education



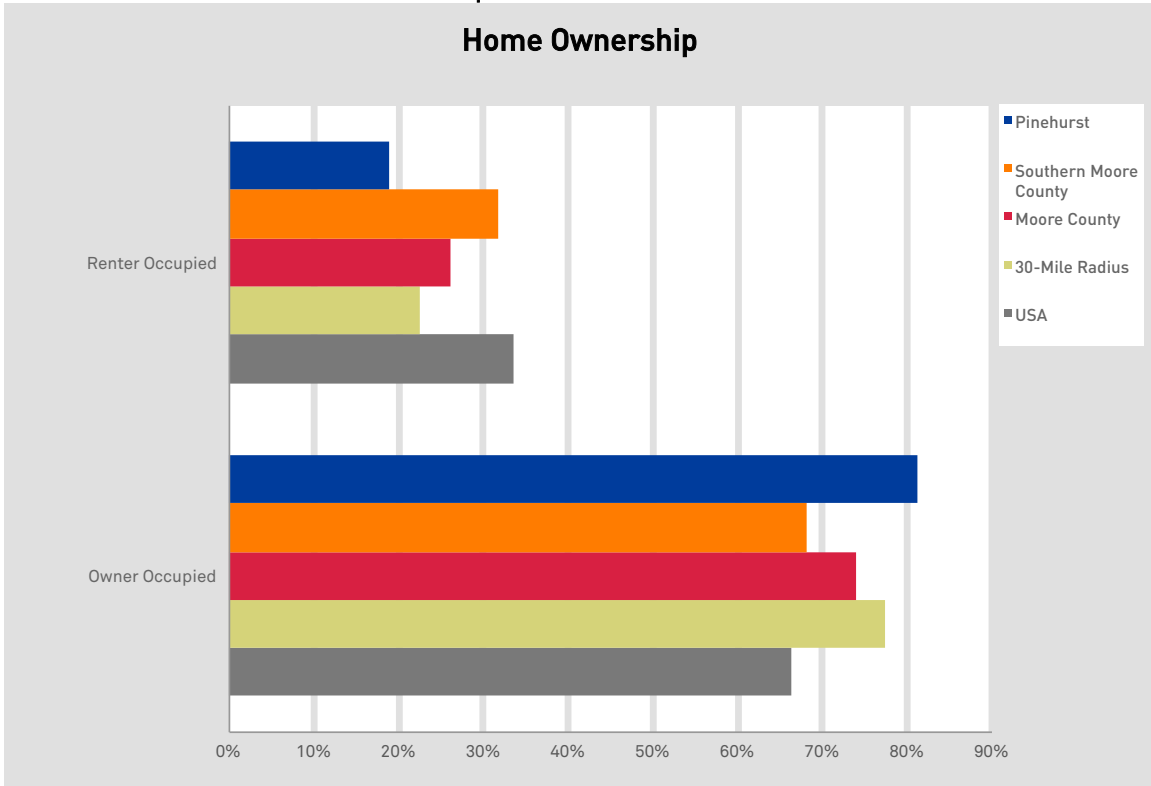
C. Income



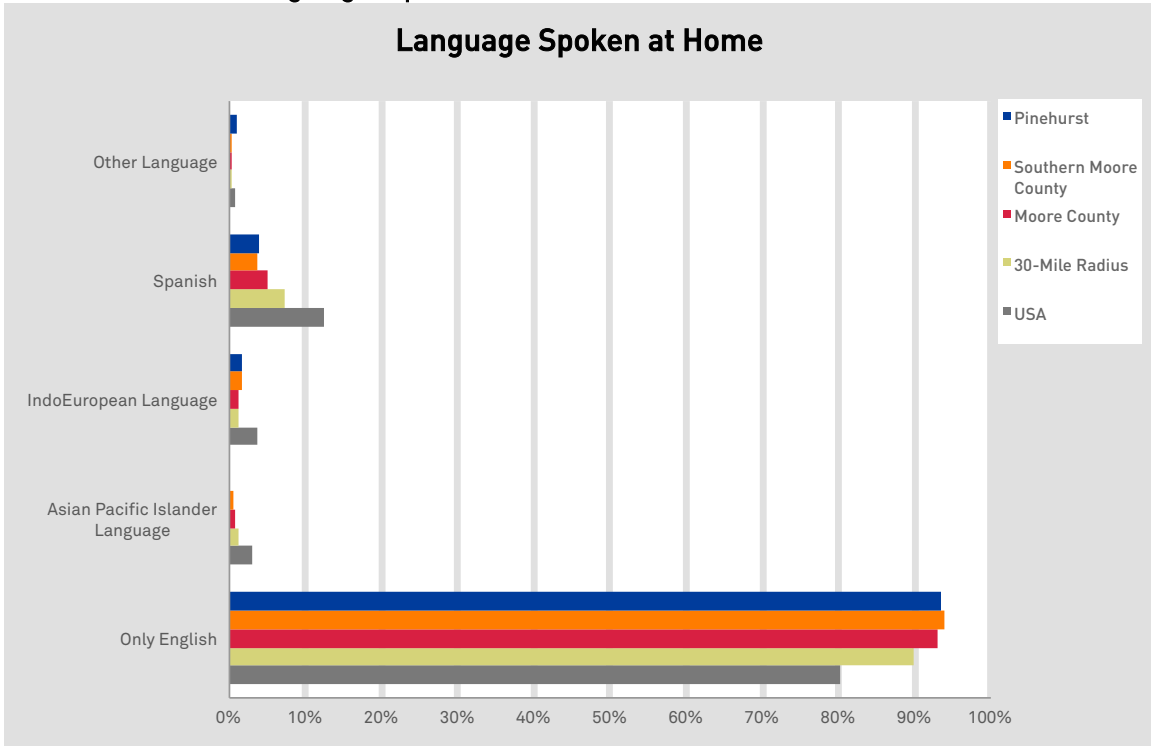
D. Race



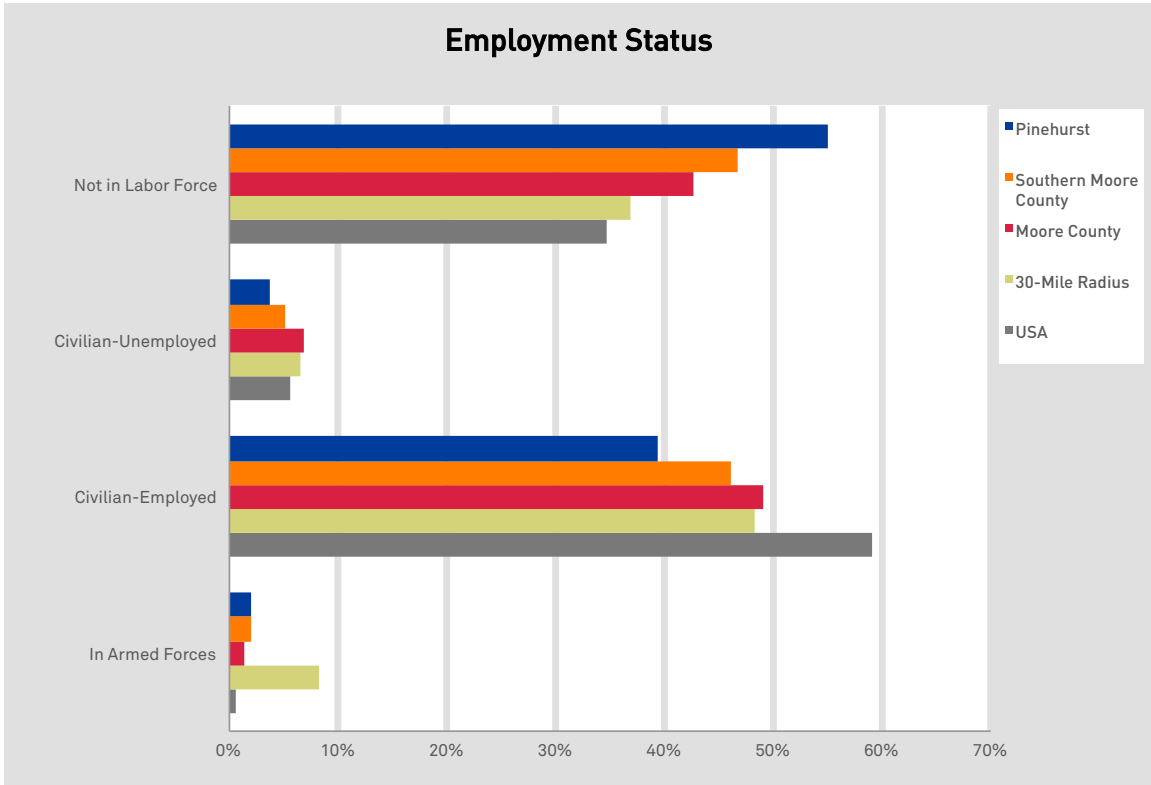
E. Home Ownership



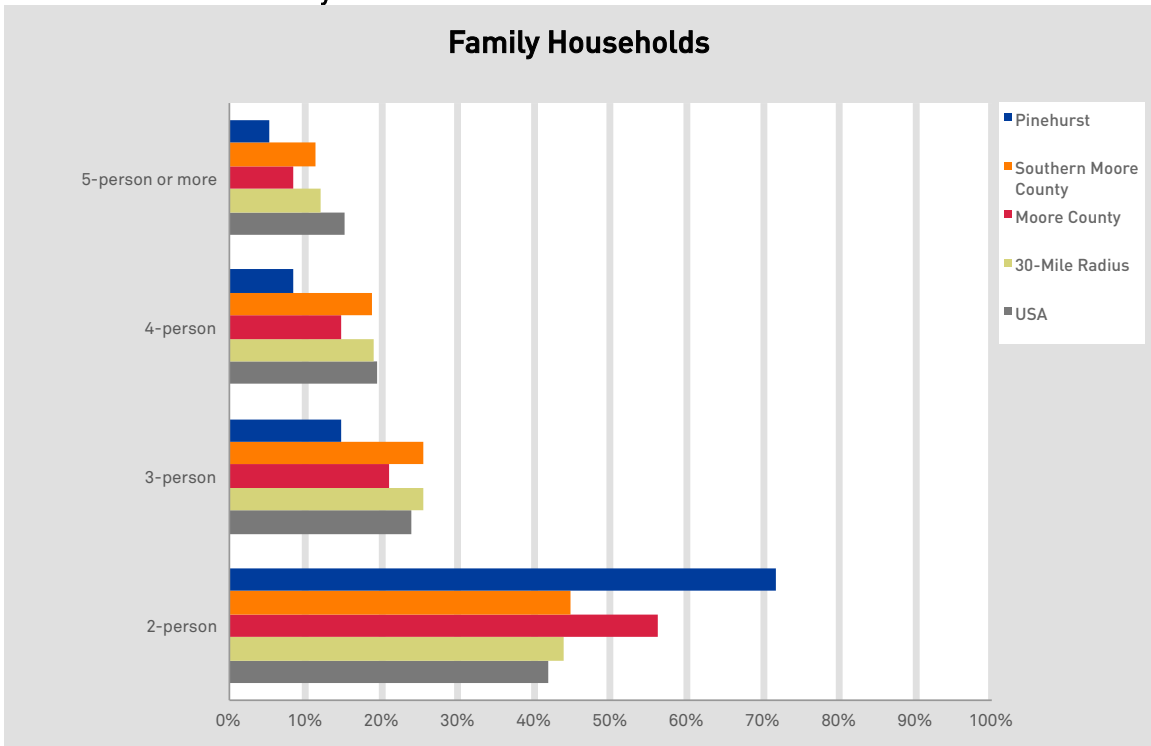
F. Language Spoken at Home



G. Employment Status

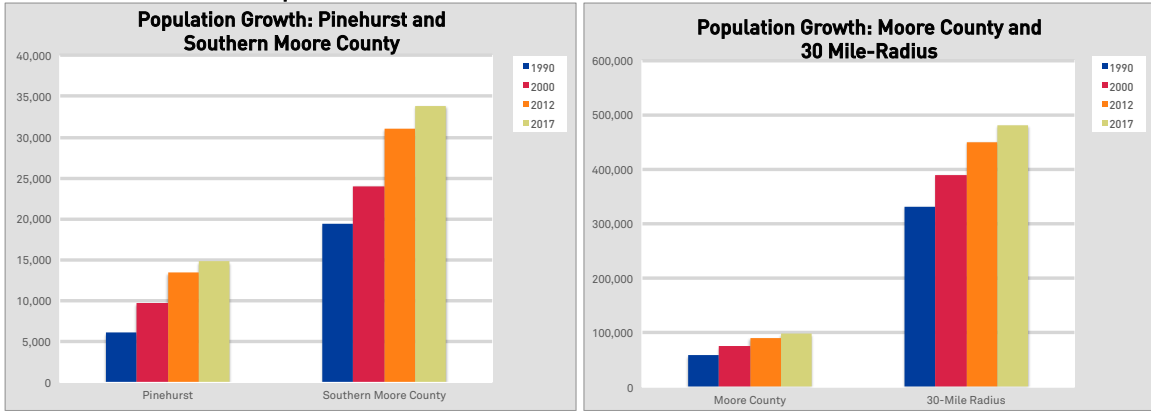


H. Family Households

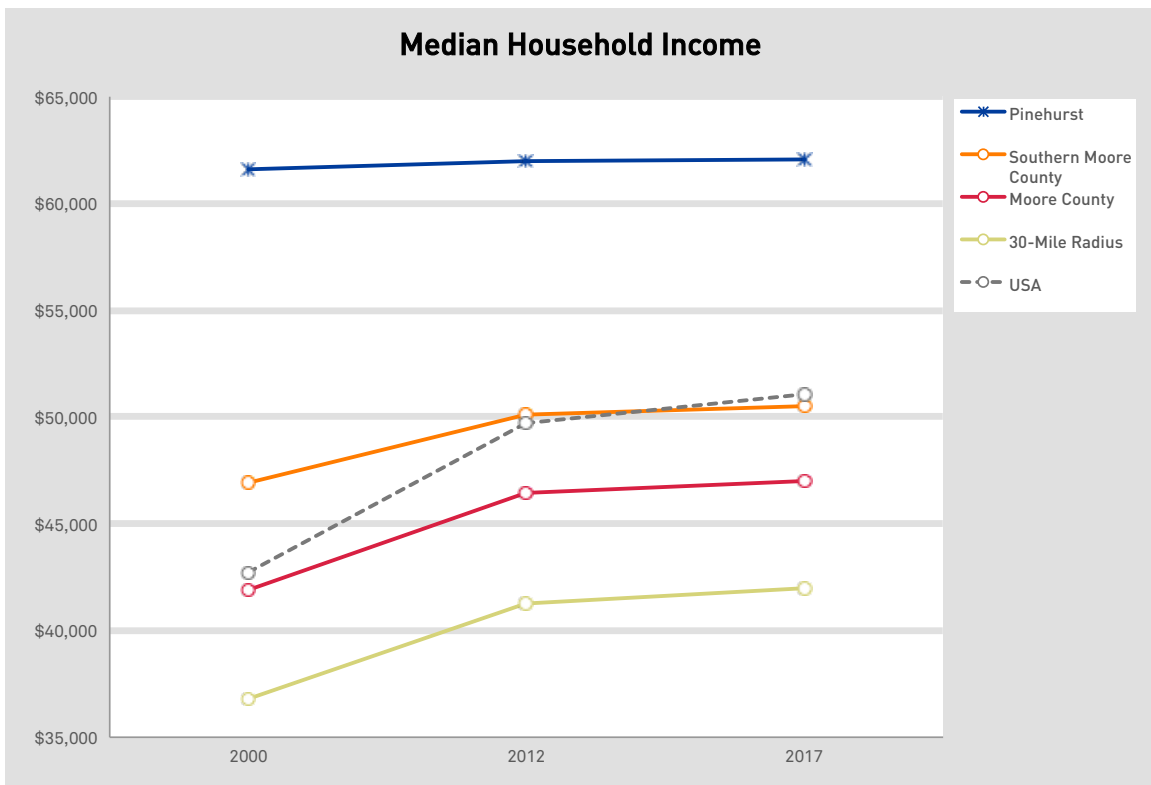


2. Market Trends

A. Population Growth



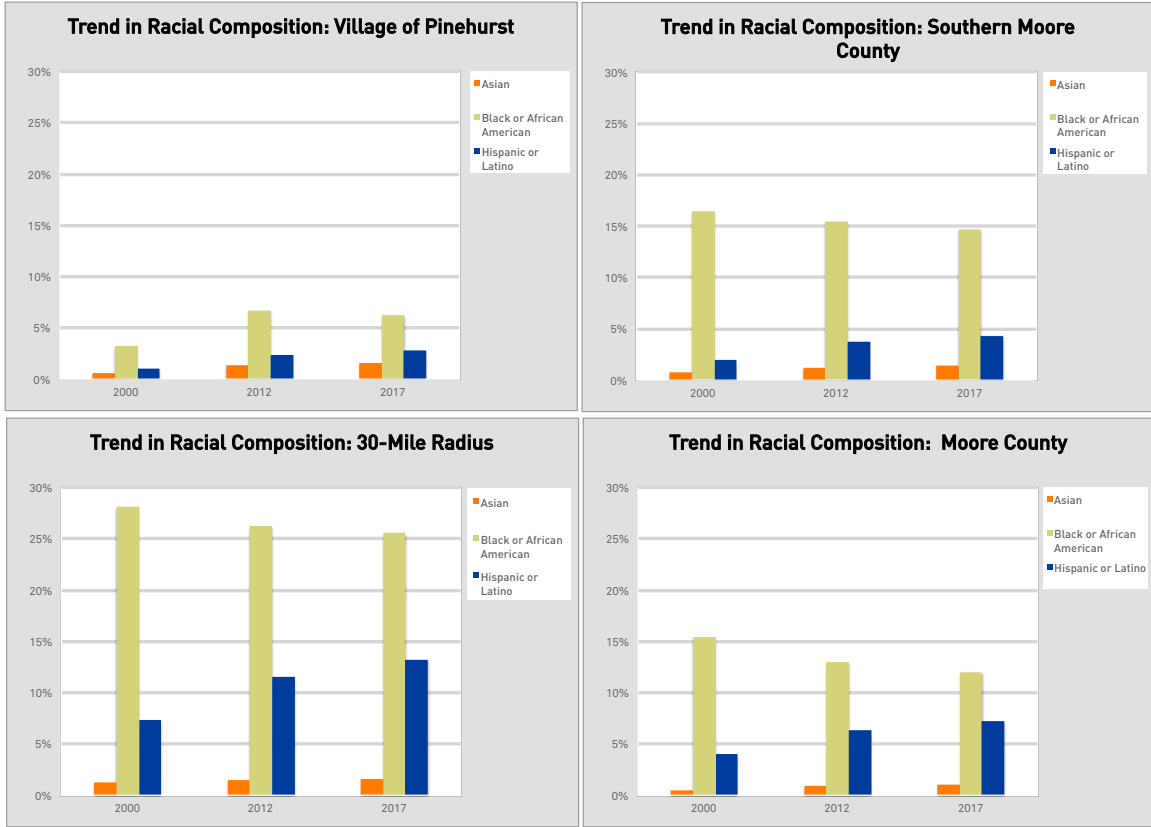
B. Income



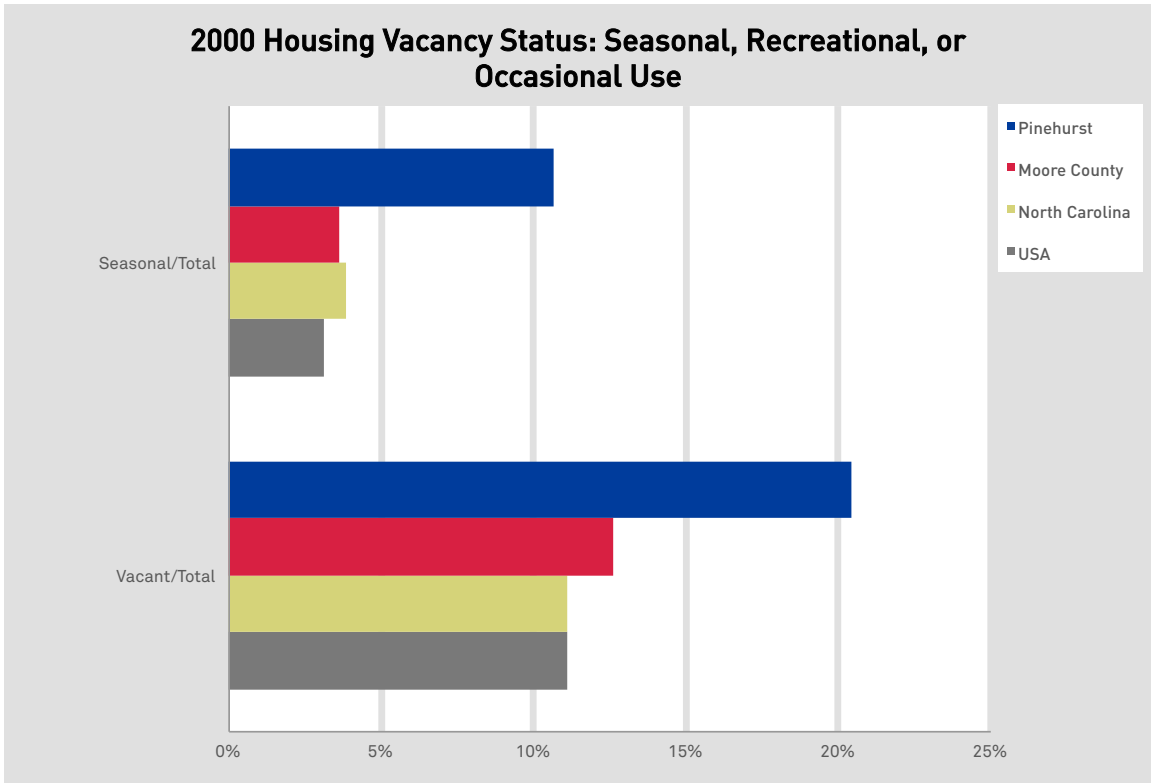
C. Age



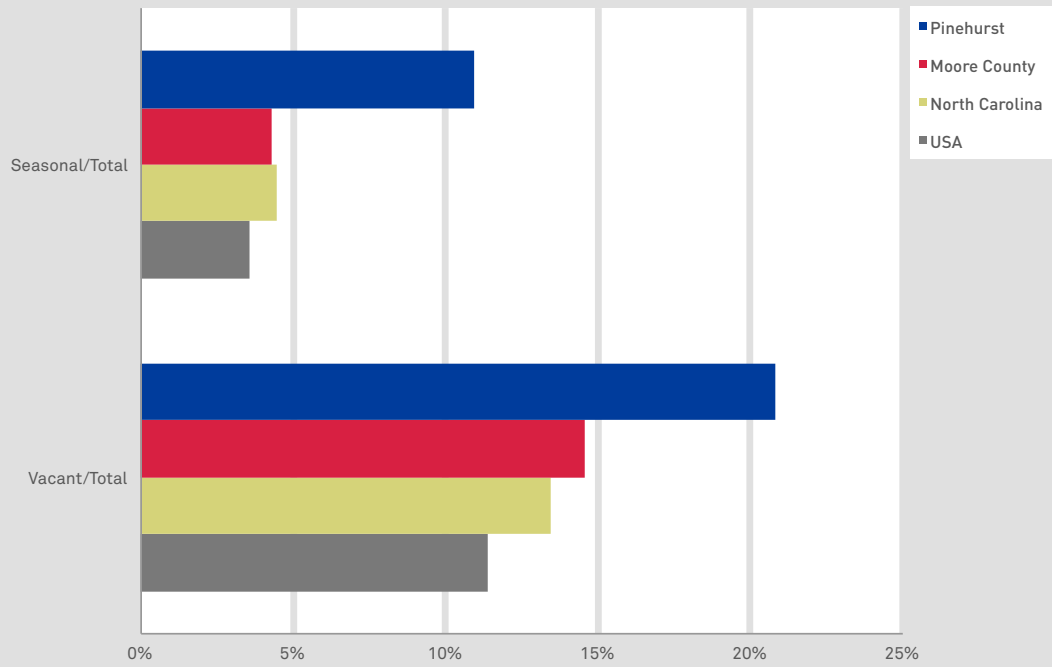
D. Race and Ethnicity



E. Seasonal Housing



2010 Housing Vacancy Status: Seasonal, Recreational, or Occasional Use



appendix c: facility inventory

Performance Facility Inventory: Facility Ratings

	Capacity	Types of Activity*	Building Condition	Staff and Support	Theatrical Functionality	Room Acoustics	Customer Amenities	Performer Amenities	Atmosphere/Character	Suitability for Users	Rating
Pinehurst											
1 Pinehurst Resort (Grand Ballroom)	1,000	5	3	2	1	2	2	2	3	1	2.1
2 Sandhills Community College (Owens Auditorium)	699	5	3	2	3	3	2	3	2	3	2.6
3 Fair Barn	600	9	4	2	1	1	2	1	4	1	2.2
4 Pinehurst Resort (Cardinal Ballroom)	500	4	3	2	1	2	2	2	3	1	2.1
Southern Moore County											
1 Pinecrest High School (Robert E. Lee Auditorium)		City									
		Southern Pines									
2 Sunrise Theater	1,330	6	2	2	3	3	2	2	2	3	2.3
3 The O'Neal School (Hanna Center Theater)	361	6	3	3	3	3	2	2	4	3	2.9
4 Poplar Night Spot	251	6	4	2	2	2	2	2	2	3	2.5
5 Aberdeen Recreation Station	150	6	3	2	2	2	2	2	4	3	2.5
6 Weymouth Center for the Arts & Humanities (Great Room)	130	5	4	2	1	1	2	2	2	1	2.1
	90	9	3	2	1	2	2	1	4	1	2.1
Planned Facilities											
Given Memorial Library & Tufts Archives Expansion Project		Pinehurst									
Aberdeen Recreation Station Phase II		Aberdeen									
	240	Flexible Presentation Space									
	300-400	5,500 sq ft space would contain a retractable stage									

Performance Facility Inventory: Programs & Activity

		Producing						Presenting Activity								Rentals				
		Theatre	School/College	Music	Dance	Comedy	Arts Education	Film	Broadway	Comedy	Dance	Music	Theatre	Family	Lectures	Performing Arts	Private/Civic Events	Outside Promoter	Other	
		Capacity																		
Pinehurst																				
1	Pinehurst Resort (Grand Ballroom)	1,000																		
2	Sandhills Community College (Owens Auditorium)	699	■	■	■		■					■	■		■	■	■			
3	Fair Barn	600													■	■				
4	Pinehurst Resort (Cardinal Ballroom)	500													■	■	■	■		
Percent of facilities with Programs & Activity			25%	25%	25%	0%	0%	25%	0%	0%	0%	0%	75%	25%	0%	25%	100%	100%	75%	75%
Southern Moore County																				
1	Pinecrest High School (Robert E. Lee Auditorium)	Southern Pines	1,330	■	■	■		■												
2	Sunrise Theater	Southern Pines	361						■											
3	The O'Neal School (Hanna Center Theater)	Southern Pines	251	■	■	■		■												
4	Poplar Night Spot	Aberdeen	150										■		■					
5	Aberdeen Recreation Station	Aberdeen	130						■						■					
6	Weymouth Center for the Arts & Humanities (Great Room)	Southern Pines	90									■			■					
Percent of facilities with Programs & Activity			33%	33%	33%	0%	0%	50%	33%	0%	0%	0%	67%	17%	17%	50%	100%	100%	50%	50%

Performance Facility Inventory: Facility Features

		Types of Space			Features				
		Alcohol Allowed	Film/ Projection Equipment	Parking	Flexible seating	Rehearsal or Program Space	Gallery	Fly Space	Other Event Space
Pinehurst									
1 Pinehurst Resort (Grand Ballroom)	Capacity: 1,000	■	■	■	■				■
2 Sandhills Community College (Owens Auditorium)	Capacity: 699	■	■	■				■	
3 Fair Barn	Capacity: 600	■	■	■	■				
4 Pinehurst Resort (Cardinal Ballroom)	Capacity: 500	■	■	■	■				■
Percent of facilities with Facility Features		100%	100%	75%	75%	0%	0%	25%	50%
Southern Moore County									
1 Pinecrest High School (Robert E. Lee Auditorium)	City: Southern Pines Capacity: 1,330		■	■		■		■	
2 Sunrise Theater	City: Southern Pines Capacity: 361	■	■	■					
3 The O'Neal School (Hanna Center Theater)	City: Southern Pines Capacity: 251			■		■		■	
4 Poplar Night Spot	City: Aberdeen Capacity: 150	■	■	■	■				
5 Aberdeen Recreation Station	City: Aberdeen Capacity: 130	■	■	■	■	■			■
6 Weymouth Center for the Arts & Humanities (Great Room)	City: Southern Pines Capacity: 90	■	■	■	■		■		■
Percent of facilities with Facility Features		67%	50%	83%	50%	50%	17%	33%	33%