



management
services
incorporated



September 2019

Cultural Facilities Needs Assessment

Prepared for the City of Carlsbad, CA

contact:

Duncan Webb

Webb Management Services, Inc.

501 Fifth Avenue, Suite 1202

New York, NY 10017

(212) 929-5040

duncan@webbmgmt.org

table of contents

EXECUTIVE SUMMARY	3
1. INTRODUCTION.....	10
2. FORCES + TRENDS.....	12
3. MARKET ANALYSIS.....	16
4. EXISTING FACILITIES	24
5. USER DEMAND	32
6. BENEFITS + IMPACTS.....	36
7. CONCLUSIONS + RECOMMENDATIONS	38

Appendices:

- A. Study Participants
- B. Market Data
- C. Carlsbad Visitor Characteristics
- D. Facility Inventories
- E. City of Carlsbad Planning Document Literature Review

Executive summary

Webb Management + WolfBrown have been hired by the City of Carlsbad to conduct a needs assessment that would assess the possible need for cultural facilities to serve the community. This investigation is the result of recommendations coming out of the 2018 Arts and Culture Master Plan. That plan specifically recommended:

“Launch a feasibility study to explore the creation of a City of Carlsbad cultural arts facility that responds to the regional interest for a larger performance venue for professional theater and can provide classrooms, rehearsal spaces, and production studios.”

In order to understand the opportunity for new and improved cultural facilities for the city, we have conducted extensive research in the community, focusing on four key questions:

- **The Market:** Who is living in and visiting Carlsbad? What does that tell us about market propensity to support the arts and culture?
- **User Demand:** What is the demand for arts and cultural space on the part of local artists, arts organizations, arts educators and arts presenters?
- **Facility Supply:** What is the supply of arts and cultural facilities in and around Carlsbad? Are there gaps in that inventory that a new facility might fill?
- **Benefits + Impacts:** Where does the City of Carlsbad and the greater community want to be in the future? How does investing in the arts help to advance those goals?

To answer these questions, we interviewed a cross-section of cultural, political, and community leaders; toured local and regional cultural facilities; studied the size and characteristics of the market area; developed and evaluated a detailed inventory of existing performing arts and meeting and event facilities; estimated user demand for performance space; and, reviewed long-term planning reports in order to understand how, and where, a performing arts facilities project might align with community goals.

Forces + Trends

The feasibility study begins with a review of the broader forces and trends impacting today’s cultural sector. Across the country, we are observing declines in traditional performing arts audiences, increasing competition for private sector philanthropy, and increasing fragility on the part of nonprofit arts organizations due to a lack of productivity gains. At the same time, data and research also indicate increases in active arts participation, growth in the area of arts education, and improving arguments for the value of the arts. The result is that arts and cultural facilities have begun to embrace broader definitions of culture and increasingly aim to operate as community living rooms rather than palaces for the arts.

Market Analysis

Understanding the market is an important part of any feasibility study. To define the market for cultural facilities in Carlsbad, we collected and mapped four years of ticket buyer and admission data for the Museum of Making Music (MoMM) and three years of ticket buyer data from New Village Arts (NVA). This suggested that the MoMM and NVA current market lies primarily within Carlsbad and the 20 miles surrounding the Ruby G. Schulman Auditorium at the Carlsbad City Library and allowed us to define the market for cultural facilities as such. We then collected demographic data from Environics Analytics, a market research resource that expands and extrapolates Census data using a variety of inputs. Finally, we assessed visitor data from the San Diego Tourism Authority's 2017 Visitor Profile Survey for the San Diego County Region. This suggested the following:

- High levels of educational attainment, an aging population and affluent income levels suggest demand for both traditional and popular arts and entertainment programs. Programs including traditional symphonic and theater performances are often appealing to this cohort. A willingness to spend and overall price sensitivity may not be as big of a concern for local residents considering the high percentage of affluent households.
- The race and ethnic composition of the market, as well as the tourist population, reveals programming should be diverse, inclusive, and with varying formats. This can include programming by local arts groups, partnering with local and regional ethnic associations and presenting touring groups that have representation from minority cohorts
- Based on San Diego Tourism Authority data, the number of visitors to Carlsbad is steadily growing. These individuals are primarily attracted to the beach and amusement parks and are willing to spend over \$45 on recreational activities. Plans to bolster arts and culture activity in Carlsbad should consider how to attract visitors, targeting an increase in cultural participation from 3 percent in 2017.
- Overall, the size and characteristics of the market suggest propensity to support traditional and diverse forms of cultural events. This is supported by the population demographics, the visitor profile report and national indicators regarding how different population characteristics respond to various arts activities.

Existing Facilities

In order to understand the existing supply of cultural facilities and programs in the market, we have developed inventories of indoor and outdoor performance spaces. In addition, we also created a meeting and events facilities inventory, intended to help us understand how a cultural facility might also be used to accommodate meetings and events. This suggested the following about local and regional facilities:

- Local and regional indoor performance facilities are primarily used for producing performing arts and academic/educational programming. They are also rented by outside cultural organizations, schools/colleges and private entities. Few indoor facilities, particularly in

Carlsbad, present activity. Amongst those that do, music is the most commonly presented activity type, suggesting opportunities for alternative forms of presented entertainment (theatre, dance, film, family shows, comedy, a lecture series and so on).

- Most of the inventoried indoor facilities have capacities between 100 and 400, medium quality ratings and low to no availability. This suggests that there are gaps for a high-quality performance facility in the market. This is particularly true in Carlsbad, where none of the facilities have a quality rating above 2.6, nearly every facility has low or medium availability and 10 of the 23 inventoried facilities are affiliated with a religious organization, school or university.
- Outdoor performance facilities are activated through community events and presented music (typically headlining and popular music acts). They cover a range of capacities but tend to lack the permanent equipment and backline features required to make them ideal sites for cultural programming. In addition, the inventory highlights that all of the outdoor sites in Carlsbad are temporary locations in parks. This suggests an opportunity for a high-quality, outdoor venue that can be used throughout the year for performances and events.
- The artist studio space inventory reveals a lack of available studio spaces for artists to create in the market area. The Foundry has 16 studio spaces, but anecdotally, artists and community members expressed a desire for more access to studio space and specialized equipment, such as spaces to accommodate woodworking, ceramics and fiber arts. Over the past few years, these types of spaces have closed despite the continued demand and interest from artists in the community.
- The meetings and events facility inventory suggest that most meeting and event facilities in Carlsbad belong to hotels and resorts and range in capacity from 30 to 1,700 people for a reception. Community and Meeting/Event facilities tend to be smaller in size than hotel spaces. They also vary more in the number of attributes they offer. City staff suggested that meeting and event space within the civic buildings is hard to come by, often times leading groups to scramble to find a decent-sized room to hold a meeting or conference.

User Demand

Key to building an argument of support for arts and cultural facilities in a community is understanding the need, or demand, for space on the part of potential users. To assess this, information was gathered from local artists, organizations, and community leaders and members in order to quantify and categorize demand for cultural facilities, visual art studio space and rehearsal and program space in Carlsbad. This allowed us to conclude the following:

- Twelve organizations have expressed interest in utilizing a new performing arts facility in Carlsbad. Most of these organizations have demand for space that can accommodate music or dance, although there is demand for a smaller theater space as well. Important facility features include rehearsal space, a flexible seating arrangement, sufficient back-of-house support spaces, a catering kitchen and lobby/box office space.

- In total, users have 307 days of demand for performance space: 286 days for performances, 21 days for rehearsals/tech. Of that demand, 46 performance days in a 50-199 seat venue, 153 days in a 200-399 seat space and 83 days of use for a 400-599 seat venue.
- The local performing arts groups and other organizations expressed a need for rehearsal and gathering space. With some organizations meeting daily, these rehearsal and support spaces are expected to be used over 200 days a year.
- Anecdotal research suggests that there is strong demand for industrial arts and artist studio space in Carlsbad. With the pending introduction of Barrio Glassworks to The Village, there is a strong sense that additional art spaces could strengthen the visual arts community in Carlsbad.

Community Benefits + Impacts

The final piece of the study considers how investing in arts and culture can help the City of Carlsbad advance goals for the future. Individuals interviewed as part of the study suggested that new facilities could contribute to quality of life, create sense of place, diversify tourism and the economy, and keep money in the community.

Further, the City of Carlsbad has identified the integration of arts, public art and art education into community life and increasing year-round tourism as two goals of the Envision Carlsbad General Plan. At the community level, interest has been expressed in facilities for arts and culture through the Arts + Culture Master Plan surveying. Given this, an arts facility in Carlsbad does appear to be in line with community goals for the future, as it would help build identity in the community, diversify the economy, and contribute to year-round tourism attraction.

Conclusions + Recommendations

This research allowed us to conclude the following:

- ***The Market:*** High levels of educational attainment and household income in Carlsbad and its 20-mile radius indicate a strong likelihood to support traditional performing arts (ballet, theatre, opera, symphonic music etc.). At the same time, the regional and tourist population is ethnically diverse, suggesting programming should be inclusive, with varying formats. This can include programming by local arts groups, partnering with local and regional ethnic associations and presenting touring groups that have representation from minority cohorts.

Based on tourism statistics from the San Diego Tourism Authority, tourism to Carlsbad is growing. These individuals are primarily attracted to the beach and amusement parks, but are willing to spend over \$45 on recreational activities. Plans to bolster arts and culture activity in Carlsbad should consider how to attract visitors, targeting an increase in visitor cultural participation from 3 percent in 2017.

- ***Existing Facilities:*** The facility inventories suggest that there are a few gaps in the market that new cultural facilities could fill. First, there is an opportunity for a high-quality, flexible

indoor performance facility with 400- to 600-seats that can double as a City Council Chamber. This is particularly true in Carlsbad, where none of the facilities have a quality rating above 2.6, nearly every facility has low or medium availability and 10 of the 23 inventoried facilities are affiliated with a religious organization, school or university. Then, there is an opportunity for a high-quality outdoor space, specifically a space that has the back-end features and amenities to support festivals, performances and events and can serve as a park when not in use. Next, there is an opportunity for a unique industrial art space and artist studio space, possibly leveraging partnerships with a local university or the soon to open Barrio Glassworks. Finally, there is a need for community meeting and event space for city use and rental by local businesses and residents. The city currently has a number of meeting and event facilities, but the majority of them are within hotels and used for corporate functions, conferences and events.

- **User Demand:** An analysis of user demand suggests that a performing arts facility in Carlsbad could be activated by a combination of rentals by local and regional arts groups and a mix of touring programs such as classical and contemporary music, comedy and speakers. In sum, 13 users have expressed a need for 307 performance days: 286 days for performances, 21 days for rehearsals/tech. Of that demand, 46 performance days in a 50-199 seat venue, 153 days in a 200-399 seat space and 83 days of use for a 400-599 seat venue. The ideal facility would have rehearsal space, a flexible seating arrangement, sufficient back-of-house support spaces, a catering kitchen and lobby/box office space. The local performing arts groups and other organizations expressed a need for rehearsal and gathering space. With some organizations meeting daily, these rehearsal and support spaces are expected to be used over 200 days a year. City representatives noted a demand for meeting and event space as well as a space for larger City Council gatherings. This type of demand would often occur during 'business hours' and activate the space when arts organizations are not meeting.
- **Benefits + Impacts:** Numerous city planning documents and the community input speaks to a desire for cultural facilities in the community. Dating back to the 1990 Cultural Plan, new performing and visual art facilities are seen as an important priority for the city and its residents. Dedicated cultural venues can provide not only places for presentation of performing or visual arts but also contain additional areas for public gathering and social connections, and multigenerational participation in cultural activities. Furthermore, new performance spaces will ensure Carlsbad arts organizations and their audiences remain in Carlsbad, also enhancing the experience of visitors to the area.

Based on these findings, Webb Management Services provided the City of Carlsbad with the following recommendations:

Develop a 400- to 600-seat flexible performance space. This should be a high-quality, state-of-the-art facility for the Carlsbad community. It should feature a 400- to 600-seat flex venue that can accommodate local music, dance and theatre organizations, some touring entertainment, festivals such as the Carlsbad Music Festival and civic functions. The flexibility of the space will allow for City of Carlsbad gatherings, townhalls and City Council chamber sessions. Additional functionality should accommodate meeting and event functions, forums and nonprofit galas and fundraising events.

The size of the building to accommodate these spaces could be in the range of 30,000 to 40,000 gross square feet. As much of this space would need to be on the ground floor, the footprint for the building could be 18,000 to 23,000 square feet, which is between .4 and .55 acres. Parking would also be required nearby. A 500-seat theater might require 350 spaces, which is based on one space for each 1.5 attendees, plus some staff parking. If there are 200 parking spaces per acre, that suggests 1.75 acres of single-level parking. That requirement is reduced if structured parking on multiple levels is possible.

Include Rehearsal, Program, and Teaching Spaces. The need for support spaces to complement the performance space is equally as important. With many local arts organizations relying on churches and high schools to rehearse, there is a lack of consistency and access to the necessary rehearsal, teaching or program space. These spaces should also be available to rent for meeting and events, city staff meetings and private events. Included in the spaces should be features for dance (i.e. mirrors, sprung floor and barres), music (i.e. quality acoustics and a piano) and theatre (i.e. audio/visual equipment).

Finally, the facility should have a commercial kitchen. This space should be available for rent by the community. It should have flexible catering policies and be designed with the diversity of Carlsbad and the surrounding region in mind. For example, the kitchen equipment essential to preparing Latin American or Asian cuisine.

This additional recommendation might add another 5,000 to 10,000 gross square feet, most likely all on one level. And there would be an additional parking requirement of some 50 spaces. That suggests a total area of up to .5 acres for this component.

Create an Outdoor Performance + Event Space. A space such as this should stand out from the other parks and outdoor spaces in the market. Namely, it should have the infrastructure, including electrical and water supply, to support major events and festivals, recreation spaces to attract residents and tourists alike, and minimal permanent structures so the venue can revert back to a pastoral park when not in use.

With the necessary infrastructure to host festivals and events, the city and community groups can regularly use the space for weekly concert series, movies in the park and other cultural events without having to transport and set-up stages, sound equipment and screens. Given the scale of the project and its potential impact on a North County area, a regional partnership for this venue might make sense. Note that we would suggest more of a plaza than an amphitheater, meaning a flat expanse with a stage and support area at one end.

The area required for such a performance and event space is flexible, and depends very much on the site and what is developed around it. At the more modest end of the scale, we might imagine a one-acre plaza with a raised stage at one end. This might accommodate 3,000 people standing or seated. For that capacity, there could be the need for another 2,000 parking spaces and thus 10 acres of surface parking. Certainly, that level of demand, if also responding to other parking needs, would help to justify structured parking.

Develop an Industrial Art Space. Building upon the approved development of Barrio Glassworks that plans to open in The Village, an industrial art space outfit with kilns for ceramics and the equipment necessary to create fiber art, woodworking and jewelry. It should unify the visual art community by supplanting the closed facilities at UC-SD and Palomar College, and allow for studio rentals, residencies and education programming to take place under-one-roof. The facility should include affordable studio memberships that ensure both emerging talent and established artists have access, and include resources for arts, such as art books and publications, computer workstations, equipment to rent and materials to buy.

As with our recommendation on rehearsal meeting and teaching space, this component might add another 5,000 to 10,000 gross square feet, and again most likely all on one level. And with an additional 25 parking spaces, the total site requirement is .36 acres.

Cultural Facilities + City Hall: Finally, Webb Management Services took into account other infrastructure and capital planning currently underway. When considering the future site of City Hall, we would make the point that several of these recommendations could reasonably be combined and/or co-located. In the case of the industrial arts spaces, these might best be located in Carlsbad Village as a part of an effort to highlight this as an arts district or art-making area through the careful rehabilitation of existing structures. But for our other three recommendations of the theater, rehearsal/teaching/meeting spaces, and the plaza, we could certainly imagine these pieces developed at one location. And we would also advocate for the development of these spaces as a part of the larger City Hall redevelopment plan. Having reviewed the “Scoping and Space Planning Analysis for a New City Hall” report, we see an exciting opportunity for the City to integrate civic and cultural spaces. We would point to the following advantages of such a combined project:

- A central plaza would be a unifying element for the larger project.
- Parking needs could be more efficiently satisfied with a combination of day-time and evening uses.
- The main theater could be adapted to serve as a council chamber for City Hall (as is the case with the Tarpon Spring example on page 40).
- The theater, rehearsal and teaching spaces could also be used for various City meetings and events.

All of these spaces could be operated and maintained jointly to minimize costs to the City.

1. Introduction

Webb Management Services is a management consulting practice for the development and operation of arts and cultural facilities. The firm was established in 1997 and has completed more than 425 projects for public and private sector clients across the country. Services include feasibility studies, cultural master plans, cultural district plans, primary research for arts organizations, business plans and strategic plans.

Webb Management + WolfBrown have been hired by the City of Carlsbad to conduct a needs assessment that would assess the possible need for cultural facilities to serve the community. This investigation is the result of recommendations coming out of the 2018 Arts and Culture Master Plan. That plan specifically recommended:

“Launch a feasibility study to explore the creation of a City of Carlsbad cultural arts facility that responds to the regional interest for a larger performance venue for professional theater and can provide classrooms, rehearsal spaces, and production studios.”¹

In August 2017, PROS Consulting analyzed the feasibility of 1/ a large scale, two-story multi-use multigenerational recreation facility for the city and 2/ an 8-14-acre outdoor recreation site as described in the Parks + Recreation Department Master Plan. Each study identified one or two sites for the proposed projects and conducted an analysis based on the available spaces. Despite the overwhelming community support for the projects, in each case, it was determined that the city’s ability to develop the projects as envisioned was not feasible due to space limitations which would have forced the developments to eliminate major amenities in order to fit within the available footprints. The site limitations and subsequent outcomes of each study should be accounted for when considering the potential for performing and visual arts facilities.

In order to understand the opportunity for new and improved cultural facilities for the city, we have conducted extensive research in the community, focusing on four key questions:

1. Are there sufficient audiences to support additional cultural programming in new spaces?
2. What are the needs of local artists, arts organizations, arts educators and arts presenters that might be addressed with new facilities?
3. What facilities already serve the community, and what elements of that inventory are missing or deficient?
4. Finally, how might new cultural facilities advance the broader goals of the city?

¹ Arts & Culture Master Plan: Implementation Charts, p.93

We answer those questions in the following chapters on the basis of extensive interviews in the community, visits to existing facilities, the collection of data on the local and regional market for the arts, a review of other city plans and planning documents and the search for comparable projects in similar communities.

2. Forces + Trends

New technologies, changing tastes and a growing desire to actively participate in the creative process has impacted how, when and where we experience arts and culture. Following is a brief overview of some of the broader forces and trends impacting the creative sector, as well as the behavior of audiences and participants today.

2.1 Arts Participation + Consumption

The [Survey of Public Participation in the Arts \(SPPA\)](#), released by The National Endowment for the Arts, assesses arts participation on the part of the country's adult population. The most recent report came out in 2012 ([the next iteration of the study is expected this year](#)) and suggested that participation within traditional arts disciplines—ballet, opera, symphonic music and theatre—has remained relatively flat over the last 20 years. When applicable, 2017 SPPA data has been included, however the entirety of the report is not available.

In total, over half of adults are estimated to attend live performance or visit museums or galleries annually. Other data indicated that:

- Amongst adults under the age of 40, attendance at traditional performing arts events, particularly those in formal performance venues, is being replaced by participation in nontraditional cultural and entertainment events like outdoor festivals. Between 2012 and 2017, there was significant growth in adults' rates of attendance at outdoor performing arts festivals and at types of performing arts events not listed by the survey.
- Our greatest concern is the decline in arts participation on the part of younger adults (ages 18 to 24). For example, the percentage of those attending a musical theatre performance has dropped from 17% in 1982 to 13% in 2012. The rate of attendance remained largely unchanged for musical and non-musical plays between 2012 and 2017.
- On the other hand, we are encouraged by the growth of active arts participation. More people are playing an instrument, taking painting lessons, dancing and so on, creating new demand for arts facilities that support these programs.
- Educational attainment and a household's income level are the best predictors of arts attendance. The propensity to attend arts events among those who have completed college is exponentially greater than for those who have finished only high school. Likewise, those households that earn more have a greater propensity to attend an arts event. Age also matters, but not nearly as much as education and income level—older adults tend to have higher rates of participation than younger adults, but only to a point.

Additional factors influencing arts consumption include:

Increasing Demand for Flexibility and Convenience: Consumers have become less willing to commit to an event in advance. While this has resulted in a decline in subscription ticketing, it has also led to a willingness to pay more later—the perceived premium of flexibility and the “on-demand” lifestyle. There is also less tolerance for the event with built-in hardships, whether that means an uncomfortable seat, poor concessions service or bad traffic to and from the event. This suggests a low threshold for opting out of an event, or choosing another venue, and pushes facilities and presenters towards a higher level of customer service.

The Desire for a Social Experience: Research suggests that audiences are drawn to the arts today by the opportunity for a social experience (as opposed to the more traditional attraction of intellectual or emotional stimulation). This means that the passive experience of attending a cultural event is no longer satisfying the appetite of attendees. Instead, nationwide, we have observed a rise in self-directed, home-based, living arts participation that includes more intense, “hands-on” arts experiences. This is evidenced by the rise of multi-sensory museum exhibitions, food + beverage themed concert events and cultural events that immerse an audience in the performance.

At the same time, facility presenters and content producers must deliver much more than what is on the stage, creating an environment in which the social elements of the experience can be fully enjoyed and shared, not just with those physically present, but with online peers as well. Examples of this include: the use of Snapchat filters at performances, behind-the-scenes “stories” on Instagram and pre- and post-event functions that cater to specific segments of an audience (i.e. Young Professionals Networking).

Reliance on Social Media: Social media platforms like Facebook, Instagram, Youtube and Snapchat, along with trade newsletters and blogs, are critically important as a means for consumers to spread word of mouth in a viral way. For content producers, it’s about creating those “Instagram-able moments” that can be quickly and easily shared across online platforms. At the same time, arts presenters and venues are vulnerable to increased scrutiny when some action or occurrence “goes viral.”

2.2 Nonprofit Arts Organizations

Along with changes in the nature of demand for arts activities, there have been significant changes on the supply side, particularly related to the health and sustainability of nonprofit arts organizations. According to figures from the Urban Institute’s National Center for Charitable Statistics (NCCS), there were 118,000 arts nonprofit organizations registered in the United States in 2016, as compared to 82,000 in 1996, an increase of 44 percent over a twenty-year period. This growth in arts nonprofits has led to increasing—and increasingly sophisticated—competition for public and private financial support. Based on an analysis of 2006-2010 data from the NCCS and the U.S. Census Bureau’s Economic Census, performing arts groups and museums receive 45 percent of their funding from contributed income. The majority of those funds derive from individual giving (20.3%), followed by foundations (9.5%), corporations (8.4%) and local, state and federal funding (6.7%).

In 1965, William J. Baumol and William G. Bowen published “The Economic Dilemma of the Performing Arts.” In it, they theorized that the lack of productivity gains in the creation of art (it takes the same number of musicians and performers to rehearse and perform Beethoven’s Symphony No. 9 in 2019 as it did when it was first performed in 1824), plus the inevitability of cost increases, would essentially force all organizations to raise more contributed income every year just to maintain the same level of financial stability. This idea, which is now commonly referred to as Baumol’s Cost Disease, confirms that because there are not productivity gains over time in the way that art is created, the sector faces increasing financial challenges. This is a fact of life for all cultural facilities.

2.3 Children + the Arts

The arts are now understood to be a vital part of the 21st Century classroom. This has been successfully articulated in the STEM to STEAM movement (science, technology, engineering, arts, and math), which has expanded the traditional areas of innovation (science, technology, engineering and math) to include the performing and visual arts. Contributing to this movement has been a mounting body of evidence that touts the benefits of arts education, including:

- Improved literacy and English Language Arts skills.
- Advanced achievements in math.
- Improved school culture.
- The development of communication skills.
- Strengthened problem solving abilities.
- Increased capacity for leadership.
- Cross-cultural understanding.
- Propensity towards volunteerism and civic engagement.

2.4 Changes in Facility Development + Operations

As participation in the arts has changed, so, too, has the way those working in or near the creative sector think about facilities and how they are developed, operated and sustained. Most notably, the old image of a theater, museum or gallery as a place where fancy people in formal attire can attend a performance or exhibition opening has largely been replaced by the new image of a cultural venue as a community living room, a place that is always open and always active with informal programming and an atmosphere that is buzzing and welcoming. Such as BRIC’s Lobby + Stoop in downtown Brooklyn. When guests enter the building, they are greeted by a public space that overlooks a contemporary art gallery, a café and an informal performance space that can accommodate receptions, ceremonies, special events and presentations. This type of space is continuously activated throughout the day and creates a communal, shared-space that is inviting to seasoned BRIC attendees and new members alike.

In line with this transition, facilities and organizations are supporting a culture of active participation in the arts through hands-on programs and classes and the engagement of audiences before, during and after events.

Other trends contributing to the “community living room” vision include:

- A commitment to providing affordable facility access to nonprofit users, as well as arrangements that motivate efficient use of space and the maximization of revenues for both user and facility.
- Increased commitment to retaining staff and leadership that are reflective of the diversity of the community, racially, ethnically and in terms of ability.
- Embracing the arts as a fundamental component of community engagement, economic development and quality of life enhancements. This prompts an arts facility to be a key participant in community gatherings (convocations, town halls, etc.) and engage with the broader business community to support their efforts, i.e. partnerships with the local Convention and Visitor’s Bureau or chamber of commerce.

Finally, we see a shift away from facilities that might be termed palaces of the arts—huge, iconic buildings in which multiple components are housed under one roof (like the Kennedy Center in Washington, DC)—to cultural districts, where multiple facilities are developed within a walkable area. This allows for a long-term development strategy that combines new facilities with the adaptive re-use of existing structures. Generally, the costs of developing a district are low and the sets of facilities developed within them tend to be more inclusive and authentic of the community-at-large. Districts also tend to be better at motivating commercial development, as they are relatively porous and accommodating of other building projects.

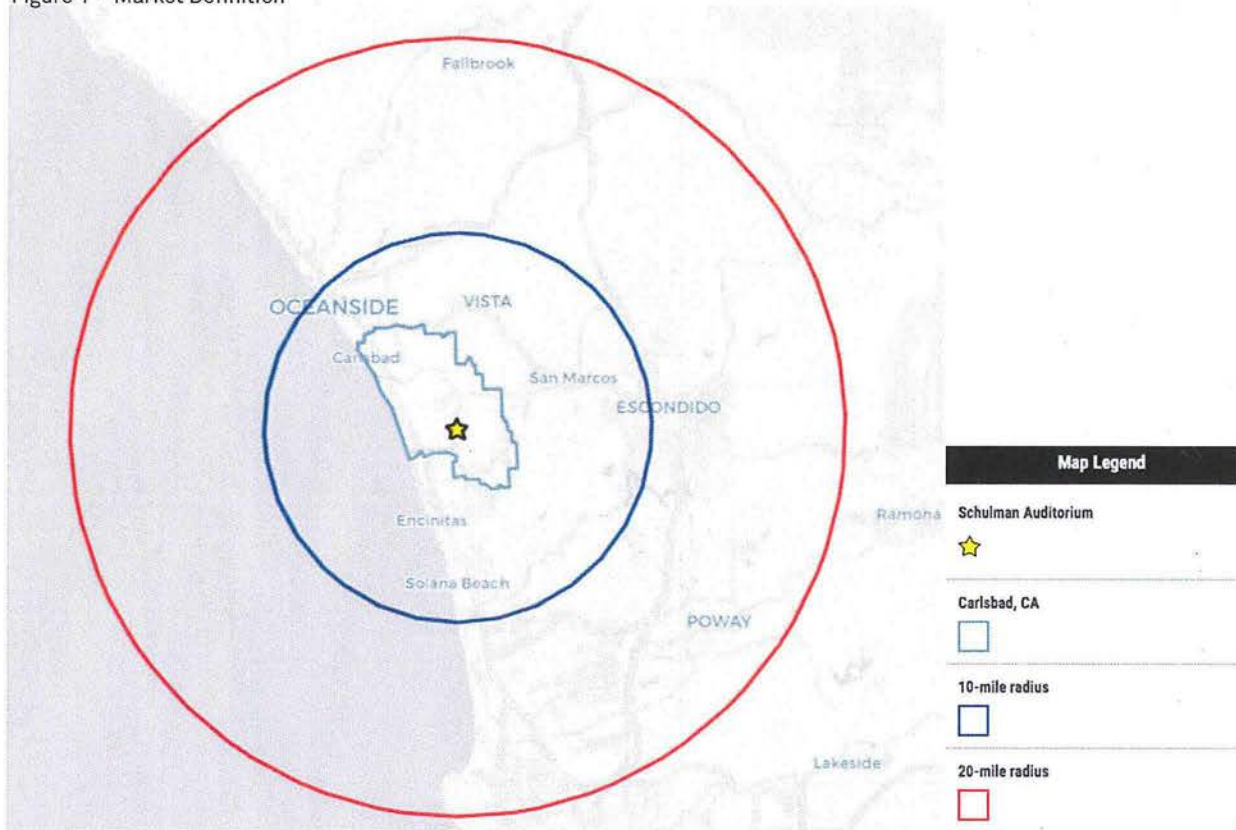
3. Market Analysis

3.1 Defining the Market Area

Defining a market, or potential audiences, can be a complicated issue for cultural facilities. As a starting point, the market for facilities in Carlsbad is the population of Carlsbad. But, the city does not exist in a closed system—it is part of a much larger region of coastal communities stretching from San Diego to Camp Pendleton. While those who live in and near Carlsbad are most likely to be involved with arts programming, any new facility has the potential to draw audiences, arts organization interested in renting and program participants from beyond the local community.

To determine the market area for cultural facilities in Carlsbad, we spoke to local arts groups and gathered audience data from the Museum of Making Music (MoMM) and New Village Arts (NVA). Figure 1 shows a map of the market area, defined as the City of Carlsbad and those areas within 10- and 20-miles radius from Ruby G. Schulman Auditorium at the Carlsbad City Library complex.

Figure 1 – Market Definition



These market areas were arrived at after analyzing the distribution of audiences to Museum of Making Music events (Figure 2 and Table 1), general admission to MoMM (Figure 3) and events at New Village Arts (Table 2). Additional maps of NVA’s audiences can be found in Appendix B.

Figure 2 – MoMM Event Ticket Buyers (2016-19)

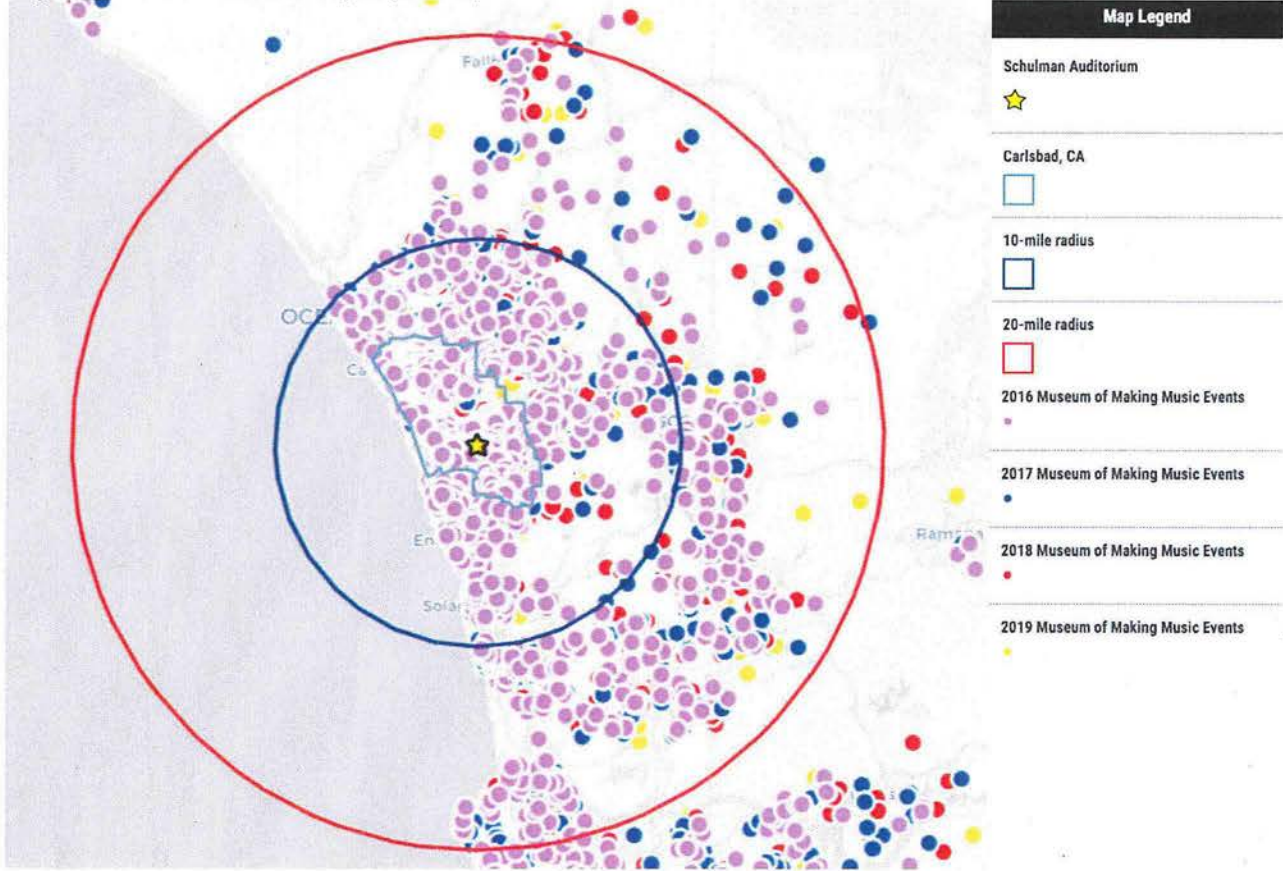


Figure 3 – MoMM Admissions to Exhibits (2016-19)

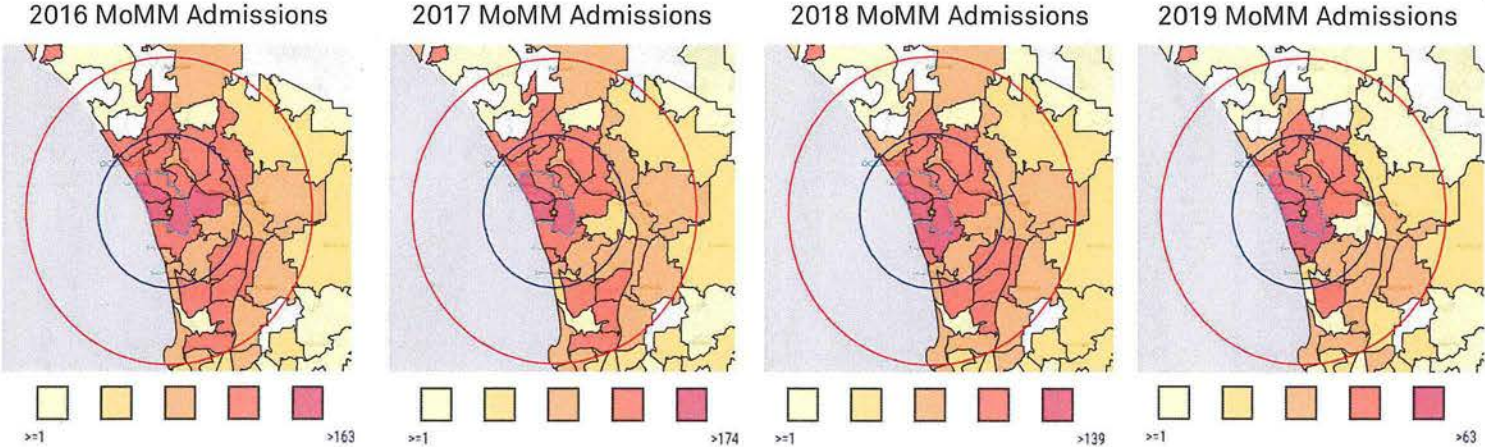


Table 1 – MoMM Event Ticket Buyers (2016-19)

MoMM Regional Ticket Buyers								
	Ticket Buyers				Ticket Buyers By Market			
	MoMM 2016 Events	MoMM 2017 Events	MoMM 2018 Events	MoMM 2019 Events*	MoMM 2016 Events	MoMM 2017 Events	MoMM 2018 Events	MoMM 2019 Events*
Within:								
Carlsbad, CA	972	981	948	415	30%	30%	30%	27%
10-mile Radius	2101	2113	2096	977	64%	64%	66%	63%
20-mile Radius	2567	2559	2478	1176	78%	77%	78%	76%
Beyond: 20-mile Radius	706	765	694	364	22%	23%	22%	24%
Ticket Buyer Households	3,273	3,324	3,172	1,540				

*MoMM 2019 is partial year (January - June 2019)

Table 2 – NVA Single Ticket Buyers (2016-18)

New Village Arts Regional Ticket Buyers						
	Ticket Buyers			Ticket Buyers By Market		
	NVA 2016 Single Ticket Buyers	NVA 2017 Single Ticket Buyers	NVA 2018 Single Ticket Buyers	NVA 2016 Single Ticket Buyers	NVA 2017 Single Ticket Buyers	NVA 2018 Single Ticket Buyers
Within:						
Carlsbad, CA	822	1094	1108	37%	37%	36%
10-mile Radius	1367	1891	1956	62%	65%	64%
20-mile Radius	1643	2277	2321	74%	78%	76%
Beyond: 20-mile Radius	575	644	727	26%	22%	24%
Ticket Buyer Households	2,218	2,921	3,048			

The audience distribution to these events suggests that over 60 percent of attendees are traveling from within the 10-mile radius, including the communities of Oceanside, Vista and Encinitas. The concentration of admissions in Figure 3's heat map supports this observation, as do the Tables 1 and 2. When analyzing MoMM and NVA's audiences, we concluded that nearly 80 percent of audiences are traveling from within 20-miles. Based on our experience working in comparable communities, these data from local cultural groups and anecdotal accounts from Carlsbad residents about local driving tendencies, we concluded that the 10- and 20-mile radius is the appropriate market area for new cultural facilities in Carlsbad.

3.2 Local + Regional Market Characteristics

Using data from Environics Analytics, one of North America’s premier data and analytics companies, insights and trends about each market area can be derived. These demographic data suggests the following about the Carlsbad market:

It is Growing Steadily: Figure 4 illustrates that from 2000 and 2010, the City of Carlsbad population experienced rapid growth, 30 percent, while the region grew at a more modest 14 percent rate. Between 2010 and 2019, population growth continued, with the city reaching 121,109 in 2019. According to Environics, by 2024, it is projected that the local population will reach 129,109, an increase of 7 percent.

The population in the 10-mile radius is expected to grow to 657,000 by 2024, increasing in population by nearly 100,000 since 2010 (Figure 5). The 20-mile radius experienced similar growth, growing from 1.3M in 2010 to 1.5M in 2024. While current population growth has slowed since 2000-2010, the market area still anticipates gradual growth.

There Are High Levels of Educational Attainment: Levels of educational attainment are strong in the city and the surrounding market segments. While roughly 55 percent of Carlsbad residents have a Bachelor’s Degree or higher, the 10- and 20-mile markets have 45 percent or lower. When comparing the market areas to national averages, all three Carlsbad markets represents a highly educated cohort.

Locally, 11 percent of resident’s highest level of education is a high school

Figure 4

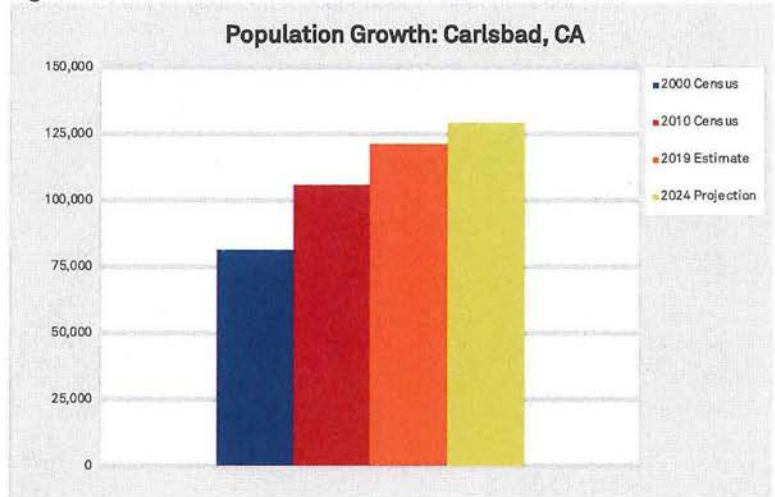


Figure 5

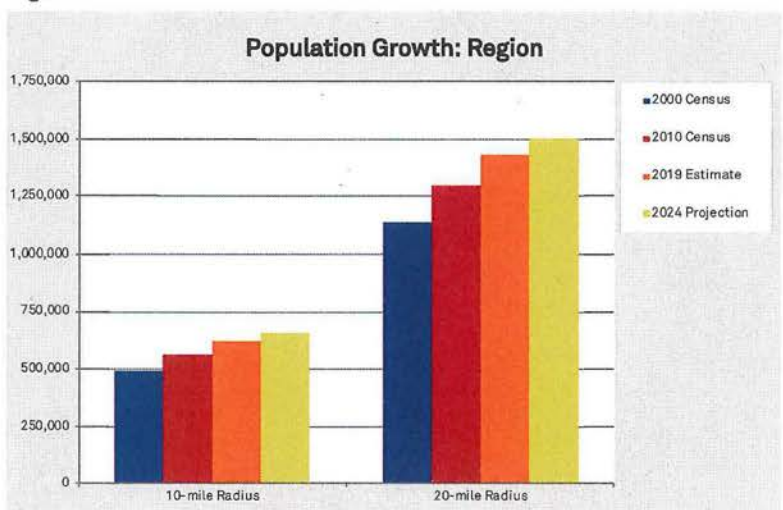
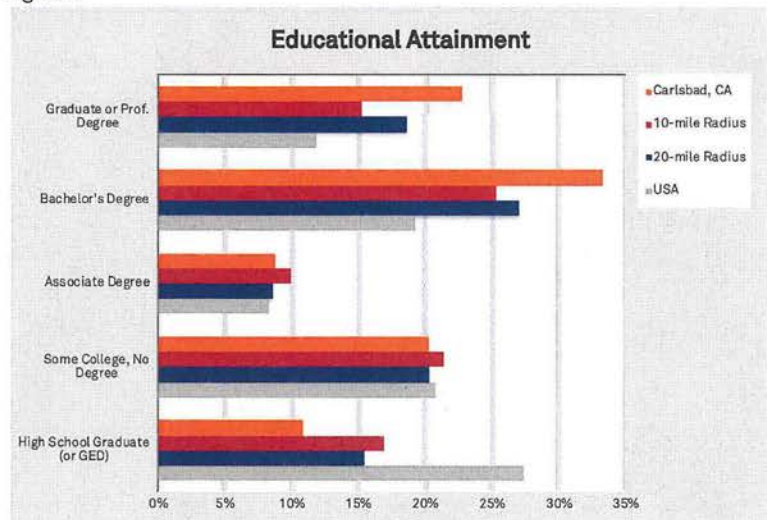


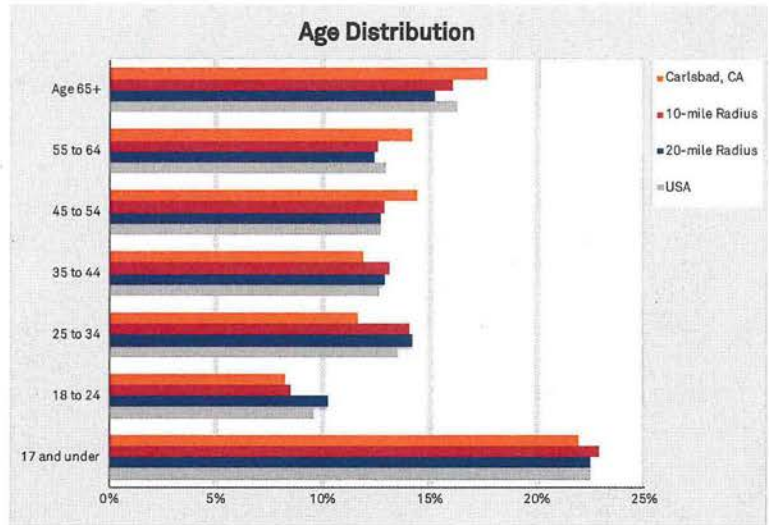
Figure 6



diploma (or GED), compared to 27 percent nationally. The rates of individuals that completed some college or received an Associate’s degree is similar across all market segments and the U.S. average. Based on evidence provided by the NEA’s SPPA², educational attainment is one of the best predictors of arts attendance. The higher the level of education in a community, the greater likelihood to attend an arts event.

Locally Skews Older: Each of the market segments have an aging population, although the 20-mile radius’ population does skew younger. In Carlsbad, for example, 14 percent of the population is aged 55 to 64 compared to 13 percent of the national and 12 percent in the 20-mile radius. Conversely, within the 20-mile radius, 24 percent of the population is aged 18 to 34, while locally that cohort represents 20 percent of the population. Across all market segments, the population 17 and under sits at 22 percent.

Figure 7



There are High Levels of Affluence: In Carlsbad, 67 percent of the population earns \$75,000 or more, while 55 and 59 percent of households in the 10- and 20-mile radius earn over \$75,000, respectively. Nationally, 41 percent of the population falls into this income bracket.

When looking closer at the top earners, you observe a high concentration of wealth in each market segment. Locally, 36 percent of households earn over \$150,000, the 10-mile sits at 25 percent, and the 20-mile radius at 28 percent. Like educational attainment, household income is a proven indicator of an individual’s propensity to attend an arts event, according to the SPPA. Local and regional income levels suggest the market has a strong propensity to attend arts events.

Figure 8

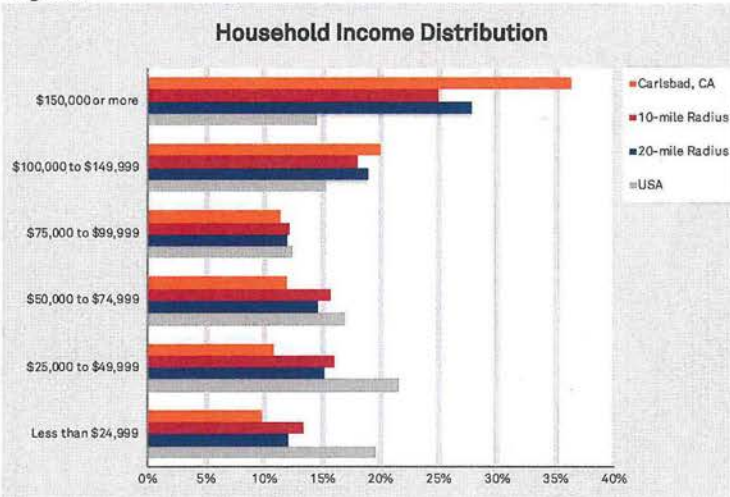
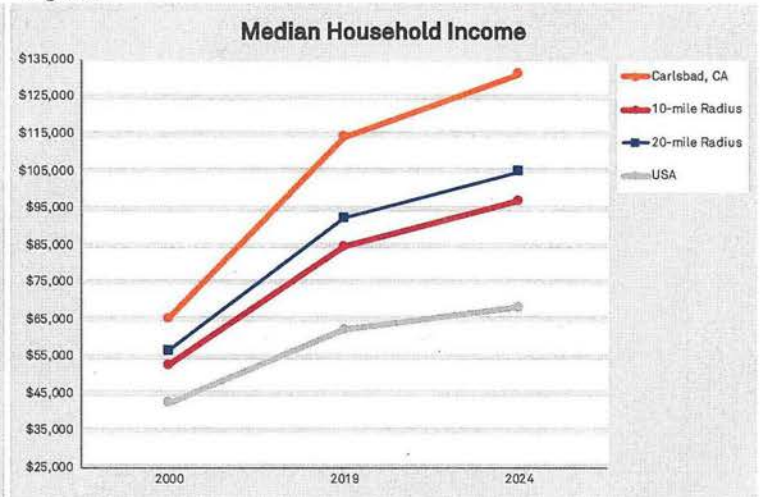


Figure 9

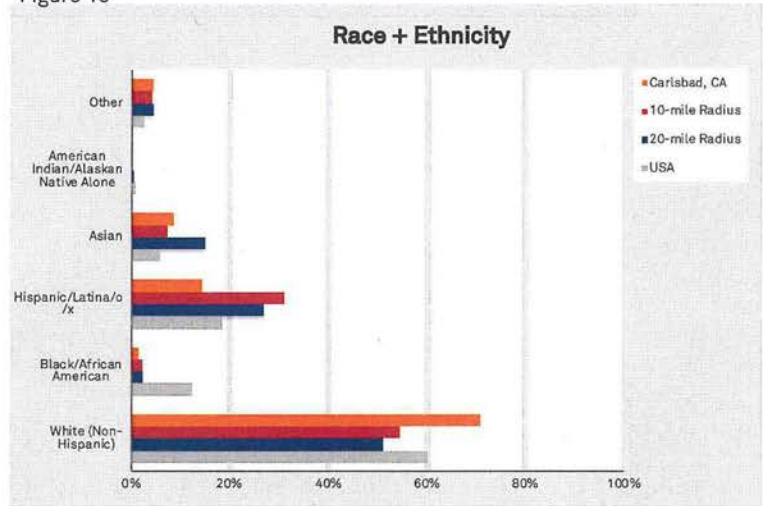


² Complete findings from the NEA’s Survey of Public Participation in the Arts can be found [here](#) or at [arts.gov](#)

In both market segments, Median Household Income (MHI) is projected to increase over the next five years. In Carlsbad, MHI was \$114,245 in 2019 and is projected to reach \$131,137 by 2024. In the 20-mile radius, MHI was \$92,313 in 2019 with projections to reach \$104,735 by 2024.

Racial + Ethnically Diverse: Carlsbad and the surrounding market segments represent two separate race and ethnic profiles. In Carlsbad, for instance, 71 percent of the population identifies as White (Non-Hispanic) and the surrounding market segments are 55 percent, or less, White. Regionally, the 10-mile radius has a large Latinx population, 31 percent and the 20-mile radius consists of 27 percent Latinx and 15 percent Asian, both well above the national average.

Figure 10



3.3 Tourism in Carlsbad

Based on a 2017 report profiling the visitors to Carlsbad and supporting documents, data suggests tourism to Carlsbad can be described by the following³:

Steady Growth: Since the economic recession, visitors have incrementally grown from 2.4M to 4.3M in 2017. Of those visiting Carlsbad, 40 percent are from other Southern California communities, 20 percent are from Mountain States and 12 percent are from Northern California.

Recreational Interests: Tourists to Carlsbad overwhelmingly indicated that ‘Pleasure / Vacation’ represented the primary purpose for their visit. Sixty-five percent of visitors considered pleasure or vacation as their primary reason to visit Carlsbad, compared to 56 percent of visitors to San Diego County. Other reasons to visit Carlsbad included ‘Visiting Friends / Relatives,’ 24 percent, while business, conferences and other purposes totaled 11 percent.

Table 3

Year	Total Visitors to San Diego County	Total Visitors to Carlsbad	Percentage of Carlsbad Visitors
2005	31,777,000	2,860,000	9%
2006	32,200,000	2,946,000	9%
2007	31,563,000	3,710,000	12%
2008	31,102,000	2,916,000	9%
2009	29,606,000	2,474,000	8%
2011	31,146,000	2,697,000	9%
2013	33,091,000	2,987,000	9%
2015	34,260,000	3,865,000	11%
2017	35,010,000	4,313,000	12%

Source: CIC Research, Inc. "San Diego Visitor Activity Model." (Visitor survey was not conducted in 2010, 2012, 2014 or 2016)

Majority Day-Trippers: In 2017, more than eight out of ten (83%) of Carlsbad visitors were day trippers. The remaining 17 percent stayed overnight, averaging 3.7 nights in the city.

³ Appendix C provides a table of Carlsbad Visitor Characteristics, Year over Year trends, from 2013 to 2017

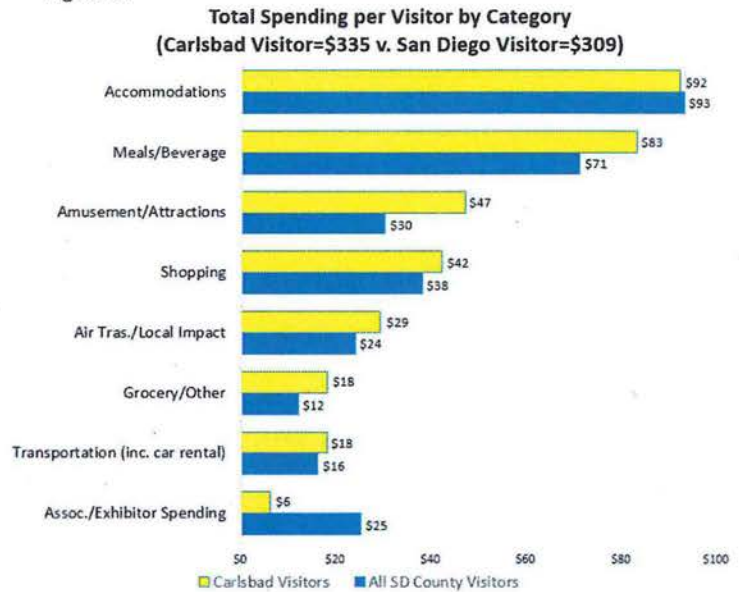
Diverse, Middle Age, High Affluence:

According to the 2017 Visitor Profile, the median age is 41, the annual household income is \$92,700 and Latinx and Asian populations represent 51 percent of visitors, up from 22 percent in 2013. The average visitor in 2017 spent \$335 per trip to Carlsbad. Figure 11 shows a breakdown of the \$335 per trip, with \$47 in amusement/attractions spending.

Beach + Amusement Park Destination:

Visitors to Carlsbad seek out two primary attractions, the beach and amusement parks, presumably LEGOLAND. In 2017, 64 percent of visitors indicated they went to an amusement park and 63 percent relaxed on the beach. Another 40 percent took part in shopping. Of note, only 3 percent of visitors took part in an arts and cultural activity, compared to 10 percent of visitors going to other San Diego County communities.

Figure 11



3.4 Market Analysis Conclusions

This research suggests the following about the market for the arts in and around Carlsbad:

- High levels of educational attainment, an aging population and affluent income levels suggest demand for both traditional and popular arts and entertainment programs. Programs including traditional symphonic and theater performances are often appealing to this cohort. A willingness to spend and overall price sensitivity may not be as big of a concern for local residents considering the high percentage of affluent households.
- The race and ethnic composition of the market, as well as the tourist population, reveals programming should be diverse, inclusive, and with varying formats. This can include programming by local arts groups, partnering with local and regional ethnic associations and presenting touring groups that have representation from minority cohorts
- Based on San Diego Tourism Authority data, the number of visitors to Carlsbad is steadily growing. These individuals are primarily attracted to the beach and amusement parks and are willing to spend over \$45 on recreational activities. Plans to bolster arts and culture activity in Carlsbad should consider how to attract visitors, targeting an increase in cultural participation from 3 percent in 2017.
- Overall, the size and characteristics of the market suggest propensity to support traditional and diverse forms of cultural events. This is supported by the population demographics, the

visitor profile report and national indicators regarding how different population characteristics respond to various arts activities.

4. Existing Facilities

To understand the existing supply of cultural facilities and programs in the market, we have developed inventories of indoor and outdoor performance spaces and meeting and event spaces. All inventories are included as Appendix D.

4.1 Indoor Performance Facilities

We have developed an inventory of indoor performance facilities within the defined market area. To be included on the inventory, a facility must be used four or more times a year for a live, public performing arts event (a church that has a children's choir that sings every Sunday would not be included, for example). The inventory details the programs, features and amenities of the various facilities. Additionally, an overall facility rating has been assigned based on the following eight variables:

1. Facility Condition
2. Staff and Support
3. Theatrical Functionality
4. Acoustics
5. Customer Amenities
6. User Amenities
7. Atmosphere + Character
8. Suitability for Users

Variables are rated on a weighted scale of 1 to 4, with 4 being the best possible score. The 'facility condition' and 'staff and support' categories carry the most weight. The exercise is somewhat subjective, but provides a good basis for comparing one facility to another. A glossary of terms and a detailed description of each facility rating variable can be found in Appendix D.

There are 23 facilities with capacities ranging from 80- to 1,200-seats within Carlsbad and an additional 25 facilities within the 20-mile radius, ranging in capacity from 98- to 1,523-seats. These facilities range from churches and library program rooms to theaters at MiraCosta College and Escondido's California Center for the Arts. All are shown in the map on the following page, Figure 12.

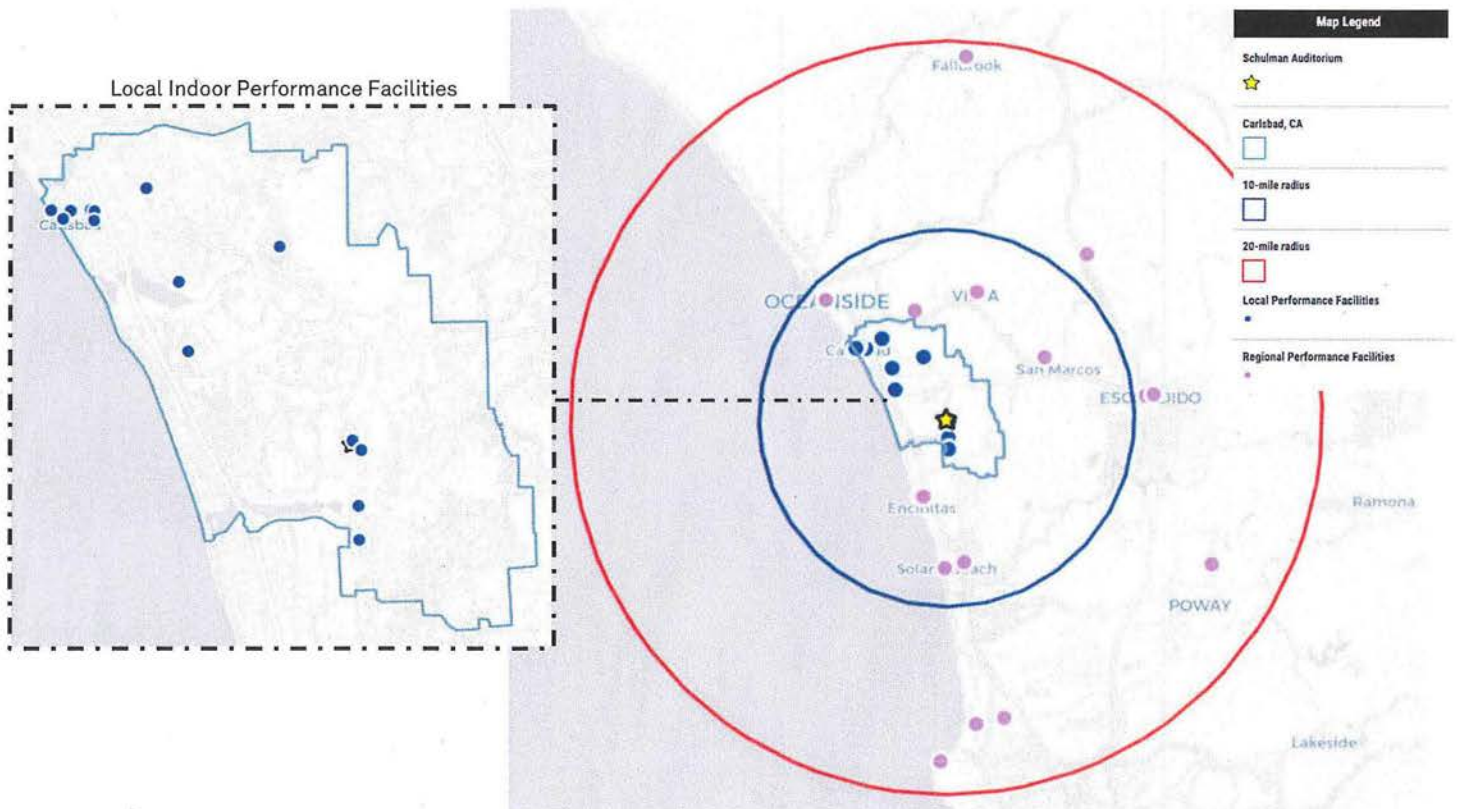
Most local facilities have low quality ratings. In part, this is because most facilities are either intended for other uses (a church service, for example) or are older facilities that require physical improvements. This is the case at New Village Arts, for instance, which is currently exploring opportunities to improve their facility. Twenty-one of the inventoried local facilities have capacities of 600-seats or fewer, with only two facilities with a capacity of 400- to 600-seats. There are no purpose-built performance spaces between 300- to 600-seats, only high schools and religious spaces can accommodate audiences of this size. These education and religious spaces are typically

difficult to access and/or not built for high-end theatrical functionality, suggesting a gap in the market for such space.

Regionally, we observed more facilities with higher ratings and larger seating capacities. Unlike the local facilities, regionally over 70 percent of facilities 'Produce' performing arts activities. Facilities like the La Jolla Playhouse and Lawrence Welk Theater are predominately producing spaces that occasionally 'Rent' or 'Present' other artists. Nine facilities, compared to two locally, have capacities between 400- and 600-seats, including multiple venues at MiraCosta College, Conrad Prebys Performing Arts Center and La Jolla Playhouse.

Figure 12

Local + Regional Indoor Performance Facilities



The tables found in Appendix D show each facility’s capacity and our measure of quality, as previously described. This information allows us to visually present the inventory with a series of matrices (Figures 13, 14 and 15). Each matrix shows the quality rating on the vertical axis and the seating capacity on the horizontal axis. The size of each circle is an indication of how many different types of programs the facility supports (the larger the circle, the more types of activities are supported).

As Figure 14 confirms, there is a dearth of high-quality facilities locally and a clear gap in the market, as indicated by the red dotted-circle. Figure 15 gives us an opportunity to assess the facilities in the market based on availability. Considering the facility’s availability to be rented is an important

consideration because it addresses the challenges a local arts organization may face when seeking a place to perform. Availability is based on the ease with which an outside user can book a space for use on a prime night of the week (Thursday, Friday or Saturday) and is determined through interviews with facility managers/users or online research.

Of the 47 facilities inventoried in the market, 30 of them have low availability or are not available. Consulting Figure 15, nearly all the facilities between 200 and 500 seats have low availability, the purple circles. Only the AVO Playhouse and the California Center for the Arts Theater in Escondido have high or medium availability, respectively.

Figure 13

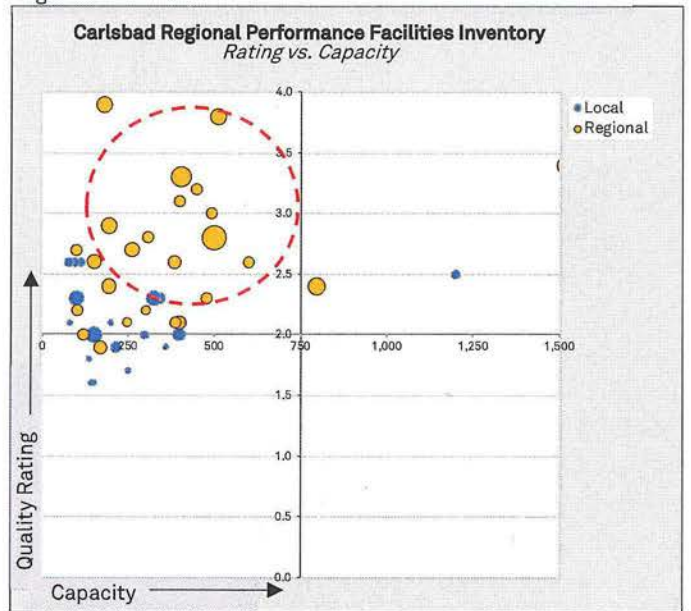


Figure 14

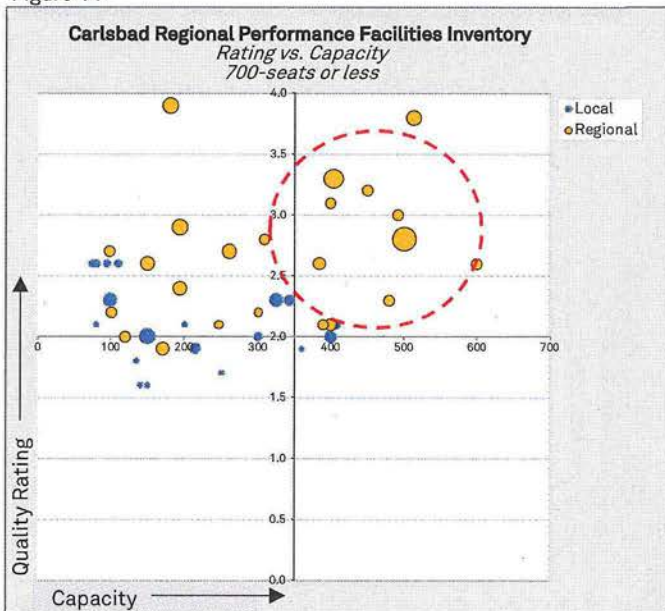
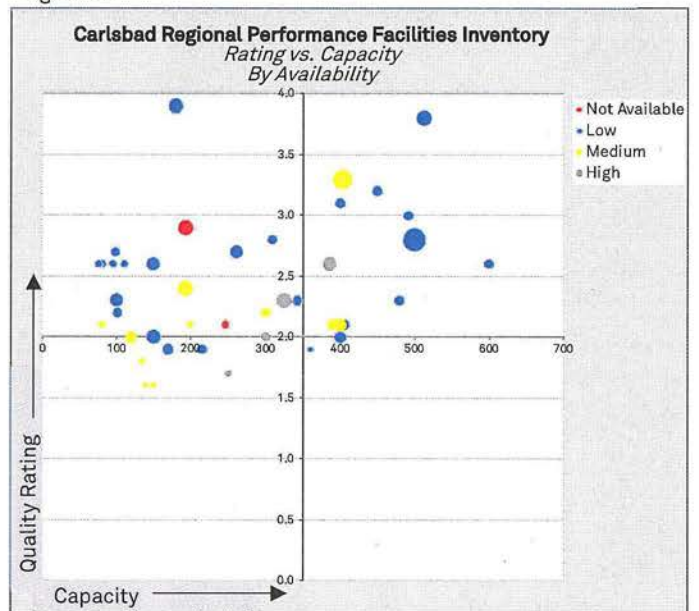


Figure 15



Now let's focus in on several key local facilities:

Ruby G. Schulman Auditorium – located within the Carlsbad City Library complex, the Schulman Auditorium seats 215 and is frequently used by community organizations, city events and programs and youth camps. While the auditorium is serving a variety of community stakeholders, it does come with limitations. A lack of backstage amenities, a small stage with no wing or fly space and limited lighting and sound equipment are frequently cited by users.

New Village Arts Theatre – a 99-seat, city-owned building, the theatre is located in The Village area of Carlsbad. In addition to the theatre space, the nonprofit operator, New Village Arts, Inc., manages working artist studio spaces that are open to the public. Named The Foundry, approximately 14 artists currently rent the artist studio spaces. As a self-producing theatre company with a full season of performances, the theatre is not rented out for outside performances or touring productions. Occasionally, community events are hosted in the theatre when available.

St. Michael's by the Sea – Used as the primary venue for the Carlsbad Music Festival each year, the St. Michael's campus includes a 200-seat sanctuary space, a 135-seat parish hall and an 80-seat chapel. With limited lighting and sound equipment permanently installed, the music festival is required to outfit the space whenever an event is hosted. Besides the music festival, the facilities are infrequently used for cultural events, but church administrators are interested in inviting additional cultural groups to use the space as a way to fulfill their mission.

Museum of Making Music Multipurpose Room – an intimate room for performances presented by the museum, the 150-seat venue has one of the most diverse set of presentations in Carlsbad. On any given night, classical, blues, zydeco, rock or folk music is played. Frequently, family programming is presented too.

4.2 Outdoor Performance Facilities

We have also developed an inventory of outdoor performance facilities that are used for arts programming. Instead of considering the larger 20-mile radius, this inventory focuses on the 10-mile radius surrounding Carlsbad based on conversations with residents, city officials and local arts organizations. The 10-mile radius allows us to focus on the outdoor sites in Carlsbad, Escondido, Oceanside, Vista and Encinitas (note, facilities that fall just outside the 10-mile radius but are part of Escondido’s cultural scene are included).

Table 4

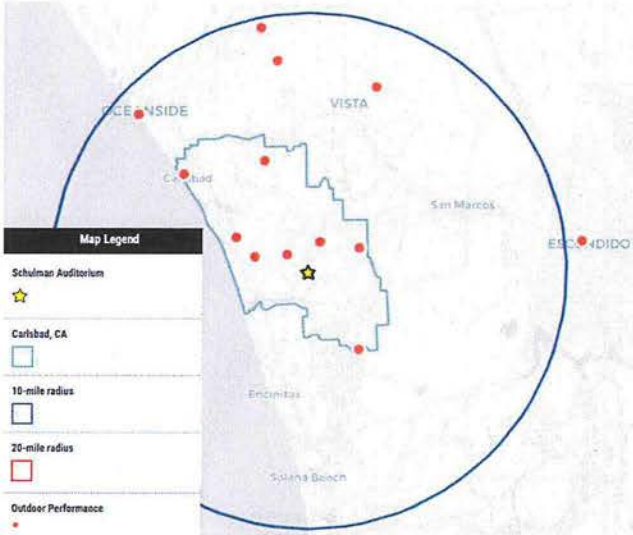
Outdoor Performing Arts Sites: 10-mile radius around Carlsbad, CA				
Site Name	City	Type	Events	Capacity
California Center for the Arts - Great Green	Escondido	Lawn - Temporary Stage - Lawn Seating	Music Concerts, Civic Events, Private Events	10,000
Alga Norte Community Park	Carlsbad	Park - Temporary Stage - Lawn Seating	TGIF Concerts in the Park, Family Open Studios workshops	4,000
Poinsettia Community Park	Carlsbad	Park - Temporary Stage - Lawn Seating	TGIF Concerts in the Park, Family Open Studios workshops	4,000
Stagecoach Community Park	Carlsbad	Park - Temporary Stage - Lawn Seating	TGIF Concerts in the Park, Family Open Studios workshops	3,000
Calavera Hills Community Park	Carlsbad	Park - Temporary Stage - Lawn Seating	TGIF Concerts in the Park, Family Open Studios workshops	3,000
Rancho Del Oro Park	Oceanside	Park - Temporary Stage - Lawn Seating	Concerts in the Park , Movies in the Park	3,000
Mance Buchanan Park	Oceanside	Park - Temporary Stage - Lawn Seating	Concerts in the Park , Movies in the Park	3,000
Junior Seau Oceanside Pier Amphitheatre	Oceanside	Amphitheater - Permanent Stage - Lawn Seating	Supergirl Pro Festival, Movies in the Amphitheater, Graduation / Civic Events	2,500
Moonlight Amphitheater	Vista	Amphitheater - Permanent Stage - Stadium + Lawn Seating	Produced Theater, Presented Music Concerts, Film	2,000
California Center for the Arts - Lyric Court	Escondido	Lawn - Temporary Stage - Lawn Seating	Music Concerts, Independence Day Celebration, Civic Events, Private Events	500
St. Michael's by the Sea Episcopal Church - Lawn	Carlsbad	Lawn - Temporary Stage - Lawn Seating	Carlsbad Music Festival	350
Leo Carrillo Ranch	Carlsbad	Park - Temporary Screen - Lawn Seating	Leo Carrillo Film Festival, Holiday at the Rancho, Day of the Dead	300
Aviara Park Amphitheater (In-Development)	Carlsbad	Park - Permanent Stage - Lawn Seating	In-Development	200
The Flower Fields at Carlsbad Ranch	Carlsbad	Park - Temporary Stage - Lawn Seating	Music Concerts, Arts + Craft Vendors, Basket Weaving, Food Truck, Wine Tasting, Visual Art Workshop, Yoga	50

In total, there are 14 sites that currently host cultural events in the market area. Of those, only two are in permanent amphitheater spaces, the Junior Seau Oceanside Pier Amphitheatre and Moonlight Amphitheater in Vista. Each of the sites in Carlsbad are community spaces, such as the parks, Leo

Carillo Ranch and the Flower Fields. Because events like TGIF Concerts in the Park and Movies in the Park take place in these park settings, temporary equipment is required to produce these shows. Across the market area, there is a lack of back-end amenities and resources to allow for efficient, high-quality cultural programming and festivals.

Located just outside the 10-mile radius are the outdoor facilities at the California Center for the Arts. The Great Green and Lyric Court host 52 free community events, such as First Wednesdays, the summer music series Hidden City Sounds, Música en la Plaza, Independence Day Festival, Día de los Muertos Festival and the Winter Wonderland Festival. Additionally, the spaces are used for private rentals, including weddings, conferences and business retreats.

Figure 16



4.3 Artist Studio Space

The same 10-mile radius was used to inventory the artist studio spaces in the area. Artist studio space is working space for designated artists to create in. These spaces are available for artists in residence or for artists to rent.

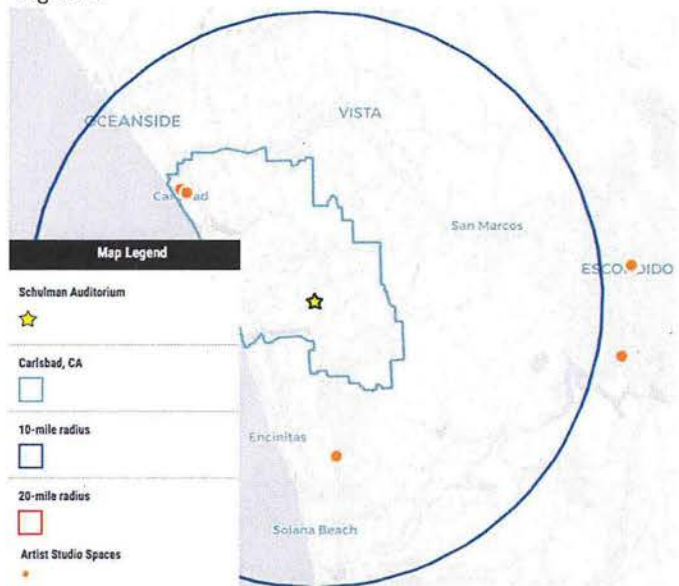
Table 5
Visual Art Studio Inventory: Carlsbad, CA
Studio spaces within 10-miles of Carlsbad, CA

Visual Arts Facilities	# of Studios	Medium										Activity							Facility Features						Total Facility Features			
		Sewing + Needle Work	Painting + Drawing	Sculpture	Metalworking	Glassblowing	Woodworking	Photography + Digital Media	Print Making	Ceramics	Jewelry	School + Youth Programs	Adult Programs + Events	Summer Camps	Univeristy + Academic	Festivals + Major Events	Events	Residencies	Incubator	Auditorium + Lecture Space	Classroom + Work Space	Meeting + Reception Space	Retail Space	Gallery		Artist Housing	Kitchen Access	
The Foundry	16																											1
ArtHatch	16																											2
Barrio Glassworks (In-development)	1																											2
Gallery 262	3																											3
Ship in the Woods	-																											3
Lux Art Institute	-																											3
Total		0	5	2	0	1	1	3	1	2	1	2	3	1	1	1	4	2	1	0	3	0	2	5	2	2		
Percent		0%	83%	33%	0%	17%	17%	50%	17%	33%	17%	33%	50%	17%	17%	67%	33%	17%	0%	50%	0%	33%	83%	33%	33%			

In total, there are six facilities in the market area, two of which are located in Carlsbad. The Foundry, part of the New Village Arts Theatre, has 16 artist studio spaces and a gallery. Barrio Glassworks is currently in development and is expected to offer a mix of hands-on programming, observation and studio time for glasswork.

Over in Escondido, ArtHatch has similar offerings to The Foundry. With 16 artist studio spaces, ArtHatch also frequently hosts teen and adult education programs. Gallery 262 offers 3 studio spaces that can be rented by local artists. Located in the Felicita County Park, A Ship in the Woods was founded by a group of artists as a gathering space for their experimental art. A Ship in the Woods offers artist residency and housing for artists of all disciplines and mediums, including performing artists and regularly hosts events on their property. Lux Art Institute in Encinitas is a unique museum and studio space offering visitors a chance to observe internationally recognized artists in a working studio environment. Lux education programs support community in developing a creative voice through exploration, experimentation and discovery.

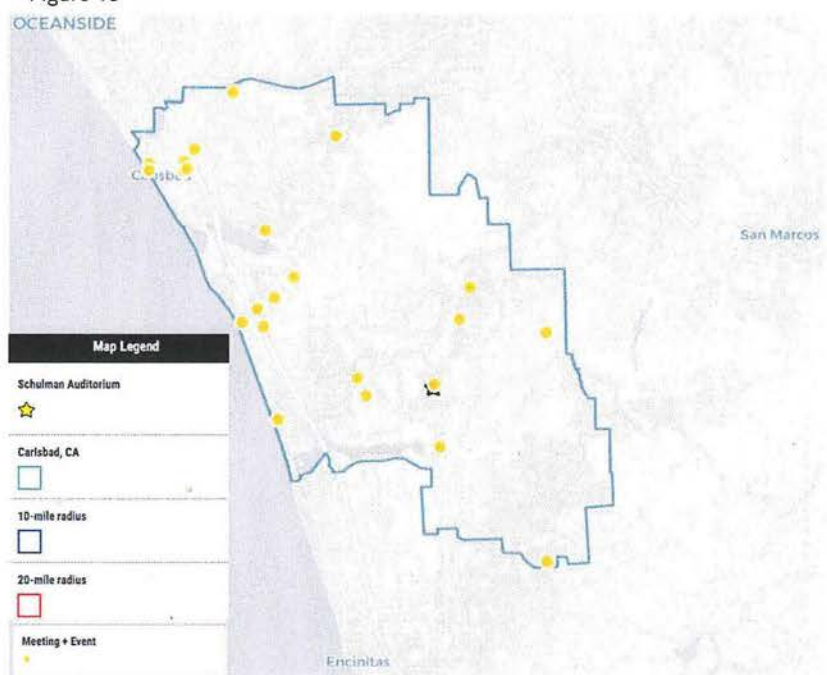
Figure 17



4.4 Meeting + Event Facilities

The Meeting + Event Facilities Inventory assesses the physical attributes and event types supported by 117 local meeting and event facilities with reception capacities from 32 to 1,700. Of the 117 meeting and event facilities in Carlsbad, 75 of them are located in a hotel or resort, 23 are in community spaces, such as the Harding Community Center, 15 are meeting at event spaces, like The Crossings at Carlsbad and four are in a restaurant or bar. Note, restaurant and bar meeting and event space is included for facilities that have dedicated event space for rental, not a restaurant that is amenable to having their restaurant rented out for a private event.

Figure 18



The community event spaces tend to have limited features and attributes, often times only providing Wi-Fi and occasionally a projector or sound equipment. The hotels and resorts are the most attribute-rich, providing renters with a wide array of technology and equipment to use. Across all meeting and event facilities, less than 50 percent have an available warming kitchen and less than 20 percent have an available commercial kitchen.

4.5 Existing Facilities Conclusions

This research allows us to make the following conclusions about the opportunity for new cultural facilities in Carlsbad:

- Local and regional indoor performance facilities are primarily used for producing performing arts and academic/educational programming. They are also rented by outside cultural organizations, schools/colleges and private entities. Few indoor facilities, particularly in Carlsbad, present activity. Amongst those that do, music is the most commonly presented activity type, suggesting opportunities for alternative forms of presented entertainment (theatre, dance, film, family shows, comedy, a lecture series and so on).
- Most of the inventoried indoor facilities have capacities between 100 and 400, medium quality ratings and low to no availability. This suggests that there are gaps for a high-quality performance facility in the market. This is particularly true in Carlsbad, where none of the facilities have a quality rating above 2.6, nearly every facility has low or medium availability and 10 of the 23 inventoried facilities are affiliated with a religious organization, school or university.
- Outdoor performance facilities are activated through community events and presented music (typically headlining and popular music acts). They cover a range of capacities but tend to lack the permanent equipment and backline features required to make them ideal sites for cultural programming. In addition, the inventory highlights that all of the outdoor sites in Carlsbad are temporary locations in parks. This suggests an opportunity for a high-quality, outdoor venue that can be used throughout the year for performances and events.
- The artist studio space inventory reveals a lack of available studio spaces for artists to create in the market area. The Foundry has 16 studio spaces, but anecdotally, artists and community members expressed a desire for more access to studio space and specialized equipment, such as spaces to accommodate woodworking, ceramics and fiber arts. Over the past few years, these types of spaces have closed despite the continued demand and interest from artists in the community.
- The meetings and events facility inventory suggest that most meeting and event facilities in Carlsbad belong to hotels and resorts and range in capacity from 30 to 1,700 people for a reception. Community and Meeting/Event facilities tend to be smaller in size than hotel spaces. They also vary more in the number of attributes they offer. City staff suggested that meeting and event space within the civic buildings is hard to come by, often times leading groups to scramble to find a decent-sized room to hold a meeting or conference.

5. User Demand

Understanding the nature of demand for performing and visual arts facilities is an important part of assessing feasibility. This chapter will identify the needs of possible facility users and assess a facility's potential to attract touring artists to Carlsbad facilities.

5.1 Performance Space Demand

Over the course of our assessment we had the opportunity to speak with several local groups. The following table summarizes each organization's demand for space and the desired capacity of the performance space.

Table 6

Organization	Desired Capacity	Current Performance Venue(s)	Annual Performances
Carlsbad Dance Center	1600	Escondido Center for the Arts; Carlsbad HS, La Costa Canyon	4
Carlsbad Unified School District	550	High School gyms	6
Carlsbad Performing Arts Academy	500	AVO; Carlsbad HS; Star Theatre	12
City of Carlsbad Cultural Arts Office	450	Schulman; Sites throughout Carlsbad	60
MiraCosta College Performing Arts	400	MiraCosta College Performing Arts Facilities	5
PGK Dance Project	375	San Diego	4
Carlsbad Community Theatre	370	Carlsbad High School	24
City of Carlsbad Cultural Arts Office	250	Schulman; Sites throughout Carlsbad	119
Carlsbad Music Festival	250	St. Michaels; Army + Navy Chapel	6
Litvak Dance	175	Schulman; San Dieguito Academy; Torrey Pines HS; Wagner Building at UCSD	5
North Coast Symphony	175	Encinitas Library Community Center; Sea Coast Comm Church; San Dieguito UMC; Greek Orthodox Church	10
Pacific Ridge School	150	Other HS; Schulman; AVO Playhouse; Exhibit at COAL	27
Hands of Peace	125	New Village Arts; Mural Museum; Exhibit at La Costa Canyon and Temple Solel	4
TOTAL			286

In total, there are 286 days of demand for performance space in the market. The two organizations with the greatest demand are the City of Carlsbad Cultural Arts Office and the Pacific Ridge School, which does not have a performance space as part of their school. The annual performance demand estimates should be considered conservative as the number of event days for touring artists to perform have not been accounted for. Furthermore, the City of Carlsbad Cultural Arts Office anticipates increasing their programming overtime with the addition of new performance spaces.

When you consider the demand for space based on the size of the facility, there is demand for 46 performance days in a 50-199 seat venue, 153 days in a 200-399 seat space and 83 days of use for a 400-599 seat venue (see table 7). In addition to Pacific Ridge School’s 27 performance days, they expressed a need for 21 tech days on the stage.

Table 7

Performance Day Demand -- by capacity

50 - 199 seats	46
200 - 399 seats	153
400 - 599 seats	83
600+ seats	4

5.2 Rehearsal + Support Space Demand

When conversing with local arts groups, the lack of rehearsal and administrative space in Carlsbad frequently came up. Four key stakeholder groups summarized their need for rehearsal space the following ways:

- **North Coast Symphony Orchestra** – the symphony struggles to access affordable rehearsal space because of its lack of college affiliation (it was previously associated with MiraCosta College for 30-years). The orchestra regularly meets on Tuesday evenings at the Seacoast Community Church in Encinitas.
- **Carlsbad Performing Arts Academy** – the dance, theatre and music academy expressed a clear need for two rehearsal spaces to accommodate the 400 students that utilize the Academy’s warehouse rehearsal space. Classes at the academy take place six days a week, starting at 9 in the morning and continuing until 9:30pm.
- **City of Carlsbad Cultural Arts Office** – current Cultural Arts support spaces have limitations, as noted in Chapter 4’s review of existing facilities. These limitations have prevented the Office from expanding program offerings and addressing the demand for adult visual and performing art classes.

- **Carlsbad Unified School District** – while the school has the necessary facilities for classes and rehearsals, there is a need for a larger meeting space to host district wide forums. A rehearsal or flexible performance space would be regularly used by District officials to host these gatherings.
- **Carlsbad Community Theatre + Christian Youth Theater** – both theater companies expressed a desire to have a formal rehearsal space to gather. Currently the Community Theatre meets at the Women’s Club and the Christian Youth Theater relies on high school facilities.

5.3 Visual Arts Studio Space Demand

The North County region around Carlsbad has recently seen a number of artist studio and industrial art program spaces close. University of California, San Diego previously had an industrial arts program, featuring metalwork, glassblowing and kilns, but closed nearly five years ago. Similarly, Palomar College closed the ceramics program at their school.

While these spaces have closed over the past few years, the demand for these spaces has not waned. Artists repeatedly expressed a desire to have wet and dry classrooms to create and equipment to craft ceramics, fiber arts and woodworking. The pending development of the Barrio Glassworks in the Village is seen by artists and members of the city as a potential catalyst for future studio space investments. Members of the Arts Commission and the city are interested in exploring industrial arts residency programs and ways to support the industrial artist community in Carlsbad.

5.4 Meeting + Event Space Demand

City officials repeatedly indicated a need for meeting and event space. The current availability of civic and library spaces is not sufficient for their day-to-day needs and the City Council currently does not have an adequate space to host larger city council meetings. Any new cultural facility in the community should include civic meeting spaces that can be utilized throughout the day by local officials. A flexible performance space can also function as the City Council chamber. Utilizing a performance space as a City Council chamber emerged from several interviews and has been successfully implemented in similar communities.

Secondly, a need for affordable meeting space for community groups was expressed. The cost to access the hotel and resort meeting space is not feasible for many groups, requiring them to use meeting spaces in Carlsbad community centers. These spaces have limited features and amenities and are often very busy. This type of demand would often occur during ‘business hours’ and activate the space when arts organizations are not meeting.

5.5 Conclusions

This analysis suggests that there is demand for a performance and visual art space in Carlsbad, based on the following:

- Twelve organizations have expressed interest in utilizing a new performing arts facility in Carlsbad. Most of these organizations have demand for space that can accommodate music or dance, although there is demand for a smaller theater space as well. Important facility features include rehearsal space, a flexible seating arrangement, sufficient back-of-house support spaces, a catering kitchen and lobby/box office space.
- In total, users have 307 days of demand for performance space: 286 days for performances, 21 days for rehearsals/tech. Of that demand, 46 performance days in a 50-199 seat venue, 153 days in a 200-399 seat space and 83 days of use for a 400-599 seat venue.
- The local performing arts groups and school district expressed a need for rehearsal and gathering space. With some organizations meeting daily, these rehearsal and support spaces are expected to be used over 200 days a year.
- Anecdotal research suggests that there is strong demand for industrial arts and artist studio space in Carlsbad. With the pending introduction of Barrio Glassworks to The Village, there is a strong sense that additional art spaces could strengthen the visual arts community in Carlsbad.

6. Benefits + Impacts

Investing in arts and entertainment facilities can have significant impacts on, and bring positive benefits to, a community. Let's consider these first in terms of City planning efforts and then by relating what we heard and learned in the community. A detailed review of relevant City planning documents can be found in Appendix E.

Table 8

City Planning Document	Goals + Strategies	Relevance of Cultural Facilities
<i>Arts + Culture Master Plan</i>	Hundreds of open-ended online community survey responses provide feedback to indicating a strong desire for cultural “gathering spaces” and performing arts venues that make it easy for people to experience the arts.	A performing arts venue enables residents to attend performances within the city of Carlsbad, rather than in neighboring cities with existing venues, creating economic impacts as well as other social and community benefits.
<i>Envision Carlsbad General Plan Update</i>	Working Paper 4, Section 3.4 - states that the General Plan Update “presents an opportunity for the city to encourage the development of new cultural art venues in the eastern and southern portions of the city to provide balanced opportunities for the entire community to appreciate, learn, perform and enjoy cultural arts.	New cultural venues are recognized as an important community asset; however, they tend to be sited in the city’s northwestern quadrant which is not conducive to citywide use and accessibility.
	Arts, History, Culture and Education Goal- 7-G.3: Integrate the arts, public art and art education as a vital aspect of community life, with a wide range of facilities and public programs designed to engage the city’s diverse audiences as active participants and patrons.	Dedicated cultural venues can provide not only places for presentation of performing or visual arts but also contain additional areas for public gathering and social connections, multigenerational participation in cultural activities.

City Planning Document	Goals + Strategies	Relevance of Cultural Facilities
<i>Envision Carlsbad General Plan Update (Cont.)</i>	Economy, Business Diversity and Tourism Goal - 8.P.5: Encourage increased year-round tourism through such means as working with the Carlsbad Tourism Business Improvement District to help market Carlsbad as a complete multi-day, year-round destination and by working with other organizations to promote and develop Carlsbad as an ecotourism destination.	A venue that supports year-round arts programming can be a draw for cultural tourists and encourage longer stays with music, dance, theatre, film and visual arts festivals or other multi-day events – particularly in slower months.
<i>Parks & Recreation Department Master Plan</i>	The plan describes two “Big Ideas” based on community program priorities and the philosophy that “programs determine facility design.” 1/ Multiuse, Multigenerational Community Recreation Center 2/ Outdoor Adventure Park.	The two feasibility studies for Parks and Recreation facilities document issues with the available space for new venues and the role that parking and population density can play in determining siting and feasibility.
<i>Carlsbad Village & Barrio Master Plan</i>	1.5.4 Placemaking - activate the Village by promoting placemaking strategies that support arts and culture, including visual, musical and theatrical arts and other public performances.	The siting of an arts center or other mixed-use cultural venue in the Village and Barrio area aligns with the goals and strategies of the Master Plan as well as other Plans reviewed as part of this literature scan.

Interviewees suggested that a performing and visual arts facility in Carlsbad could benefit the community in the following ways:

- **It would create sense of place.** Facilities could create a sense of place, contributing to the community’s overall identity and seizing on the opportunity to host more outdoor events.
- **It would diversify tourism and the economy.** Recent tourism reports indicate that amusement parks and the beach are the primary activities tourists seek out in Carlsbad. Multiple interviewees view performing and visual arts facilities as an opportunity to bring diversity to Carlsbad tourism and the economy.
- **It would keep money in the community.** Now, when a Carlsbad arts organization like the Community Theatre or Performing Arts Academy wants to have a performance, it has to go outside of the community to find a space. That means that rental fees are being paid to vendors beyond the borders of the city. It also means that potential audiences are leaving the city to partake in arts, culture and entertainment.

7. Conclusions + Recommendations

This research suggests that there is an opportunity to develop cultural facilities in Carlsbad based on the following:

- **The Market:** High levels of educational attainment and household income in Carlsbad and its 20-mile radius indicate a strong likelihood to support traditional performing arts (ballet, theatre, opera, symphonic music etc.). At the same time, the regional and tourist population is ethnically diverse, suggesting programming should be inclusive, with varying formats. This can include programming by local arts groups, partnering with local and regional ethnic associations and presenting touring groups that have representation from minority cohorts.

Based on tourism statistics from the San Diego Tourism Authority, tourism to Carlsbad is growing. These individuals are primarily attracted to the beach and amusement parks, but are willing to spend over \$45 on recreational activities. Plans to bolster arts and culture activity in Carlsbad should consider how to attract visitors, targeting an increase in visitor cultural participation from 3 percent in 2017.

- **Existing Facilities:** The facility inventories suggest that there are a few gaps in the market that new cultural facilities could fill. First, there is an opportunity for a high-quality, flexible indoor performance facility with 400- to 600-seats that can double as a City Council Chamber. This is particularly true in Carlsbad, where none of the facilities have a quality rating above 2.6, nearly every facility has low or medium availability and 10 of the 23 inventoried facilities are affiliated with a religious organization, school or university. Then, there is an opportunity for a high-quality outdoor space, specifically a space that has the back-end features and amenities to support festivals, performances and events and can serve as a park when not in use. Next, there is an opportunity for a unique industrial art space and artist studio space, possibly leveraging partnerships with a local university or the soon to open Barrio Glassworks. Finally, there is a need for community meeting and event space for use/rental by city officials, local businesses and residents. The city currently has a number of meeting and event facilities, but the majority of them are within hotels and used for corporate functions, conferences and events.
- **User Demand:** An analysis of user demand suggests that a performing arts facility in Carlsbad could be activated by a combination of rentals by local and regional arts groups and a mix of touring programs such as classical and contemporary music, comedy and speakers. In sum, 13 users have expressed a need for 307 performance days: 286 days for performances, 21 days for rehearsals/tech. Of that demand, 46 performance days in a 50-199 seat venue, 153 days in a 200-399 seat space and 83 days of use for a 400-599 seat venue. The ideal facility would have rehearsal space, a flexible seating arrangement, sufficient back-of-house support spaces, a catering kitchen and lobby/box office space. The local performing arts groups and other organizations expressed a need for rehearsal and gathering space. With

some organizations meeting daily, these rehearsal and support spaces are expected to be used over 200 days a year. City representatives noted a demand for meeting and event space as well as a space for larger City Council gatherings. This type of demand would often occur during 'business hours' and activate the space when arts organizations are not meeting.

- **Benefits + Impacts:** Numerous city planning documents and the community input speaks to a desire for cultural facilities in the community. Dating back to the 1990 Cultural Plan, new performing and visual art facilities are seen as an important priority for the city and its residents. Dedicated cultural venues can provide not only places for presentation of performing or visual arts but also contain additional areas for public gathering and social connections, and multigenerational participation in cultural activities. Furthermore, new performance spaces will ensure Carlsbad arts organizations and their audiences remain in Carlsbad, while potentially attracting additional arts organizations from San Diego County and enhancing the experience of visitors to the area.

Recommendations

Based on the previous conclusions, we recommend the following for the City of Carlsbad.

1/ Develop a 400- to 600-seat flexible performance space. This should be a high-quality, state-of-the-art facility for the Carlsbad community. It should feature a 400- to 600-seat flex venue that can accommodate local music, dance and theatre organizations, some touring entertainment, festivals such as the Carlsbad Music Festival and civic functions. The flexibility of the space will allow for City of Carlsbad gatherings, townhalls and City Council chamber sessions. Additional functionality should accommodate meeting and event functions, forums and nonprofit galas and fundraising events.

The size of the building to accommodate these spaces could be in the range of 30,000 to 40,000 gross square feet. As much of this space would need to be on the ground floor, the footprint for the building could be 18,000 to 23,000 square feet, which is between .4 and .55 acres. Parking would also be required nearby. A 500-seat theater might require 350 spaces, which is based on one space for each 1.5 attendees, plus some staff parking. If there are 200 parking spaces per acre, that suggests 1.75 acres of single-level parking. That requirement is reduced if structured parking on multiple levels is possible.

Example: Lake Forest Civic Center | Lake Forest, CA

The City of Lake Forest (population 85,000) is currently constructing the Lake Forest Civic Center, a 12.4 acre complex that will include a Performing Arts Hall & City Council Chambers, City Hall and Policing Center, Community & Conference Center and Senior Center.

Completion of the project is anticipated for Fall 2019. The Performing Arts Hall will include a 200-seat theater equipped with state-of-the-art audio-visual and acoustic capabilities, a 1,509 sq.ft stage, a 411 sq.ft dressing room with 6



dressing stations, a ticket booth and a lobby area that will accommodate up to 34 guests. In addition to serving as the official site for City Council and Commission meetings, the Hall will be available for rent for plays, musicals, pageants, awards ceremonies, graduations and more. A parking deck that will accommodate over 300 vehicles, including electrically-powered vehicles, is also a part of the city's plans.

The Community & Conference Center will serve as the city's flexible meeting space open to the public. Residents will enjoy five conference rooms, three multipurpose rooms and the ability to create one large multipurpose room of 7,853 sq.ft by combining all three multipurpose rooms. The rooms will be available for rent for luncheons, ceremonies, weddings, seminars, classes and more, with a maximum capacity of 1,124 in the largest room. The facility will boast flat panel monitors, projectors and projector screens throughout, a catering kitchen and central fireplace. Several of the rentable spaces will have direct access to an outdoor courtyard.

Lastly, the new Civic Center will include a senior center, The Clubhouse, which will incorporate existing senior activities such as BINGO & Free Hot Lunch Program, Bowling League, Golf Days, Movie Days and more. The 23,000 sq.ft facility will include a kitchen, game room, outdoor patio and multi-purpose rooms. The total estimated project cost for the Civic Center is \$73 million.

This project is relevant to Carlsbad by virtue of the combination of cultural and civic facilities.

***Example: Tarpon Arts Performing Arts Center |
Tarpon Springs, FL***

The Tarpon Arts Performing Arts Center is nestled inside the City Hall of Tarpon Springs (population 25,000), 15 miles north of Clearwater, Florida. The Center is operated by the City of Tarpon Springs' Department of Cultural Services/Division of Arts & Historical Resources, whose mission is "to present stimulating, engaging and educational performances, workshops, festivals, concerts and visual arts that celebrate the unique heritage and culture of Tarpon Springs and the State of Florida, while bringing nationally-acclaimed artists to the community in an effort to establish Tarpon Springs as a dynamic cultural destination."



The beaux arts-style building was originally constructed in 1925 to serve as a schoolhouse. In 1987, the City of Tarpon Springs restored the building, moved City Hall's offices and created a 300-seat theater. While the 39,000 sq. ft. Center is known for its small-town charm and listing on the National Register of Historic Places, it is fully equipped with quality acoustics. Broadway musicals, opera, plays and musical concerts are presented all year round. The Center relies heavily on volunteers to serve key roles in Front of House. Parking is free at the Center, with spaces on all sides of City Hall.

A short 10-minute walk from the Center is the Cultural Center, which sits inside of Tarpon Springs' original City Hall that was built in 1915. When City officials decided to move, plans were made to convert the original City Hall into a cultural center with an 85-seat theater. The Cultural Center hosts community theater productions and other community events throughout the year. It also relies on volunteers to staff shows and special events.

This is another example of a City project that combines cultural and civic facilities.

2/ Include Rehearsal, Program, and Teaching Spaces. The need for support spaces to complement the performance space is equally as important. With many local arts organizations relying on churches and high schools to rehearse, there is a lack of consistency and access to the necessary rehearsal, teaching or program space. These spaces should also be available to rent for meeting and events, city staff meetings and private events. Included in the spaces should be features for dance (i.e. mirrors, sprung floor and barres), music (i.e. quality acoustics and a piano) and theatre (i.e. audio/visual equipment).

Finally, the facility should have a commercial kitchen. This space should be available for rent by the community. It should have flexible catering policies and be designed with the diversity of Carlsbad and the surrounding region in mind. For example, the kitchen should be equipped with the essential appliances to prepare Latin American or Asian cuisine.

This additional recommendation might add another 5,000 to 10,000 gross square feet, most likely all on one level. And there would be an additional parking requirement of some 50 spaces. That suggests a total area of up to .5 acres for this component.

Example: Center for the Arts | Jackson, WY

The Jackson Hole (population 10,000) Center for the Arts serves as a community gathering place and home for twenty resident arts organizations. Built in 2007, the Center partners with local higher education institutions and a variety of artists from all disciplines to create a vibrant, creative environment. Located at the heart of the Grand Tetons resort town, the Center includes six visual arts studios, four dance studios, five classrooms, twenty-two offices for administrative purposes and a 525-seat theatre. Each resident organization has a tenant rental agreement with the Center's administration that ranges from 1 to 5 years.



The 76,000 sq.ft Center is owned by the city and operated by a nonprofit. The Center's staff is responsible for managing the facility and its residents, in addition to presenting a number of live events each year. The theatre hosts 175 annual performances for the Center's Presenter Series and resident organizations' performances. The Center engages with the broader community through partnerships with local hospitals and regional groups that aim to bolster the arts through civic engagement.

Relative to Carlsbad, this is a good example of a full set of rehearsal, teaching, program and meeting facilities coming with a 500-seat theater.

**Example: Mosesian Center for the Arts |
Watertown, MA**

The Dorothy and Charles Mosesian Center for the Arts (formerly the Arsenal Center for the Arts) is a multi-disciplinary community arts center located in Watertown, Massachusetts (population 36,000). Once a US Army arsenal, the 30,000 sq. ft. venue is now home to a 339-seat theater, a 100-seat Black Box theater, exhibition galleries, 2 rehearsal halls, classrooms and resident artist studios. In addition to touring productions, the Center presents its own programming through the work of the award-winning, Watertown Children's Theatre, as well as their resident, professional theatre company, New Repertory Theatre.



The Center has a robust education program that offers affordable arts exploration classes for children, teens and adults. Over 50 instructors offer their expertise in ceramics, printmaking, mixed media, painting, musical theater, dance, literary arts and more.

The MainStage Theater, Black Box Theater, Rehearsal Hall and Mezzanine Classroom are all available for rent. The theaters are equipped with theatrical sound and lighting. The rehearsal hall is equipped with a sprung dance floor.

Here again we see an example of a performance space combined with a good set of rehearsal and support facilities covering 30,000 square feet.

3/ Create an Outdoor Performance + Event Space. A space such as this should stand out from the other parks and outdoor spaces in the market. Namely, it should have the infrastructure, including electrical and water supply, to support major events and festivals, recreation spaces to attract residents and tourists alike, and minimal permanent structures so the venue can revert back to a pastoral park when not in use.

With the necessary infrastructure to host festivals and events, the city and community groups can regularly use the space for weekly concert series, movies in the park and other cultural events without having to transport and set-up stages, sound equipment and screens. Given the scale of the project and its potential impact on a North County area, a regional partnership for this venue might make sense. Note that we would suggest more of a plaza than an amphitheater, meaning a flat expanse with a stage and support area at one end.

The area required for such a performance and event space is flexible, and depends very much on the site and what is developed around it. At the more modest end of the scale, we might imagine a one-acre plaza with a raised stage at one end. This might accommodate 3,000 people standing or seated. For that capacity, there could be the need for another 2,000 parking spaces and thus 10 acres of

surface parking. Certainly that level of demand, if also responding to other parking needs, would help to justify structured parking.

Example: Celebration Square | Mississauga, ON

The 2011 opening of Celebration Square in Mississauga (population 828,000) was the result of extensive community engagement to envision how to activate downtown and develop a stronger sense of place and community in the city. With the help of the Project for Public Spaces, the city developed the vision for Celebration Square. The 280,000 sq.ft space is operated by the city as an outdoor community center with a range of programming and events, from farmers' markets to Canada Day celebrations to performances and festivals.



The 6.6-acre site is located between the Central Library and the Civic Hall and features gardens, a water feature that turns into an ice rink in the winter, a permanent fully equipped main stage for large-scale performances and a smaller amphitheater that seats 300. The square hosts more than 100 free events and attracts more than 500,000 visitors to downtown each year.

All events at Celebration Square are free and open to the public. Professional organizations and not-for-profit community groups can submit an application to book the various facilities in the Square.

This is an excellent and relevant model for Carlsbad as a civic plaza that is also very active as a cultural and entertainment venue.

Example: Addison Circle Park | Addison, TX

Completed in 2003 at a cost of \$7.5 million, Addison (population 15,000) Circle Park is a landmark in the new community in the Dallas suburbs. Maintained by the City's Parks Department, the Park addressed the need for outdoor space that would also serve as a downtown civic center. Town administrators posed a challenging planning and design problem: to create an inspiring and beautiful 10-acre park ideal for the community's everyday use, that then transforms into a civic gathering space for festivals of over 100,000 people.



Designers focused on shaping spaces and the land to create good sightlines for outdoor performances, to organize ticket-holders and to allow for the placement of tents for events, food and beverage vendors. They worked to create an infrastructure, including electrical and

water supply, to support major concerts for 12,000 people, theater events and other 500-1,000 person concerts and events.

The result includes more than 372,000 sq. ft. of open lawn, plaza and garden spaces that provide a variety of venues for performances, special events and festivals, as well as the daily recreational needs of local residents. Features include three distinct performance venues, parking for more than 2,100 cars, ticket booths and public restrooms, a covered pavilion with seating capacity for 200 guests, a concession kitchen, fields for active recreation, walking trails and water and electrical hookups located throughout.

In addition to serving as a civic gathering place for Addison's residents and host for touring productions, the Park hosts an array of events each year. The Park attracts almost one million people each year to support the town's economy.

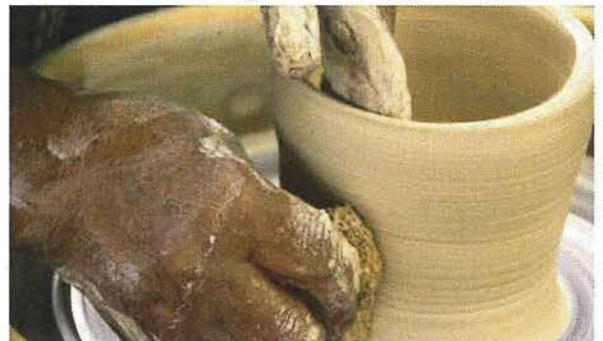
Relative to the Carlsbad opportunity, Addison is important as a set of outdoor facilities that can easily be converted from a plaza or passive park into small and large venues for concerts and other community celebrations.

4/ Develop an Industrial Art Space. Building upon the soon to open Barrio Glassworks in The Village, an industrial art space outfit with kilns for ceramics and the equipment necessary to create fiber art, woodworking and jewelry. It should unify the visual art community by supplanting the closed facilities at UC-SD and Palomar College, and allow for studio rentals, residencies and education programming to take place under-one-roof. The facility should include affordable studio memberships that ensure both emerging talent and established artists have access, and include resources for arts, such as art books and publications, computer workstations, equipment to rent and materials to buy.

As with our recommendation on rehearsal meeting and teaching space, this component might add another 5,000 to 10,000 gross square feet, and again most likely all on one level. And with an additional 25 parking spaces, the total site requirement is .36 acres.

Example: Irvine Fine Arts Center | Irvine, CA

The Irvine (population 277,000) Fine Arts Center is located within Heritage Community Park, a 36.5-acre park boasting 3 pools, an amphitheater, sports fields and a community center. The Arts Center's 18,000 sq. ft. provides art classes and camps in ceramics, photography, culinary arts, jewelry-making, painting and more. The Center's main gallery showcases regional visual artists. The Center hosts an annual juried exhibition, as well as Studio Arts Festival, a juried festival showcasing Southern California artists and their original works of art.



Artists with previous studio experience can rent studio space in the Center's Open Studio Program for ceramics, jewelry, photography and printmaking. The Ceramics Studio is fully

equipped with three large gas kilns firing at Cone 10, two low-fire electric kilns firing at Cone 06 and a Raku kiln. More than a dozen wheels line the perimeter of the studio along with two slab rollers, a spray booth and damp room. The Jewelry Studio is equipped with jewelry casting and fabricating equipment including casting centrifuge, burnout ovens, torches, hydraulic press, polishing and finishing machines. The program is primarily staffed with volunteers who have significant experience and knowledge in the program's offerings.

The Center has a tiered membership program that provides discounts on classes and programs, as well as member's only discounts at the Art Center Store. Admission and parking are free to the public.

For our purposes, this is a good example of a successful and very busy industrial arts space.

Example: Artworks Loveland | Loveland, CO

Artworks Loveland (population 77,000) is a nonprofit contemporary art center and the largest studio artist community in Northern Colorado. Dedicated to advancing contemporary art by offering artists an environment that fosters artistic growth, collaboration and expression, Artworks is more than an art gallery.



Known for their exhibition space, workspace and artist-in-residency programs, Artworks 20,000 sq.ft is comprised of thirty artist studios and two galleries. Artists are afforded 24/7 access and workspaces that are tailored to suit their needs: high ceilings, natural light, raw concrete flooring and high speed internet. Affordable studio memberships ensure that the community is inclusive of both emerging talent and established artists, and include access to art books and publications, computer workstations and printers, photo equipment and darkroom studios. Studio membership also provides artists with a platform to promote their work. Currently, the facility's website features over 20 artists whose specialties include performance and video art, printmaking, sculpture, jewelry making and more.

The Artworks Loveland Contemporary Art Gallery is available for event rental, offering guests two adjoining gallery spaces that can accommodate up to 100 guests. Full-service packages and a la carte options are available for receptions, cocktail parties, artist presentations and other intimate gatherings.

Loveland is interesting to us as a part of a larger strategy to make Loveland known internationally as a home for industrial.

**Example: GoggleWorks Center for the Arts |
Reading, PA**

GoggleWorks Center for the Arts is housed within the buildings of the former Wilson + Co. factory campus, the country's first manufacturer of optical lenses in Reading PA (population 88,000). In 2005, three years after the factory closed, the campus was transformed into GoggleWorks, "a place to develop skills, ask questions, experiment freely and investigate the human spirit." The Center's 145,000 sq.ft is comprised of three galleries, meeting rooms, multiple working studios, four event studios, a 130-seat, operating movie theater and a bistro with a performance stage.



A wide array of programming is offered in ceramics, drawing and painting, hot and warm glass, metalsmithing, photography and printmaking. Special programs include art history lectures and workshops, summer camps that combine art and the outdoors, virtual reality camp and more. Programs are offered in a variety of formats, including group visits, private sessions and after school. A summer fellowship is offered to area high school students who are interested in pursuing higher education or professional careers in the visual arts.

Artists enjoy the Center's numerous artist studios where they can create, display and sell work. Artists undergo an application process to be featured in one of the artist studios and exchange volunteer service for highly subsidized rental rates.

The Center's film theatre, gallery, meeting rooms and studios are available for rent. The largest studio space can accommodate up to 275 people and has access to an adjacent warming kitchen.

This is an excellent example of a full set of industrial arts facilities and programs completed as an adaptive re-use project.

5/ The Co-location of Spaces: Finally, we would make the point that several of these recommendations could reasonably be combined and/or co-located. In the case of the industrial arts spaces, these might best be located in Carlsbad Village as a part of an effort to highlight this as an arts district or art-making area through the careful rehabilitation of existing structures. But for our other three recommendations of the theater, rehearsal/teaching/meeting spaces, and the plaza, we could certainly imagine these pieces developed at one location. And we would also advocate for the development of these spaces as a part of the larger City Hall redevelopment plan. We would point to the following advantages of such a combined project:

- A central plaza would be a unifying element for the larger project.
- Parking needs could be more efficiently satisfied with a combination of day-time and evening uses.

- The main theater could be adapted to serve as a council chamber for City Hall (as is the case with the Tarpon Spring example on page 40).
- The theater, rehearsal and teaching spaces could also be used for various City meetings and events.
- All of these spaces could be operated and maintained jointly to minimize costs to the City.