
Broadway Theater in Maryland

The Future of the Mechanic Theatre:
It's Maryland's to Choose

October 1991

Published by
The Abell Foundation
210 North Charles Street
Baltimore, Maryland 21201



Executive Summary

BCPA needs to consider whether a) it needs a larger performing arts center, or b) it needs to reduce its mission.

The Baltimore Center for the Performing Arts (BCPA), Maryland's largest performing arts organization, has one of this country's most successful touring Broadway theater houses. BCPA, however, is facing new issues that threaten the future of Broadway in Baltimore. Costs of attracting, staging and managing Broadway shows have increased significantly. BCPA is under pressure to generate higher revenues to meet these increased costs. BCPA, however, is restricted from achieving higher revenues because its primary theater, the Morris A. Mechanic Theatre, has limited capacity (only 1,607 seats) and already high ticket prices. BCPA needs to consider whether a) it needs a larger performing arts center, or b) it needs to reduce its mission and present low-cost Broadway and/or non-Broadway shows.

BCPA has brought Broadway to Baltimore for 15 years. Hosting shows primarily in the Mechanic Theatre, BCPA has been able to develop one of the most successful Broadway theaters in the country. Presenting approximately 300 shows a year to over 350,000 people, BCPA has achieved a ranking of number six in ticket revenues and number five in length of season among all U.S. and Canadian legitimate theaters. In addition, BCPA has built one of the largest subscriber bases in the country—22,000 people.

BCPA's shows are one of Baltimore's major tourist attractions, second in the art and museum world only to the National Aquarium. Each year, BCPA brings a total of \$23.2 million in sales, \$8.7 million in employment income, 475 jobs and \$1.5 million in taxes to the Central Maryland economy. Theatergoers come to Baltimore from all over the Mid-Atlantic region: 44 percent from Baltimore City; 49 percent from the city's surrounding five counties; and seven percent from more distant Maryland counties, Pennsylvania, Delaware, Washington, D.C. and Virginia.

Many cities around the country have recently built larger (2,000 to 3,000 seat) theaters or mixed-use performing arts centers. As a result, Baltimore's Mechanic is now considered a relatively small theater and thus less attractive to producers. As demonstrated by BCPA's difficulty in booking shows for next year, BCPA is at a disadvantage and can no longer attract the "best" of Broadway. BCPA could not meet the financial guarantees required by three major Broadway productions for next year (Tommy Tune's "Bye Bye Birdie," Jerome Robbins' "Broadway" and "City of Angels"). In addition, BCPA has been overlooked for two of Broadway's top hits: "Phantom of the Opera" and "Miss Saigon." These shows, in terms of the physical facilities it takes to present them, are the wave of the future. The fact is, an increasing number of Broadway shows are going to be in this larger format. Baltimore will not be in a position to attract them because it will not be able to accommodate them. Such shows in the future will bypass Baltimore and go to other cities. The producer of "Phantom of the Opera" and "Miss Saigon" is currently considering only theaters with 2,000 or more seats. The Lyric, primarily designed for concerts, not theater, was reviewed in 1990 as unacceptable.

BCPA is beginning to see the results of rising costs and increased competition. Baltimore's ranking in box office revenues is declining versus other cities. Its subscriber base is beginning to erode and its impact on the economy has declined since last year.

BCPA is at a critical crossroads. It must decide whether to keep and strengthen its competitive advantage by building a larger performing arts center (approximately 2,500 seats) or reduce its mission and present "low-cost" Broadway and non-Broadway shows.

Executive Summary

If BCPA decides to build a new performing arts center, such a center is projected to increase programming and thus attendance by 25 percent the first season. Its impact on the economy will be roughly commensurate, an increase of about 22 percent in the same time frame: BCPA's direct and indirect spending would increase to a total of \$28 million in sales, \$10.6 million in employee income, 580 jobs and \$1.8 million in taxes to the Central Maryland economy. In addition, a major tourist attraction in the state would be saved.

The cost of a new performing arts center needs to be evaluated. Grieves Worrall Wright & O'Hatnick Inc., a Baltimore architectural firm, estimates building costs at one site, the Power Plant in the Inner Harbor, to be approximately \$25 million, including a large and small theater and an option to build a restaurant overlooking the water. The Power Plant is an ideal site; it is central to BCPA's subscribers and located in the high-traffic Inner Harbor. The Power Plant also offers BCPA the opportunity to save money on construction costs. The Power Plant's building and foundation could form the structure of the new facility. Other sites also need to be evaluated. A cost analysis of performing arts centers around the country indicates total costs can range from \$40 to \$100 million. Many of these facilities, however, are larger than the Power Plant site as they have up to three theaters and numerous additional features (rehearsal halls, lounges, parking lots, etc.). Operating revenues and expenses are projected to produce a modest surplus in the first 10 years, assuming construction costs are granted.

BCPA can also decide not to build a larger theater. If so, BCPA will need to restructure current operations. As BCPA is beginning to do already, it will have to present "low-cost" Broadway—small musicals, straight plays, shows with non-union employees or one-person shows. Over time, the costs of these shows will rise and BCPA may only be able to offer Baltimore non-Broadway touring shows. Operating subsidies may be able to delay this impact in the short term, but eventually BCPA will have to downsize its mission away from presenting Broadway theater.

The costs of not building a larger theater will rise quickly over the next several years—both in terms of declining attendance and subscribers, lost revenues and economic impact on the city. BCPA will lose its place among the country's top revenue-generating presenters.

Time is running out. BCPA already had difficulty booking shows for the 1991-1992 season. A decision needs to be made now about building a new performing arts center. BCPA's long-term lease on the Mechanic Theatre expires in mid-1995. BCPA needs to decide whether it wants to renew the lease, if it can, and how long it should be renewed.

In the following pages, the issues mentioned here are presented in more detail. It is clear that if BCPA does not build a new performing arts center, Maryland may lose one of its top cultural, educational and economic development attractions.

Over time, costs will rise and BCPA may only be able to offer Baltimore non-Broadway touring shows.

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BALTIMORE ♦ CENTER ♦ FOR ♦ THE ♦ PERFORMING ♦ ARTS, INC.

1976 ♦ 15 SENSATIONAL SEASONS ♦ 1991

A CHORUS LINE
 A COUPLA WHITE CHICKS
 SITTING AROUND TALKING
 A DAY IN HOLLYWOOD/A NIGHT
 IN THE UKRAINE
 A MATTER OF GRAVITY
 A PARTY WITH COMDEN & GREEN
 A RAISIN IN THE SUN
 A SOLDIER'S PLAY
 A TOUCH OF THE POET
 AFRICA OYE!
 AGNES OF GOD
 AIN'T MISBEHAVIN'
 ALVIN AILEY AMERICAN
 DANCE THEATER
 AMADEUS
 AN EVENING WITH ELLA
 ANIMAL FARM
 ANNA CHRISTIE
 ANNIE
 ARSENIC AND OLD LACE
 BEETHOVEN'S TENTH
 BILOXI BLUES
 BLITHE SPIRIT
 BORN YESTERDAY
 BRIGHTON BEACH MEMOIRS
 BROADWAY BOUND
 BROWNING VERSION/
 HARLEQUINADE
 BUBBLING BROWN SUGAR
 CABARET
 CALIFORNIA SUITE
 CAMELOT
 CAN-CAN
 CATS
 CHAPTER TWO
 CHICAGO
 CHILDREN OF A LESSER GOD
 CLARENCE DARROW
 CORPSE!
 CYRANO DE BERGERAC
 DA
 DANCIN'
 DAVID COPPERFIELD
 DEATHTRAP
 DIVERSIONS AND DELIGHTS
 DOUBLES
 DRACULA
 DREAMGIRLS
 DRIVING MISS DAISY
 EMLYN WILLIAMS
 AS CHARLES DICKENS
 EQUUS
 EUBIE
 EVITA

FAITH HEALER
 FAME: THE MUSICAL
 FIDDLER ON THE ROOF
 FILUMENA
 FOR COLORED GIRLS...
 42ND STREET
 FOXFIRE
 GIGI
 GOLDA
 GRACIOUS LIVING
 GRAND HOTEL THE MUSICAL
 GREASE
 GRIND
 HELLO, DOLLY!
 HELLZAPOPPIN
 I DO! I DO!
 I LOVE MY WIFE
 I OUGHT TO BE IN PICTURES
 I'M NOT RAPPAPORT
 INTO THE WOODS
 JOSEPH AND THE AMAZING
 TECHNICOLOR DREAMCOAT
 KISMET
 LA CAGE AUX FOLLES
 LENA HORNE:
 THE LADY AND HER MUSIC
 LEND ME A TENOR
 LES MISÉRABLES
 LITTLE SHOP OF HORRORS
 LOVE LETTERS
 M. BUTTERFLY
 MACBETH
 MAKIN' WHOOPEE
 MAMA, I WANT TO SING
 MAMA, I WANT TO SING,
 PART II
 MARCEL MARCEAU
 MASS APPEAL
 MASTER HAROLD AND THE BOYS
 ME AND MY GIRL
 MORNING'S AT SEVEN
 NUNSENSE
 OCTETTE BRIDGE CLUB
 ON GOLDEN POND
 ONE MO' TIME
 OTHELLO
 OTHER PEOPLE'S MONEY
 PAUL ROBESON
 PENNY BY PENNY
 PETER PAN
 PIPPIN
 RAISIN
 ROOM SERVICE
 RUDOLF NUREYEV AND FRIENDS
 RUN FOR YOUR WIFE

SAME TIME, NEXT YEAR
 SHADOW OF A GUNMAN
 SHENANDOAH
 SHOW BOAT
 SING, MAHALIA, SING!
 SINGIN' IN THE RAIN
 SLY FOX
 SMILE
 SONG & DANCE
 SOPHISTICATED LADIES
 SOUTH PACIFIC
 ST. MARK'S GOSPEL
 STARLIGHT EXPRESS
 STEEL MAGNOLIAS
 STEVE AND EYDIE
 SUGAR BABIES
 SWEENEY TODD
 TANGO ARGENTINO
 TEDDY & ALICE
 THE AMERICAN CLOCK
 THE BED BEFORE YESTERDAY
 THE BEST LITTLE WHOREHOUSE
 IN TEXAS
 THE CIRCLE
 THE ELEPHANT MAN
 THE ELIOT FELD BALLET
 THE GLASS MENAGERIE
 THE KING AND I
 THE KINGFISHER
 THE LAST OF MRS. CHEYNEY
 THE MAGIC SHOW
 THE ME NOBODY KNOWS
 THE MIKADO
 THE MUSIC MAN
 THE NIGHT OF THE IGUANA
 THE NUTCRACKER
 THE REAL THING
 THE TAP DANCE KID
 THE UNSINKABLE MOLLY BROWN
 THE VOYAGE OF EDGAR ALLEN POE
 THE WASHINGTON BALLET
 THE WIZ
 THEY'RE PLAYING OUR SONG
 TIMBUKTU
 TO GRANDMOTHER'S HOUSE WE GO
 TORCH SONG TRILOGY
 TRU
 TWICE AROUND THE PARK
 VINCENT
 WHOSE LIFE IS IT ANYWAY?
 YOUR ARM'S TOO SHORT
 TO BOX WITH GOD
 ZIEGFELD: A NIGHT AT THE FOLLIES
 ZORBA

Overview of Activities

Baltimore Center for the Performing Arts

With one legitimate theater, Baltimore is ranked among the top 10 cities in presenting Broadway revues.

Successful Broadway In Baltimore

Baltimore Center for the Performing Arts (BCPA) has one of the country's most successful touring Broadway theater houses. Among U.S. and Canadian theaters during the 1989-1990 season, BCPA ranked number six in Broadway ticket revenues and number five in length of Broadway season. Even with only one legitimate theater, Baltimore City is ranked among the top 10 cities in presenting Broadway revues.

- BCPA presents approximately 300 shows—primarily theater and dance—over nine months each year
- In total, BCPA's shows have an annual attendance of approximately 350,000 to 400,000
- BCPA has a subscriber base of 22,000, one of the largest in the country. The number of subscribing residents from surrounding counties—Anne Arundel, Howard and Carroll—continues to increase with population growth.

A Major Tourist Attraction in Maryland

A 1988 survey of major arts organizations and museums in Maryland by the Regional Planning Commission showed BCPA had one of the highest number of annual visitors. Following the National Aquarium (1,471,000 visitors), BCPA had the largest number of visitors (333,000). BCPA ranked above the Maryland Zoo (329,000 visitors), the Baltimore Museum of Art (329,000 visitors), the Baltimore Symphony Orchestra (300,000 visitors), the Maryland Science Center (268,000 visitors) and The Walters Art Gallery (231,000 visitors).

A Large Economic Impact on the City and State

BCPA has had a significant economic impact on the Central Maryland region (Exhibit A). BCPA's expenditures on payroll, services and utilities along with audience's and actors' spending on food and living expenses adds significantly to the economy.

- As a result of direct spending by BCPA, its audience and its traveling shows, BCPA added \$11.4 million in sales, \$4.4 million in employee income, 330 jobs and \$808,000 in taxes to the Central Maryland economy during its 1989-1990 season.
- Including direct and indirect spending by BCPA in 1989-1990, BCPA added a total of \$23.2 million in sales, \$8.7 million in employee income, 475 jobs and \$1.5 million in taxes to the Central Maryland economy.

Overview of Activities

Baltimore Center for the Performing Arts

Financial Independence

BCPA, operating with an \$8 to \$10 million annual budget, is relatively independent financially.

- Except for an annual subsidy by the city of \$171,000, BCPA breaks even on its operations each year (Exhibit B).
- BCPA is one of the only nonprofit performing arts institutions that does not rely on major financial support from grants. In its charter, BCPA has the option to seek additional public funds, but has declined to request funds outside of its annual city subsidy.

BCPA is one of the only nonprofit performing arts institutions that does not rely on major financial support from grants.

Recent Issues

Rising Costs

The increasing costs of presenting touring Broadway shows are beginning to affect BCPA's ability to offer the best of Broadway to Baltimore.

- The costs of attracting touring Broadway shows have increased substantially (10 to 20 percent) over the last three years. Producers are now requiring guaranteed weekly revenues of over \$250,000 for new musicals (Exhibit C). To break even, BCPA has to generate box office receipts of over \$375,000 during eight shows.
- The costs of operating touring shows have also risen. The added complexity and use of high technology equipment in show sets has increased operating expenses (Exhibit D). Over the last eight years, expenses have increased five percent annually (at about the rate of the consumer price index).

Restricted Revenues At the Mechanic Theatre

Total revenues have risen to meet these higher costs, but future increases are limited due to the Mechanic Theatre's small size (1,607 seats) and already high ticket prices.

- Total revenues have increased, but these increases have gone primarily to the producers (13 percent growth in revenues during the last five years) as opposed to BCPA (5 percent growth in revenues during the last five years) due to the larger financial guarantees required by producers (Exhibit E).
- For big hits, BCPA sells out at the Mechanic. A well designed, larger theater would bring in more revenues from shows for both the attraction and BCPA. BCPA could bring in additional revenues from increased attendance.
- Prices have increased to generate more revenues to meet rising costs (BCPA's ticket prices are primarily cost-based). For big hits, BCPA has charged up to \$48.50 per ticket.
- Fifty dollars for a ticket may be a limit for many customers. In a 1989 audience survey by BCPA, survey respondents indicated that on an average evening of entertainment for two they rarely (six to seven percent of the time) spent more than \$100. Married respondents generally spent between \$50 and \$75 an evening, while single respondents spent between \$25 and \$50 an evening.

A well designed, larger theater would bring in more revenues from shows for both the attraction and BCPA.

Recent Issues

Lyric Opera House Is an Inadequate Option

Although the Lyric has an appropriate number of seats for touring Broadway theater (2,522), the Lyric is not an ideal option for BCPA as it has many seats with obstructed views of the stage. The Lyric was built for concerts. Both producers and theatergoers continue to complain to BCPA that the Lyric is not well suited for theater (poor viewing and acoustics, out-of-date rigging system, lack of space backstage and poor dressing rooms). In addition, the Lyric has a full schedule of programming responsibilities and is not available to BCPA on a regular basis.

The Lyric is not an ideal option for BCPA.

A Threat to Future of Broadway Theater in Baltimore

Baltimore is one of the few cities that can guarantee at least a 50 percent full house for four weeks.

Missed Opportunities

Due to revenue limitations and the relatively small, 1607-seat Mechanic Theatre, BCPA cannot bring major hits like "Phantom of the Opera" or "Miss Saigon" to the Mechanic. Producers are requiring too large financial guarantees and higher theater size minimums (2,000 seats and above). Recently, BCPA had to decline three popular shows for the 1991-92 season (Tommy Tune's "Bye Bye Birdie," Jerome Robbins' "Broadway" and "City of Angels"). The weekly financial guarantees required by the producers were between \$290,000 and \$385,000 a week. BCPA would have to make over \$2 million dollars within four weeks to cover its costs (rarely does a show make over \$1 million at the Mechanic in four weeks).

Increased Competition

In contrast, other cities are well suited to present big hits and are becoming more attractive to producers

- Historically, producers have preferred Baltimore because of BCPA's large subscriber base, long running shows and good location (close proximity to New York). Baltimore is one of the few cities that can guarantee at least a 50 percent full house for four weeks.
- Most cities of comparable size, however, now have bigger theaters which can guarantee more revenue per show. Many cities have recently built new performing arts centers with seating capacities of 2,500-3,000 (Exhibit F). The average size of a touring theater is 2,700 seats.

Declining Ranking and Revenue for Baltimore

Nationally, the market for touring Broadway was a \$350 million business in the 1989-1990 season. The addition of "Les Miserables" helped increase national revenues by \$100 million from 1988-1989. Big hits over the last five years accounted for a large percent of each season's revenues. During the 1989-1990 season, 54 percent of the box office revenues were generated by three hit shows: "Les Miserables" (28 percent); "Phantom of the Opera" (18 percent—netted in just two theaters); and "Cats" (eight percent). Top shows continue to run for several years. Many performing arts centers, including the Mechanic, bring back top hits several times.

Within the national market, Baltimore ranks among the top ten cities in gross box office receipts—very high relative to its population (Exhibit G). However, Baltimore's ranking has declined because new "big hits" have gone to other cities with larger and multiple theaters (Exhibit H). Overall, this bypassing of Baltimore obviously results in less revenue for the city and state.

A Threat to Future of Broadway Theater in Baltimore

Eroding Subscriber Base

If Baltimore can no longer compete for "big hits" with cities that have larger theaters or performing arts centers, BCPA will lose its comparative advantage because its subscriber base will erode—Broadway hits are the main reason people become season subscribers.

- The number of subscribers declined eight percent this year and six percent in 1986-1987, two years when BCPA did not have a top hit. In both of the years when BCPA had a hit, subscription orders rose by over 10 percent.
- If BCPA stops bringing major Broadway hits to Baltimore, its subscribers are very likely to go to Washington, D.C., Philadelphia or New York for Broadway. Subscribers might also choose other and cheaper forms of entertainment.

If BCPA stops bringing major Broadway hits to Baltimore, its subscribers are very likely to go to Washington, D.C., Philadelphia or New York.

Options

The issue is whether BCPA's Broadway repertoire can survive in the future without a larger theater.

BCPA needs to consider its alternatives for the future. BCPA can either build a new performing arts center with expanded capacity or try to survive without a larger facility and restructure current operations.

A. A New Performing Arts Center for Baltimore

Overview

A new facility would keep and strengthen touring Broadway theater in Maryland. It would also enable BCPA to expand operations and alleviate its long-term financial and operational constraints. Maryland would gain by having Baltimore continuing as one of the top cities in the country for the presenting of Broadway theater. A new, larger theater would bring Baltimore and Maryland more revenues and tax dollars. The major "costs" of a new theater would be the construction costs of the new facility and, importantly, the reduced feeling of closeness and intimacy theatergoers get when they see a show at the smaller, and perhaps more intimate, Mechanic. The issue is whether BCPA's Broadway repertoire can survive in the future without a larger theater.

1. Size, Structure and Location

A New Facility

A performing arts center in Baltimore for touring Broadway would need to be built to maximize artistic attributes, allow for flexibility in programming and promote positive economics. Most new theaters being built around the country are multi-use performing art centers with 2,000 to 3,000 seats. Many have additional smaller theaters, rehearsal halls, offices, concession areas, and meeting rooms for outside revenues. Often these centers are built as part of a master plan for downtown development and have linked plans to build parking garages, office buildings, hotels, and restaurants (see the Appendix after the Exhibits for more details on performing art centers).

Size

Baltimore may have a need for a large performing arts center. According to recent performing art center builders, a 2,500- to 3,000-seat theater brings together the maximum in artistic and economic interests. The president of Playhouse Square in Cleveland stated in an interview, "A theater below 2,000 seats is now a luxury for theatergoers; it is no longer economically viable to present Broadway in small theaters." Baltimore's financial performance shows that its 1,607-seat theater almost always loses money on shows (Exhibit I). BCPA makes money only on its "other" revenues: subscription income, telecharge fees and interest income.

Options

Structure

According to BCPA's theater manager, a theater with a thrust stage, a large orchestra and more than one balcony level is a model structure for a large theater. Several examples now exist around the country (e.g., Tampa Bay Performing Arts Center). To preserve some feeling of intimacy, Hope Quackenbush, BCPA's managing director, believes a 2,400- to 2,600-seat theater is the ideal size for a large theater. To allow for increased revenue generation to cover the rising show costs, a new theater should have a minimum of 2,500 seats.

A new theater in Baltimore also must have a high percentage of seats with good views. BCPA's subscribers are very fastidious about their seats (BCPA's subscribers only subscribe to approximately 70 percent of the seat locations; rear orchestra and mezzanine seats are rarely used by subscribers). "Dress" and "box" seat areas also seem to be popular as they make theatergoers feel special or distinguished; these seats, however, are more expensive to build and less efficient structurally.

Convertibility

Even within the spectrum of Broadway shows, there are diverse types of performances. Some shows have a cast of only one or two people and need an intimate theater; others, like "Cats" or "Starlight Express," have a large cast and loud music and could present in a theater with 3,000 seats or more. Ideally, Baltimore could use two theaters or a convertible theater — one that had the option of seating 2,500 people, or less, by closing off sections of the theater. A technical assessment of the ability to "convert" theaters to a smaller size is needed. One local architect mentioned that convertible theaters "never work" and suggested building an additional smaller theater to address the issue (see below).

Multiple Theaters

More than one theater is typical for a new performing arts center. Many performing arts centers around the country have built a smaller theater adjacent to their larger theater. A smaller theater (500-700 seats) could be rented at its cost to the public for presentation of community programs (smaller dance and theater presentations, childrens series), smaller Broadway productions (e.g., "Shirley Valentine") and private events. A smaller theater could be operated at a minimal incremental operating cost since many of its needs could be met by the staff of the large theater. BCPA is currently considering presenting Off-Broadway theater next year at the Power Plant's old 300-seat theater.

Location

The Inner Harbor is an ideal location for a new performing arts center because it is centrally located to BCPA's subscribers and has a popular, complementary

Options

The Power Plant in the Inner Harbor is a potential site for a larger theater. The Mechanic and Lyric, on the other hand, are not ideal sites.

infrastructure—parking, office buildings, hotels, restaurants and other cultural institutions. Also, the visibility in a high traffic area will serve as a major marketing tool for a new center.

Sites

The Power Plant in the Inner Harbor is a potential site for a larger theater. It offers BCPA an ideal site and potential financial savings. According to James Grieves of Grieves Worrall Wright & O'Hatnick Inc., a Baltimore architectural firm, the Power Plant could hold a 2,000-3,000 seat theater, plus a smaller theater if desired. The theater could be built within the current structure and foundation and save BCPA construction costs. Building costs alone are estimated to total approximately \$25 million (\$348/sq. ft.), including costs for a large theater, small theater and restaurant along the water (Exhibit J). Site costs, start-up costs and miscellaneous fees have not been included. This square footage cost appears to be an average for other performing art centers which have ranged from \$250-\$450/sq. ft. The major savings at the Power Plant is in the size—most new performing art centers are almost twice as large because they are built to accommodate additional theaters, halls, offices, etc.

The Mechanic and Lyric, on the other hand, are not ideal sites due to their location and current structures which have been reconfigured several times. The Mechanic, for example, would have to be torn down and totally rebuilt to convert to a large theater. Additional sites need to be identified and reviewed.

2. Programming

Program

A larger theater with 2,500 seats (with good views) would change BCPA's programming structure and content. Given an increase in capacity of over 50 percent, a larger performing arts center could run shows for three weeks instead of four and thus hold more shows during the theater's 36-week season. An average show brings approximately 35,000 to 40,000 people to the theater. A new theater with 2,500 seats could hold 60,000 theatergoers in just three weeks. As a result, a larger performing arts center could run at least two to four shows a year (by broadening the subscription season) and bring in 25 to 45 percent more theatergoers. BCPA could use the additional programming time for an expanded repertoire, including pop, opera, dance, ballet and local programs. BCPA currently presents a range of performing arts. A new performing arts center could widen this range and possibly BCPA's season. A summer program could be introduced, similar to the Meyerhoff Symphony Hall's indoor summer festival.

Options

Resident companies

It is unclear whether a 2,500-seat theater would have local performing arts groups as residents, since many of these groups currently have their own facilities. However, local organizations would be encouraged to access the facility for special performances. The smaller theater, however, would be ideal for local programming. According to the Mid-Atlantic Arts Foundation's Directory, Maryland and Washington, D.C. together have over 100 performing arts organizations (including dance, music, opera, musical theater and theater groups). Many of these groups which do not have permanent residences could rent the smaller, community theater to showcase their work. Community programs focused on ethnic arts and theater for young audiences have been very popular in other performing art centers around the country.

The smaller theater, however, would be ideal for local programming.

3. Demand, Markets and Capacity

Demand

With a greater number of shows and shorter-running shows (three weeks from four weeks), annual attendance at a new performing arts center could generate 25 to 45 percent more theatergoers, just from programming increases. A new, visible and widely marketed performing arts center in Maryland with its strong interest in the arts (Exhibit K) and growing population (Exhibit L) will likely attract more theatergoers to take advantage of this increased capacity. Annual attendance is projected to increase the first season by at least 25 percent due to the 20 to 40 percent expected population growth in surrounding areas and the improved location (increased visibility) of the theater. Recent subscription growth of 20 to 40 percent in communities with growing populations indicates BCPA has yet to tap into a number of regions. Placing a new performing arts center in the Inner Harbor will also encourage tourists and visitors from D.C. to increase and expand their visits to Baltimore.

Note: The increase in number of shows and resulting projected annual attendance increase of 25 percent is factored into the projected operating budget (Exhibit N).

Target Markets

A review of population statistics shows that Maryland population is expected to increase 16 percent over the next 20 years (Exhibit L). Population growth, a primary indicator of subscription growth, is expected to be particularly strong in the many counties surrounding Baltimore in which BCPA continues to build its subscription base. Rapidly growing areas over the next 20 years include: Howard County—43 percent; Carroll County—43 percent; Frederick County—41 percent; Queen Anne's County—41 percent; Harford County—29 percent; Cecil County—21 percent; Anne Arundel County—18 percent; Montgomery County—18 percent; and Prince George's County—17 percent. In addition, Southern Maryland is expecting a population

Options

growth of 43 percent over the next 20 years. Growing communities in these areas should be targeted for subscriptions.

In addition to growing in size, Maryland's population is also growing in age. Forty-three percent of Maryland's population will be over the age of 45 in 2010, compared to 31 percent in 1990 (Exhibit L). Historically, the majority of theatergoers have been over 35 years old with incomes above \$20,000. This indicates that a larger percentage of the population may be interested in theater in the future if household incomes remain comparable.

Capacity

On average, BCPA sells out 70 percent of the house (78 percent of the Mechanic and 65 percent of the Lyric), generating an annual attendance of 350,000 to 400,000. However, capacity differs widely (50 to 100 percent) by type of performance (Exhibit M) and time of performance (weekends are more popular). With a new 2,500 theater and shorter-running shows (three weeks), capacity is expected to begin at an average of 80 percent for "top hits," 65 percent for musicals and 50 percent for straight plays. Capacity is projected to grow one to two percent a year, bringing capacity to 90 percent for "top hits," 75 percent for musicals, and 65 percent for straight plays within 10 years.

4. Projected Operating Budget

Budget Projects Modest Surplus of Revenues (Exhibit N)

A 36-week program in Baltimore containing primarily touring Broadway (a mix of "big hits," musicals, plays), plus special performances of pop music, opera, ballet and dance, would likely generate a modest \$0.5 to \$1.5 million a year in surplus revenues during the first 10 years of operation (assuming the construction and start-up costs are granted). BCPA may also be able to generate some revenues from concession or other fees, depending on what amenities are included in the new performing arts center. Any surplus revenues could be used by BCPA to contribute to debt service, to help stabilize ticket prices or to continue to build its endowment for future years. An analysis of price vs. capacity for the 1989-1990 national tour of "Driving Miss Daisy" indicates larger capacities often result in lower prices (Exhibit O).

Operating Budgets of New Performing Arts Centers Include Grants

Most new performing art centers have an operating deficit of 20 to 30 percent a year (Exhibit P). Many centers engage in other businesses related to the theater to break even (hotels, parking garages, office buildings). However, BCPA is already operating and has the advantage, before building a larger performing arts center, of a proven successful theater. Over the last 10 years, BCPA has broken even on its operations.

Most new performing arts centers have an operating deficit of 20 to 30 percent a year.

Options

A new theater would alleviate current revenue limitations (assuming the construction costs are granted). Most of the new revenue would fund added expenses (depreciation, maintenance, utilities, labor).

5. Construction Costs and Endowment Needs

Estimate of New Construction Costs

Based on a sample of new performing arts centers around the country, a new performing art center with a large theater capacity of approximately 2,500-3,000 seats would cost in total anywhere from \$40 to \$100 million (or \$250-\$450/sq. ft.) to build and start up. In order to estimate operating revenues and expenses, we have estimated a new 2,500-seat theater to cost a total of \$65 million (Exhibit P). An engineering study would need to be done to give actual costs. This figure assumes BCPA would build a new performing arts center similar to those built around the country (200,000+ square feet). Given the infrastructure on the Inner Harbor and BCPA's facilities at One North Charles Street, BCPA may not need a facility of that size.

A new performing arts center would cost in total anywhere from \$40 to \$100 million to build and start up.

Estimate of Construction Costs for Rebuilt Facility

As mentioned previously, the Power Plant in the Inner Harbor has been proposed as a potential site for a performing arts center. Building costs at the site for a large theater (2,700 seats and approximately 70,000 sq. ft.), a small theater and a restaurant have been estimated by Grieves Worrall Wright & O'Hatnick Inc. to be \$25 million (\$348/sq. ft.). Other costs (financing fees, site costs, etc.) have not been included.

Endowment Needs

Most theaters and performing art centers have three main funds—a capital fund for construction, maintenance and repairs; an operating fund for programming and operations; and an endowment fund for security and special needs. BCPA currently has assets of close to \$8 million, including marketable securities of over \$6 million. BCPA is well positioned to expand its operations as long as its endowment continues to grow and provide security for operations. BCPA's current endowment is about the size of a new performing arts center's initial endowment.

6. Organization and Staff

Current Organization and Staff

BCPA has an organization in place. To begin managing and operating a new and larger performing arts center, however, BCPA would need to add and expand several functions within its organization. BCPA currently has a small board of directors,

Options

management team and staff (28 full-time employees in total). Part-time union employees are hired to work in the theater during shows (stagehands, ushers, etc.). On average, BCPA employs 150 people during the season and 50 people off-season. BCPA uses outside firms for investment, advertising, legal work, security and cleaning.

Current BCPA Organization	Number of Full-Time Personnel
Board of Directors	6
Management	2
Theater Operations	2
Press/Public Affairs	2
Subscriptions	4
Accounting/Bookkeeping	3
Telecharge/Group Sales	3
Marketing	2
Computer Systems	2
Administration/Other	2
Total	28

Expanded Organization and Staff

Based on a review of other performing art centers, new and expanded functions at BCPA's organization should include the following functions: fundraising; financial planning and control; and facilities maintenance and security.

- If BCPA has to raise public and private funds to build a new performing arts center (which is very likely), BCPA would need an expanded board of directors for fundraising activities plus a fundraising director on staff.
- BCPA would need an expanded financial planning and control staff (internally or externally) to manage the ownership of a facility and its expanded operations.
- Maintenance, security and custodial staff would be required to operate a new facility. BCPA rents most of its facilities today and is not currently responsible for many of these tasks. When needed, BCPA currently contracts out these tasks.

Also, marketing and planning capabilities will be critical because BCPA will aim to increase its attendance and subscriber base. A rigorous and focused marketing campaign would need to be launched with the opening of a new center.

A rigorous and focused marketing campaign would need to be launched with the opening of a new center.

Options

Organizational Structure

At BCPA, each of the major functional areas reports to the managing director. With an expanded board of directors and staff, the managing director will need to further decentralize BCPA's administrative functions and/or employ additional management assistance.

7. Funding Sources and Support

Public/Private Partnerships

If BCPA decides to build a new performing arts center, capital funds will need to be raised. Most new performing arts centers have funded construction costs with both public and private funds. City, county, state and federal governments have shared the costs with the private sector (Exhibit P). Public funds have occasionally been raised through hotel tax revenues, Urban Development Action Grants (UDAGs) and industrial revenue bonds (bonds are often repaid by private grants several years later). For private funds, major fundraising campaigns have been organized.

If Baltimore decided to build a performing arts center, an arts coalition would need to be formed.

Funding Sources	Funding Methods
Public Sector:	
• Federal, State, City, & County Governments	Grants, Low-Interest Loans, Cultural and Retail Taxes, Arts Fund Allocations
Private Sector:	
• Businesses, Organizations and Individuals	Grants, Matching Gifts, Commemorative Gifts, Investment Endowments
BCPA:	Endowment Funds, Modest Surplus Funds from Operations (if achieved)

Unity In the Arts Community

In each of the cities that built a new performing arts center, the arts community was organized and unified. All arts organizations publicly supported the common goal of a new performing arts center. If Baltimore decided to build a new performing arts center, an arts coalition would need to be formed. This task would be difficult and take a lot of work because the scarcity of public and private funds has made organizations more hesitant to support new arts initiatives in Baltimore.

Options

If BCPA does not build a new performing arts center, BCPA will need to restructure current operations.

8. Costs and Benefits to Maryland

As shown earlier, BCPA has had a large impact on the Central Maryland economy. A new performing arts center would enable BCPA to survive and continue to contribute to the Maryland economy.

With its expected increase in programming and attendance of 25 percent the first season, the overall economic impact will increase, in the same time frame, an additional 22 percent and increase to approximately \$28 million in sales, \$10.6 million in employee income, 580 jobs and \$1.8 million in taxes. Sales would be generated from BCPA's expenditures on payroll and services as well as audience and show staff spending on food, transportation and living expenses.

The primary costs of a new performing arts center would be the construction costs which could range from \$25 (Power Plant estimate) to \$65 (average in the industry) million. The theater would pay back its costs quickly to Maryland by adding sales, employee income and jobs to the economy. Taxes incurred by BCPA to the city, county and state, however, will be less dramatic as few taxes are paid by the theater. If a new performing arts center costs \$25 million of public funds, BCPA could pay back these public costs with tax revenues paid to the city, county and state in approximately 30 years (with a seven percent interest rate).

B. Restructuring Current Operations

1. Short- and Long-Term Options

If BCPA does not build a new performing arts center, BCPA will need to restructure current operations. In the short-term, BCPA would need to limit its repertoire to "low-cost" Broadway and subsidize some of its operations. In the long term, BCPA would need to downsize its mission.

Short-Term Option

BCPA's lease on the Mechanic expires in 1995. Over the next three to five years, BCPA could continue to present Broadway theater. However, BCPA would no longer have the resources to present the "best" of Broadway. As mentioned earlier (see section on "A Threat to Future of Broadway Theater in Baltimore—Missed Opportunities"), BCPA could not meet the financial requirements of three major Broadway shows for next season in addition to "Phantom of the Opera" and "Miss Saigon." BCPA would have to offer Baltimore "low-cost" Broadway over the next few years. BCPA's options will be musicals with small casts, straight plays, shows with non-union employees (like this year's "Ziegfeld: A Night At The Follies") and one-person shows.

Options

In an attempt to hold on to a few large shows, BCPA, in the short term, could subsidize several shows and present a few shows at the Lyric (if possible) despite subscriber complaints. Subsidizing a major show would require close to a \$1 million grant or a large dip into BCPA's \$6 to \$8 million endowment. Subsidizing a few shows each year could be a costly venture. BCPA would need to organize a fundraising team and achieve high annual-giving targets. In the long run, however, this solution appears destined for failure because the producers are continuing to weed out smaller theaters.

Long-Term Option

Even with subsidies and a renewed lease on the Mechanic in 1995 (which may not be possible), BCPA will have to decrease its mission in the long term. Within the next seven to 10 years, many Broadway shows will be financially and structurally out of BCPA's reach. Even today, Cameron Mackintosh, a major Broadway producer, will not currently show "Phantom of the Opera" or "Miss Saigon" in Baltimore because he requires a 2,000-or-larger seat theater (the Mechanic has only 1,607 seats) and considers the Lyric unacceptable. Subsidies may not be enough to attract a show to Baltimore. BCPA would then have to downsize its mission and present non-Broadway touring shows that are less expensive. However, Marylanders may not choose to see non-Broadway touring shows because they will always have the option of traveling and seeing Broadway in Washington, Philadelphia or New York. The subscriber base would likely fall significantly without Broadway in Baltimore.

BCPA would need to organize a fundraising team and achieve high annual-giving targets.

2. Costs and Benefits to Maryland

The benefits of not building a new performing arts center are the saved construction costs. The costs are the operational subsidies, declining attendance and subscriber base, and the reduced economic impact on the state. A drop in attendance will drop BCPA's economic impact on Central Maryland. For example, a 25 percent reduction in attendance will reduce BCPA's economic impact 15 to 25 percent (depending on whether there is a change in operating income). BCPA's total economic impact will drop to approximately \$18.6 million in gross sales, \$7 million in employee income, 380 jobs and \$1.1 million in taxes. A 50 percent decline in attendance would result in a 40 to 50 percent drop in BCPA's economic impact (assuming operational expenses declined to 25 to 50 percent of their current amounts). In this case, BCPA's total economic impact would fall to \$13 million in sales, \$5 million in employee income, 265 jobs and \$0.8 million in taxes. In addition, attendance could decline further. It is clear BCPA has a difficult choice to make.

It is clear BCPA has a difficult choice to make.

Timing and Next Steps

If BCPA chooses to seek support for a new performing arts center, it needs to begin its efforts today.

Time is running out. BCPA is having difficulty booking shows for the 1991-1992 season. A decision needs to be made about building a new performing arts center. BCPA's long-term lease on the Mechanic Theatre expires in mid-1995. BCPA needs to decide whether it wants to renew the lease, if it can, and how long it should be renewed.

A. A New Performing Arts Center

Many of the new performing arts center organizations around the country have taken three to five years to build a facility, and longer to organize and fund. If BCPA chooses to seek support for a new performing arts center, it needs to begin its efforts today as the process can be lengthy. The following steps are some activities BCPA needs to begin work on immediately:

1. Inform staff, subscriber base, theatergoers and general public about issues and actions
2. Organize a team of community leaders(public and private) to manage the process, assist in generating funding and build political support
3. Work with parties that may be concerned about a new performing arts center
4. Research potential sites and determine building costs
5. Identify architect(s) and engineer(s).
6. Begin plans for operating a new performing arts center

B. Restructuring Current Operations

If BCPA decides to forego building a new performing arts center, it needs to consider taking the following steps:

1. Renegotiate lease on Mechanic Theatre
2. Organize strategy and team to raise operating funds and begin soliciting for financial support
3. Perform marketing research on options for "low-cost" Broadway and non-Broadway touring shows
4. Perform review of operating costs and assess possibility of reducing spending
5. Develop incentive plan to keep subscribers

Exhibits

**Baltimore Center for the Performing Arts
Central Maryland Economic Impact Analysis**

1989-1990 Season

Direct Economic Impact (Includes Items from A-D on following pages)

	<u>Gross Sales</u>	<u>Employ. Income</u>	<u>Jobs</u>	<u>Taxes</u>
Selected Operating Expenses	\$ 4,781,000	\$2,243,000	120	\$125,400
Audience Expenditures	5,557,650	1,806,236	178	389,291
Show Expenditures	1,088,850	353,876	35	76,269
Other				215,000
Total	\$11,427,500	\$4,403,113	333	\$805,960

Total Economic Impact — Direct and Indirect Expenditures

	<u>Gross Sales</u>	<u>Employ. Income</u>	<u>Jobs</u>	<u>Taxes</u>
Selected Operating Expenses	\$ 8,653,610	\$4,306,560	140	\$ 310,499
Audience Expenditures	12,226,830	3,702,784	280	786,252
Show Expenditures	2,395,470	725,446	55	154,042
Other				215,000
Total	\$23,275,910	\$8,734,791	475	\$1,465,793

Multipliers Used to Estimate Indirect Impacts

(Source: Maryland Department of Economic and Employment Development)

	<u>Gross Sales</u>	<u>Employ. Income</u>	<u>Jobs</u>	<u>Taxes</u>
Selected Operating Expenses	1.81	1.92	1.17	NA
Audience Expenditures	2.20	2.05	1.57	NA
Show Expenditures	2.20	2.05	1.57	NA

Note: All data from BCPA Financial, Operating and Employment Records

**Economic Impact Analysis
BCPA Information**

A. Operating and Non-Operating Expenses

	<u>Total</u>	<u>Maryland Only</u>
Attraction Share	*	*
Payroll Costs:		
Front Salaries	\$ 508,000	\$ 508,000
Musicians	227,000	227,000
Employee Benefits	152,000	152,000
Pension	61,000	61,000
Management Fees	25,000	25,000
Telecharge Salaries	116,000	116,000
Stagehand Salaries	613,000	613,000
Wardrobe Salaries	192,000	192,000
Subscription Salaries	125,000	125,000
Plant Manager Salary	22,000	22,000
G&A Salaries	198,000	198,000
Temporary Help	4,000	4,000
Subtotal	\$2,243,000	\$2,243,000
Services, Rentals and Parking Fees:		
Advertising	1,031,000	1,031,000
Deliveries	3,000	3,000
Rentals	70,000	70,000
Piano	5,000	5,000
Professional Fees	67,000	67,000
Space Rental	237,000	237,000
Promotions	119,000	119,000
Parking	55,000	55,000
Gallery Fee	9,000	9,000
Subtotal	1,596,000	1,596,000
Building, Maintenance, Utilities		
Sanitation	60,000	60,000
Electric & Steam	111,000	111,000
Security	28,000	28,000
Office	69,000	69,000
Repairs and Maintenance	62,000	62,000
Telephone	59,000	59,000
Depreciation	79,000	79,000
Subtotal	468,000	468,000

* The \$7.9 million paid to producers to bring shows to Baltimore not included as operating and non-operating expenses. 15 percent of these dollars, however, remain in Maryland (see Section D of Exhibit A).

A. Operating and Non-Operating Expenses (continued)

	Total	Maryland Only	
Other Costs:			
Data Processing	\$ 12,000	\$ 12,000	
Computer Costs	105,000	105,000	
Bad Debts	23,000	23,000	
Group Sales Costs	18,000	18,000	
Subscription and Dues	3,000	3,000	
Customer Relations	3,000	3,000	
Insurance	5,000	5,000	
League Fees	10,000	0	
Royalties	7,000	0	
Miscellaneous	13,000	13,000	
Ticket Printing Costs	22,000	0	
Supplies	60,000	60,000	
Travel	17,000	0	
Subtotal	298,000	242,000	
Bank and Credit Card Fees:	232,000	232,000	
Total (- Taxes & Attract)	\$4,837,000	\$4,781,000	99%
Taxes:			
Payroll Taxes	\$ 214,000	\$ 214,000	
Licenses and Other Taxes	1,000	1,000	
Subtotal	215,000	215,000	
Total (+ Taxes)	\$5,052,000	\$4,996,000	99%

B. Number of Employees

Date	Number of Employees
7/89	49 (Theater closed)
8/89	51 (Theater closed)
9/89	50 (Theater closed)
10/89	121
11/89	129
12/89	120
1/90	165
2/90	164
3/90	86
4/90	137
5/90	237
6/90	132
Average	120

C. Audience Expenditures, Hotel/Retail Taxes

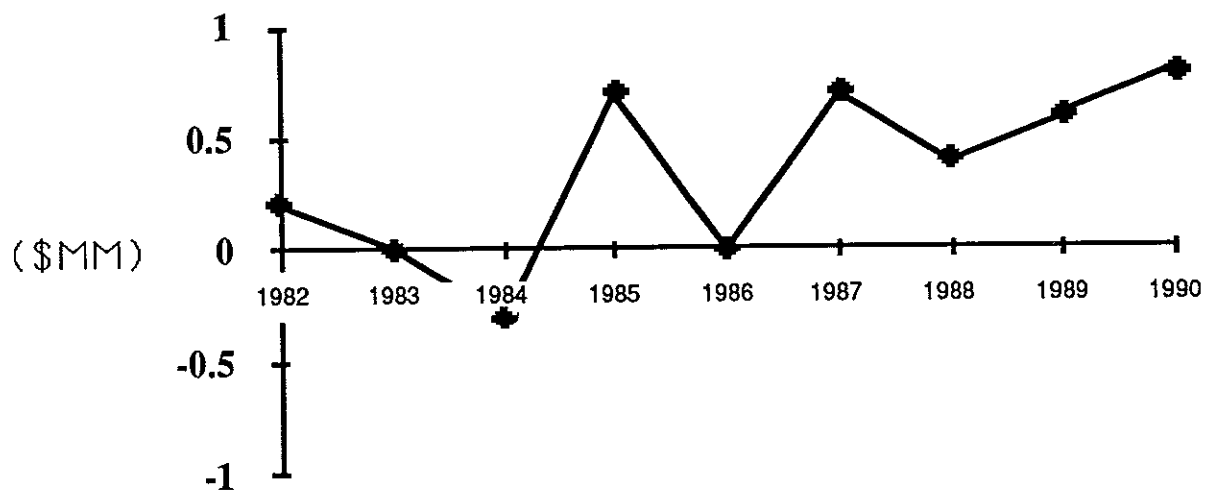
Visitors' Residence	Mechanic Attendance	Percent of Total Attendance	Avg. Dollars Spent per trip*	Total Dollars Spent
Greater Baltimore	311,550	93.00%	\$14	\$4,361,700
Other — Day trip	11,725	3.50%	14	164,150
Other — Overnight	11,725	3.50%	88	1,031,800
Total	335,000	100.00%	\$116	\$5,557,650

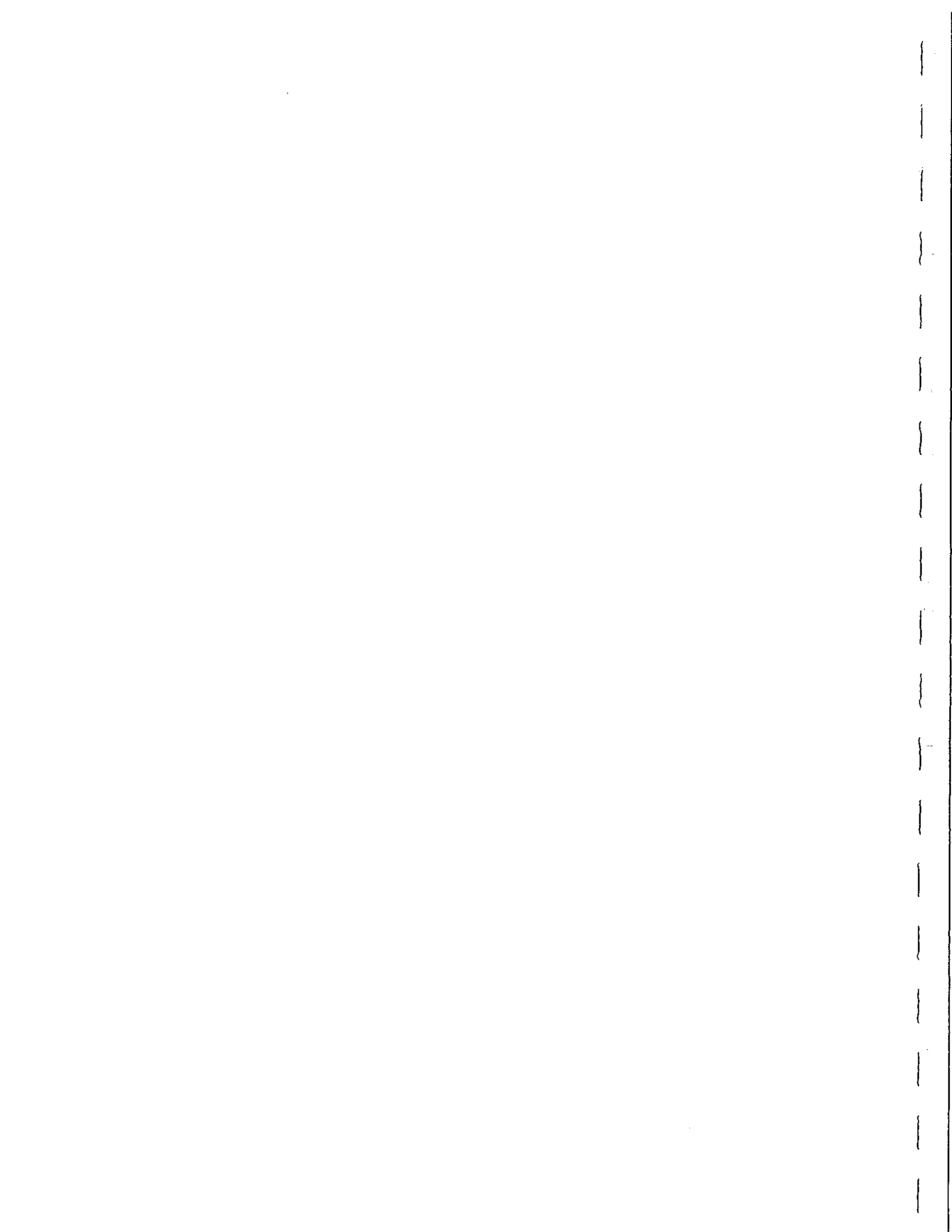
* Source: Maryland State Department of Economic and Employment Development

D. Traveling Show Staff Expenditures (Attraction Revenues that remain in Maryland)

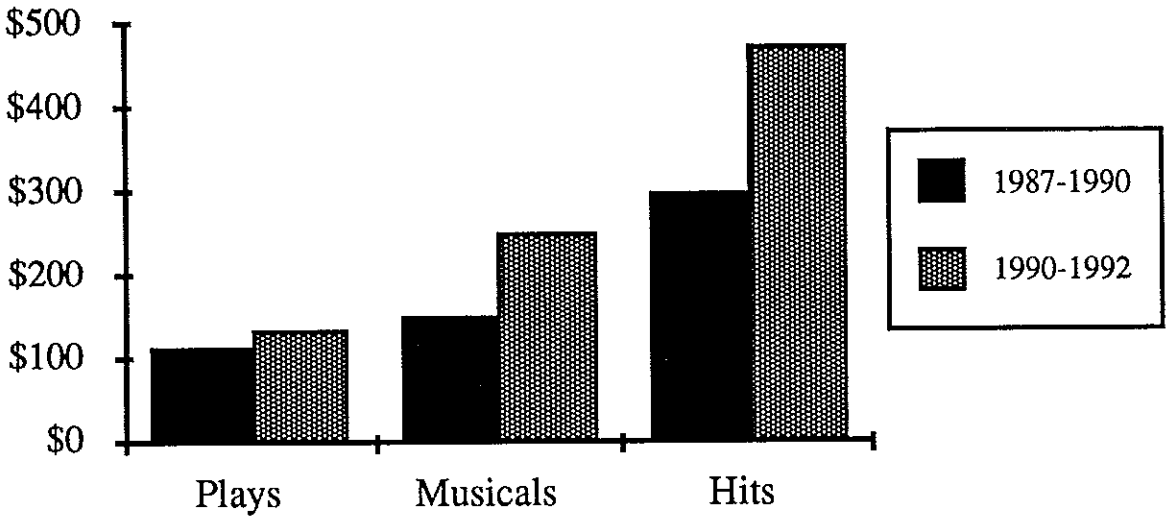
1989-90 Season Show	# of Weeks	Approx. Cast Size	Cast Stipend Spending*
"King & I"	1	40	\$ 23,800
"Washington Ballet"	0.5	NA	NA
"The Circle"	4	20	47,600
"Driving Miss Daisy"	4	10	23,800
"Nunsense"	4	20	47,600
"Les Miserables"	9.5	100	565,250
"Other People's Money"	4	15	35,700
"Into the Woods"	4	60	142,800
"The Unsinkable Molly Brown"	4	50	119,000
"Mama, I Want to Sing II"	2	20	23,800
"Cats"	2	50	59,500
Total	39	385	\$1,088,850**

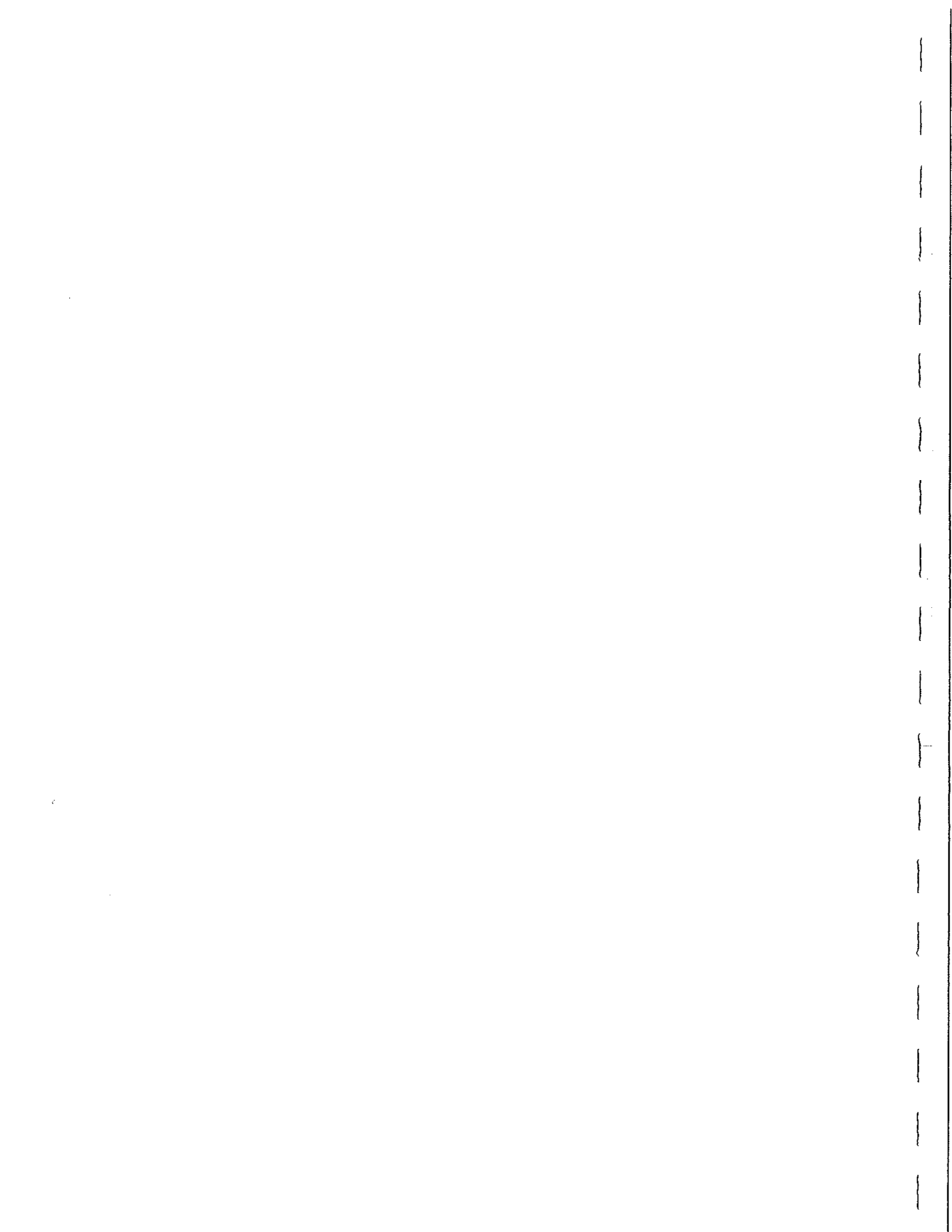
BCPA Net Income
1982-1990



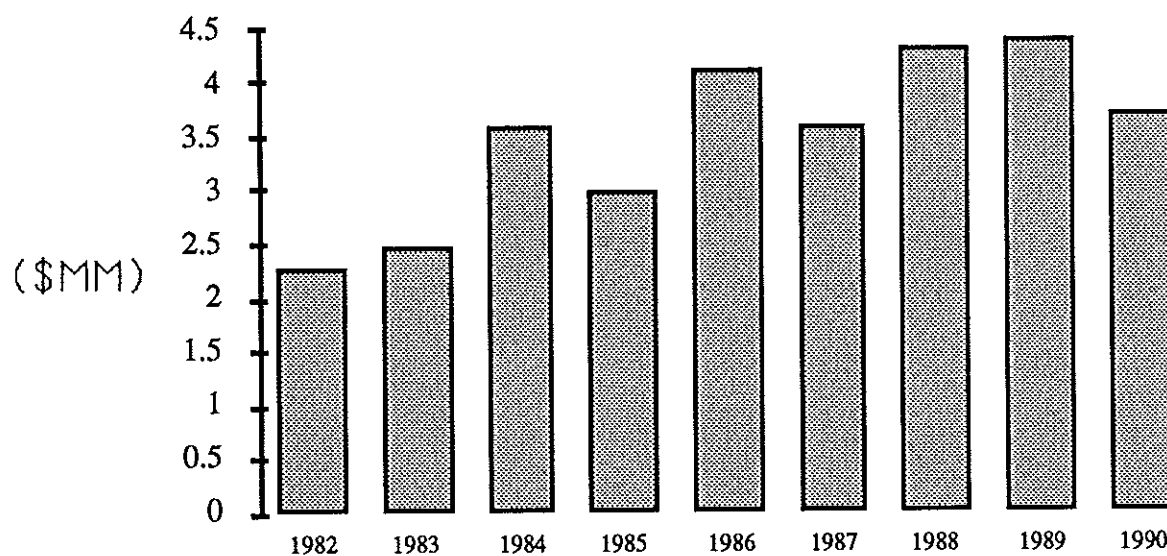


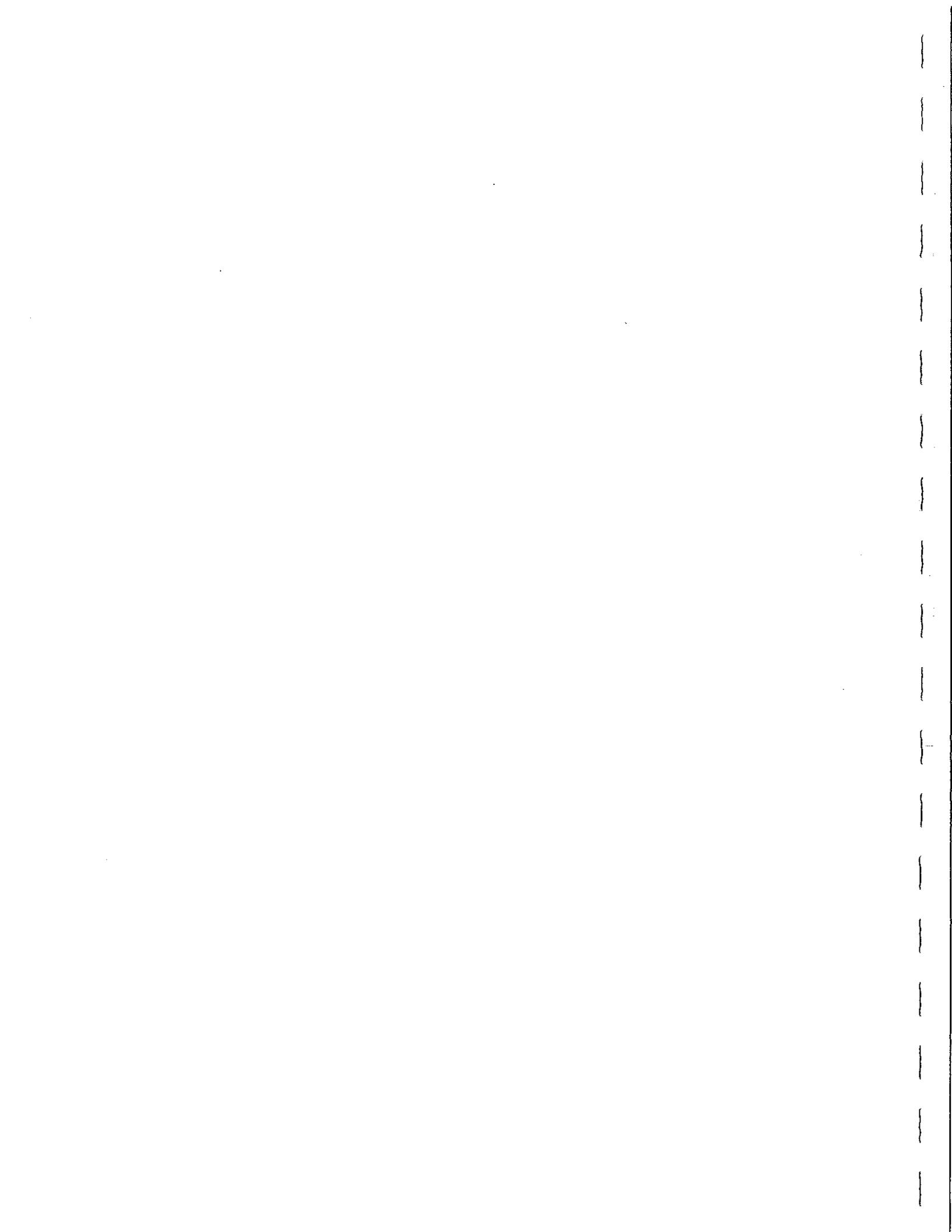
Average Weekly Financial
Guarantees Required by Producers
(\$000)



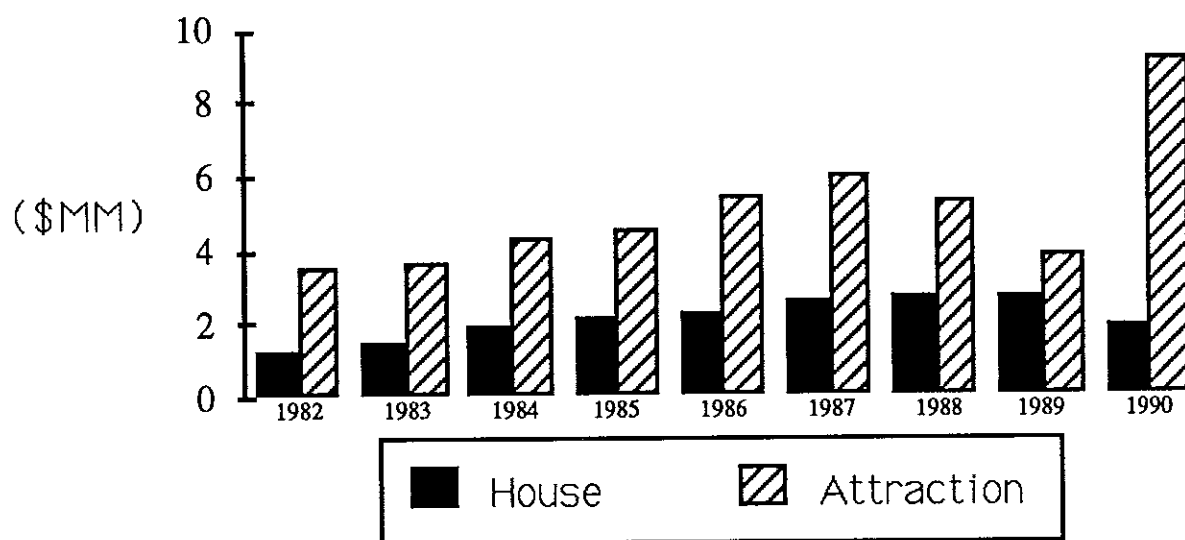


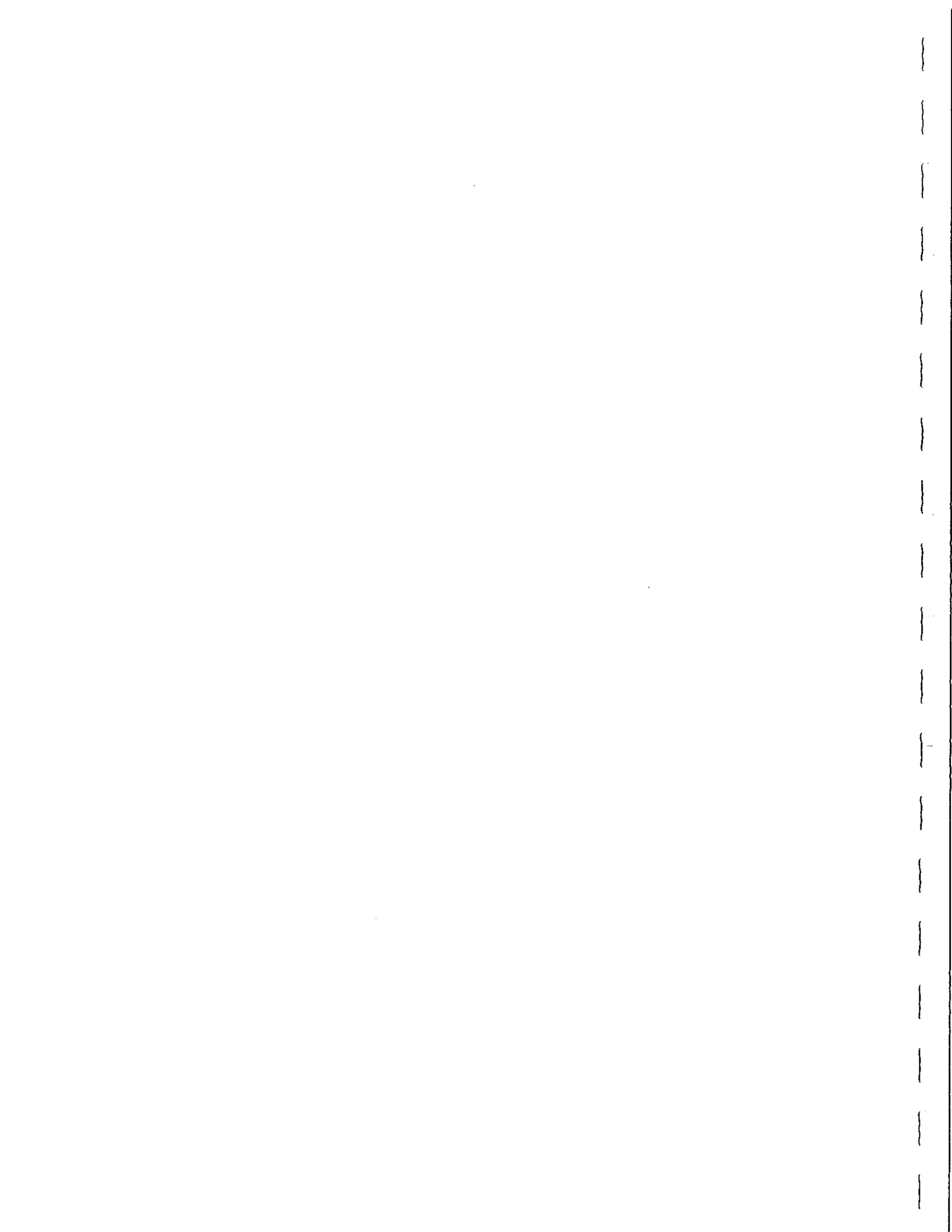
BCPA Operating Expenses 1982-1990





**Box Office Revenues
House and Attraction Split
1982-1990**





**Legitimate Theaters and Performing Arts Centers
in Metropolitan Areas Comparable to Baltimore
(Population 1.3 to 3.3 million)**

Averages: 2,668 seats per theater, 2 to 3 theaters in each area

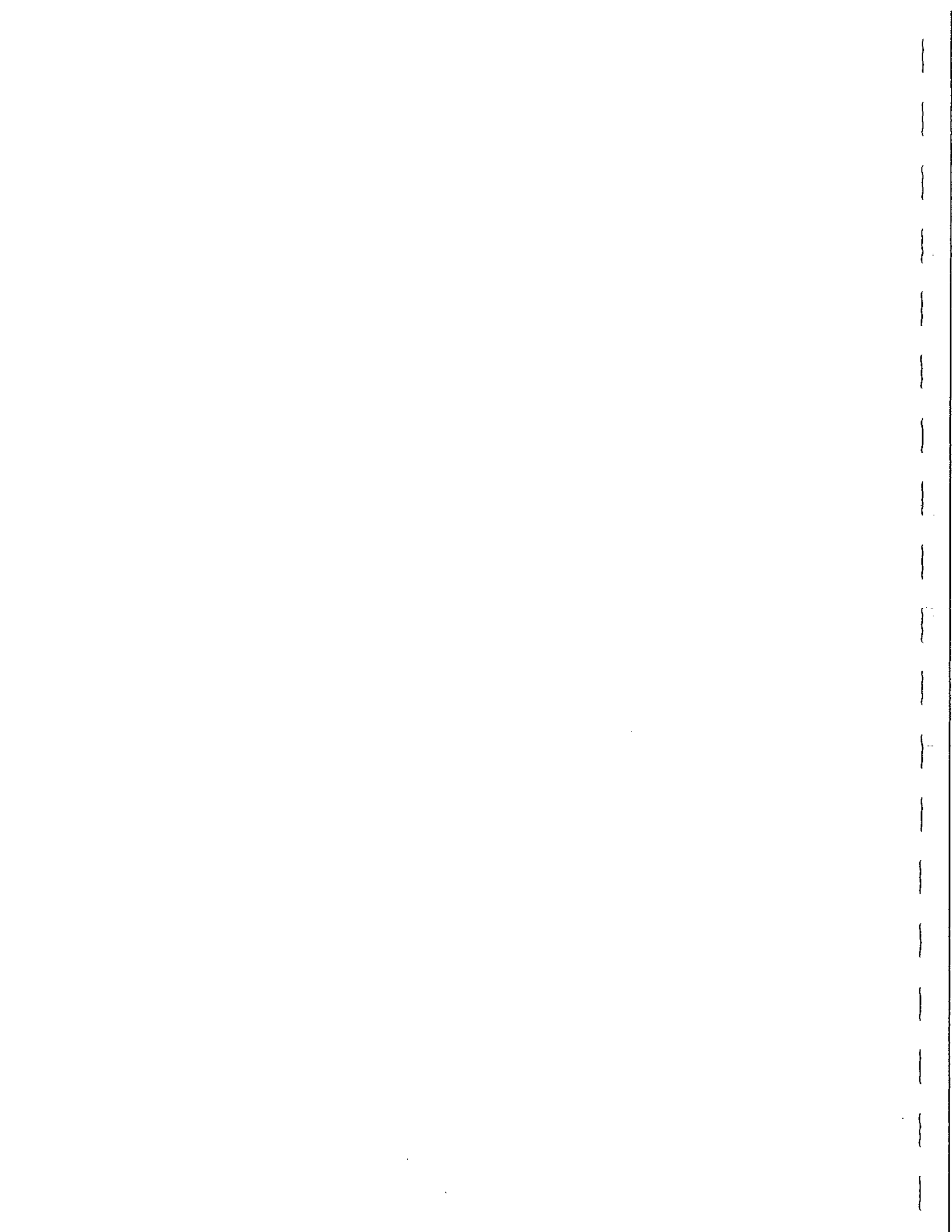
Metropolitan Area	Population in Millions	Theaters and Size of Theaters
Miami/Ft. Laud., FL	3.0	Coconut Grove (1,116), Dade Co. Auditorium (2,498), Gusman (1,709), Hirsfeld (824), Jackie Gleason (2,648)
Cleveland, OH	2.8	Music Hall (3,000), State (2,958), Palace (2,664), Ohio (1,005)
Atlanta, GA	2.7	Civic Center (4,591), Fox (4,578), Symphony (1,762)
St. Louis, KY	2.5	Fox (4,121), Powell (2,717)
Seattle, WA	2.4	Fifth Ave (2,130), Paramount (2,962)
Minn./St. Paul, MN	2.4	Northrop (4,866), Orpheum (2,741), Ordway (1,822), O'Shaughnessy (1,742)
San Diego, CA	2.4	Civic Theater (2,896)
Baltimore, MD	2.3	Lyric Opera House (2,552), Mechanic Theater (1,564)
Pittsburgh, PA	2.3	Heinz Hall (2,847), Benedum (2,768), Syria (3,774)
Phoenix, AZ	2.0	Symphony Hall (2,498)
Tampa, FL	2.0	Tampa Bay PAC (2,443), Mahaffy Theater (1,910)
Denver, CO	1.9	Auditorium (2,170)
Cincinnati, OH	1.7	Music Hall (3,630), Taft (2,500)
Kansas City, MO	1.6	Music Hall (2,402), Midland (2,786), Lyric (1,700)
Milwaukee, WI	1.6	Pabst (1,388), Riverside (2,515), Uihlem Hall (2,184)
Portland, OR	1.4	Civic Auditorium (3,000)
Sacramento, CA	1.4	Community Center Theater (2,326)
Norfolk, VA	1.4	Chrysler Hall (2,363)
Columbus, OH	1.3	Franklin Co. Veterans Memorial (3,944), Mershon Aud. (3,058), Ohio (2,897), Palace (2,827)
San Antonio, TX	1.3	Lila Cockrell (2,552), Majestic (2,271), Municipal Auditorium (4,934)
New Orleans, LA	1.3	Theater of Performing Arts (2,317), Saenger (2,936)

NOTE: Additional pit seating not included.

Gross Receipts for Touring Broadway Shows
1989-1990 Season
(Sources: LATP, U.S. Census)

Rank	City	Gross Receipts (\$ million)	# of Plays	# of Theaters	Total # Weeks (all theaters)	1990 MSA Population (million)
1	Los Angeles	\$ 55	19	7	131	13.8
2	Toronto, Ontario	52.7	11	4	99	3.7*
3	San Francisco, CA	25.6	15	4	73	6
4	Washington, D.C.	23.3	25	6	116	3.7
5	Detroit, MI	15.5	12	3	41	4.6
6	Boston, MA	13.8	13	4	39	8.2
7	Chicago, IL	11.7	6	4	27	8.2
8	Philadelphia, PA	10.5	12	6	35	6
9	Baltimore, MD	10.4	11	2	38	2.3
10	Pittsburgh, PA	10.3	14	4	20	2.3
11	Costa Mesa-Orange Co., CA	8.7	9	1	14	2.3
12	Dallas, TX	6	9	2	15	3.8
13	Miami, FL	5.4	8	1	13	3
14	St. Louis, MO	4.5	10	2	10	2.5
15	Atlanta, GA	4.4	9	2	10	2.7
16	Houston, TX	3.9	7	2	9	3.6
17	Denver, CO	3.7	5	2	9	1.9
18	Cincinnati, OH	3.6	8	2	8	1.7
19	Cleveland, OH	3.4	8	2	9	2.8
20	Wilmington, DE	3.2	8	1	14	0.6
21	Minneapolis-St. Paul, MN	3.2	5	1	7	2.4
22	Louisville, KY	3.1	7	1	7	1
23	Seattle, WA	3.1	8	3	9	2.4
24	New Haven, CT	2.9	6	2	9	0.4
25	Sacramento, CA	2.8	6	2	6	1.4
26-110	All Other Cities	60.5				
	Total (\$ MM)	\$352.5				

* Projected Estimate



Box Office Receipts Rankings 1986-1990

Rank	1985-1986	1986-1987	1987-1988	1988-1989	1989-1990
1	Los Angeles (44.2) ¹	Los Angeles (32.3) ¹	Wash., D.C. (21.8) ¹	Los Angeles (46.5) ²	Los Angeles ⁴
2	Chicago (26.9) ¹	San Francisco (24.5) ¹	Los Angeles (20.9) ²	D.C. (26.7) ²	Toronto (52.7) ⁴
3	Toronto (21) ¹	Wash., D.C. (20.3)	Boston (19.7) ³	San Francisco (14.3) ¹	San Francisco (25.6) ²
4	Wash., D.C. (21)	Toronto (17.4) ¹	San Francisco (16.5)	Toronto (13.4) ²	Wash., D.C. (23.3)
5	San Francisco (19.7)	Detroit (8.8) ¹	Toronto (9.1)	Boston (13.1) ³	Detroit (15.5) ³
6	Philadelphia (9.3)	Chicago (8)	Pittsburgh (7.7) ¹	Philadelphia (13.1) ²	Boston (13.8) ²
7	Baltimore (6.4)	Miami (7.7) ¹	Baltimore (7.1)	Chicago (10.4) ²	Chicago (11.7) ²
8	Dallas (4.8)	Boston (7.7)	Philadelphia (5.7) ¹	Detroit (7.7) ¹	Philadelphia (10.5)
9	Cleveland (3.5)	Philadelphia (7.5) ¹	Cleveland (5) ¹	Baltimore (6.8)	Baltimore (10.4) ³
10	Denver (3.4)	Baltimore (7.1) ¹	Miami (4.2) ¹	Miami (5.9) ²	Pittsburgh (10.3) ³

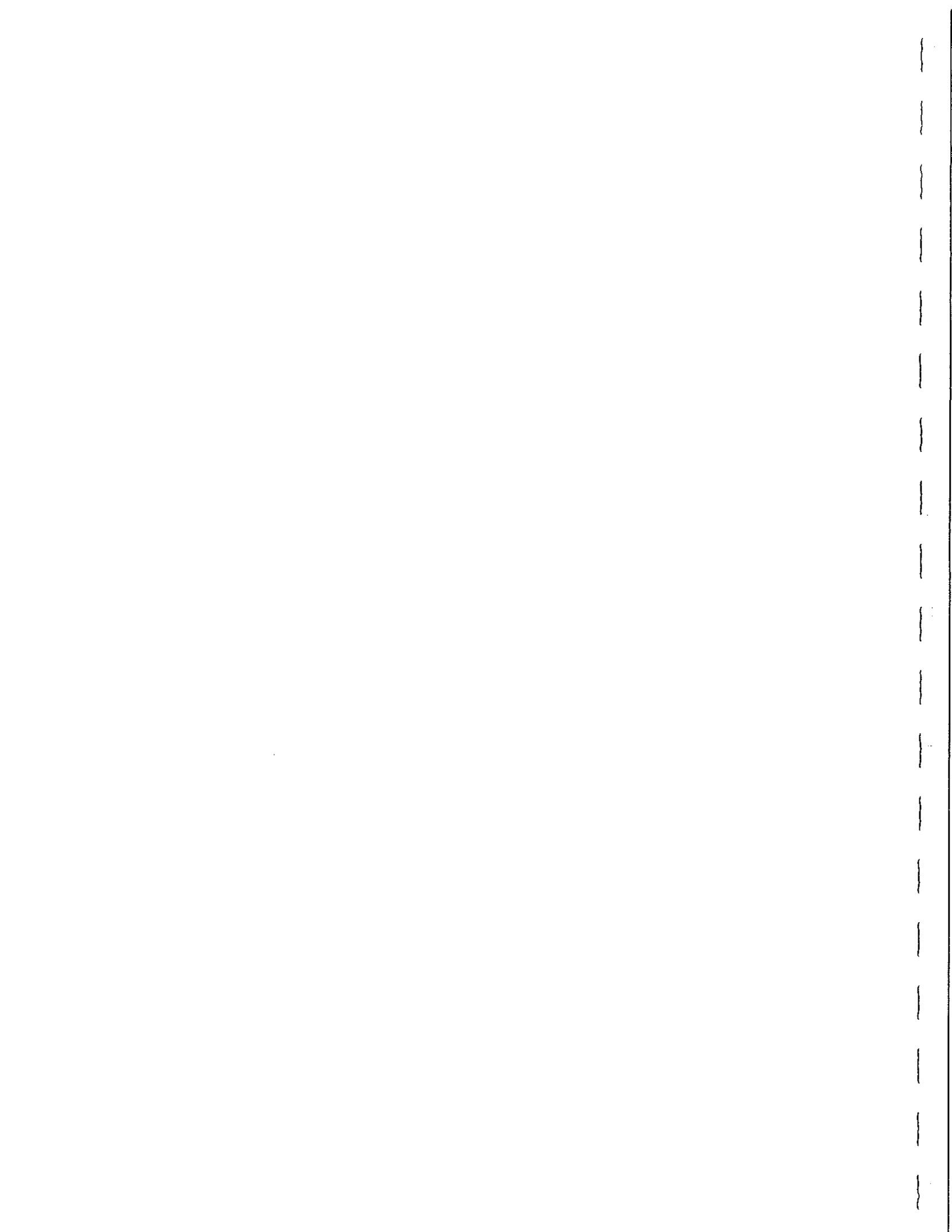
Notations:

¹ "Cats"

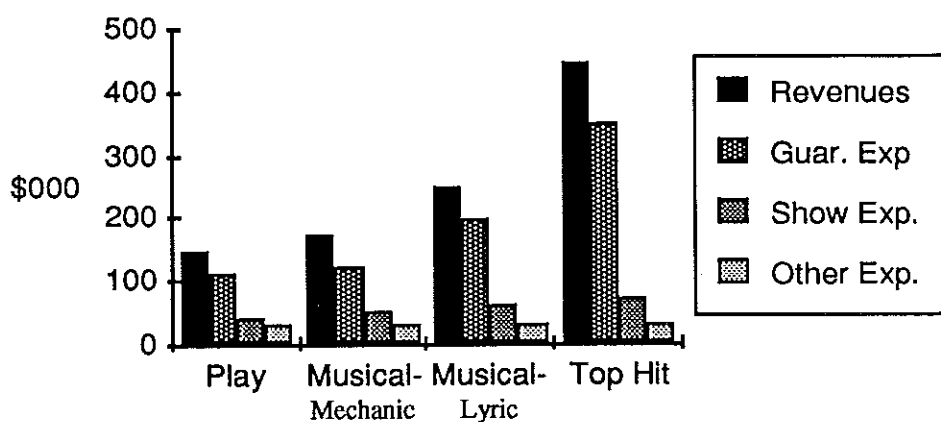
² "Les Miserables"

³ "Cats" and "Les Miserables"

⁴ "Les Miserables" and "Phantom of the Opera"



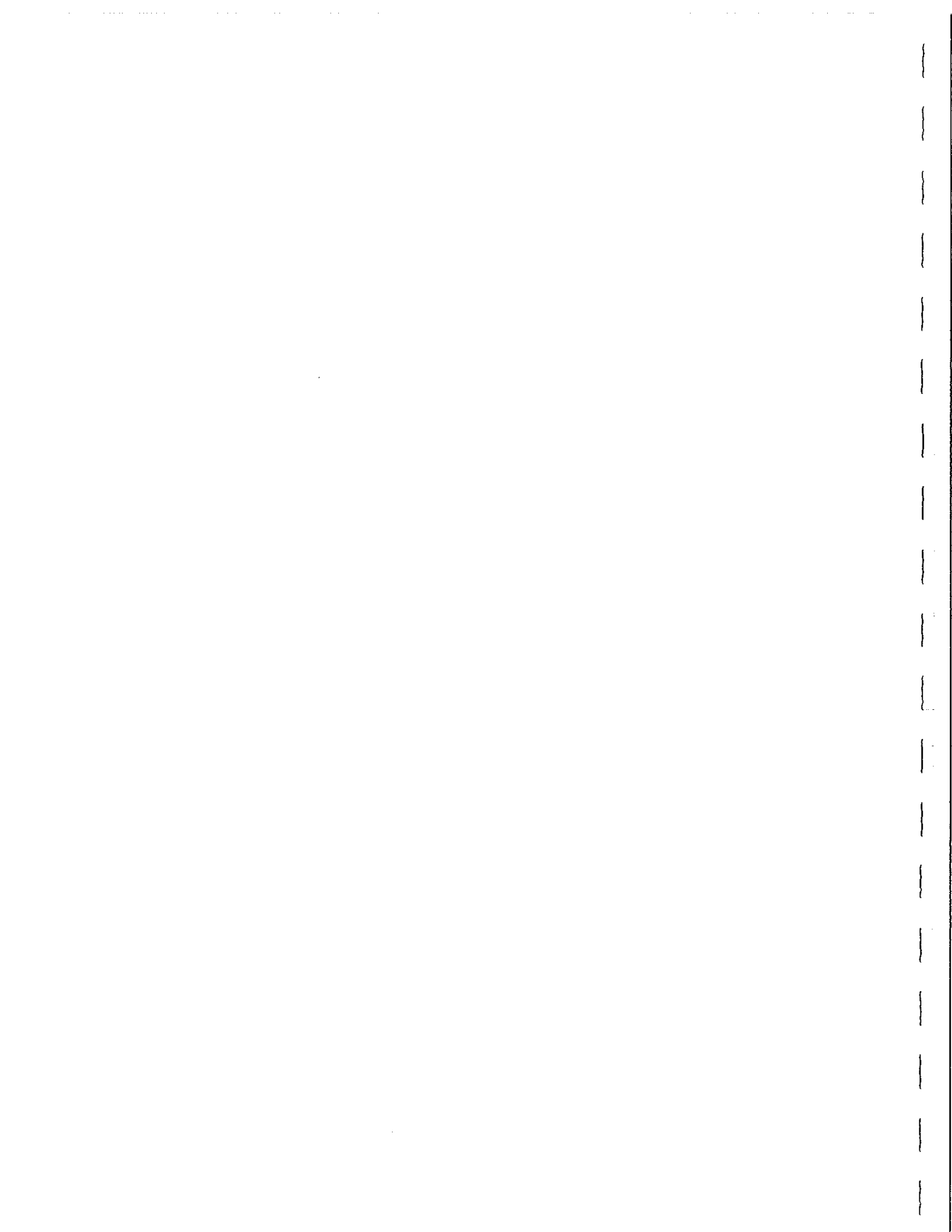
Weekly Show Revenues and Expenses 1989-1990



Example: BCPA Income Statement, 1989-1990 Season

(All Costs Fully Allocated—\$000)

Show or Activity	Revenue from Box Office	Producer Share of Revenues	BCPA Share of Revenues	BCPA Show and Other Costs	BCPA Net Surplus or (Loss)	Percentage of Surplus
Shows:						
"The Circle"	\$ 678	\$ 439	\$ 239	\$ (297)	\$ (58)	(7%)
"Driving Miss Daisy"	722	465	257	(294)	(37)	(5%)
"Nunsense"	690	381	309	(294)	15	2%
"Les Miserables"	4,564	4,503	61	0	61	8%
"Into the Woods"	868	740	128	(382)	(254)	(31%)
"Unsinkable Molly Brown"	1,128	800	328	(480)	(152)	(19%)
"Other People's Money"	569	440	129	(312)	(183)	(23%)
"Mama, I Want to Sing"	182	170	12	(137)	(125)	(15%)
"Washington Ballet"	7	7	0	2	2	0%
"King and I"	203	72	131	(131)	0	0%
"Cats"	791	550	241	(208)	33	4%
Show Total	10,402	8,567	1,835	(2,533)	(698)	(86%)
Activities:						
Telecharge			462	(286)	176	22%
Subscription			810	(502)	308	38%
Pier 4			0	(3)	(3)	0%
Pier 6			1,304	(1,100)	204	25%
Interest Income			505	0	505	62%
City Subsidy			251	0	251	31%
Miscellaneous			66	0	66	8%
Total Activities			3,398	(1,891)	1,507	186%
Total All Shows/ Activities	\$10,402	\$8,567	\$5,233	\$(4,424)	\$ 809	100%



Grieves Worrall Wright & O'Hatnick Inc.

TO: Patrice Cromwell
FROM: Jim Grieves
DATE: 4-4-91
RE: Power Plant Development

Fax - 625-4250

Assumption

1. North building (gross interior area 16,700sq.ft.) would be used as "auditorium" area for a theatre. It would necessitate the removal of all existing interior partitions and insertion of a sloped seating area with an orchestra level equal to \pm 1800 seats. Balcony (s) for an additional 900 seats would add \pm 8,,000 sq. ft. to the area.
2. Exit "corridors" would be added to the east and west sides of the building overlooking the Inner Harbor - \pm 4,000 sq. ft.
3. The central building (gross interior area 11,610 sq. ft.) would be used for the stage, scene shop, dressing rooms, etc. A proscenium opening between Building 1 & 2 would have to be cut and a major structural beam or truss would have to be inserted. There is about 90' of height in the central building, more than enough for a fly loft (2 1/2 to 3 times proscenium height). There would be 50' -0" in front of the smoke stacks for a stage with ample room between for additional depth and access to a scene shop. Loading could occur in this central building area.
4. The south building could be developed separately or made part of the complex. It could be a light filled lobby/eating hall perhaps open to the public for lunch and dinner. Its natural configuration could be preserved to make it less costly to develop and more attractive to an outside vendor (s). There is 10,488. sq. ft. of space in this building .
5. A 500-600 seat theatre could be developed under the auditorium space of the north building. The area created for this use would need to be \pm 13,000.00sq. ft.

Power Plant Development
 April 4 1991
 Page 2

Recapitulation of space

1.	North building	16,700 sq.ft. x \$200.00 =	\$3,340,000.00
a.	Balcony (s)	8,000 sq.ft. x \$200.00 =	\$1,600,000.00
b.	Circulation	4,000 sq.ft. x \$200.00 =	\$800,000.00
c.	Miscellaneous	4,000 sq.ft. x \$150.00 =	\$600,000.00
d.	Total	32,700	\$6,340,000.00
2.	Central building	11,610sq.ft. x \$150.00 =	\$1,741,500.00
a.	Miscellaneous	4,000sq.ft. x \$150.00 =	\$600,000.00
b.	Total	15,610	\$2,341,500.00
3.	South building	10,488sq.ft. x \$100.00 =	\$1,048,800.00
a.	Kitchen equipment	=	\$500,000.00
b.	Total		\$1,548,800.00
4.	500-600 seat theatre	13,000sq.ft. x \$200.00 =	\$2,600,000.00
5.	Total building costs		\$12,830,300.00
6.	Contingency 15%		\$1,924,545.00
7.	5%/year building escalation x 3 years		\$2,326,000.00
8.	Fees		\$2,500,000.00
9.	Lighting & rigging		\$800,000.00
10.	Seating and furniture		\$1,500,000.00
11.	Project insurance		\$500,000.00
12.	Total building costs		\$22,380,845.00

Final cost assumptions

Total development	\$25,000,000.00
2700 seat theatre only	\$15,000,000.00
600 seat theatre addition	\$6,000,000.00
"Food-Hall"/Lobby south building	\$4,000,000.00

Marylander's Participation in the Arts National Comparison

Percent of Population That Attended Various Types of
Performing Arts in the Last 12 months

Event	Maryland 1989	National 1985	National 1982
Live Jazz Performance	16%	10%	10%
Live Classical Music	23%	13%	13%
Live Opera Performance	5%	3%	3%
Live Musical Play	32%	17%	19%
Live Non-Musical Play	22%	12%	12%
Live Ballet Performance	6%	4%	4%
Visited an Art Gallery	46%	22%	22%
Visited an Art or Craft Fair	53%	40%	39%
Read or Listened to Poetry	32%	19%	20%

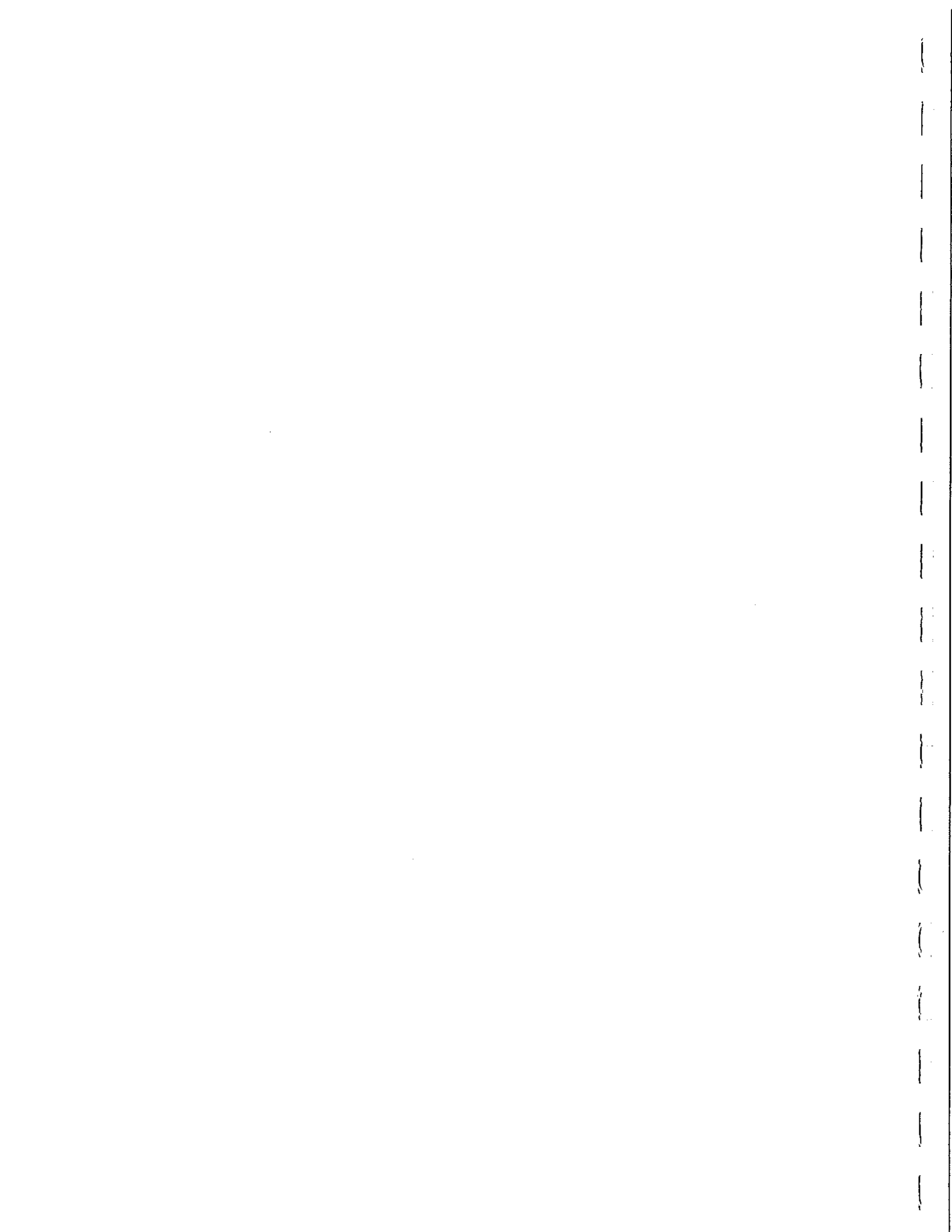
Sources: University of Maryland, Survey Research Center and
Maryland Department of Economic & Employment Development, 1989

Maryland Population Demographics by County 1990 -2010

	1990 (000s)	1990 % of Total	2010 (000s)	2010 % of Total	1990-2010 % Growth	1979* % \$15k+	2010 % Age 45+
State of Maryland	4742.5	100%	5524.4	100%	16%	64%	43% (31% '90)
Baltimore Region:	2353.8	50%	2642.2	48%	12%		
Anne Arundel	426.8	9%	502.1	9%	18%	73%	42%
Baltimore Co.	697.9	15%	745.8	14%	7%	70%	47%
Carroll	123.4	3%	176.6	3%	43%	69%	40%
Harford	180	4%	231.4	4%	29%	69%	42%
Howard	181.8	4%	269	5%	48%	80%	41%
Baltimore City	743.9	16%	717.3	13%	(4%)	44%	41%
Washington Suburbs:	1588.9	34%	1900.9	34%	20%		
Frederick	150	3%	211.8	4%	41%	66%	39%
Montgomery	720.5	15%	848.2	15%	18%	79%	46%
Prince George's	718.4	15%	840.9	15%	17%	72%	43%
Southern Maryland:	224.7	5%	321.6	6%	43%		
Calvert	51.1	1%	81.2	1%	59%	69%	40%
Charles	100	2%	147.9	3%	48%	74%	37%
St. Marys	73.6	2%	92.5	2%	26%	61%	41%
Upper Eastern Shore:	184.7	4%	228.3	4%	24%		
Caroline	27.2	1%	31.5	1%	16%	48%	43%
Cecil	78.4	2%	99.3	2%	27%	61%	45%
Kent	17.2	0%	17.8	0%	3%	46%	55%
Queen Anne's	32.9	1%	46.5	1%	41%	57%	44%
Talbot	29	1%	33.2	1%	14%	55%	54%
Lower Eastern Shore:	166.4	4%	192.6	3%	16%		
Dorchester	30.7	1%	31.5	1%	3%	46%	46%
Somerset	22.6	0%	25.2	0%	12%	40%	41%
Wicomico	74.9	2%	87.6	2%	17%	53%	43%
Worcester	38.2	1%	48.3	1%	26%	NA	52%
Western Maryland:	224.1	5%	238.8	4%	7%		
Allegany	75.4	2%	76.6	1%	2%	47%	44%
Garrett	28.2	1%	31.9	1%	13%	43%	36%
Washington	120.5	3%	130.3	2%	8%	55%	44%

* Most recent data

Source: Maryland Department of State Planning



Show Type Vs. House Capacity 1983-1990

<u>Major Show Types</u>	<u>% of Tickets Sold*</u> <u>(Mechanic & Lyric)</u>	<u>% of Tickets Sold**</u> <u>(Mechanic: adjusted for Lyric)</u>
All Shows (91):	70%	78%
Musicals (48):	68%	75%
"Top Hit" National Tours (3)	97%	100%+
National Tours (37)	67%	74%
PreBroadway tryouts - new (4)	65%	72%
Revivals (3)	53%	59%
PreBroadway tryouts - revival (1)	51%	57%
Plays (40):	64%	71%
PreBroadway tryouts - revival (7)	73%	81%
National Tours (21)	65%	72%
PreBroadway tryouts - new (7)	59%	65%
Revivals (3)	57%	63%
Others (2)	33%	37%
Ballets (3):	73%	81%

* Numbers include capacity use of both 1,607-seat Mechanic (80%) and 2,522-seat Lyric (20%)

** Numbers adjusted to reflect only capacity use of Mechanic

Projected Annual Costs and Revenues for 2,500-Seat Performing Arts Center

ASSUMPTIONS:

- 2,500-seat Performing Arts Center (PAC) begins operation in 1996.
- PAC has a 36-week season (on average) including the following:

<u>Show Type</u>	<u># of Shows</u>	<u>Total Weeks</u>
Top Hit	1	6
Musicals	4	12
Plays	4	12
Other	10+	6
- Dance		
- Ballet		
- Opera		
- Pop		
Total: 36 weeks on average		

- Broadway Shows generate revenues. All other uses rent facility for rental fee.
- Weekly costs are based on the following 1989-1990 Season information:

<u>Show Type</u>	<u>Guarantee (\$000)</u>	<u>Show Expenses (\$000)</u>	<u>Other Expenses (\$000)</u>
Top Hit	\$350	\$90	\$31
Musical	200	60	31
Play	112	42	31

- All revenue, expense, capacity and ticket price growth rates are noted above. These growth rates are based on historical financial information (1982-1990)
- Revenue and expenses from Pier 4 and Pier 6 excluded.
- Baltimore City subsidy excluded from non-operating income.
- PAC estimated to cost \$65 million; also included are an annual depreciation cost of \$2.2 million (30-year useful life). \$400,000 additional maintenance and utilities expense included.
- All dollars in nominal amounts.

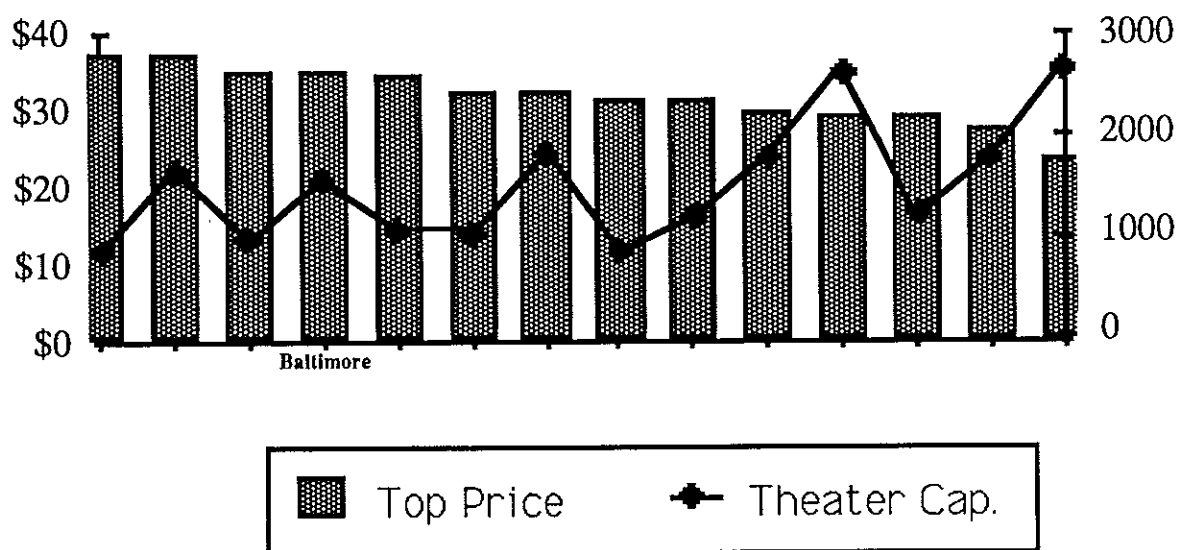
Projected Annual C
2,500-Seat Perform
(Operations begin

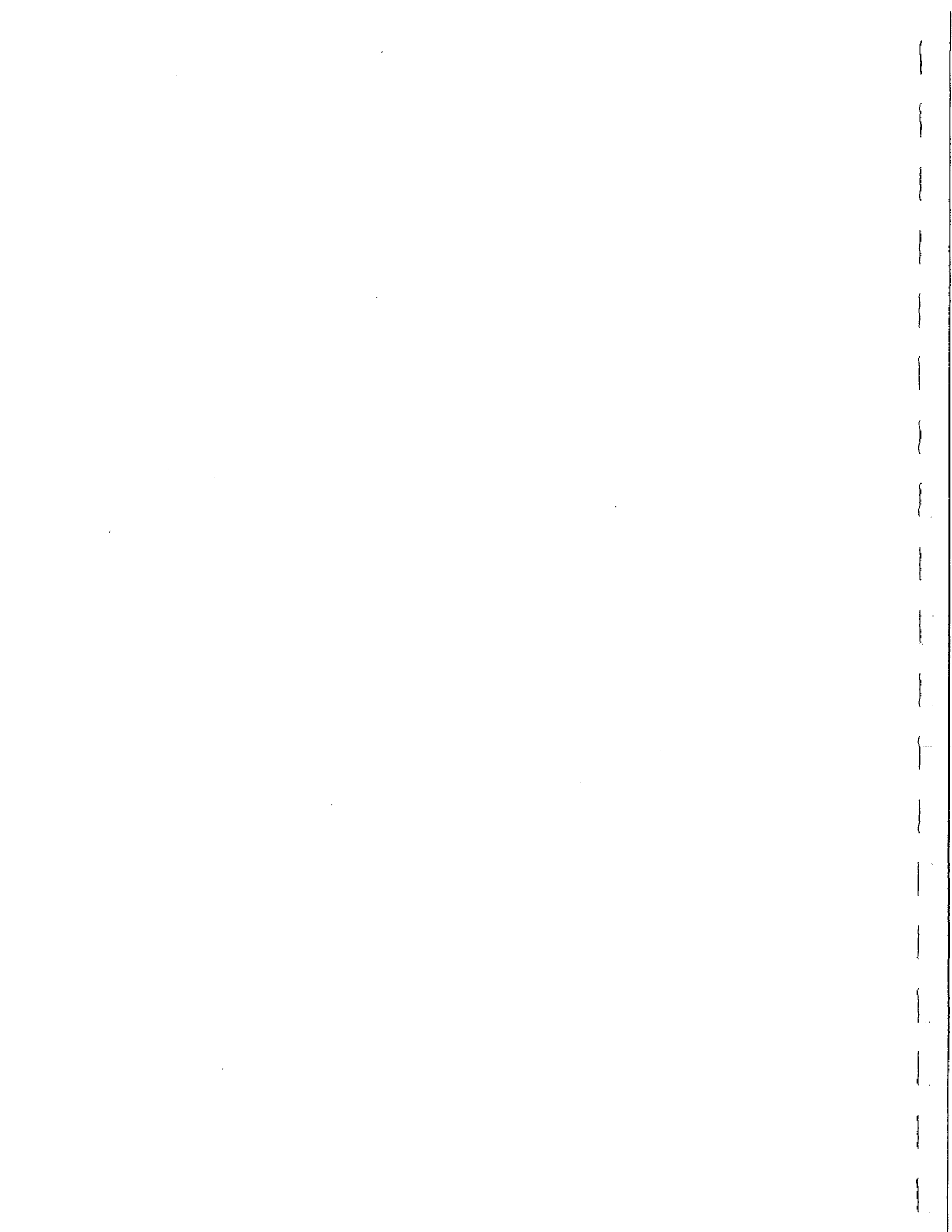
	# of Weeks	1990	2001	2002	2003	2004	2005
Operating Revenues:							
• Top Hits	6	\$3,840	\$7,830	\$8,400	\$9,011	\$9,666	\$10,369
Top Hit Price (+6% per year)		\$40	\$76	\$80	\$85	\$90	\$96
Capacity (+1.2% per year)		80%	86%	87%	88%	89%	90%
• Musicals	12	\$4,680	\$9,714	\$10,451	\$11,245	\$12,098	\$13,017
Musical Price (+6% per year)		\$30	\$57	\$60	\$64	\$68	\$72
Capacity (+1.5% per year)		65%	71%	72%	73%	74%	75%
• Play	12	\$3,000	\$6,338	\$6,840	\$7,380	\$7,964	\$8,594
Play Price (+6% per year)		\$25	\$47	\$50	\$53	\$57	\$60
Capacity (+1.8% per year)		50%	56%	57%	58%	59%	60%
• Other Show Receipts	6	0	0	0	0	0	0
Total Operating Revenues		\$11,520	\$23,883	\$25,691	\$27,636	\$29,728	\$31,979
Attraction Share of Revenue:							
• Top Hits (+10% per year)	6	\$2,100	5,992	6,591	7,250	7,975	8,772
• Musicals (+10% per year)	12	2,400	6,847	7,532	8,285	9,114	10,025
• Plays (+10% per year)	12	1,344	3,835	4,218	4,640	5,104	5,614
Total Attraction Share		5,844	16,674	18,341	20,175	22,193	24,412
Net Operating Revenues:		NA	7,209	7,350	7,461	7,536	7,567
Show Expenses:							
• Top Hits	6	540	1,025	1,087	1,152	1,221	1,294
• Musicals	12	720	1,367	1,449	1,536	1,628	1,726
• Plays	12	504	957	1,014	1,075	1,139	1,208
Total Show Expenses		1,764	3,349	3,550	3,762	3,988	4,228
Other Expenses (36 weeks)							
• Hit/Musical/Play (+6% per year) 36 (120% of 1990 amount)		1,440	2,734	2,898	3,071	3,256	3,451
All Operating Expenses:		NA	6,082	6,447	6,834	7,244	7,679
Net Operating Income:		NA	1,127	903	627	292	(111)
Annual Non-Operating Rev/Exp:							
Non-Operating Revenues:							
Telecharge (+8% per year)	36	460	1,073	1,158	1,251	1,351	1,459
Subscription (+8% per year)	36	810	1,889	2,040	2,203	2,379	2,569
Interest Income (+8% per year)	36	505	1,177	1,272	1,373	1,483	1,602
Non-Operating Income		1,775	4,139	4,470	4,827	5,214	5,631
Telecharge/Subscription Expenses: (+6% per year)	36	800	1,519	1,610	1,706	1,809	1,917
Depreciation Expenses:	36	2,200	2,200	2,200	2,200	2,200	2,200
Add'l Maint./Utilities Expenses:	36	400	400	400	400	400	400
Net Non-Operating Revenues:		NA	20	260	521	805	1,113
Net Surplus/Loss:		NA	1,147	1,163	1,148	1,096	1,002

Notes: See attached page of assumptions. First year of operations p



Top Ticket Price vs. Theater Capacity
1989-1990 Tour of "Driving Miss Daisy"





**New Performing Arts Centers and Renovated Theaters
(Mixed-Use Touring Performing Arts)**

RECENTLY BUILT OR REBUILT PERFORMING ARTS CENTERS					
Name	Location	New or Renovated	Opening/ Re-Opening Date	# of Theaters	# of Seats
Benedum Center	Pittsburgh, PA	Renovated	1987	1	2,800
Broward County PAC	Ft. Lauderdale, FL	New	1991	2	595, 2,700
Kentucky Center	Louisville, KY	New	1983	2	626*, 2,479
Kravis Center	W. Palm Beach, FL	New	1992	1	2,200
NJPAC - Phase I	Newark, NJ	New	1995/6	2	300, 2,700
NJPAC - Phase II	Newark, NJ	New	No Date Set	1	2,400
North Carolina PAC	Charlotte, NC	New	1992	2	440, 2,100
Orange County PAC	Orange County, CA	New	1986	1	3,000
Playhouse Square	Cleveland, OH	Renovated	1982/4/8	3	1,035, 2,714, 3,098
Tampa Bay PAC	Tampa, FL	New	1987	3	300, 960, 2,493

* Kentucky added a third theater in 1988 (139 seats)

OPERATING INFORMATION — MANAGEMENT AND ANNUAL EXPENSES (\$MM)					
Name	Management/ Ownership	Resident Groups	Annual Oper. Costs	Deficit (%) of Oper. Exp.)	Comments
Benedum Center	Cultural Trust	4	1988 - \$3.3	1988 - 30%	1990 - 15% op. def.
Broward County PAC	PAC Authority	0	Opening 2/91	Opening 2/91	
Kentucky Center	KCA/State	4	1989 - \$4.6	28%	5th yr. of operation
Kravis Center	Kravis Center, Inc.	6	Opening 1992	Opening 1992	
NJPAC - Phase I	NJPAC/State	NA	Opening 1995	Opening 1995	
NJPAC - Phase II	NJPAC/State	1	Opening 1998	Opening 1998	
North Carolina PAC	Foundation/City	7	\$2.5	Opening 1992	1st year estimate
Orange County CPA	OCCPA, Inc. (Priv.)	5	1990 - \$19.5	33%	
Playhouse Square	Foundation/County	5	1990 - \$8	18%	Expect \$1.7 def./yr.
Tampa Bay PAC	TBPAC, Inc./City	None	1990 - \$7	28%	4th yr. of operation

CONSTRUCTION COSTS & FUNDING SOURCES (1990 Dollars*—\$MM)			
Name	Construction Costs	Endowment and Other Costs	Sources of Funds
Benedum Center	\$56	NA	\$11 Fed, \$10 City & Co., \$35 Private
Broward County PAC	\$52	NA	\$24 State, Co. & City, \$25 Private (+hotel tax)
Kentucky Center	\$61	\$10	\$42 State, \$4 City, \$25 Private (+ hotel tax)
Kravis Center	\$53	NA	\$5 City, \$11 Co., \$18 IRB, \$20+ Private
NJPAC - Phase I	\$80, \$60 (site)	NA	\$20 IRBs, \$1.2 State, Private funding
NJPAC - Phase II	\$60	NA	NA
North Carolina PAC	\$45	\$17	\$15 City, \$15 State, \$32 Private
Orange County PAC	\$94	NA	All Private
Playhouse Square	\$51	NA	All Private
Tampa Bay PAC	\$71	\$12	\$54 City (bond issue), \$29 Private

* All construction dollars converted (from mid-construction date) to 1990 dollars based on GNP growth.

Appendix:
Notes on Nine New Performing Arts Centers

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Benedum Center for the Performing Arts Pittsburgh Cultural Trust Pittsburgh, Pennsylvania

Contact:

James F. Murray-Coleman, Assistant Director for District Development, (412) 471-6070.

General:

In the mid-1980s, the Pittsburgh Cultural Trust renovated the 1928 Stanley Theater and renamed it the Benedum Center for the Performing Arts. As part of its arts and entertainment district master plan, the Pittsburgh Cultural Trust restructured the Benedum Center to enhance the city's performing arts facilities. The facility was expanded with a new 75-foot-deep backstage and a six-story support building, permitting rehearsal spaces and dressing rooms.

In addition to the Benedum Center, the Pittsburgh Cultural District is home to Heinz Hall (2,800 seats), renovated in 1970, and the Fulton Theater, whose Phase I renovation was completed in May 1991. The master plan for the district calls for an array of commercial, recreational, residential and retail projects to be completed over the next 10 years. Projects underway include two mixed-use developments, one of which incorporates a fourth performing arts facility (800 seats) and an 11-story office building, and a parking garage/movie theater complex. A 32-story office tower is planned for the turn of the century. The trust is encouraging the arts as a catalyst for economic activity, and believes that this is the key to the redevelopment of the 14-block Cultural District.

Management:

The Pittsburgh Cultural Trust is a private, nonprofit corporation with functional areas which include district development, institutional development, marketing, arts services and facility programming. The day-to-day operations of the Benedum Center and Fulton Theater are managed by the trust.

Facilities and Costs:

The gross area of the Benedum Center is 107,000 square feet and contains 2,800 seats. The renovation, completed in 1987, cost \$43 million (\$27 million for construction, \$12 million for the land and \$4 million for financing and other fees). The costs were partially financed by the public sector [\$8.5 million from an Urban Development Action Grant (UDAG) and \$7.5 million from local city/county Auditorium Authority bonds]. The private sector contributed another \$27 million, including \$8.5 million generated by the sale of air rights to the developer of a nearby office tower. At the outset of the fundraising campaign, the Howard Heinz Endowment guaranteed \$12 million in private investment to stimulate private giving.

The Benedum Center's operating budget was not made available. However, the Assistant Director for District Development Murray-Coleman mentioned it operates at a deficit. The Pittsburgh Cultural Trust naturally seeks to keep the operating deficit to a minimum, without creating a handicap for the nonprofit arts groups who use the facility. The trust hopes its development activities will help cover the deficits generated by entertainment activities. In 1988, the trust had \$3.3 million in operating expenses, \$1.9 million in operating revenues and \$1.8 million in operating support. Also received in 1988 was \$3.8 million in capital contributions and over \$650,000 in contributed services.

Programming:

The Benedum Center is the home-base theater for four resident groups: the Pittsburgh Opera, the Pittsburgh Ballet Theater, the Civic Light Opera and the Pittsburgh Dance Council. During the 1991-1992 season, the resident groups accounted for approximately 28 weeks of the Benedum's activity. The Cultural Trust also presents a series of touring Broadway shows in partnership with PACE Theatrical Group and the Pittsburgh Symphony Society. The Symphony Society owns and operates Heinz Hall, a 2,800-seat theater and concert hall also in the Cultural

**Benedum Center for the Performing Arts
Pittsburgh, Pennsylvania**

Programming (continued):

District. The series presents 9 to 11 weeks of first-run tours split between the Benedum and Heinz Hall. Prior to the opening of the Benedum in 1987, Heinz Hall had been the home of the Pittsburgh Symphony, the resident groups (now housed at the Benedum) and the Broadway series. Attendance in the Cultural District increased 65 percent between 1986 and 1990. The Cultural Trust renovated and re-opened the Fulton Theater (1,370 seats) in the Cultural District on May 31, 1991. This theater will be home to a new series of first-run, legitimate Broadway plays. The theater will also give small- to mid-size arts organizations the ability to present programs in a suitable environment within the Cultural District.

Broward Center for the Performing Arts Ft. Lauderdale, Florida

Contact:

Jane Podgurski, General Manager, (305) 522-5334.

General:

In 1984, a seven-member policymaking authority, the Performing Arts Center Authority, was created by the Florida legislature to govern the design, development and management of a performing arts center for Broward County. The center, which opened in February of 1991, is a major component of the city's new Arts and Science District. The \$100 million district includes the performing arts center as well as a science and technology museum, an IMAX theater and a riverfront park.

Management:

The center is governed by the Performing Arts Center Authority and managed by a team of six directors: an executive director, general manager, director of development, director of communications and audience development, director of finance, and box office manager. In addition, the center has a group of business and community leaders, the Broward Performing Arts Foundation, Inc., dedicated to raising funds from the private sector.

Facilities and Costs:

The Performing Arts Center has two theaters: a 2,700-seat theater for major national, international and regional productions; and a 595-seat intimate theater for community theater, children's productions, seminars, emerging dance companies and chamber music presentations. In addition to the theaters, the center has a multipurpose community hall, a large lobby for events, reception areas, a gift shop, a box office and a 950-space parking garage.

The facility cost \$52 million for construction, equipment and land. The site occupies 204,000 square feet. Building costs for the main building accounted for only \$18 million of the total \$52 million.

Funds for the center were raised from public and private sources. The center's public funds were given by: the state (\$5 million); the county (\$8 million); the city (\$5 million); the Downtown Development Authority (\$5 million in the form of land); a PECO grant (\$7.75 million); and the State Cultural Facilities Grant (\$0.75 million). The private sector is expected to give the center approximately \$20 million.

Programming:

The multi-use center expects to present 550 events each year, including national and international shows as well as regional and local programming. The 2,700-seat theater presented a three-month run of Andrew Lloyd Webber's "Phantom of the Opera."

Community Linkages:

A Community Action Program has been organized to increase the participation of the community. In addition, the Arts and Sciences District, which includes the performing arts center, has a commitment to provide cultural experiences to 90,000 Broward County school children annually.

Kentucky Center for the Arts Louisville, Kentucky

Contact:

Marketing and Public Relations, (502) 562-0100.

General:

The Kentucky Center for the Arts, the largest state-built arts facility in the country, opened in 1983. Beginning in 1967, early planning was undertaken by the state, and an executive director was hired in 1978. In 1980, the governor altered the operational structure of the Kentucky Center to a partnership between the state and private business interests, and this unique public-private partnership has continued from those early days.

Management:

The Kentucky Center is a state-owned facility run by a staff of more than 90 employees. The four major management positions are president, executive vice president, vice president finance, and vice president marketing and programs. The Kentucky Center for the Arts Corporation's 12-member board of directors oversees the facility's operations. The 19-member board of directors of the Kentucky Center for the Arts Endowment Fund, Inc. (a separate nonprofit, tax-exempt organization which contributed to the construction of the Kentucky Center) provides support to the Kentucky Center through solicitation of contributions from private sources.

Facilities and Costs:

The Kentucky Center features three performance halls: a 2,479-seat multipurpose hall; a 626-seat theater; and a 139-seat "black box" experimental theater. In addition, the building houses two rehearsal halls, administrative and ticket offices, a concession area, a gift shop, a restaurant and a parking garage.

The Kentucky Center cost a total of \$34.5 million to build. Of this, \$23.5 million came from a Commonwealth of Kentucky general-obligation bond issue; the City of Louisville financed the \$2.5 million parking garage and donated the land; and the remaining \$8.5 million was underwritten by the Kentucky Center for the Arts Endowment Fund, Inc., from the \$13.5 million it raised from the private sector. Annual operating expenses are approximately \$5 million. Jefferson County provides funding via a one percent hotel room tax, the Kentucky General Assembly provides \$600,000 annually toward the facility's operating expenses, the Endowment Fund provides money to cover operational deficits, and the remainder of the annual operating budget comes from earned income and contributions.

Attendance:

Some 600 performances are held at the Kentucky Center each year, of which the facility itself presents more than 70. Nearly 500,000 people, including almost 150,000 students and educators, attend performances and other events at the facility annually.

Programming:

The Kentucky Center encourages and supports local performing arts activities, presents the finest in nationally and internationally renowned artists, presents the works of Kentucky artists, and provides comprehensive educational programs for Kentucky's youth. The facility's programming philosophy complements its five Resident User Groups (Kentucky Opera, Louisville Ballet, The Louisville Orchestra, Louisville Theatrical Association and Stage One: The Louisville Children's Theatre).

The Kentucky Center's performance series include classical events, contemporary "cutting edge" artists, diverse musical concerts from jazz to blues to Afro-pop to bluegrass, international artists working within traditional art forms, poetry and prose readings, contemporary films and videos, and travel films. The Kentucky Center is one of only a few performing arts centers in the nation with a comprehensive education program and a professional education staff, and serves as a major arts education resource for Kentucky's students and teachers.

Raymond F. Kravis Center for the Performing Arts West Palm Beach, Florida

Contact:

Paul Beard, Managing Director, (407) 833-8300

General:

In 1983, a group of prominent Palm Beach business and civic leaders organized a drive to raise funds and build a world-class performing arts center in Palm Beach County. This group named the performing arts center after Raymond F. Kravis, a prominent oil and gas consultant from Oklahoma who made Palm Beach his winter home for more than 20 years. With funding commitments secured from both the private and public sectors, the Kravis Center began construction in 1990 of a 2,200-seat performing arts center.

Management:

The Kravis Center is currently managed by a limited staff as the facility will not be completed until 1992. The primary focus of the center is on fundraising. The 30-member board of directors is primarily a fundraising effort. The center has several managers on staff: the executive and artistic director, the managing director and the development director. In addition, the center has the help of several administrative personnel and many volunteers.

Facilities and Costs:

The Kravis Center occupies 200,500 square feet. The center has a 2,200-seat theater, a rehearsal hall (or "black box" theater), meeting rooms, catering facilities and a grand lobby that can be used for business or social events.

The facility will cost \$51 million to build. So far, the county has committed \$10 million, the city has given \$5 million plus a parking garage, and six banks have bought \$17 million of industrial revenue bonds from the Kravis Center. Over \$20 million is expected to be raised from the private sector. The industrial revenue bonds are expected to be repaid through private grants in the future.

The center expects to have an operating budget of approximately \$4 million. An annual deficit is expected. Annual giving campaigns will meet these deficits.

Attendance:

The executive and artistic director is planning to present 300 shows a year to 500,000 people at the Kravis Center.

Programming:

The center will be used for a wide variety of performing arts: opera, musical theater, drama, comedy, ballet, modern dance, symphony, and programs for children and adults at leisure.

Resident Groups:

The Palm Beach Opera, the Philharmonic Orchestra of Florida, the Ballet Florida, the Greater Palm Beach Symphony, the Florida Symphonic "Pops" of Boca Raton and the Miami City Ballet will use the Kravis Center as their home.

New Jersey Performing Arts Center Newark, New Jersey

Contact:

Lawrence P. Goldman, President, and Tom Lussenhop, Director of Finance, (201) 648-8989

General:

The New Jersey Performing Arts Center (NJPAC), a private nonprofit corporation, is a partnership of the State of New Jersey, the City of Newark and the private sector created to plan, build and operate a center for the performing arts in Newark. Under the Kean Gubernatorial Administration, an effort was initiated to study the feasibility of a performing arts center in New Jersey. This effort, through a public/private partnership, led to the creating of the New Jersey Performing Arts Center in Newark.

Management:

NJPAC has a small organization at the moment. It is operating with a 20-member board of directors, a president and a director of finance. Its primary focus is on design, construction and fundraising.

Facilities and Costs:

As reported in the *New York Times* in January 1991, the president of the NJPAC announced to the public the details of a \$200 million performing arts center to be built in Newark. The facility will have two major components: 1) an \$80 million multi-use hall which includes both a 2,700-seat theater and a 300-seat theater; and 2) a \$60 million (estimated) 2,400-seat concert hall for the New Jersey Symphony. Additionally, approximately \$60 million will be spent on an open-air plaza (with access to an existing 1,100-seat municipal parking garage), land and infrastructure. Construction and development will take place in two phases. The multi-use hall will be built in Phase I and the concert hall will be built in Phase II. The complex is required to have over 40 percent of its 12 acres devoted to commercial development since it is expected to stimulate Newark's downtown revitalization.

Funds have been raised from both the public and private sectors. The state has pledged \$20 million to buy the 12-acre tract. The state will lease the site to the performing arts center for the next 99 years. The federal government has given NJPAC \$1.2 million to help fund open space planning, design and construction. In addition, the private sector has undertaken a large-scale fundraising campaign. The multi-use hall is expected to be completed by 1995-1996. The concert hall is expected to be completed by 1998.

NJPAC projects operating expenses of \$4 million a year. An annual net shortfall of \$1 million is projected. The shortfall will be heavily influenced by the availability of parking- and real estate-related revenues.

Attendance:

NJPAC expects attendance to be 470,000 in 1997 and 650,000 in 2003.

Programming:

NJPAC plans to present a broad range of performing arts including orchestra, opera, dance, drama, chamber music, touring shows, and experimental and children's theater.

North Carolina Blumenthal Center for the Performing Arts Charlotte, North Carolina

Contact:

Executive Director's Office, (704) 333-4686.

General:

In the mid-1970s, a cultural action plan called for a performing arts center to be built in uptown Charlotte. The mayor and, later, the Charlotte Uptown Development Corporation appointed task forces to study ways to achieve this goal. With support from the city, state and private sector, plans to build a performing arts center went ahead. The center is scheduled to open in the fall of 1992.

Management:

The city will own the center and lease it to the Foundation Board of Trustees, the center's board of directors. The foundation will oversee the operations and finances of the center. An executive director and professional staff has been hired to manage the center.

Facilities and Costs:

The center occupies 190,00 square feet. It includes a 2,100-seat performance hall, a 440-seat theater, two rehearsal halls, two box offices and two over-street walkways to two nearby parking garages and mall.

The center will cost a total of \$45 million. The cost is funded by \$15 million from the City of Charlotte and \$15 million from the State of North Carolina. Thirty-two million has been publicly raised; of this, \$15 million will be used to fund the remaining cost of the center. Publicly raised funds will also fund: other equipment, campaign costs and working capital (\$2 million), an operating endowment (\$5 million), and an Arts and Science Council endowment (\$10 million). The first year's operating budget will be \$2.5 million.

Programming:

The center expects to have approximately 150 performances in the first year, including a variety of performing arts. The large performance hall will be used for major national, international and regional shows.

Resident groups:

Many local organizations plan to participate in the new performing arts center. Opera Carolina, the Charlotte Repertory Theater, the Charlotte Symphony Orchestra, N. C. Dance Theater, Oratorio Singers of Charlotte, Charlotte Choral Society, Community Concerts will be resident organizations at the center.

Orange County Center for the Performing Arts Costa Mesa, California

Contact:

Richard T. Bryant, Director of Communications and Marketing, (714) 556-2121.

General:

The Orange County Center for the Performing Arts, Inc. is a nonprofit corporation organized in 1973 to manage the development of a new performing arts center in Orange County. After 13 years of planning, seven years of volunteer fundraising and 39 months of construction, the Orange County Performing Arts Center was created.

Management:

The center has a chairman, president, vice president for development, general manager (programming), and a staff for theater operations, publicity, marketing, group sales, finance, box office and development. The center's success relies on an unrivaled network of more than 4,000 highly motivated volunteers and support group members who provide a broad base of support for programming and operations.

Facilities and Costs:

Construction costs totaled \$72.8 million. The center raised all construction costs plus an endowment of \$67 million (most of which are deferred assets as these amounts are will and insurance bequests) through contributions from the private sector — individuals, families, businesses and foundations. By opening night, the fundraising effort had included 5,000 volunteers and reached 10,973 gifts. The center has a 3,000-seat theater, a large rehearsal hall (which can be converted into an adjustable space theater), three additional rehearsal halls, a performers' lounge and over 19 dressing rooms. The needs of ballet and dance performers were a major consideration in the design of the center. The center occupies approximately 225,000 square feet.

Operating Budget:

In 1990, the center had operating expenses of \$19.5 million (including all programming costs and depreciation). Revenues from box office and other sources generated \$13 million, leaving a deficit of \$6.4 million (33 percent of expenses). Combined annual operating and capital fundraising campaigns in 1990 raised over \$6.1 million. The operating fund, which includes all performance activity, showed a surplus for the year.

Attendance:

Since opening in 1986, more than three million people have attended over 1,200 performances. Average paid attendance for all presentations, both those sponsored by the center and regional groups, has been roughly 80 percent, significantly above national norms.

Programming:

A 1988 report on the center indicated that the year's performances included: Broadway musicals (34 percent), classical music (26 percent), ballet (17 percent), pop music (12 percent), opera (6 percent) and other (5 percent). A *Times Orange County* poll in 1988 showed that the residents' wish list was Broadway plays (40 percent), pop music (27 percent), classic music (14 percent), dance (10 percent), opera (four percent) and other (five percent). The poll showed a stronger interest in Broadway and pop music than the center had presented during the year. The center used 87 percent of its capacity during its 1988 season.

Subscription Programs:

The center has several subscription programs. It has four series: classical ballet performances (the 1991-1992 season includes performances by The Royal Ballet, American Ballet Theatre and The National Ballet of Canada), Broadway musicals, jazz concerts and chamber music.

Orange County Center for the Performing Arts
Costa Mesa, California

Resident companies:

Resident groups include The Pacific Symphony Orchestra, the Orange County Philharmonic Society, Opera Pacific, the Master Chorale of Orange County and the Pacific Chorale.

Special Programs/Community Linkages:

The center sponsors and encourages educational programs through which children and youth can develop a continuing appreciation for the performing arts. "Stage One" features free lecture/demonstrations by major touring companies at the center, while "Center on Tour" introduces dance in the classroom through demonstrations by Southern California artists. Each year, the center and the Orange County Department of Education co-present the Kennedy Center *IMAGINATION CELEBRATION*, a countywide arts festival for children. This year's nine-day festival reached 144,000 children and their families.

Playhouse Square Center Cleveland, Ohio

Contact:

Larry Wilker, President, (216) 771-4444

General:

The Playhouse Square Foundation, Cleveland's urban redevelopment catalyst, restored the historic Ohio (1,035 seats), State (3,098) and Palace (2,714) theaters over a six-and-a-half-year period ending in 1988. Playhouse Square Center's management is a major presenter and producer of entertainment and is very active in real estate development.

Management:

Traditional organization structure — theater operations, programming, fundraising (\$1.3 million a year). The center employs 75 people.

Facilities and Cost:

Total cost for the renovation was \$37.7 million, all of which was privately funded. In addition to rebuilding the theaters, Playhouse Square Center and developing partners built an \$8.2 million, 750-car parking garage (1987), a \$40 million, 280,000-square-foot office building (1989) and a \$32 million luxury hotel (1991). A \$5 million Housing & Urban Development grant was secured to help fund the hotel along with tax increment financing. Newer initiatives include a market housing complex, movie theater and restaurant. All of these initiatives have ties to each other — theatergoers get discounts on hotel reservations, parking, etc.

According to Larry Wilker, the theater's earned income recovers about 80 to 85 percent of its operating expenses (\$10 million a year). The commercial operations are expected to help the foundation fund its annual theater operations deficit.

Attendance:

750,000 people a year (the foundation had expected to have one million a year), 600 performances a year

Programming:

Playhouse Square Center presents a balanced program which consists of classical, theater and contemporary performances. Since there are major resident companies which have full seasons of both opera and ballet, those disciplines are not as heavily presented as the others. Playhouse Square Center is also a producer of musicals for national tours and for Broadway.

Resident Companies:

Forty percent of capacity is used by the Cleveland Ballet, the Cleveland Opera, Dance Cleveland, The Great Lakes Theater Festival, the Ohio Ballet and the Theater League of Cleveland.

Special Programs/Community Linkages:

The foundation runs a Children's Theater Series that involves over 40,000 children. Over 10,000 children are on a waiting list for the program. The foundation also has started an "Incubator Program" which supports new work of American artists. The foundation is very involved in community programming.

Tampa Bay Performing Arts Center

Tampa, Florida

Contact:

Steve Loftin, General Manager, (813) 222-1008.

General:

Tampa Bay Performing Arts Center, Inc. (TBPAC) was incorporated on September 15, 1980 as a nonprofit organization to promote interest in the performing arts, provide support facilities for the education of the public in the performing arts, and engage specifically in the design, construction and establishment of a performing arts center. The construction of the center was completed in 1987, at which time the center began operations. The center has three theaters: Festival Hall (2,493 seats); Playhouse (960 seats); and the Robert and Lorena Jaeb Theater (300 seats).

Management:

The center is run by TBPAC, but owned by the city. TBPAC has 47 full-time personnel. The major functional areas include administration, marketing, development, operations, facilities maintenance and security. TBPAC also has a development council which is a committee of the board of directors. Over 800 volunteers assist TBPAC as ushers during the season.

Facilities and Costs:

The total cost of building and furnishing the 290,000-square-foot facility was \$61 million in 1984. The City of Tampa funded \$39.5 million and the private sector funded \$21.5 million. To finance its portion of the cost, the city issued \$38.57 million in Guaranteed Entitlement Revenue Bonds. The private portion was pledged and paid between 1982 and 1991.

TBPAC has produced an operating deficit in each of its four years of operation. The accumulated deficit at September 30, 1991 is estimated to be \$3.1 million.

In addition to the three theaters, TBPAC has a large rehearsal hall, offices, a performers' lounge, a banquet/meeting hall and a central box office. The center is located on a nine-acre site along the Hillsborough River in downtown Tampa.

Attendance:

In 1988, the attendance was close to 500,000 with 554 performances. Attendance for all performances was 72.1 percent of capacity (the national average).

Programming:

Within the last six months, the programming has undergone some transition. Under new leadership, TBPAC is trying to build a solid audience for Broadway shows. TBPAC presents Broadway shows, resident theater, orchestra, pop music, chamber music, dance and ballet. Broadway shows, however, produce more revenues. TBPAC is trying to build its Broadway subscriber base. The center currently has 7,000 subscribers. During the 1990-1991 season, TBPAC partnered with PACE to present five shows. Next year, TBPAC will present six Broadway shows plus a special. Separately, TBPAC is planning to also introduce a Senior Sunday series and an orchestra series.

Broadway is presented in Festival Hall (2,493 seats), along with the Florida Orchestra, the Tampa Ballet and the touring ballet. Smaller and less expensive shows are presented in The Playhouse (960 seats) or Jaeb Theater (300 seats). The Playhouse often presents residential theater (e.g., the Tampa Players) and modern dance. The Jaeb Theater is generally used for community programming or meetings.

Tampa Bay Performing Arts Center
Tampa, Florida

Resident Companies:

Resident groups, like the Florida Orchestra, the Tampa Ballet and the Tampa Players, get preferred rental rates and charges.

Special Programming/Community Linkages:

TBPAC sponsors, through private funds, the Tampa Bay Youth Orchestra for junior high school students. TBPAC also organized a curriculum-driven program for teachers and students. This program, funded by the State Education Department, fits into schools' English/Language Arts programs.

