

Feasibility Study for New Performing Arts Facilities in DuPage County, IL

Phase One: Needs Assessment Summary

Presented to the Economic Development Committee

April 16, 2024

Introduction & Context

The impetus for the study

In 2021 County Board forms an ad-hoc fine art committee

Choose DuPage directed to issue RFP and manage study

Webb Mgmt. selected with partners Wight & Co. and Schuler Shook.



Image credit: Marcos Andrichak, Art and Culture, 2008, Vale do Paraiba University collection

Introduction & Context

About Webb Mgmt

Management consulting practice focused on the development, renovation, and operation of cultural facilities.

27 years of experience and more than 500 completed projects

Experts in feasibility studies, business plans, strategic plans, and district plans, all focused on live arts and entertainment.

Completed last feasibility for new facilities in DuPage County in 1999.



Photo credit: Hylton Performing Arts Center, Prince William, VA, with the text, "building creativity" written across the center of the photograph

Introduction & Context

Phase One: the needs assessment

This is the needs assessment, including:

- Forces and trends
- Market analysis
- Potential uses and users for new facilities
- Existing facilities and competitive analysis
- Aligning the project with County goals
- Conclusions and recommendations



Photo credit: North Central College, Performing Arts

Introduction & Context

Assessment methodology

- 31 confidential interviews
- Research on DuPage as arts market
- Reviews of broader forces and relevant trends in the arts sector
- Identification and systematic accounting of arts facilities in the region, including County-based performing arts centers, venues for arts programs, and larger outdoor amphitheaters through the greater Chicagoland area
- Analysis of comparable national projects as precedents and use-cases for our recommendations



Photo credit: Paramount Theatre

Forces & Trends

Facilities are responding to change by...

- Embrace a broader definition of cultural activities.
- From “Friday Night Lights” to the “community living room.”
- Partnering with educators on programs and their delivery.
- From arts palaces to arts districts
- Supporting active as well as passive participation.
- Enhancing the social experience
- Maintaining low cost of access
- Address economic and community development issues.

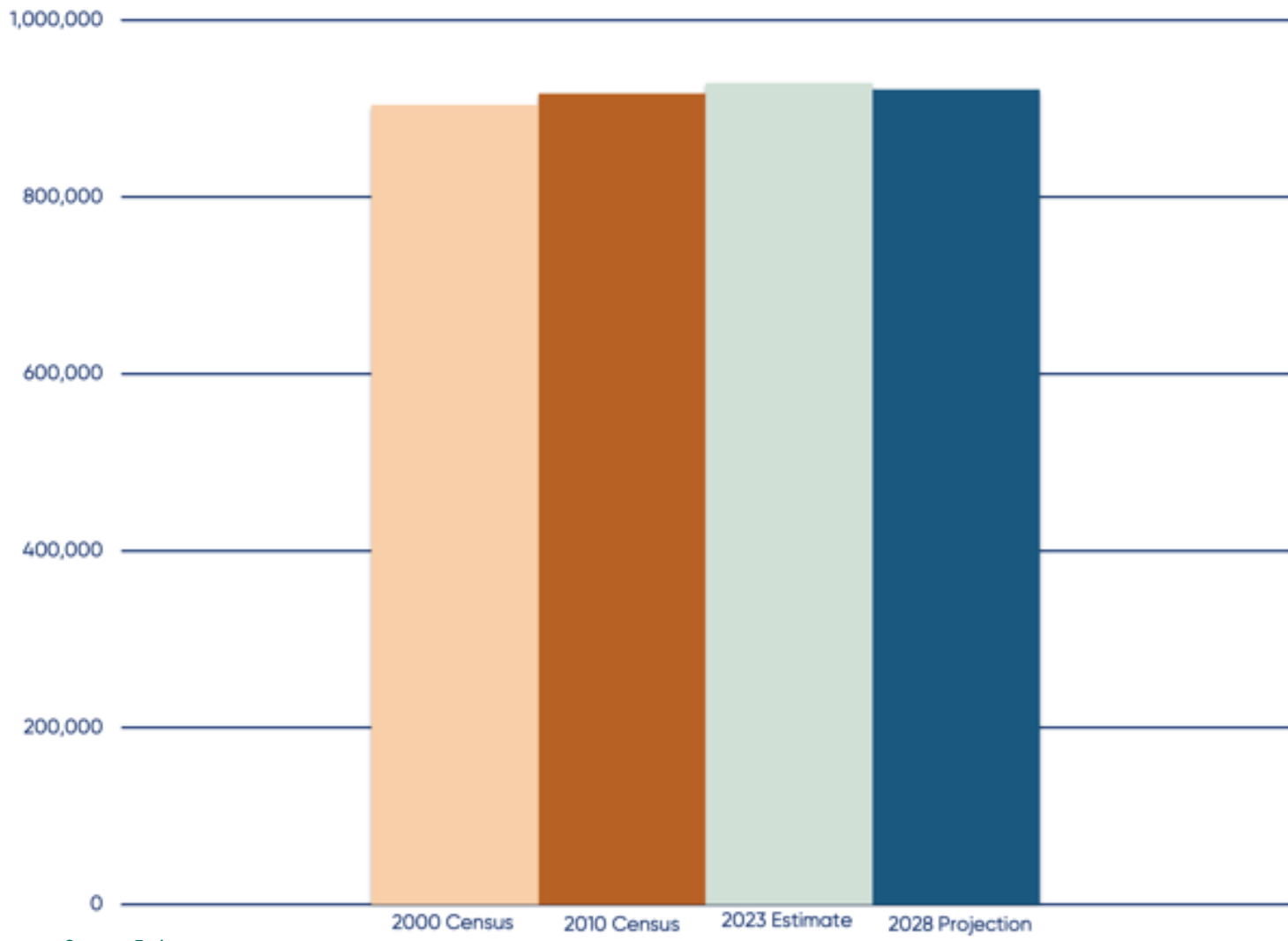


Phot credit: Dallas Arts District

Market Assessment

Market size & characteristics

Local Population Growth
DuPage County, IL



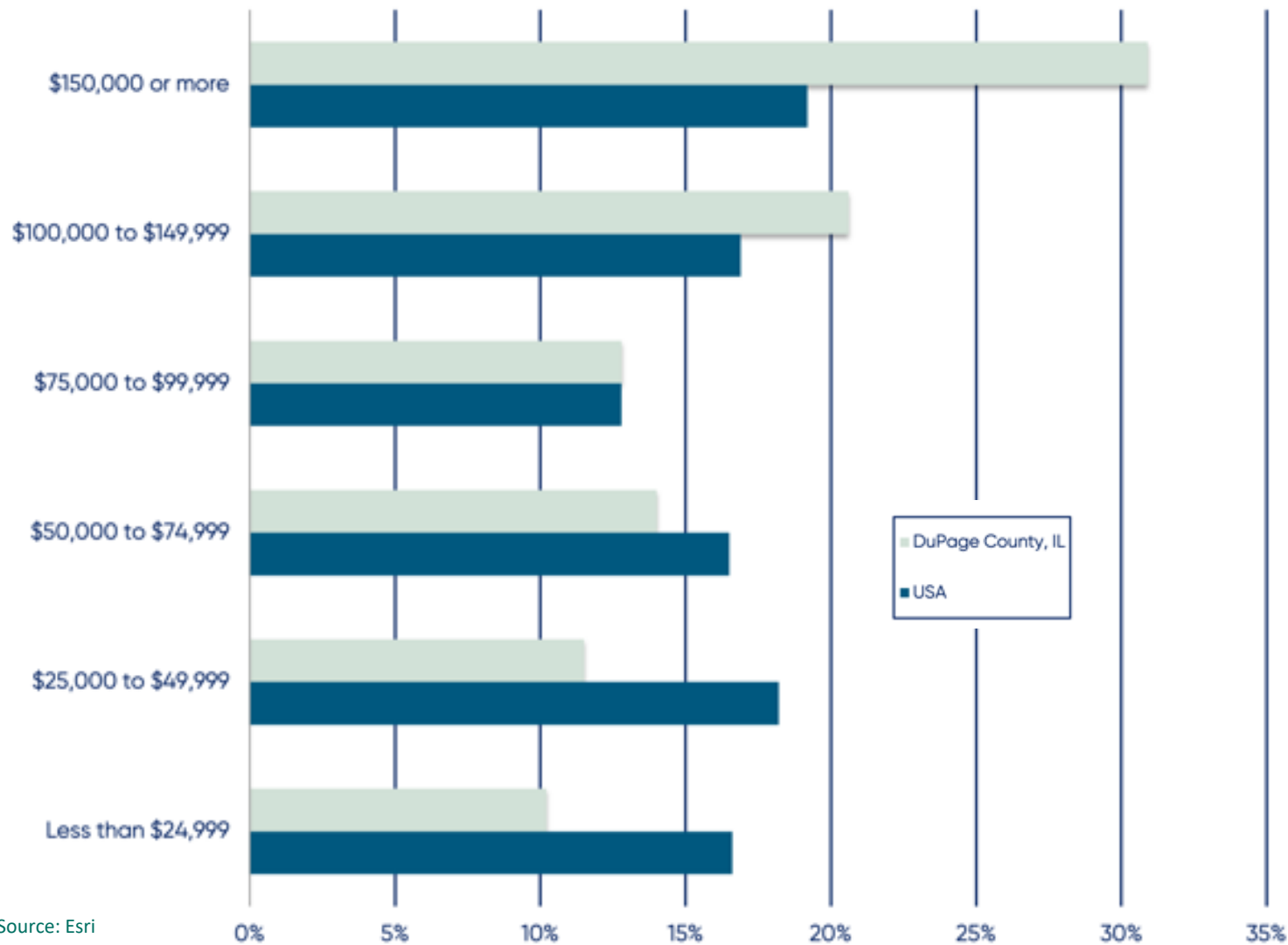
Source: Esri



Market Assessment

Market size & characteristics

Household Income Distribution



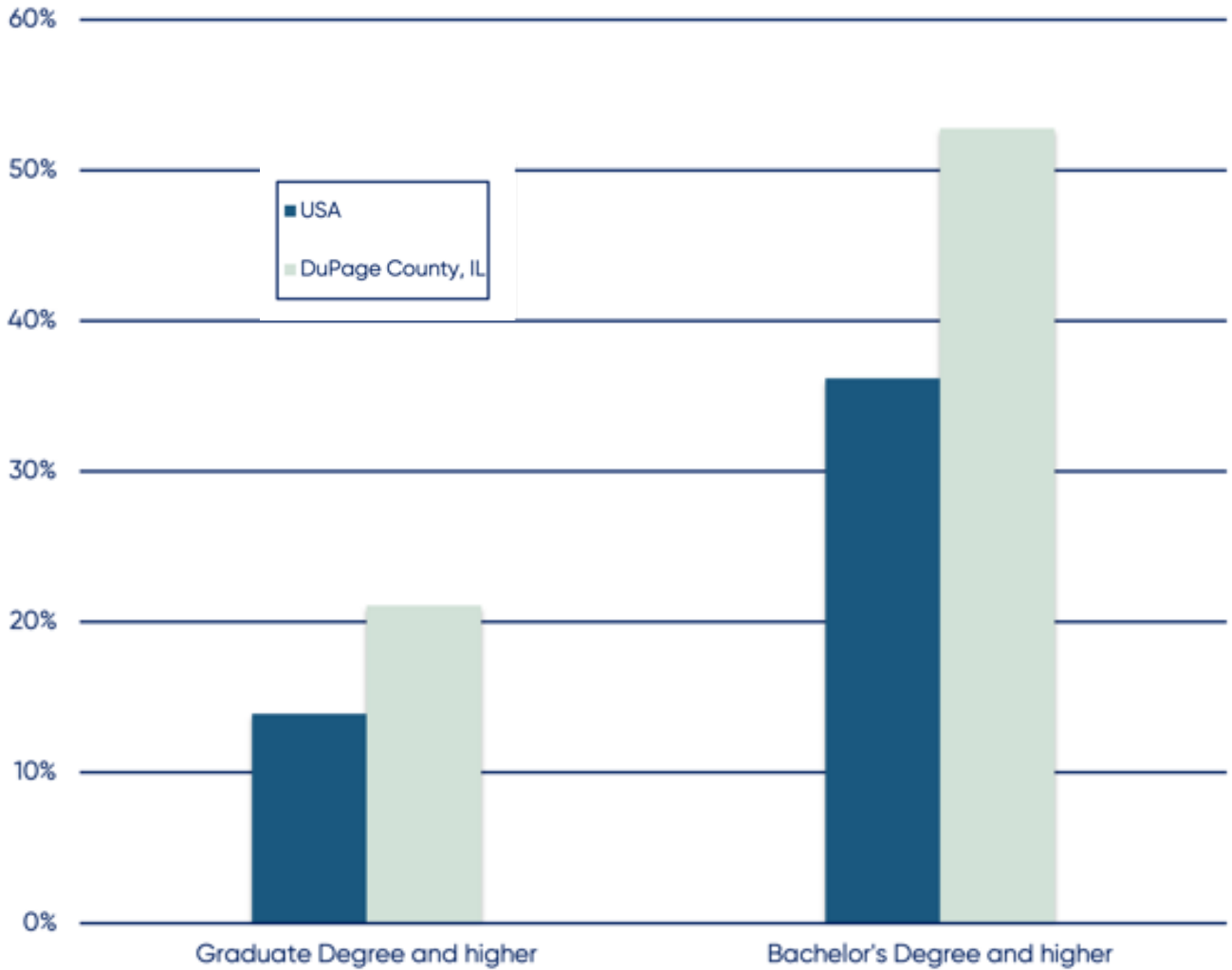
Source: Esri



Market Assessment

Market size & characteristics

Educational Attainment
Bachelor's Degree or Higher



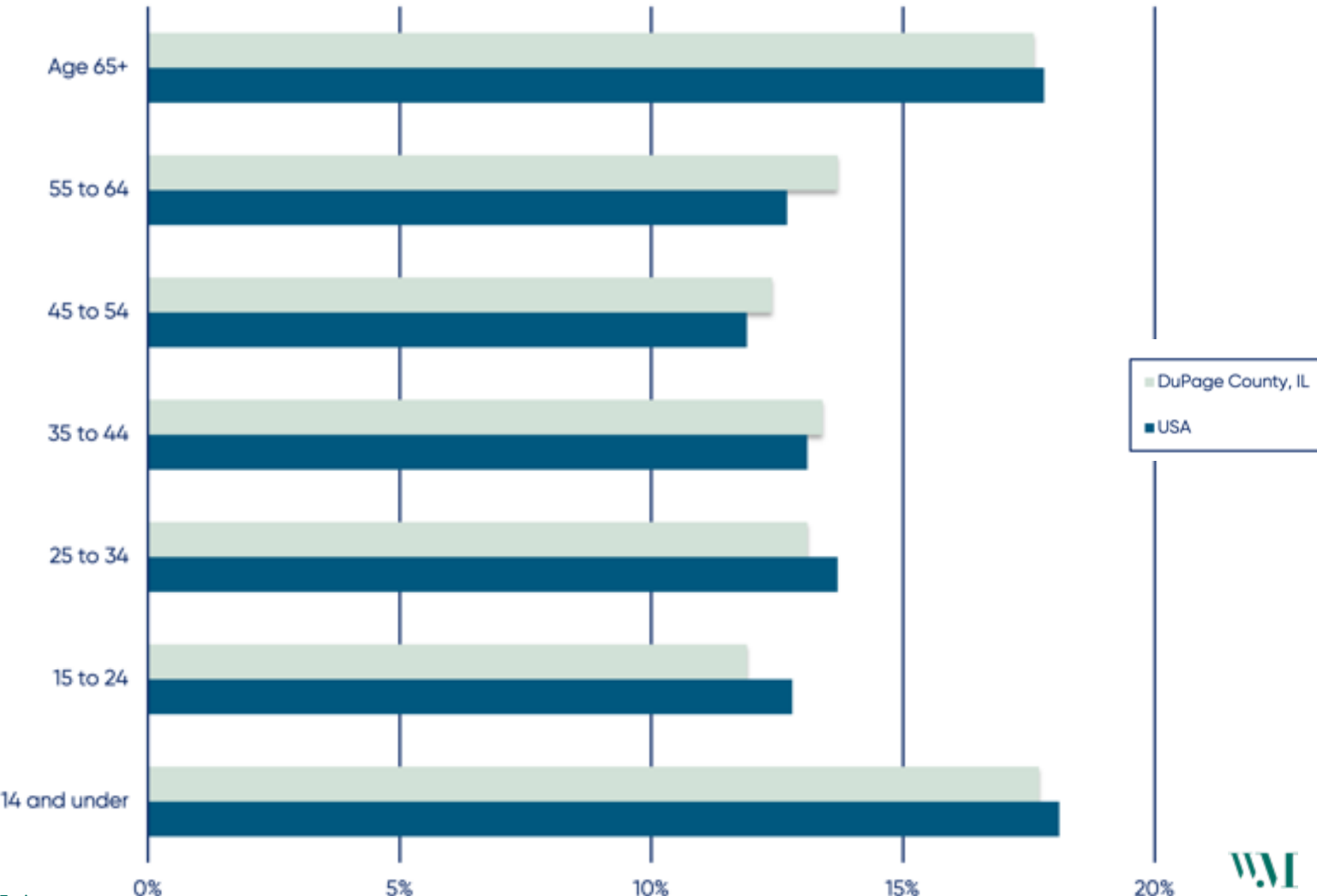
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Market Assessment

Market size & characteristics

Age Distribution



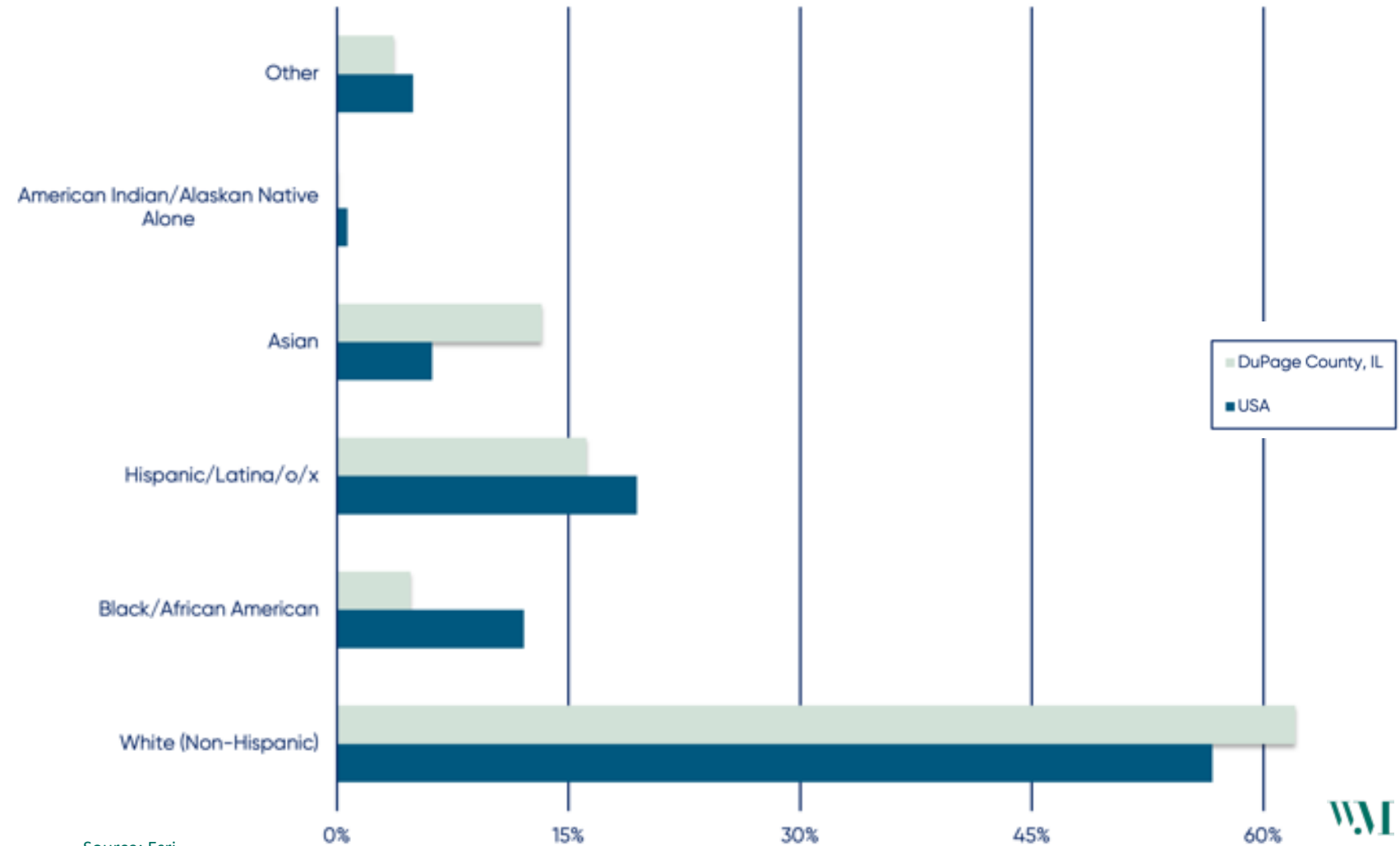
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Market Assessment

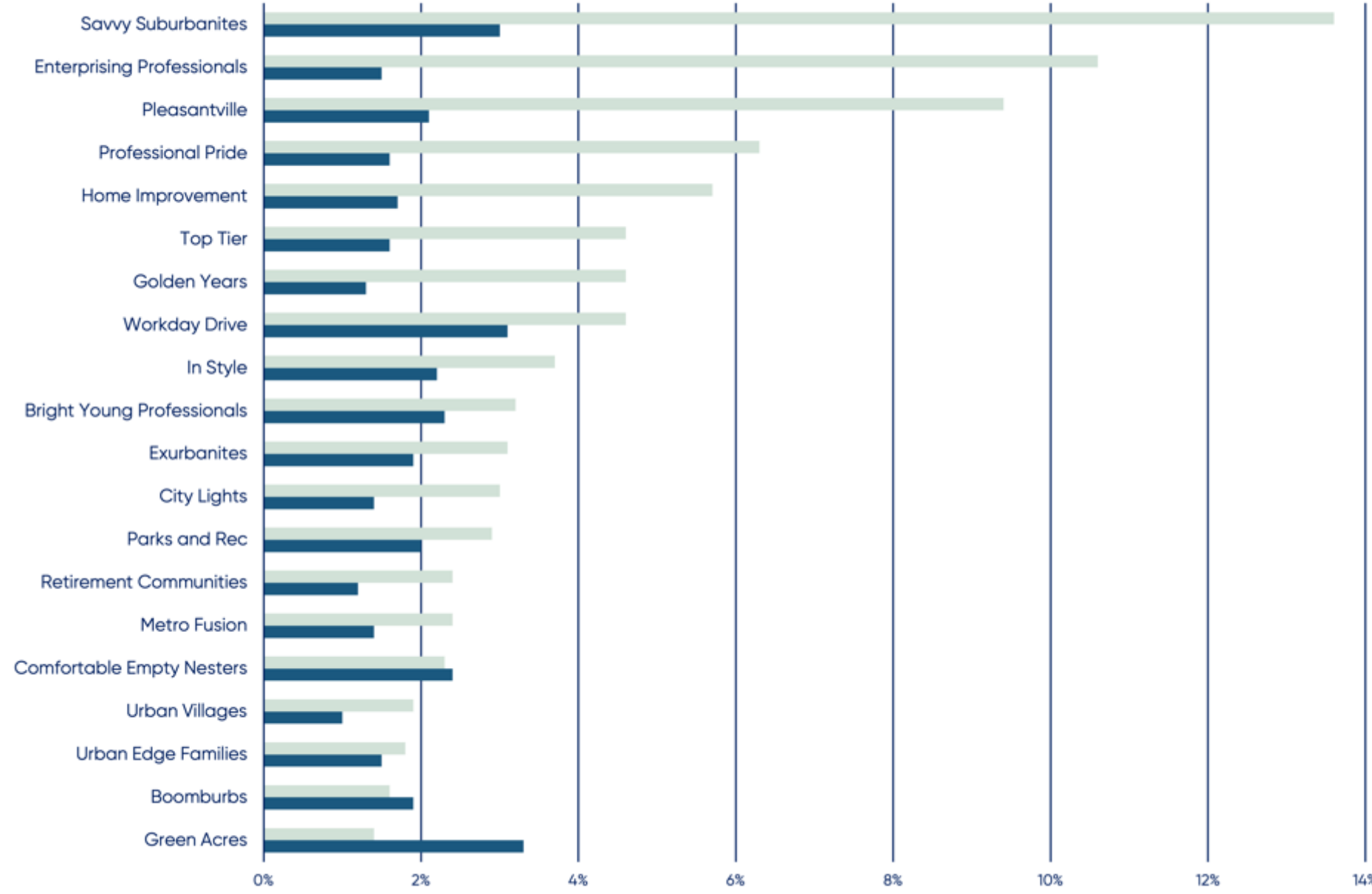
Market size & characteristics

Race & Ethnicity



Source: Esri

Top Twenty Tapestry Segments for households in 2023



A&E index:
 Savvy Suburbanite 163
 Enterprising Professionals 130
 Pleasantville 132
 Professional Pride 205
 Home Improvement 104

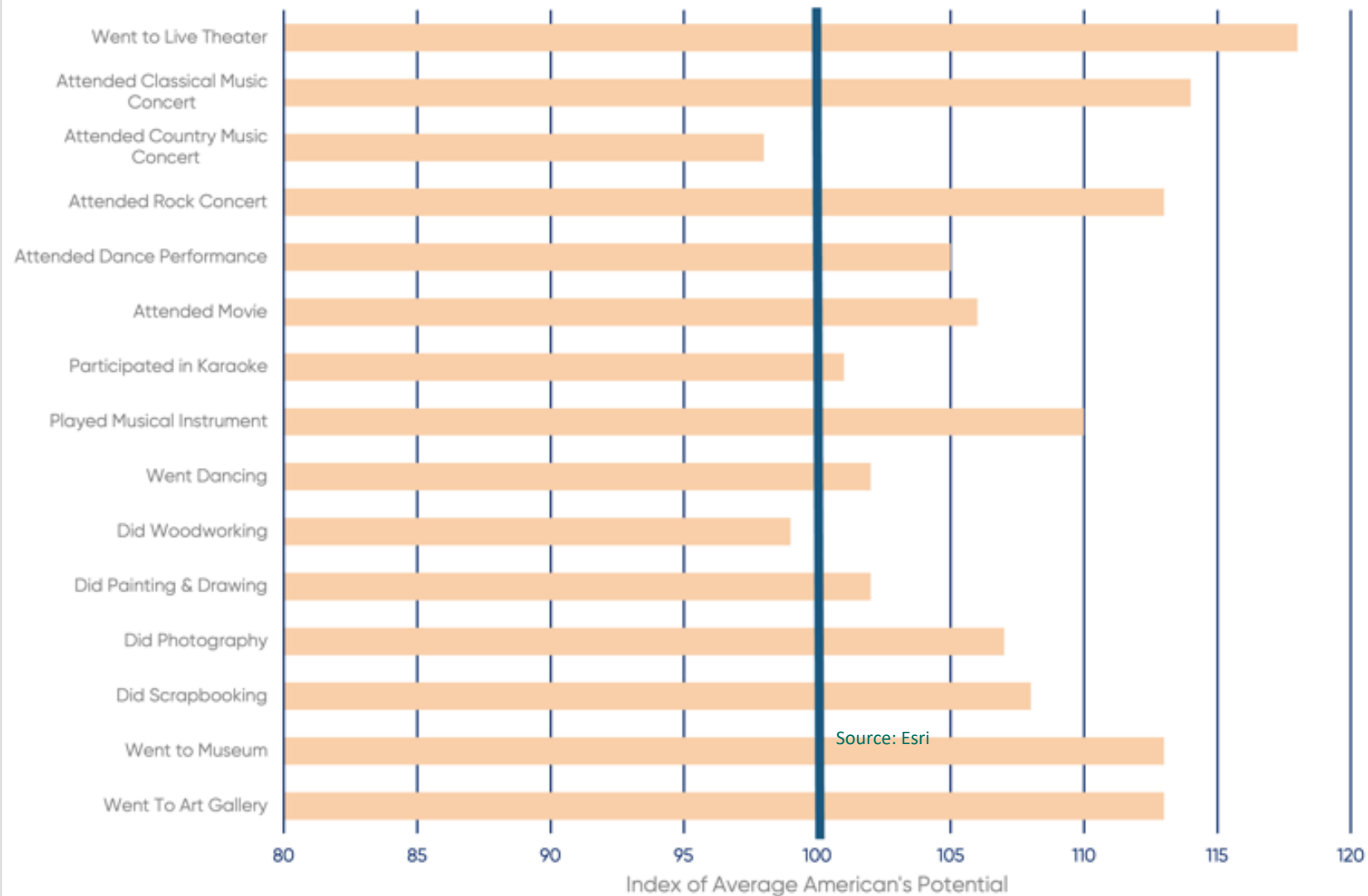
Source: Esri

Percent of Households by Tapestry Segment



Market Assessment

Market Potential Index (MPI) for DuPage County



Competitive Facilities & Programs

Facilities included

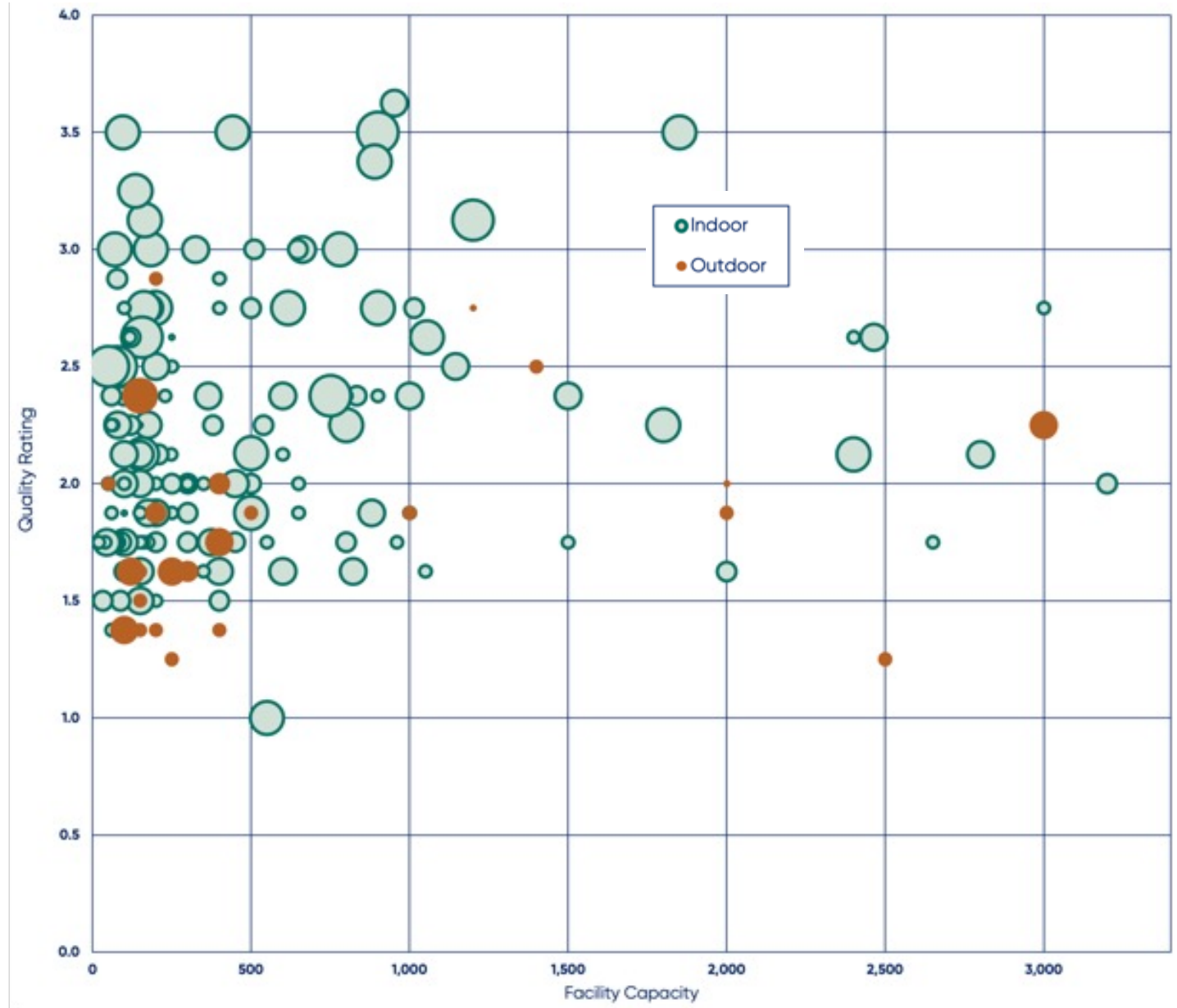
- Performance facilities
- Active arts facilities
- Large outdoor venues



Photo credit: The McAninch Arts Center, the College of DuPage

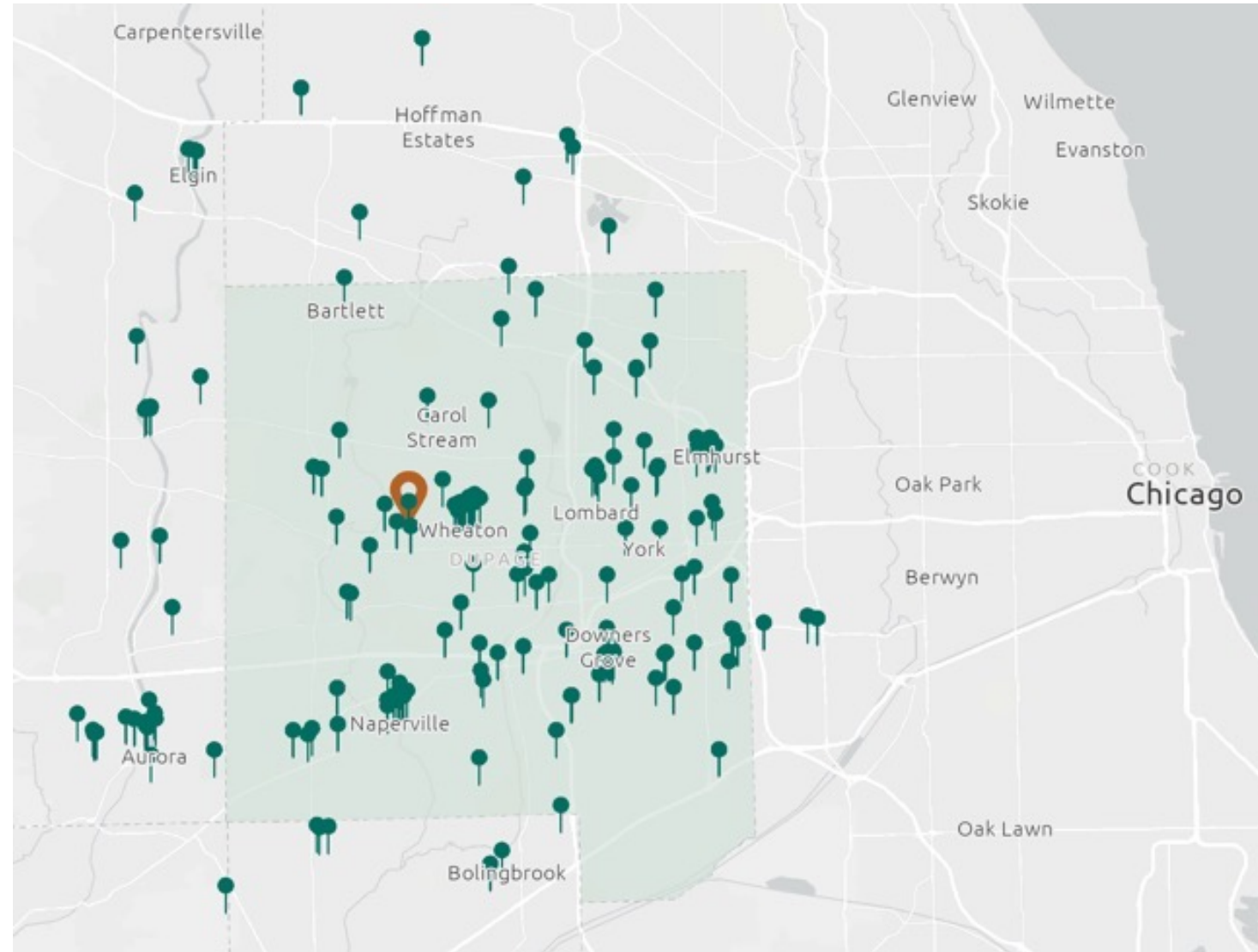
Competitive Facilities & Programs

Matrix of performing arts venues



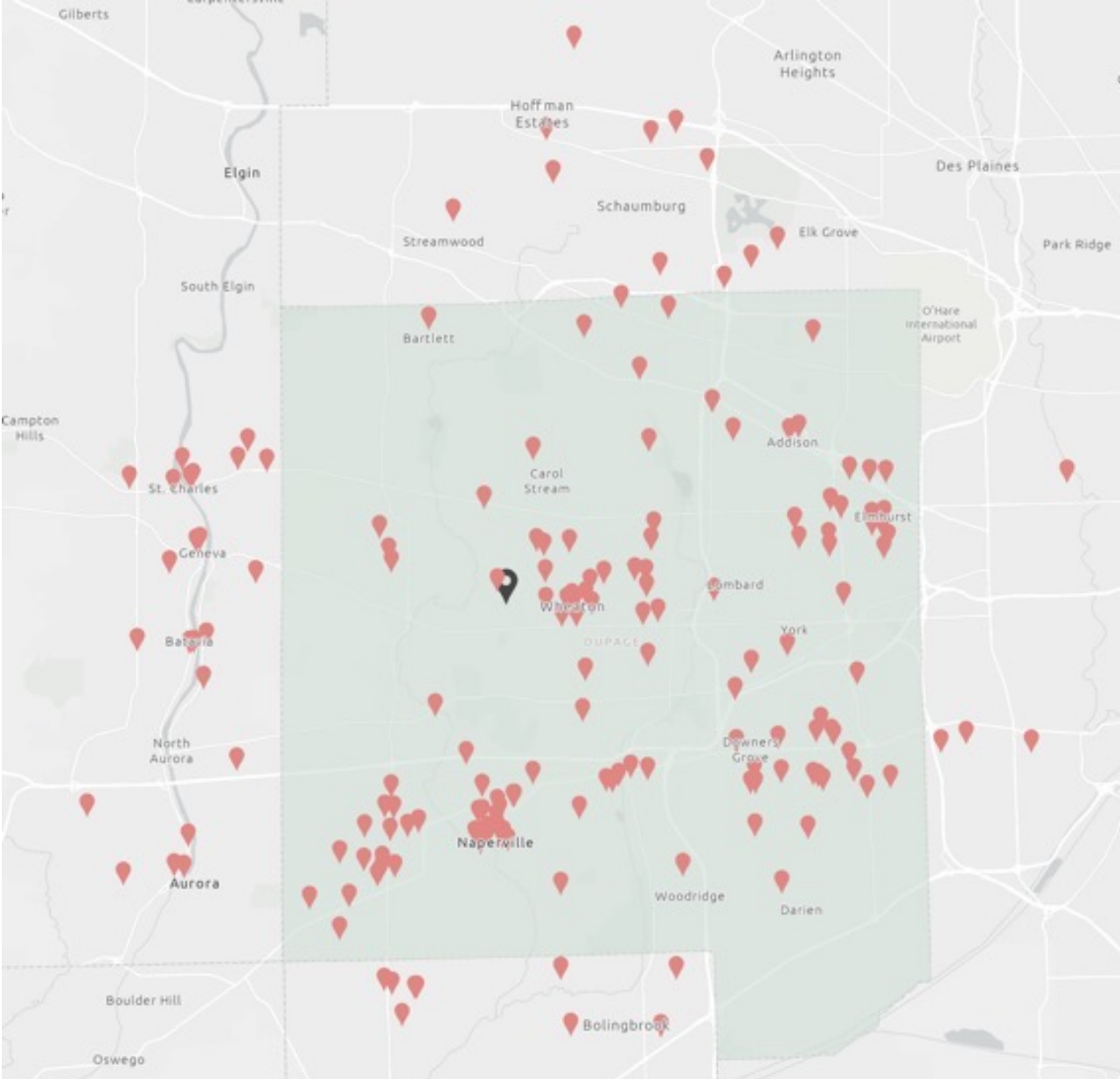
Competitive Facilities & Programs

Map of performance facilities in the area



Competitive Facilities & Programs

Map of nearby active arts facilities

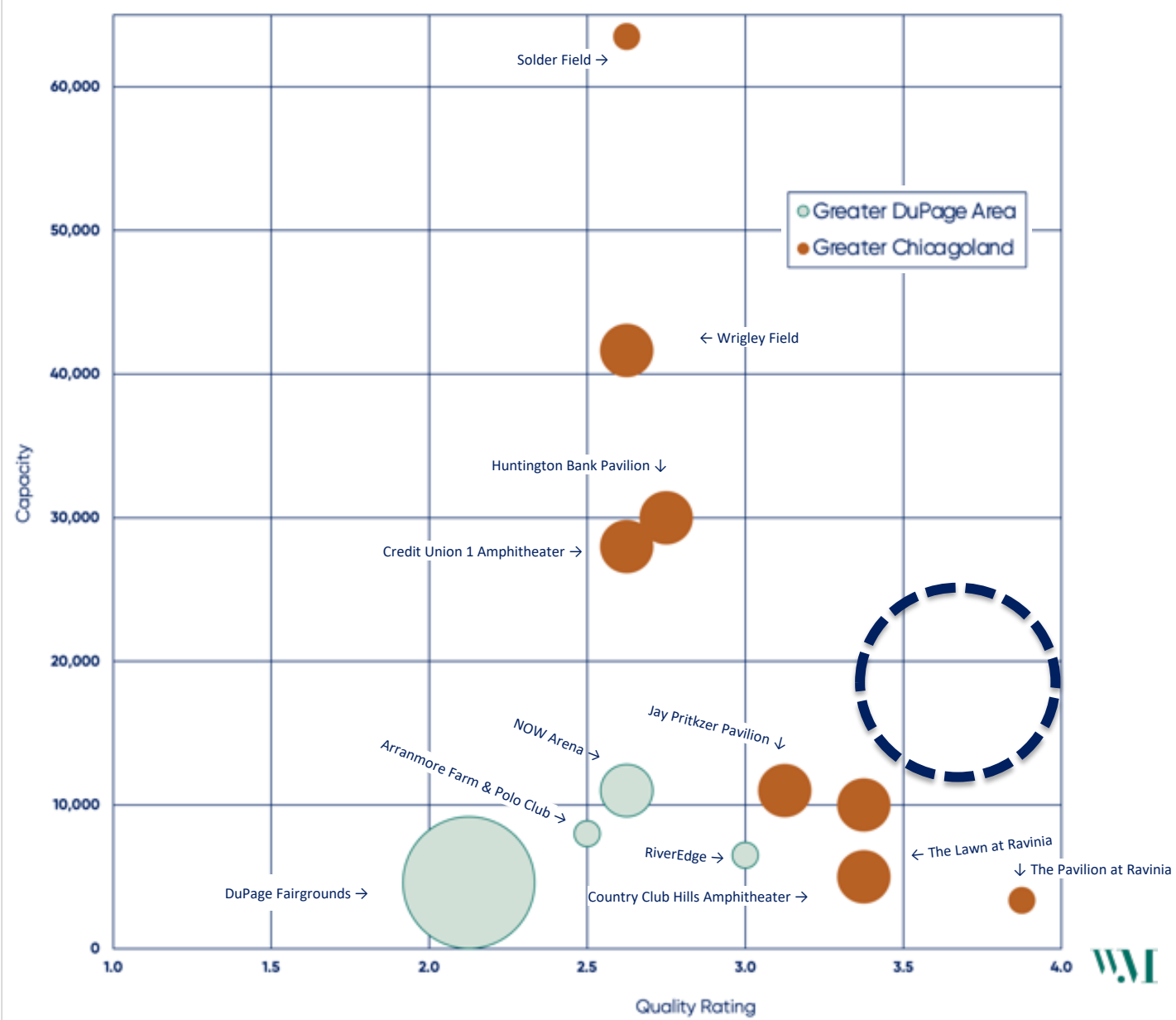


Map credit: Esri with Webb Mgmt inventory research data collected between Dec 2023 - Jan 2024



Competitive Facilities & Programs

Large outdoor venues in the area

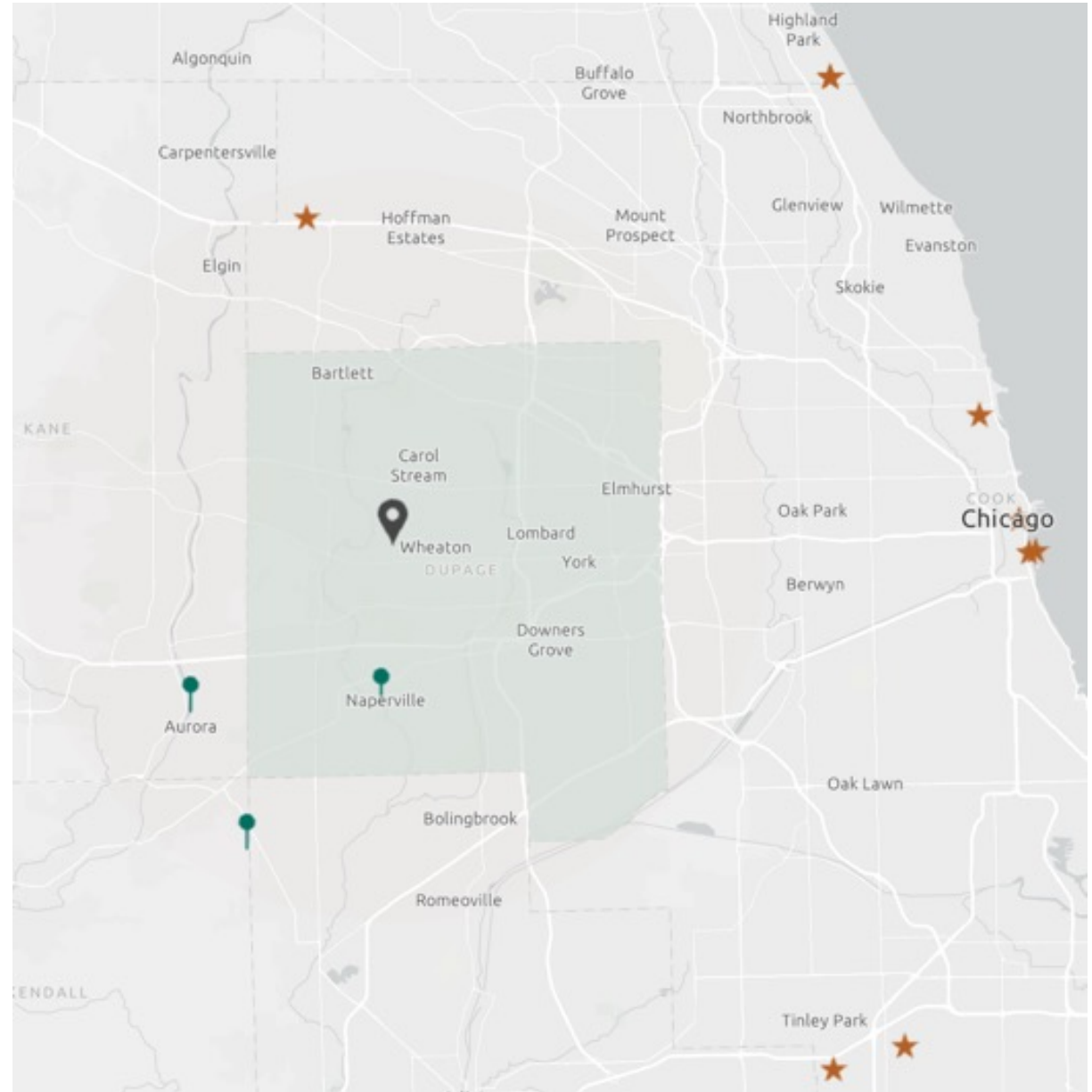


Source: Webb Mgmt inventory research data collected between Dec 2023 - Jan 2024



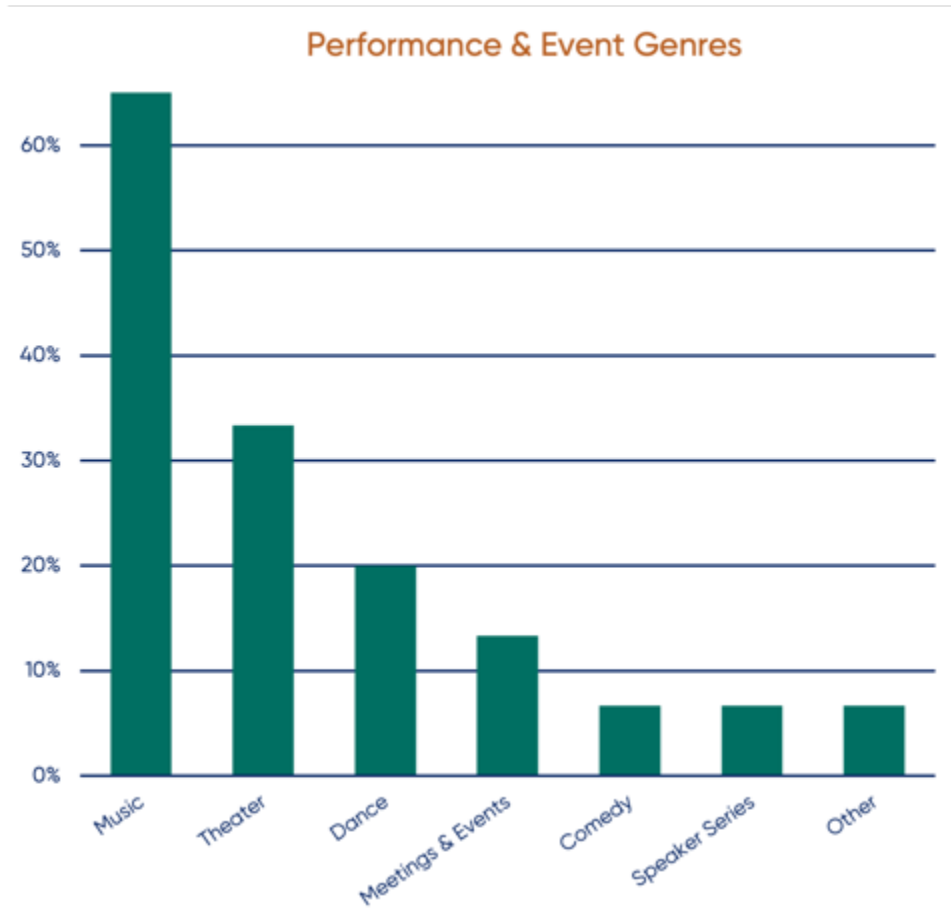
Competitive Facilities & Programs

Large outdoor venues in the area



Facility Uses & Users

User survey results



Source: Survey Monkey results

550

The median number of seats desired for a potential new theater among survey respondents

Facility Uses & Users

Challenges & opportunities

- Responding to existing nonprofit demand
- Competing for touring product
- Active arts programs



Aligning with County Goals

County strategic planning process

- County Board and Choose DuPage are actively exploring strategies to ensure sustained growth and income through visitation to the County. Two key areas were identified for potential investment:
 - First is sports tourism
 - New performance, rehearsal, and teaching space for the arts.
- Additional Priority is supporting the mental and physical health of DuPage residents.

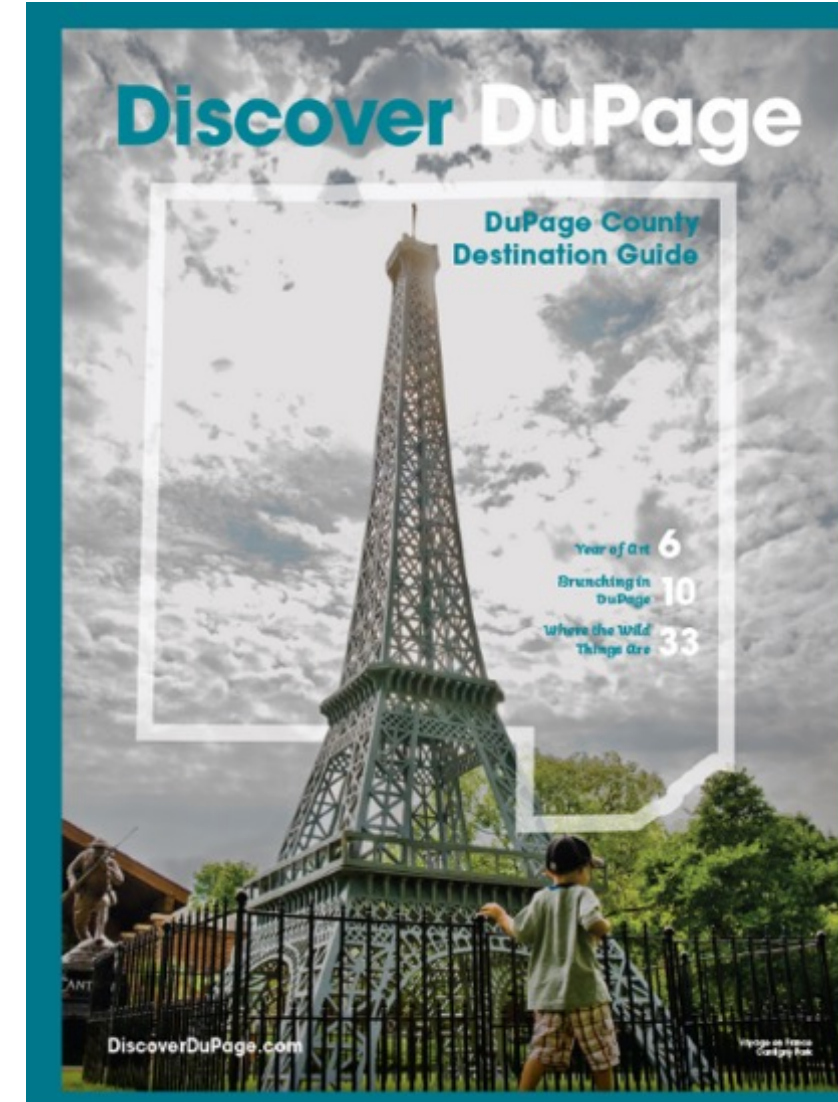


Image credit: Discover DuPage

Conclusions

What we've learned

DuPage County has a large population with the propensity to participate in live arts and entertainment programs. Strongest market opportunities are for active arts programs and less formal outdoor performances and events.

There is a large set of indoor, outdoor and active arts spaces in the County, such that new facilities must be carefully designed and positioned so as to compete for audiences and programs.

New opportunities for active arts participation would support current and emerging goals of County leadership around economic and community development.

Recommendations

Six options considered

1. A new indoor regional performing arts center (e.g. North Shore Performing Arts Center, Skokie, IL)
2. A new large indoor entertainment destination (e.g. Smart Financial Center, Sugarland, TX)
3. A state-of-the-art, hyper-flexible, technology-rich space (e.g. The Shed, New York or The Sphere, Las Vegas)
4. Improved outdoor live arts and entertainment facilities
5. A new outdoor gathering and celebration location adjacent to the Government Campus
6. One or more regional arts education programs and facilities

Recommendations

Three options eliminated

1. A new indoor regional performing arts center (e.g. North Shore Performing Arts Center, Skokie, IL)
2. A new large indoor entertainment destination (e.g. Smart Financial Center, Sugarland, TX)
3. A state-of-the-art, hyper-flexible, technology-rich space (e.g. The Shed in New York or The Sphere in Las Vegas)
4. Improved outdoor live arts and entertainment facilities
5. A new outdoor gathering and celebration location adjacent to the Government Campus
6. One or more regional arts education programs and facilities

Recommendations

Recommendation: Improved large outdoor entertainment capabilities

- Invest in facilities to improve capabilities for larger events and festivals.
- Most cost-effective option is investing in Fairgrounds facilities to:
 - Improve infrastructure.
 - Better staging, lighting, amenities.
 - Long term potential to become a regional destination for live arts, entertainment and festivals.
- Take an incremental approach that builds on the established market.



Photo credit: The Cynthia Woods Mitchell Pavilion

Recommendations

Recommendation: Government Campus event area for smaller outdoor events

- Separately, develop an area in front of the DuPage County Government Campus to create a venue (2,000- 3,000 capacity) for community gatherings, live arts and entertainment performances, a focal point for community events like runs and rides, and a location for other community celebrations and street-festivals.



Photo credit: Celebration Square, Mississauga, Canada

Recommendations

Recommendation: Arts education programs and facilities

- One or more arts education programs and facilities focused on higher-end training in one or more performing arts disciplines.
- One facility in which a range of arts education programs are offered.
- Or, there could be a series of spaces programmed and operated by individual operators.
- Each space would have some combination of teaching, rehearsal, and support space appropriate to that discipline.
- This is likely a phased project.
- Key is soliciting partners like Old Town School of Music, Music Institute or Academy of the Arts.



Photo credit: DiMenna Center, image by Francis Dzikowski

Recommendations

The Fairgrounds as a possible site for live arts and entertainment

- Two of our three recommended facilities could be on or near the Fairgrounds.
- A relatively central location within the County.
- There is ample parking, with good ingress and egress.
- There are a number of under-used buildings on the site that could be adapted into arts education facilities.
- Noise issues probably manageable.
- The nearby train tracks create a noise problem, but an opportunity to open a station.
- Large enough site for initial recommendations and more..



Photo credit: DuPage County Fairgrounds

Recommendations

Next steps

1. Develop physical and site plans that consider the placement of recommended facilities at various locations throughout the County.
2. Develop a business plan for recommended facilities.
3. Project the economic impacts of recommended facilities



• Photo credit: "Measure for Measure" at Chicago Shakespeare Theater. Image by Liz Lauren