

Oregon Historic Theaters: Statewide Survey and Needs Assessment

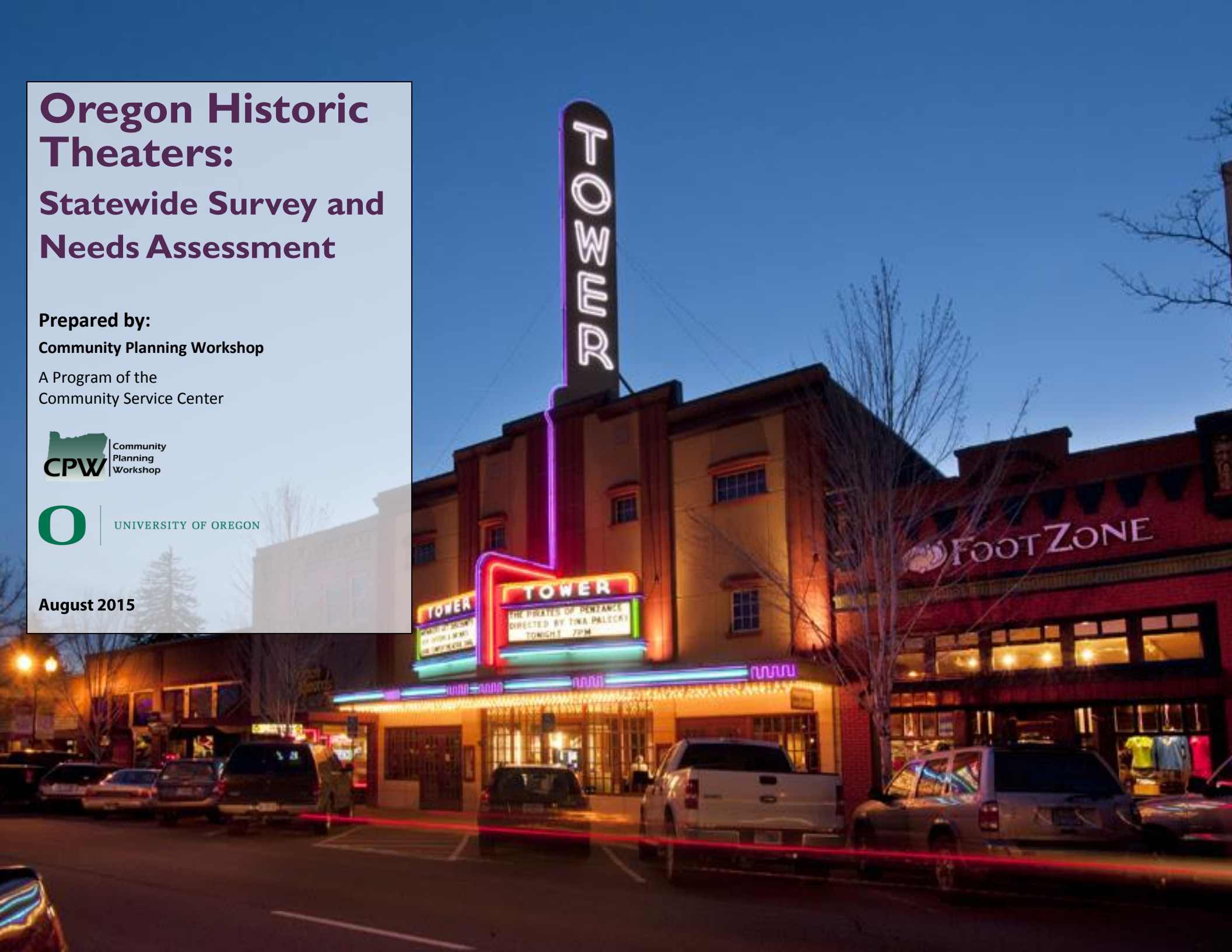
Prepared by:

Community Planning Workshop

A Program of the
Community Service Center



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Executive Summary

For centuries, audiences have gathered in theaters to laugh, to cry, to escape, to transcend. Theaters bring friends and strangers together to share an experience that is both intensely personal and strangely collective. As we increasingly satisfy our entertainment needs at home with television and online streaming, our opportunities to experience the thrill of the theater become more and more rare. Theaters that once regularly delighted packed houses are now closing their doors—in some cases forever—as audiences dwindle and the cost of maintenance rises.

Yet just as the curtain seems to be falling on the era of the independent neighborhood theater, a counter-movement is slowly taking root across the US. Theater enthusiasts, historic preservationists, and those involved with downtown revitalization are ushering in a new age for the storied structures that once lit up Main Street. Fueled in part by "buy local" supporters who favor neighborhood establishments over national chains, many venerable theaters are experiencing a comeback. Theaters' dedicated owners, creative operators, and passionate volunteers have re-tooled the theater experience to suit modern tastes. They have restored historic structures to their former glory and offer a host of new services—from dinner and drinks to educational programming to conference space—that patrons couldn't possibly find on their living room couches.

While some historic theaters have navigated their new environment with remarkable agility, others have struggled. With these theaters in mind and an eye towards the demonstrated economic benefits thriving theaters bring to their communities, several interested parties came together in 2014 to explore historic theaters' needs and lay the foundation for a statewide initiative to support and strengthen their legacy.

Between September 2014 and August 2015, the University of Oregon's Community Planning Workshop (CPW) partnered with Travel Oregon (the State's tourism commission), Oregon Main Street (the State's downtown revitalization program), and the economic development arm of Pacific Power (a state utility provider) to document the physical, operational, and financial needs of Oregon's historic theaters and develop recommendations for a statewide support system. Funding for the project came from the Travel Oregon Matching Grants Program and match-dollars from the US Economic Development Administration (EDA), administered through the University of Oregon's EDA University Center.

“To enter a theatre for a performance is to be inducted into a magical space, to be ushered into the sacred arena of the imagination.”

- Simon Callow, Charles Dickens and the Great Theatre of the World

Theaters are Community Assets

Theaters are **social spaces** that offer a venue for comfortable, public gathering. As hubs of social activity, theaters contribute to their community's sense of place, turning unpopulated main streets into desirable, livable destinations.

Theaters are **economic catalysts** that spur the growth and activity of surrounding businesses. According to 2011 estimates by Portland's Regional Arts and Culture Council, each event ticket purchased generates an additional \$24.24 in spending at local businesses.

Theaters are **cultural ambassadors** that share a community's distinctive story with visitors. They attract curious travelers who stimulate the local economy and strengthen the civic pride of locals who see the delight their community brings to others.

Methods

The Oregon Historic Theaters Needs Assessment relied on a **45-question online survey distributed to 54 historic theaters across the state** (the total number of theaters for whom CPW could gather reliable contact information). Over the course of a month and a half, **36 theaters provided complete and valid responses to the survey**—a 67% response rate. The Needs Assessment Survey asked historic theater owners and operators to provide basic information about their theaters' age, size, location, and architecture; explain their operations and business model; indicate their concerns about the physical structure; and share details of their theaters' finances.

CPW used survey responses to develop a picture of historic theaters' current position and pressing challenges. CPW also conducted **in-depth interviews** with several individuals in the historic theater industry, including owners and operators, service providers (such as state Main Street Program staff), and local experts. Along with **research from secondary sources**, these conversations guided the formation of recommendations to provide coordinated, centralized assistance to historic theaters.

What is “historic?”

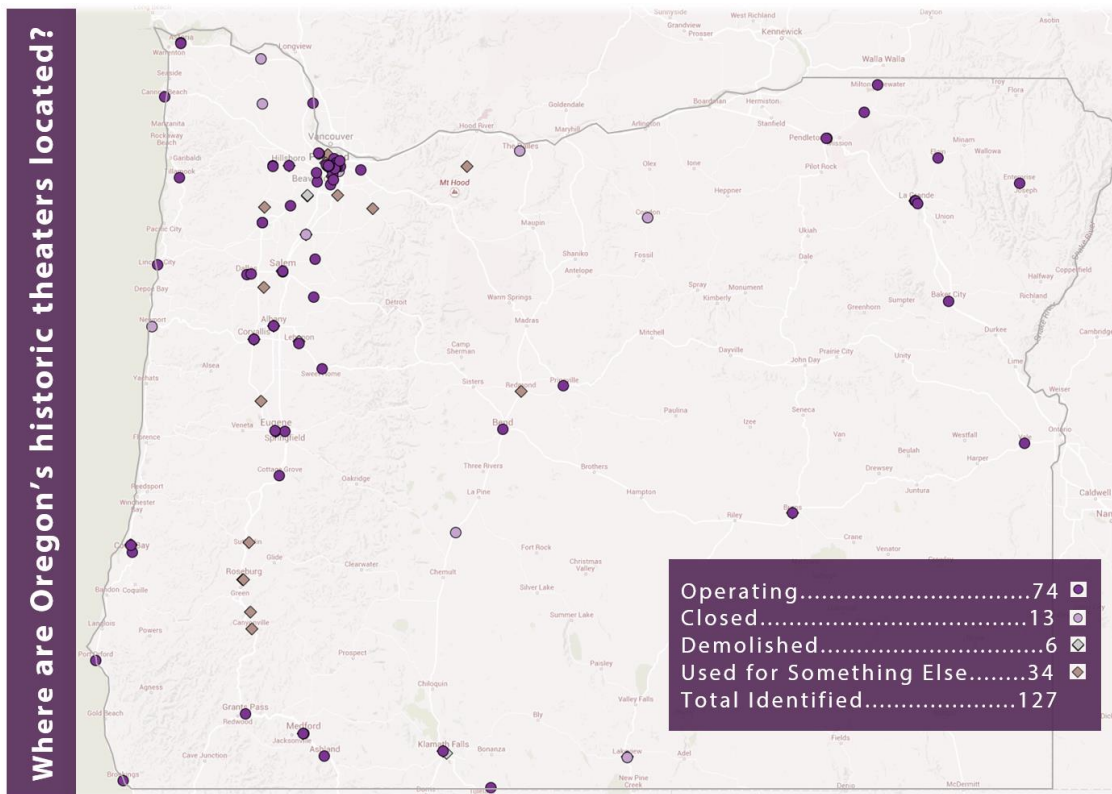
The National Register of Historic Places uses **50 years or older** to categorize structures as “historic.” This is the definition used for the Oregon Historic Theaters Needs Assessment.

Craterian Theater in Medford, OR



Image courtesy of the Craterian Theater

Inventory: A Profile of Oregon's Historic Theaters



In 2014, Oregon's Historic Theaters had...

62,000
Events

\$23 million
in Total Revenue

193 Full-Time
Employees

504 Part-Time
Employees

Figures extrapolated from Needs Assessment Survey Results

Oldest	123 years old, built 1892
Youngest	66 years old, built 1949
Biggest	20,000 square feet
Smallest	2,000 square feet

51%	Privately owned & operated
31%	Nonprofit owned & operated
18%	Public/Nonprofit partnership

Challenges: Historic Theaters in a Modern World

Four key challenges must be addressed to stabilize and strengthen theaters.



Tight Finances

Many theaters are struggling to break even.

44% do **not break even**, or don't know if they break even

60% have more than minor **concerns about their financial health**



Aging Infrastructure

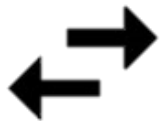
Theaters can't keep up with maintenance needs.

56% have **not been seismically retrofitted** or only partially retrofitted

57% have **no sprinkler system** for fire suppression

58% have had to **defer maintenance**

\$20.8 million in **deferred maintenance costs** reported by 19 theaters



Increased Competition

Many theaters have difficulty attracting diverse audiences and tourist traffic.

57% report **ticket sales** have remained the same or decreased



Lack of Coordination

Theaters don't have a good mechanism for sharing information.

Theater owners and operators want to share suggestions and programming opportunities, **but feel they have no outlet for doing so.**

Recommendations: How Can We Help Oregon's Historic Theaters?

Theaters must adapt in order to thrive in competitive markets. They must do this by employing creative marketing techniques, offering a wider variety of programming, finding new ways to utilize their spaces, and catering to the desires of their audiences. On the structural end, historic theaters must deal with deferred maintenance before buildings become unsafe.

Without outside assistance, however, many historic theaters will remain in their current, tenuous position. We recommend a two-pronged, statewide approach to supporting Oregon's historic theaters.

1. Comprehensive Physical Needs Assessment

First, historic theaters across the state should undergo a comprehensive physical needs assessment. **Partners at the state level should engage an historical architect to assess the physical condition of every interested historic theater.** The needs assessment survey administered through this project revealed that many theaters do not know the extent of their physical needs and do not have the capacity to investigate them. Before anyone can help theaters renovate their buildings, theaters and their partners must precisely understand the buildings' current physical state.

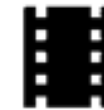
2. Statewide Historic Theaters Initiative

Second, we recommend the creation of a statewide historic theaters initiative that offers theaters funding, technical support, and a mechanism for communication and resource-sharing. Such an initiative would help theaters begin to overcome their financial, infrastructure, market, and coordination challenges. **Beginning in August 2015, state agencies are initiating a partnership exploration and beginning to develop a five-year Action Plan to assist Oregon's historic theaters.**



Funding

Help locate new funding sources while assembling current sources.



Operations

Centralize and share information on best practices and national trends.



Marketing

Create strategic and unified online representation for theaters.



Coordination

Assist theaters with connectivity and resource sharing.

Statewide Initiative

Ross Ragland in Klamath Falls, OR



Image courtesy of the Ross Ragland Theater

The Future of Oregon's Historic Theaters

The research presented here **demonstrates great need, but also great potential.** In response to cultural changes over the last century, theaters have either adapted or ceased to exist. By virtue of their continued existence, we know that the 74 operational theaters identified in this study have managed to adapt. Some have done so with remarkable success, while others are barely hanging on. Thirteen sit empty, unable to serve audiences. **Moreover, three theaters—the Whiteside, the Cameo, and the Broadway—identified themselves as threatened facilities.**

Theaters are social spaces, economic catalysts, and cultural ambassadors for their communities. Their beautiful, architecturally varied structures serve as a visual representation of commerce and comradery. Their history and stories attract patrons from near and far, which in turn benefits nearby businesses. **With coordinated support,** perhaps theaters will continue to shine as a beacon of community vitality for yet another century.

Interior of the Liberty Theater in Astoria, OR

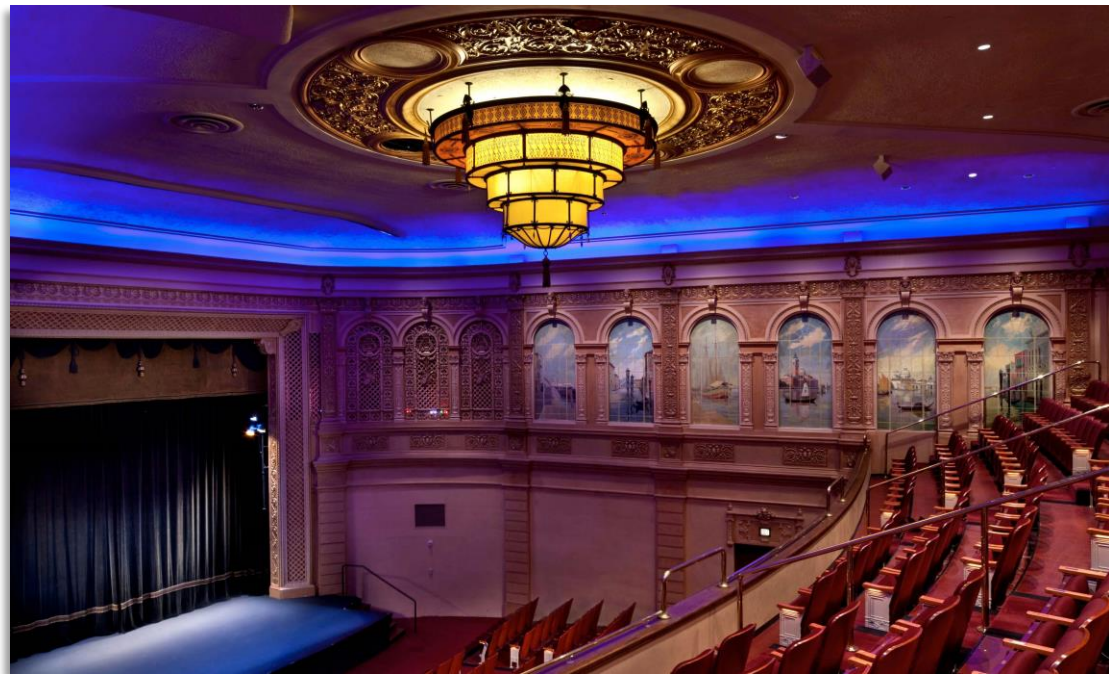


Image courtesy of the Liberty Theater

Oregon Historic Theater Needs Assessment

Prepared by:

Community Planning Workshop
Community Service Center
1209 University of Oregon
Eugene, OR 97403-1209
Email: csc@uoregon.edu
<http://csc.uoregon.edu/cpw>

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Cover Photo: Courtesy of Cascade Center of Photography
