



Feasibility & Perception Study: Proposed Cultural Arts Venue Survey in Henderson Harbor

November 2022

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Executive Summary

Research and Marketing Strategies, Inc. (RMS), offers the following findings regarding the proposed cultural arts venue in Henderson Harbor, New York. The findings of this report will support CNY Jazz and Henderson Harbor Performing Arts Association (HHPAA) planning and development of the venue, including efforts to obtain grant funding and secure financial support for the project.

RMS recommends this project should move forward in its development. The recommendations within this report are essential for the success of the project. The project presents a tremendous opportunity for the Henderson Harbor community. To capitalize on the promise of this project, HHPAA must work collaboratively with all stakeholders in the community, as success hinges on gaining buy-in from local leaders and full-time residents. In addition, the community in Henderson Harbor is quite small, and in order for the project to be sustainable, HHPAA must market aggressively to urban centers (Syracuse, Oswego, Watertown) to promote the venue.

Background & Methodology

This study includes data collected from in-depth interviews (IDIs) with community leaders, a feasibility and perception survey, and demographic analysis of the region. RMS also spoke with 10 key community stakeholders for this project. One individual was a seasonal resident of the area, two owned a second home in the area, and seven were full-time residents of the community. In addition, two of the individuals are also business owners in the community. The majority of these interviews occurred in October, 2022.

RMS designed and administered a feasibility and perception survey. The full survey is found in the Appendix. The survey includes a mix of open-ended questions, Likert type questions, and multiple choice. The survey was administered to the RMS ViewPoint panel, along with promotion across social media platforms by HHPAA. The survey was open from about six weeks in the summer of 2022. Analysis of the data included descriptive statistics and crosstabulations as appropriate. Finally, RMS leveraged eSite analytics, a tool that aggregates federal Census data, to analyze demographic data and trends within the Primary Market Area (PMA). The PMA was approximately a 20-mile radius of Henderson Harbor.

Key Findings

Based on interviews with key community stakeholders, survey participants, and analysis of demographic data, the key findings are as follows.

- Individuals participated in this survey from 74 unique Zip Codes across New York State, suggesting a wide market potential for Henderson Harbor's proposed arts venue.
- The Henderson Harbor community is not growing at a rapid pace, there is little anticipated overall growth. However, it is predicted that minorities will constitute a larger percentage of the overall population in the coming years.

- Henderson Harbor tends to be high in wealth, aging, and well educated. All factors that support profiles of those who support the arts.
- About 41% of respondents shared they make day trips to Henderson Harbor.
- About 31% identified as full-time residents, 19% seasonal residents, 8% own a second home in the region, and 2% shared they are business owners.
- Most individuals visit in fall and summer, and many in the spring.
- The most frequent number of days people shared they visit Henderson Harbor is 15 days per year.
- Data suggests seasonal fluctuations in data, with the population peaking in early fall in 2020. Previous years suggest that population increases starting in the spring and is lower during the winter months.
- Many people shared they do not stay overnight when they visit Henderson Harbor, about an equal amount indicated they stay at their second home.
- Water recreation was the top reason why people presently visit, followed by visiting friends and family. Many shared they also visit for car shows or arts and cultural events.
- A strong majority (78%) indicated they would return to Henderson Harbor.
- Many people have attended live performing arts shows or concerts in the past year (63%), and several have also visited an arts or crafts gallery (49%).
- Arts focused events center in Henderson Harbor is desired by community residents, and many believe it will improve the quality of life for residents.
- A strong majority (77%) described Henderson Harbor with positive words and phrases, such as “beautiful” and “scenic.” One individual referred to Henderson Harbor as the “best kept secret.”
- 80% of respondents shared that they support the initiative. Of the 19 individuals who said no, 12 (63%) were full-time residents. Data suggests that full-time residents are more skeptical about the project than seasonal or those who only make day trips to Henderson Harbor.
- Interviewees expressed a positive perception of the project, and believed their may be some economic benefits to the initiative. Several mentioned competition from Watertown, Clayton, and Sacketts Harbor. Some mentioned that the venue could provide season jobs to residents. Other discussed the need for the proper infrastructure (sewers) in the area. Many expressed concerns about parking. One individual was concerned about the zoning and regulations in downtown, and worried that the current ordinances make it challenge to develop downtown Henderson Harbor. Many spoke that they would “like something else to do” in the area and were highly supportive of HHPAA’s plans to build the venue.

Given these findings, RMS suggests this project move forward, with the following recommendations essential for a successful project. Our recommendations highlight some of the obstacles and barriers HHPAA may need to overcome.

Recommendations

Based on these findings, RMS offers the following recommendations. Many of these recommendations may already be occurring by HHPAA. In these cases, these data serve as an affirmation of the vision and hard work by HHPAA to make this project a reality.

Positive recommendation to move forward.

The data within this report suggests that this project should move forward, as the project presents a unique opportunity for the region, and enough evidence is present to provide a positive recommendation of this project.

Recruit and attract individuals who do not know about Henderson Harbor

A substantial number of individuals did not qualify for this survey, as they had not heard of Henderson Harbor. This is an important finding for this study, as some described Henderson Harbor as the regions “best kept secret.” Many community stakeholders mentioned that the area is not well-known, and people “fall in love” with the area once they visit. The data suggests that since the PMA of Henderson Harbor is small, substantial marketing efforts must take place in surrounding communities. In addition, the HHPAA may benefit from specifically targeting individuals who make day trips to the area, highlighting the areas (a) natural beauty, (b) proximity to major urban areas, and (c) easy access to water recreation.

Develop a strong sustainability plan

Like any initiative, this project comes with challenges regarding sustainability. The venue very well may identify funding for construction. However, planners should conduct additional research on programming desired in the community, and how to best setup a financial structure that is sustainable. Research suggests that in order to be successful, there must be multiple types of revenue streams, and not solely reliant on grant funding or volunteer support. A clear structure, management plan, and long-term vision of the facility should be laid out to support growth. HHPAA may benefit by providing events and activities beyond the arts, particularly anything related to water recreation and fishing, which the data suggests Henderson Harbor is well known for.

Develop strong partnerships with local officials and community leaders

For this project to be successful, there must significant partnership with local leaders and the HHPAA. A shared vision and detailed collaborative planning will help to streamline work and capitalize on the potential of this project. Some interviews revealed small-town politics in play, and given the area is small and everyone is connected, there is little room for politics or jockeying in a project like this. HHPAA should take the lead on collaborating with all stakeholders and working towards a shared vision of the region.

Improve communications of the project, status, and timeline to community

Many individuals desired to know more about the status of the project and on-going efforts. Some spoke that the project has been in the works for years and were skeptical about why now would be different than before. More routine communications and sharing information about

the project, through the HHPAA website or on social media, will help improve communication of the project, and garner more awareness and support of this initiative.

If proposed facility moves forward, conduct additional research on programming

The data suggests that the site could be used to host a wide variety of events, beyond the arts. Many shared they would be interested in sporting events, yoga instruction, fishing events, or other small meetups. This presents an opportunity for additional research, and potential new revenue streams for the facility.

Understand competition with other communities

One individual shared that “Henderson [Harbor] would have to figure out how to compete with [Watertown]. [The venue] would probably have to be something unique that wouldn’t be available elsewhere.” The designs of the venue, and it’s setting on the water in Lake Ontario, in Henderson Harbor, is certainly something unique to the area. Many stakeholders interviewed felt that the venue would be a major draw for individuals. With a major economic project coming to Clay, NY, with Micron, Henderson Harbor is primed for offering something unique for the anticipated economic boom to the region.

Invest in local infrastructure (sewer, electric, zoning)

Many in the IDIs expressed concerns about the infrastructure in the region. Some noted that parts of Route 3 do not have electricity, difficult zoning for businesses, limited parking in Downtown Henderson, and sewers that meet New York State code. Others spoke about issues with the sewers, and indicated that at the time of this writing, some positive changes and investments are forthcoming in 2023 regarding infrastructure. However, many shared that due to the current state of infrastructure, Henderson is “not able to compete as much with the surrounding area as it was previously,” another individual added, “I think [Henderson] can do better. Sacketts Harbor has a more robust downtown. Henderson Harbor doesn’t really have a downtown.” The cultural arts venue must integrate with plans and be part of a cohesive strategy for the region.

Increase awareness of HHPAA mission

Many individuals interviewed had low awareness of HHPAA, its mission and role with the project. Stakeholders suggested that HHPAA improve marketing and knowledge of the project.

Several ideas emerged, detailed below:

- *“A phone call like this one would work. I don’t think most people are familiar with the project. Promotion and education would get the word out.”*
- *“They should probably use social media and mail correspondence. and let people know about the project time duration. There are people that have lived here a long time and need to have their voices heard.”*
- *“Hold town meetings. More communication. More stuff online. There’s not a lot of info it available online and most of it’s outdated. It would be nice if there were a website on progress and planning of the project.”*

- *“Getting in touch with people and seeing if they want to donate or help in any way.”*
- *“There are a lot of retirees and older people here and school is losing students, so the community has more seniors. That’s something to consider when reaching out to the community.”*
- *“They must put a conceptual plan together and hold regional meetings in other townships besides Henderson Harbor, where visitors will be coming from, and hold strategic meetings. They must identify key players and donors. There is a wealth base in Henderson Harbor that could make it happen.”*

Develop targeted marketing for individuals who travel to Henderson Harbor on weekends or day trips

RMS looked at the data for individuals with children under 18 (n = 27), who visit Henderson Harbor for day trips. Although a small sample size, the responses are telling for HHPAA planning and marketing of the new facility. The data suggest this is one market for the HHPAA to market towards. All individuals reported that they would return to Henderson Harbor. Most shared they come for water recreation and for arts and cultural events. One individual shared, “such a beautiful area with so many water offerings,” another added, “when I’m in the area, I spend my time outdoors. I love the scenery and wildlife,” “we go for the car shows and art festivals,” added another participant.

These individuals also expressed very high interest in attending events at an amphitheater-like setting. HHPAA may benefit from recruiting individuals like this to be “champions” for the area, bringing their friends to the venue for events and allow them to explore the Henderson Harbor area. As one individual during the IDIs shared, “[Henderson Harbor] needs something to draw people. It’s not big but there are a lot of people in the area who would take advantage of it,” the data suggest one market to draw from is individuals looking for weekend and day trips.

Work to garner support for full time residents

Full-time residents presented more skepticism about the program, one full-time individual shared, “How will you keep the 100s of loud, uncivilized, littering, speeding, obnoxious people out?” Another added, “There are other things that could be done in the Town of Henderson to make it an appealing place.” This group compromised 12 of the 19 “Nos” for the project, or 67% of all the no votes. Further, only 58% of these individuals said “Yes” they would support this project, opposed to the 80% overall. Although, the group was largely positive for the project, it may be the most vocal against it. Strategic outreach to this group will be essential, both to gain public support, and fundraising for the HHPAA. One individual who was interviewed corroborated this recommendation. They expressed the need for “Getting local residents to buy into it and promote and educate. Reaching out to get the word out to residents. You have seasonal/summer residents and longtime residents that run farms etc. Seasonal and summer residents may be more interested.”

Leverage potential advocates for this project: seasonal & second-home owners

Individuals who are either seasonal owners or have a second home in the area are potential advocates for this project. Many of the individuals who participated in IDIs owned a second

home and were extremely supportive of the project. They shared that many people are desiring more to do and would like to see downtown change and offer more to them. Few expressed any resistance to the project and may be sound advocates for this project.

Increase marketing and outreach for extended PMA

RMS conducted some demographic analysis on the region outside of the PMA. The extended PMA (about 60 miles from Henderson Harbor), is quite large. The area includes nearly 600,000 residents, many of which will fall into the target market for HHPAA, who may enjoy a new arts and cultural venue, and traveling to a new destination nearby.

The data presented in this report paints a picture of endless opportunity for this project. To truly capitalize on the vision of the cultural arts venue in Henderson Harbor, all stakeholders will need to buy -in to the project and work collaboratively to promote and market the venue to expanded markets in more urban centers (i.e., Syracuse , Watertown).

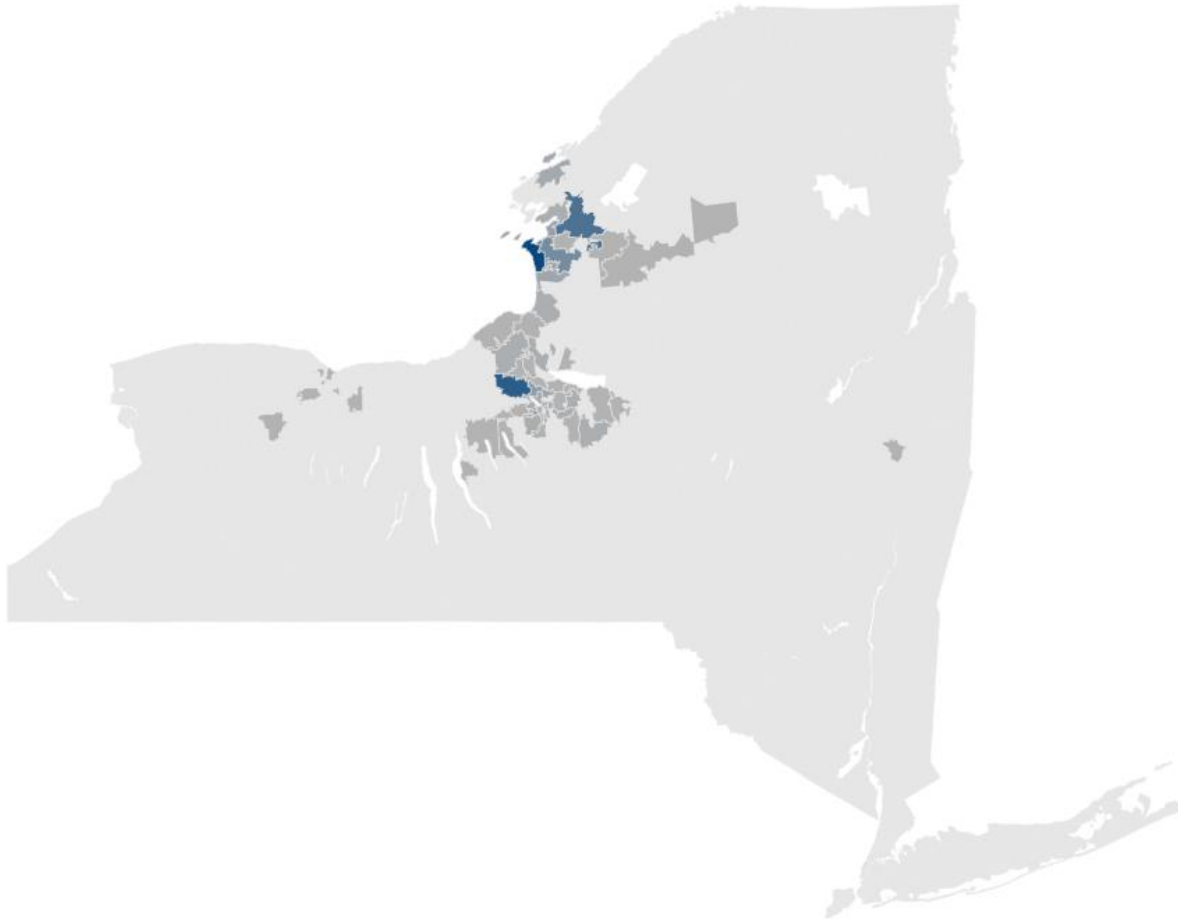
Feasibility Analysis: Scoring of Key Indicators

The chart below provides a scoring of the key indicators assessed in this study. The analysis shows that although this project is recommended to move forward, there are some key areas and considerations that HHPAA must consider during planning.

Feasibility Analysis: Scoring of Key Indicators		5 Stars – Excellent 4 Stars – Above Average 3 Stars – Average 2 Stars – Below Average 1 Star – Poor
Vision of Project	★★★★★	5 <i>HHPAA has a clear vision for the project</i>
Returning visitors / market potential	★★★★★	5 <i>Many people who come plan to come back.</i>
Age / Race	★★★★☆	4 <i>Residents in PMA are older, and large majority white, wealthy, and educated - which lends itself well towards investment and participation in the arts.</i>
Income	★★★★☆	
Education	★★★★☆	
Economic Impact	★★★★☆	4 <i>Potential to bring many individuals to Henderson Harbor for events and potential for hiring seasonal employment</i>
Competition	★★★★☆	4 <i>Limited competition, particularly a site directly on Lake Ontario</i>
Community Interest	★★★★☆	3.5 <i>Community interest is very high at 80%, but data suggests this project is not as popular with local, full-time residents (67%)</i>
Population	★★★☆☆	3 <i>PMA is very small. Project requires marketing to more urban areas.</i>
Annual Spending on the Arts	★★★☆☆	3 <i>Several individuals shared they invest in the arts, either through donations or attending events.</i>
Amenities	★★★☆☆	3 <i>Perception that there is not enough parking, and small downtown</i>
Infrastructure	★★☆☆☆	2 <i>More investment is needed to curb perception that area lacks infrastructure (sewers, electricity) to support a large-scale project</i>
Awareness of Henderson Harbor	★★☆☆☆	2 <i>Low awareness of Henderson Harbor, many individuals “screened out” of survey.</i>
Awareness of HHPA	★★☆☆☆	2 <i>Very limited awareness of HHPAA, its mission and role with project.</i>

Survey Demographics

Individuals who participated in this survey were from 74 unique Zip Codes across New York State. Many individuals' primary residence was Zip Code 13650 (Henderson, NY), 13027 (Baldwinsville, NY), and 13601 (Watertown, NY). The darker the blue on the map below indicates a higher number of responses from the Zip Code. A full list of Zip Codes is found in the Appendix. A total of 189 individuals completed the survey.



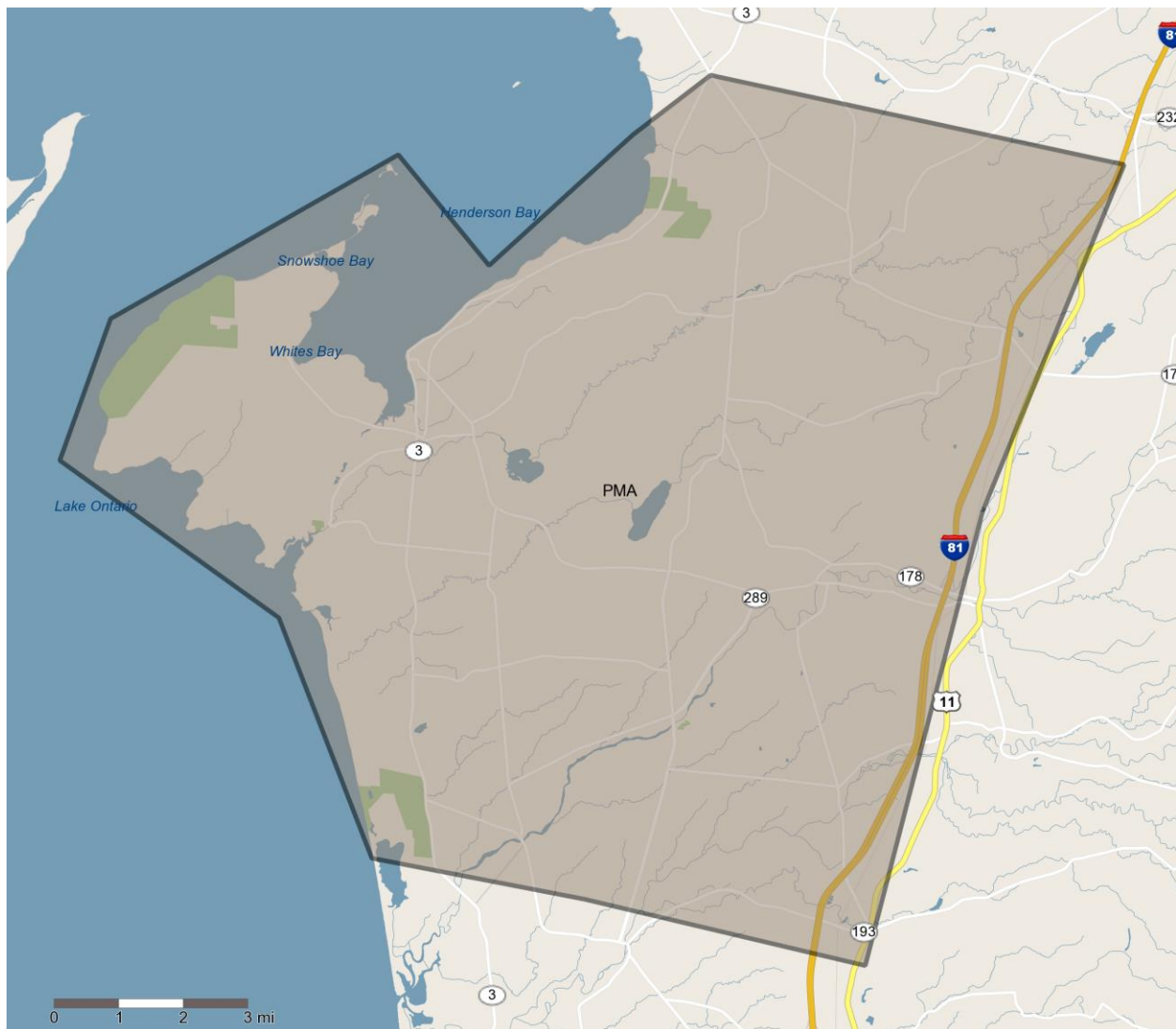
Most individuals who participated in the survey identified as a woman (67%). When asked what town and zip code their second home, camp, or property was located in, most selected Henderson Harbor. Fifty percent (50%) of respondents were over the age of 55, and the most common household size was two individuals. When asked to describe the size of their household, most individuals shared they lived in a home with two adults. Some individuals shared that a child under 18 currently lived in the home. Finally, 53% of respondents shared their income is over \$75,000. The demographics of the survey largely align with the PMA, discussed in the next section. Full survey demographic tables are located in the Appendix.

Section 1: Can the Henderson Harbor Community Support an Arts Center?

To best understand if the Henderson Harbor Community can support a cultural arts venue, RMS first looked at the demographic composition of the Primary Market Area (PMA). Then, RMS analyzed survey data and information gathered from interviews with key community stakeholders. **The key finding is that the PMA is not large enough to support the venue's activities, and in order for the venue to be successful, HHPAA must attract individuals from the surrounding urban areas.**

Demographic Analysis

The PMA for this project is shown in the map below. The PMA extends from just north of Westcott Beach State Park, to Southwick State Park in the southern boundary. Both extend to Route 81 on the eastern end of the PMA.



RMS utilized eSite analytics to gather demographic data. eSite analytics estimates the total population of the PMA analyzed to be about 5,203 individuals. The population is largely evenly split among males and females, and nearly all white. Little growth is expected in the coming years.

Table 1. Population Demographics of the PMA

Years	2010 Census	2021 Estimates	2026 Projections	% Change: 2021 to 2026
Total Population	5,286	5,100	5,203	2.0%
Population Density (Pop/Sq Mi)	46.97	36.97	37.71	2.0%
Total Households	1,955	1,893	1,937	2.3%

Table 2. Gender of the PMA

Year Gender	2010 Census		2021 Estimates		2026 Projections		% Change: 2021 to 2026
Male	2,644	50.0%	2,610	51.2%	2,656	51.1%	1.8%
Female	2,642	50.0%	2,490	48.8%	2,546	48.9%	2.2%

Although the data suggest the population is nearly all white, the data does suggest that minority populations are growing in the area. This diversity is important to note and may impact planning of programs, outreach, and activities at the arts venue.

Table 3. Population by Race

Race	2010 Census		2021 Estimates		2026 Projections		% Change: 2021 to 2026
White	5,076	96.0%	4,846	95.0%	4,911	94.4%	1.3%
Black	40	0.8%	49	1.0%	54	1.1%	10.9%
American Indian or Alaska Native	15	0.3%	17	0.3%	18	0.4%	3.3%
Asian/Native Hawaiian/Other Pacific Islander	28	0.5%	31	0.6%	34	0.7%	11.6%
Some Other Race	35	0.7%	51	1.0%	59	1.1%	15.9%
Two or More Races	92	1.7%	106	2.1%	126	2.4%	19.1%

The population within the PMA is also aging, with little growth expected for younger individuals moving into the area. Currently, about 46% of residents are 45 or older, and an additional 10% are between 35 to 44.

Table 4. Population by Age

Age	2010 Census		2021 Estimates		2026 Projections		% Change: 2021 to 2026
	Count	%	Count	%	Count	%	
0 to 4	333	6.3%	276	5.4%	279	5.4%	0.9%
5 to 14	696	13.2%	616	12.1%	604	11.6%	-2.1%
15 to 19	394	7.5%	316	6.2%	298	5.7%	-5.7%
20 to 24	286	5.4%	357	7.0%	352	6.8%	-1.4%
25 to 34	556	10.5%	616	12.1%	653	12.6%	6.0%
35 to 44	677	12.8%	556	10.9%	574	11.0%	3.3%
45 to 54	902	17.1%	643	12.6%	587	11.3%	-8.8%
55 to 64	685	13.0%	712	14.0%	678	13.0%	-4.7%
65 to 74	459	8.7%	648	12.7%	685	13.2%	5.6%
75 to 84	218	4.1%	268	5.3%	388	7.5%	44.5%
85+	80	1.5%	92	1.8%	105	2.0%	14.9%

The income in the area tends to be wealthier individuals, likely due to many individuals have second homes or camps in the area. The demographics show that the PMA tends to be largely older, white, and wealthy. These factors also align with individuals who are more likely to invest in the arts.

Table 5. Household by Income

Households by Income	2010 Census		2021 Estimates		2026 Projections		% Change: 2021 to 2026
	Count	%	Count	%	Count	%	
\$0 - \$15,000	187	9.6%	141	7.4%	124	6.4%	-12.3%
\$15,000 - \$24,999	261	13.3%	164	8.7%	149	7.7%	-9.4%
\$25,000 - \$34,999	235	12.0%	182	9.6%	170	8.8%	-6.4%
\$35,000 - \$49,999	295	15.1%	216	11.4%	203	10.5%	-6.1%
\$50,000 - \$74,999	349	17.8%	342	18.1%	337	17.4%	-1.5%
\$75,000 - \$99,999	342	17.5%	388	20.5%	408	21.1%	5.3%
\$100,000 - \$149,999	182	9.3%	281	14.8%	336	17.3%	19.6%
\$150,000 +	104	5.3%	180	9.5%	211	10.9%	17.5%
Average Income	\$65,903		\$83,532		\$90,809		8.7%
Median Income	\$49,987		\$67,891		\$74,137		9.2%
Per Capita Income	\$24,386		\$31,016		\$33,826		9.1%

Most individuals are married in the region, while about a third have never married. Many individuals have obtained a high school degree (33.8%), with the majority having completed some college or higher (56.8%). The demographics suggest that the area is well educated.

Table 6. Marital Status in PMA

Marital Status	2010 Census		2021 Estimates		2026 Projections		% Change: 2021 to 2026
	Count	%	Count	%	Count	%	
Married, Spouse Present	2,210	51.9%	2,221	52.8%	2,267	52.5%	2.1%
Married, Spouse Absent	243	5.7%	156	3.7%	161	3.7%	2.9%
Divorced	433	10.2%	461	11.0%	478	11.1%	3.8%
Widowed	242	5.7%	229	5.4%	237	5.5%	3.7%
Never Married	1,129	26.5%	1,141	27.1%	1,177	27.3%	3.1%

Table 7. Educational Attainment in the PMA

Educational Attainment	2010 Census		2021 Estimates		2026 Projections		% Change: 2021 to 2026
	Count	%	Count	%	Count	%	
Grade K - 8	61	1.7%	51	1.4%	51	1.4%	-0.1%
Grade 9 - 11	343	9.6%	259	7.3%	267	7.3%	3.0%
High School Graduate	1,232	34.4%	1,194	33.8%	1,237	33.7%	3.6%
Some College, No Degree	559	15.6%	635	18.0%	664	18.1%	4.5%
Associates Degree	553	15.5%	559	15.8%	582	15.9%	4.1%
Bachelor's Degree	468	13.1%	454	12.9%	468	12.8%	3.1%
Graduate Degree	331	9.3%	358	10.1%	376	10.2%	4.9%
No Schooling Completed	29	0.8%	25	0.7%	26	0.7%	6.2%

Extended Primary Market Area

RMS focused much of the demographic data analysis on the PMA. However, it is important that the area which the proposed venue is located is near many populous areas. Overall, an extended PMA (about 60 miles from Henderson, NY), the total population is nearly 600,000 individuals, suggesting that a key to the success of the venue will be marketing to individuals who do not now of Henderson Harbor, located within the extended PMA.

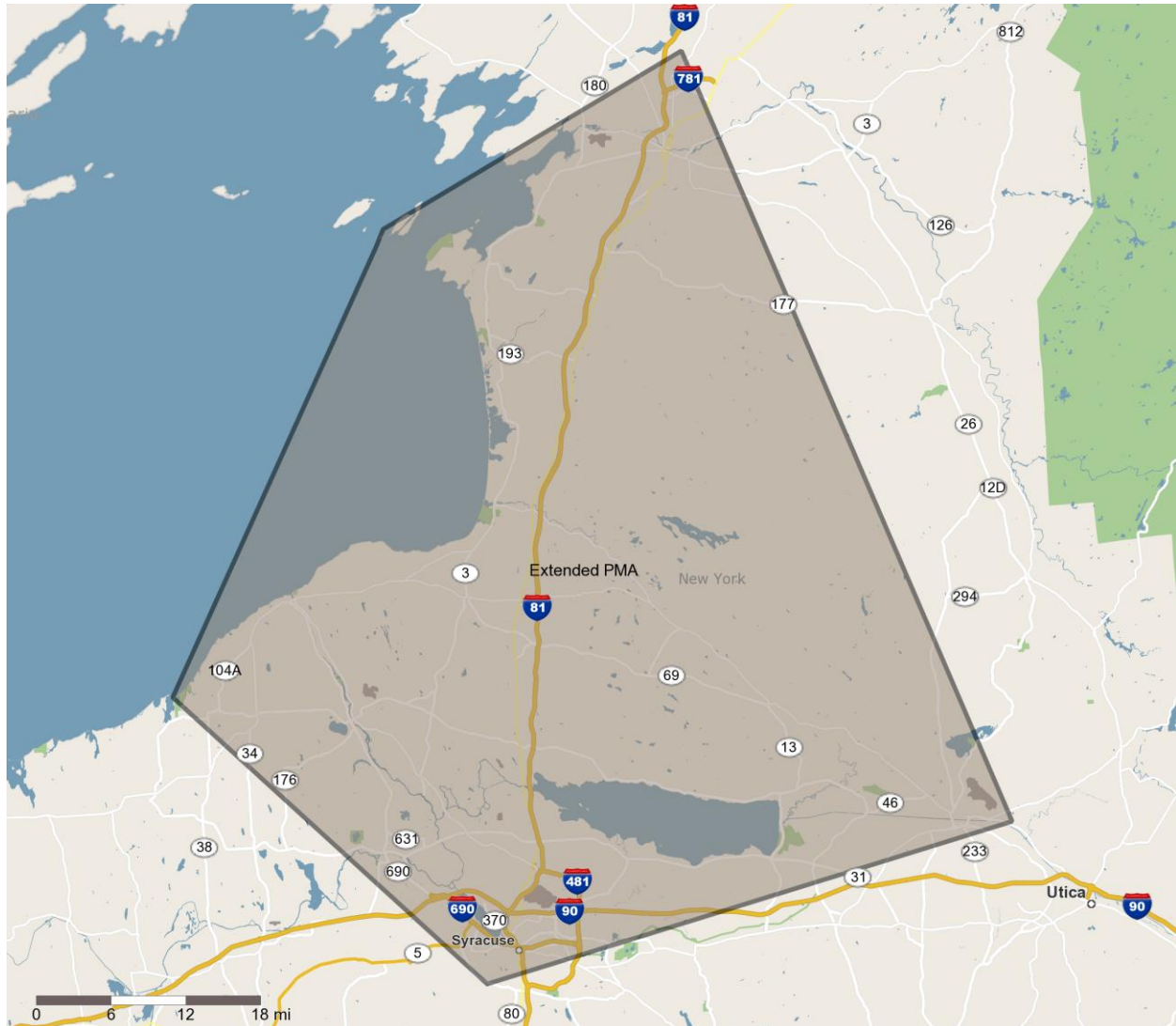


Table 8. Extended PMA Demographics

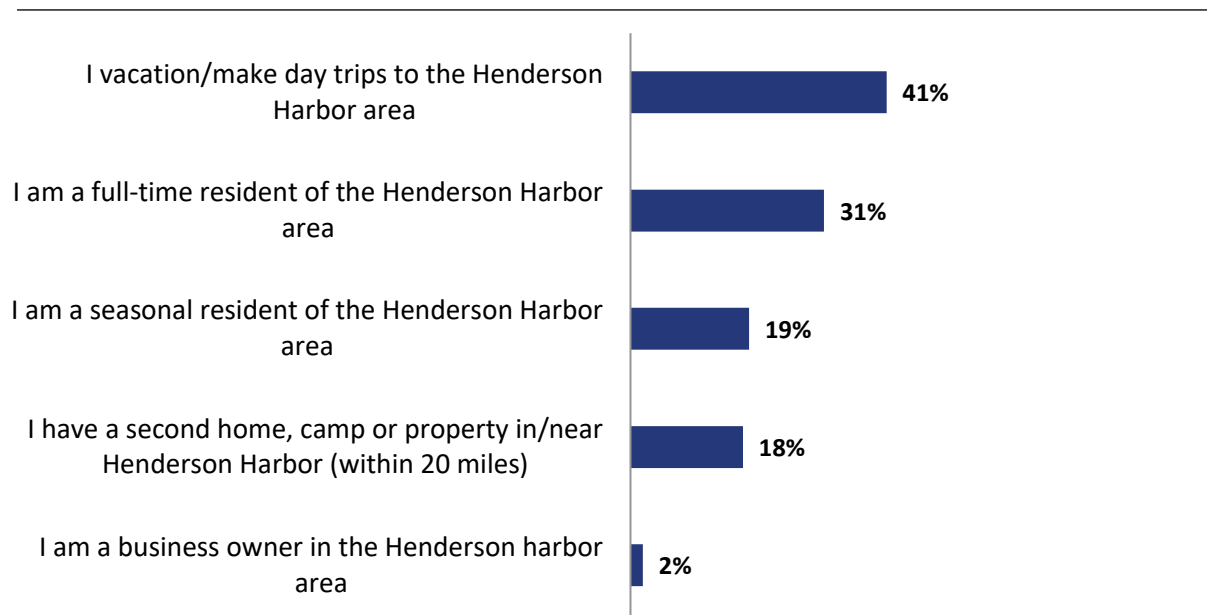
Population Demographics	2021 Estimates	2026 Projections	2021 to 2026
Total Population	570,148	575,769	1.0%
Population Density (Pop/Sq Mi)	194.45	196.37	1.0%
Total Households	228,979	232,922	1.7%
Population by Gender:			
Male	280,335	283,415	1.1%
Female	289,813	292,354	0.9%

Population by Race	2021 Estimates	2026 Projections	2021 to 2026
White	476,052	474,557	-0.3%
Black	48,723	50,239	3.1%
American Indian or Alaska Native	3,637	3,685	1.3%
Asian/Native Hawaiian/Other Pacific Islander	15,199	16,796	10.5%
Some Other Race	8,073	8,796	9.0%
Two or More Races	18,465	21,696	17.5%
Population by Ethnicity	2021 Estimates	2026 Projections	2021 to 2026
Hispanic	29,209	32,172	10.1%
Not Hispanic or Latino	540,939	543,597	0.5%
Households by Income	2021 Estimates	2026 Projections	2021 to 2026
\$0 - \$15,000	28,586	27,034	-5.4%
\$15,000 - \$24,999	22,804	22,208	-2.6%
\$25,000 - \$34,999	21,402	20,779	-2.9%
\$35,000 - \$49,999	30,561	29,761	-2.6%
\$50,000 - \$74,999	43,985	43,486	-1.1%
\$75,000 - \$99,999	31,305	32,989	5.4%
\$100,000 - \$149,999	32,441	36,094	11.3%
\$150,000 +	17,896	20,571	14.9%
Average Hhld Income	\$73,388	\$77,980	6.3%
Median Hhld Income	\$55,691	\$59,203	6.3%
Per Capita Income	\$29,945	\$32,012	6.9%
Marital Status	2021 Estimates	2026 Projections	2021 to 2026
Married, Spouse Present	197,219	199,771	1.3%
Married, Spouse Absent	22,295	22,362	0.3%
Divorced	52,417	53,178	1.5%
Widowed	29,334	29,805	1.6%
Never Married	168,018	170,046	1.2%
Age 15+ Population	469,283	475,162	1.3%
Educational Attainment	2021 Estimates	2026 Projections	2021 to 2026
Grade K - 8	7,752	7,781	0.4%
Grade 9 - 11	30,781	31,029	0.8%
High School Graduate	124,187	125,553	1.1%
Some College, No Degree	72,620	73,827	1.7%
Associates Degree	46,874	48,026	2.5%
Bachelor's Degree	60,602	62,118	2.5%
Graduate Degree	43,155	44,357	2.8%
No Schooling Completed	5,103	5,225	2.4%
Age 25+ Population	391,073	397,917	1.8%

Non-Residential & Seasonal Population

In addition to many individuals being a full-time resident of the Henderson Harbor area, the survey data suggests there is a sizeable population who makes day trips to the Henderson area (41%). This additional population means that the **HHPAA must attract more** of these individuals for day trips to attend events and support the venue.

Figure 1. How Individuals Experience Henderson Harbor (n = 189)



Note. Individuals could also respond, “I am not familiar with the Henderson Harbor Community,” 135 individuals selected this response. These individuals were disqualified from the survey. Individuals could select all that apply. Full data table is in the Appendix. Figure 1 aligns with Question 1 of the survey.

Frequency of Visits by Non-Residential Population

Most individuals visit Henderson Harbor either during the summer or fall, with many also visiting in the spring. In addition, most individuals who participated in this survey visited Henderson Harbor 15 times in the past year (mode, most frequent response), with a maximum of 250 days and a minimum of 1.

Table 9. In which season(s) do you typically visit the Henderson Harbor area?

S2 Season(s) visited	Overall (n = 189)	
	n	%
Winter	19	7
Spring	63	22
Summer	127	44
Fall	80	28

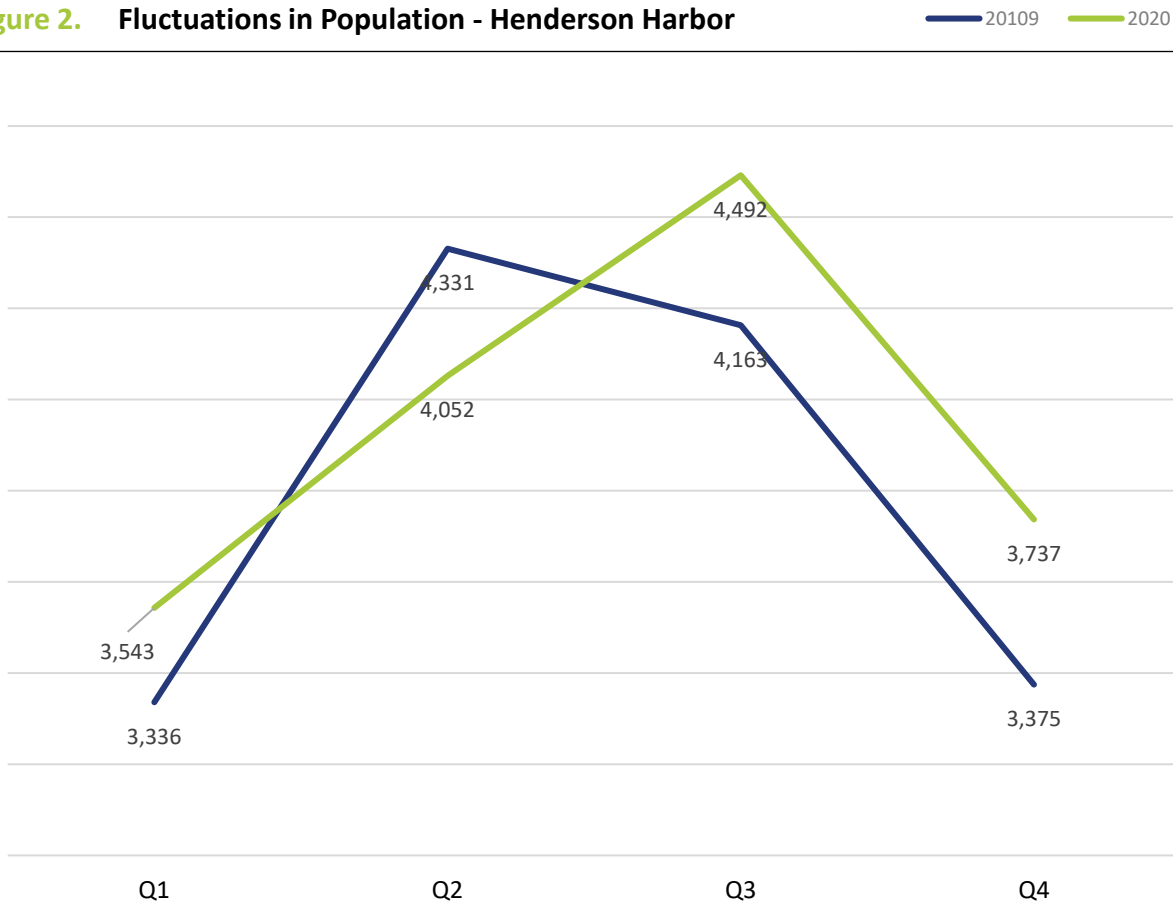
Table 10. About how many days a year do you visit/stay in the Henderson Harbor area?

S3 Days visited in a year	#
Minimum number of days visited in a year reported	1
Average Days visited per year	49.7
Max reported days visited per year	250
Mode	15

Note. Data excludes anyone who indicated they are a full time resident, n = 131.

In addition, eSite analytics reports that the population of the area fluctuates during the year, as they estimate the seasonal population by quarter. In 2020, population peaked during the fall, and in 2019, the spring. The data suggests that spring – early fall Henderson Harbor experiences an increase in population.

Figure 2. Fluctuations in Population - Henderson Harbor



When people visit Henderson Harbor, most people are not staying overnight, and if they do, the survey suggests they are staying at their second home. The data suggests there is a market for individuals who are looking for day trips to Henderson Harbor. On average, individuals reported

their immediate traveling party spends \$580.95 on trips to Henderson Harbor. For those taking day trips, they spend around \$160.24.

Table 11. Where do you typically stay when visiting the Henderson Harbor area?

S4 Where to stay	Overall (n = 189)	
	n	%
I typically do not stay overnight when visiting Henderson Harbor	39	35
Second home	35	32
Friends/Family	21	19
Hotel/Motel/Bed & Breakfast/Airbnb	16	14
Campground	13	12
Vacation rental	4	4
Other (Please describe)	2	2

Table 12. Thinking about your last visit to the Henderson Harbor area, approximately how much money, in total, did your immediate traveling party spend as a result of your visit (lodging, food, travel, entertainment)?

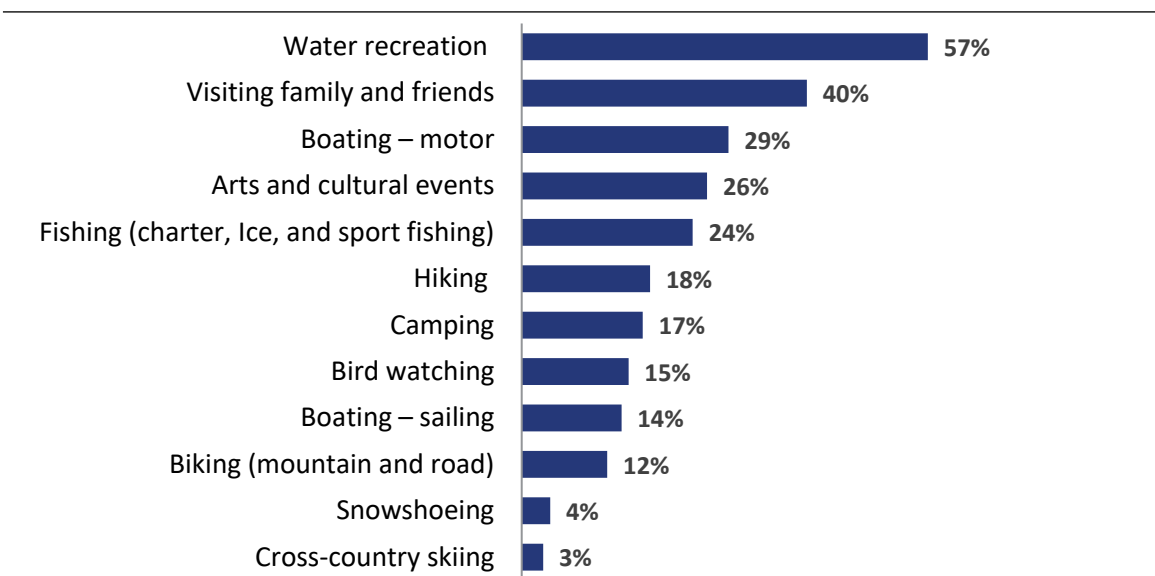
S5 Money Spent	Dollar Amount
Money spent by immediate traveling party (average)*	\$580.95
Day trips	\$160.24
Day trips – Less than 10	\$135.51
Day trips – 11-30	\$264.00

Note. Includes those with a second home, n = 106. Excludes full time residents.

Reasons for Visiting Henderson Harbor

The primary reason individuals are visiting Henderson Harbor are for *water recreation* or to *visit family and friends*. The location of the venue aligns well with these activities, as the location is near the water and close to restaurants and entertainment found in Henderson Harbor. The interviews with community stakeholders corroborated these data. One individual shared, “water related activities, boat chartering, restaurants, and season activities,” as some of the key economic drivers in the region.

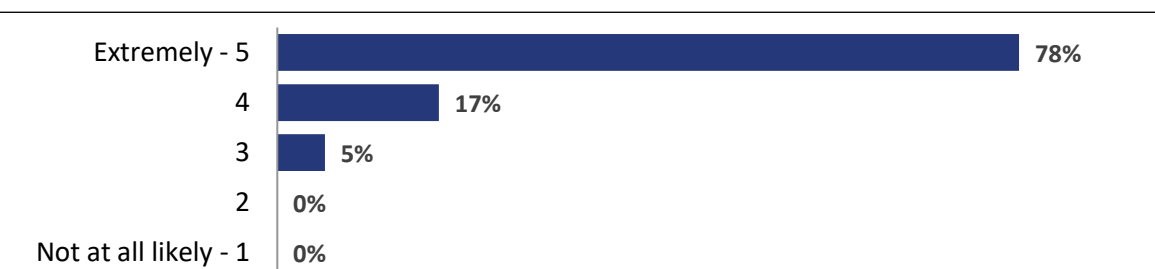
Figure 3. Primary Reasons People Vist Henderson Harbor (n = 111)



Note. Data excludes individuals who own a second home, full-time residents and business owners. Figure 3 aligns with Question 6 of the survey.

Importantly, for those that have visited Henderson Harbor, many plan on returning to the area. This data provides some insight to the individuals who are already making day trips, as an arts venue could certainly become a reason for people to return and offer something new to do within the community.

Figure 4. How likely is it you'll return to Henderson Harbor? (n = 111)



Note. Data excludes individuals who own a second home, full-time residents and business owners. Figure 4 aligns with Question 7 of the survey.

Section 2: How does the proposed facility fit within the current community?

The proposed facility will fit well within the local community. With the venue being located so near the water, the venue could serve multiple uses beyond the arts. Festivals for water recreation, fishing, or outdoor activities could add other draws to the venue, capitalizing on the venues proximity to water and entertainment offered in Henderson.

Perception of what Henderson Harbor is Best Known For

The survey suggests that individuals believe that the Henderson Harbor area is best known for *water recreation (kayaking, scuba diving, water skiing, swimming, motorboats and sailing)*. Respondents also believe that the area is well-known for *fishing (charter, ice, and sport fishing)*.

Table 13. What is the Henderson Harbor area best known for?

S9 Best Known for...	Overall (n = 189)	
	#	%
Water recreation (kayaking, scuba diving, water skiing, swimming, motorboats, sailing)	89	47
Fishing (charter, ice, and sport fishing)	69	37
Outdoor activities (hunting, camping, bird watching, hiking, biking)	21	11
Other (Please specify)	5	3
Arts and cultural events (car shows, art festivals, workshops)	4	2
Winter activities (cross-country skiing, snowmobiling, snowshoeing)	1	1

Study Participants' Participation in the Arts

In the past year 62% of respondents indicated they have *attended a live performing arts show or concert*. Of these, most individuals attended between 1 and 5 events (73%), while many attended 6-10 events (17%) and the remaining 10% shared they attended over 10 events. In addition, 49% of respondents shared they *visited an arts or crafts gallery*, with the majority of individuals sharing they attended less than 10 times in the past year.

Table 14. In the past year, have you or members of your household participated in any of the following? This activity **does not** need to have occurred in Henderson. Please provide the number of times you participated in the activity.

S10 Activity (n = 189)	%
Attended a "live" performing arts show or concert	63%
Visited an arts or crafts gallery	49%
Taken an arts class on the internet	17%

S10 Activity (n = 189)	%
Participated in a vocational choir or theatre group	9%
Participated in an arts summer camp (dancer, music, theatre)	8%
S10a Please select any activities below that you or a household member participated in:	%
None of the above	46%
Started a DIY art project	37%
Actively pursue an arts hobby	29%
Volunteered for a nonprofit arts organization	22%
Been a member of an arts-related association	15%
Worked as an artist	13%

Individuals were then asked how important arts-focused activities are to their household. If an individual responded, “none of the above” to the preceding question, they were not asked this question. Most individuals provided a score of 4 or 5, and a mean score of 3.9 (n=102).

Table 15. How important are arts-focused activities to you and your household?

S11 Arts-Focused Activities	Not at All -- 1		2		3		4		Extremely 5	
	#	%	#	%	#	%	#	%	#	%
How important are arts activities in your household?	2	2	6	6	27	27	35	34	32	31

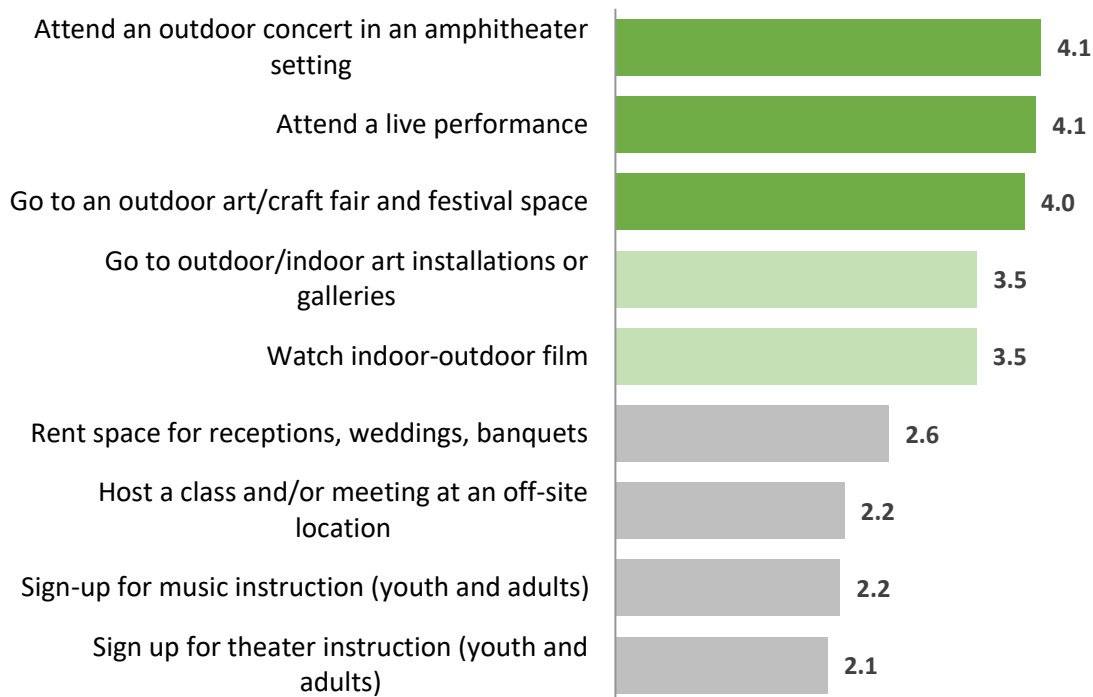
The data suggests that individuals do not spend a large portion of their income on arts events. For all income levels, the data suggests that individuals will spend about 1%-3% of their income on arts events. This should be taken into consideration when considering pricing and programming of events.

Table 16. On an annual basis, how much money do you typically spend on arts-related events?

S12 Money Spent by Income	Average \$ Spent
\$10,000 to \$24,999	\$ 272.00
\$25,000 to 49,999	\$ 190.00
\$50,000 to 74,999	\$ 298.86
\$75,000 to 99,999	\$ 529.86
\$100,000 to 149,999	\$ 718.75
\$150,000 and greater	\$ 1,504.57

Individuals are extremely likely to use the venue, as 78% shared a response of *likely* or *extremely likely* they would attend a live performance. Further, a strong majority indicated they would *watch an indoor-outdoor film, attend an outdoor concert in an amphitheater setting, go to an outdoor art/craft fair and festival space, and go to outdoor/indoor art installations or galleries.*

Figure 4. How likely are you to attend one of the following (means)



Note. For all items, n = 189. Figure 4 aligns with Question 10 of the survey.

For those that responded *extremely unlikely, unlikely, or maybe* a theme that emerged was typically tied to demand, as they had very little interest in the item selected (such as renting space). Others shared they would be more interested if life circumstances were different (children, reason to host an event, more time). Some offered that they would “love to see concerts come to Henderson Harbor,” or that to attend an event, it would have to be a “big name.”

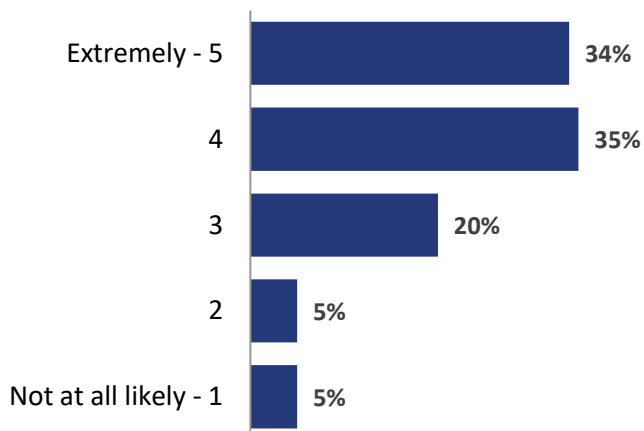
Word or Phrase to Describe Henderson Harbor

Individuals were asked to share the first word or phrase that comes to mind when they hear “Henderson Harbor,” the responses were largely positive, as 77% provide a positive word or phrase. The most commonly cited word was beautiful, followed by peaceful, others referred to Henderson Harbor as “tranquil,” and one individual shared Henderson Harbor was the “Best Kept Secret.” The key stakeholders also responded very positively, as most individuals used words such as “beautiful,” and “scenic,” one individual shared the word “destitute.”

Section 3: What does the community think about an Arts Center?

When asked how much the proposed venue would contribute to the quality of life available through the Henderson Harbor are 69% of individuals selected either a 4 (35%) or 5 – Extremely (34%), suggesting a people perceive the venue as a highly positive addition to the community.

Figure 5. How much will the proposed venue improve quality of life? (n = 189)



Note. Figure 5 aligns with Question 13 of the survey.

On a scale of 1 to 5 with 1 indicating not at all and 5 extremely, respondents provided a mean score of 3.6 when asked how important it is that Henderson Harbor have a concert, festival, and/or cultural venue for community use. In addition, 60% selected either a 5- extremely (31%) or 4 (29%).

Table 17. How important is it to you that the Henderson Harbor area has a concert, festival, and/or cultural venue for community use? (n = 189)

S15 Importance of Cultural Venue	Not at All -- 1		2		3		4		Extremely 5	
	#	%	#	%	#	%	#	%	#	%
How important?	24	13	6	3	45	24	55	29	59	31
Mean	3.6									

The facility is strongly supported by those who participated in the surveys and the interviews. **Eighty percent of individuals said they support the development of a cultural arts facility and all but one individual supported from the IDIs.** This individual was not opposed, but undecided and wanted to learn more about the project. As one interview shared:

I would say it's good for jobs and culture and could be a creative outlet. It could bring a spotlight to Henderson Harbor and bring ppl together. As opposed to something else like a solar farming plant. The project matches the vibe of Henderson Harbor and the environment.

Of the 19 individuals that responded “No,” 12 (63%) are full-time residents. This is an important finding, as the data suggests HHPAA will find more resistance to this project from full-time residents.

Table 18. Do you support the development of a cultural arts facility in the greater Henderson Harbor area? (n = 189)

S16 Support for Cultural Arts Facility	Yes		No		Undecided	
	#	%	#	%	#	%
Support for developing arts facility	152	80	19	10	18	10

Their open responses largely expressed concerns around costs, government involvement, and a feeling that project was “not feasible.”

Economic Impact

Key stakeholders expressed that there would be some economic impact by building a cultural arts venue directly in Henderson Harbor. As one interviewee suggested, “There are currently limited opportunities to do enjoy arts in Henderson Harbor. I think that’s something the area can really use. We currently go to Sacketts Harbor to enjoy the arts.” Another commented, “It would bring people from out of town for something positive and creative. It would give people better options for things to do, especially if it has to do with art music, and especially for kids.”

Several mentioned other venues in Watertown, Clayton, and Sacketts Harbor as competitive locations. They also shared that many people do not want to travel, and their comments aligned with findings in this study, that there is high interest in the community for a venue.

Others also commented that in the summer months, it may offer some seasonal jobs for individuals, although modest numbers, the venue still may provide work opportunities for some residents.

Conclusion

This report provided an extensive feasibility study to assess the viability of the proposed cultural arts venue in Henderson Harbor. **RMS recommends that the project move forward,** with careful considerations of the recommendations set forth in this report.

Appendix A: Survey Tables

Full data tables are provided below for question in which only means or charts were provided in the body of the report. Open ended responses are also included.

Table 19. The Henderson Harbor area is home to many; please select all that apply to you:

S1 Resident Status	n = 189	
	#	%
I vacation/make day trips to the Henderson Harbor area	78	41
I am a full-time resident of the Henderson Harbor area	58	31
I am a seasonal resident of the Henderson Harbor area	35	19
I have a second home, camp or property in/near Henderson Harbor (within 20 miles)	33	18
I am a business owner in the Henderson harbor area	3	2

Note. Individuals could also respond, “I am not familiar with the Henderson Harbor Community,” 135 individuals selected this response. These individuals were disqualified from the survey. Individuals could select all that apply.

Table 20. Seasonal population estimates

Seasonal Population Estimates	Estimates
Q4 2018	4,103
Q1 2019	3,336
Q2 2019	4,331
Q3 2019	4,163
Q4 2019	3,375
Q1 2020	3,543
Q2 2020	4,052
Q3 2020	4,492
Q4 2020	3,737

Table 21. What is the primary reason you visit Henderson Harbor? (Select all that apply.)

S6 Reasons to visit	Overall (n = 189)	
	#	%
Water recreation (kayaking, scuba diving, water skiing, beach)	63	57
Visiting family and friends	44	40
Boating – motor	32	29
Arts and cultural events	29	26
Fishing (charter, Ice, and sport fishing)	27	24
Hiking	20	18
Camping	19	17
Bird watching	17	15
Boating – sailing	15	14
Biking (mountain and road)	13	12
Snowshoeing	4	4
Cross-country skiing	3	3

Table 22. How likely is it that you will return to the Henderson Harbor area?

S7 Possible Return to Area (n = 111)	Not at All -- 1		2		3		4		Extremely 5	
	#	%	#	%	#	%	#	%	#	%
	How likely is it that you will return to the Henderson Harbor area?	0	0	0	0	6	5	19	17	86

Note. Question did not include seasonal residents, full-time residents, and business owners.

Table 23. What is the first word or phrase you associate with Henderson Harbor? (n=189)

Phrase	Count	Sentiment
Beautiful	20	Positive
Peaceful	11	Positive
Lake Ontario	8	Positive
Fishing	7	Positive
Lake	7	Positive
Relaxing	6	Positive
Home	5	Positive
Quaint	5	Positive
Scenic	5	Positive
Waterfront	4	Positive
Scenery	3	Positive
Picturesque	2	Positive
Pretty	2	Positive
Quiet	2	Positive

Phrase	Count	Sentiment
A-Bay and Watertown are small but packed with fun activities	1	Positive
amazing	1	Positive
Beach / water	1	Positive
Beachy and pleasant	1	Positive
Beautiful boating	1	Positive
Beautiful lake area	1	Positive
beautiful scenery	1	Positive
Beautiful small town	1	Positive
Beautiful waterfront	1	Positive
Beautiful, serene	1	Positive
Beautiful, tranquil paradise	1	Positive
beauty. clear lake water	1	Positive
best place on earth	1	Positive
Breathtaking	1	Positive
Calm	1	Positive
Chill	1	Positive
Clean	1	Positive
cottage	1	Positive
Cozy	1	Positive
Dramatic shoreline	1	Positive
Escape	1	Positive
Exciting	1	Positive
Family	1	Positive
Good food	1	Positive
Gorgeous	1	Positive
Happy Place	1	Positive
Harbor Magic	1	Positive
Henderson Harbor -> Best Kept Secret	1	Positive
Hidden gem	1	Positive
Historic	1	Positive
Home. Even though I've never lived there full time.	1	Positive
Inviting	1	Positive
Lake fun	1	Positive
Lake home	1	Positive
Lake views	1	Positive
Love	1	Positive
Lovely	1	Positive
Lovely, peaceful on the water	1	Positive
Natural beauty	1	Positive
Nature	1	Positive
Nautical	1	Positive
Nice	1	Positive

Phrase	Count	Sentiment
Outdoors	1	Positive
Pleasant	1	Positive
residential paradise	1	Positive
Rustic	1	Positive
Scenic water views	1	Positive
serene	1	Positive
Stuck in the past	1	Positive
Such a pretty area	1	Positive
Tranquility	1	Positive
unique, welcoming and peaceful	1	Positive
Unknown peaceful beauty	1	Positive
Untapped	1	Positive
variety	1	Positive
Very nice	1	Positive
Very quiet	1	Positive
world class fishing	1	Positive
Water	17	Neutral
Boating	5	Neutral
Association Island	2	Neutral
Sailing	2	Neutral
Bass	1	Neutral
being near the water	1	Neutral
Blue water	1	Neutral
Camping	1	Neutral
charter fishing	1	Neutral
Good restaurants but poor parking	1	Neutral
Sailboats	1	Neutral
Water sports	1	Neutral
Small	2	Negative
Dumpy	1	Negative
Glory days in past - needs reboot	1	Negative
Limited	1	Negative
Limited activity...maybe slow to develop all they have	1	Negative
money	1	Negative
Neglected	1	Negative
snooty	1	Negative
Totally different world than the rest of Henderson	1	Negative

Table 24. Please explain why you selected (response for what Henderson Harbor is best known for)

Q9. Open Ended Responses

- 50 years of fishing.
- A lot of fishing charters in area
- Advertising seems geared toward fishing vs the others although I participate in others
- All I know about it
- All of the above
- all types of water related activities, boating, fishing
- Always been a great place to fish
- Always visit Robert Wehle Park.
- Always went swimming, fishing, boating, etc.
- Anglers come from out of state and other countries to take charter fishing trips.
- Anything that has to do with the outdoors be it kayaking, swimming, boating, hunting, birding, etc
- Based on my activities and those of my friends and family up there
- Bass & salmon fishing
- Bass fishing
- Beautiful area
- Beautiful beach and lots of water for kayaking, boating
- Beautiful clean water mild temps
- Beautiful community that is right on the water. Lovely shops and some terrific restaurants.
- Beautiful Harbor setting one of best on Lake Ontario
- Beautiful lake views
- Beautiful year round, not overly crowded, relaxing, on the waterfront, nice restaurants.
- Because of all the great history that is there.
- Been fishing there since a child, I'm not a big winter sports person except for some ice fishing.
- Being on Lake Ontario
- Between water recreation and fishing during the summer is when we see many here to enjoy them.
- Boating
- Boating being in the water with family and friends
- Boating, swimming in the lake
- Charter boats
- Charter boats and we have our own fishing derby
- Common knowledge
- Easy access to the water
- Environment
- Even though water Recreation is good for the locals, most transient come to fish, not much else
- Everyone I know goes fishing

Q9. Open Ended Responses

- Everyone living here has water sport interests
- Family has always fished there
- Fantastic entry point for fishing
- Fishing
- Fishing charters
- Fishing for a variety of fish with good results.
- Fishing is fun and plentiful
- Fishing, boating, yachting
- For many years fishing charters is what brought me there
- Friends fish there
- Great fishing
- Great place for everything water related
- Great relaxing place to visit
- Grew up spending summers in Henderson Harbor doing all of the water activities w/ friends and family
- Has been known as the bass capital for years
- Have always known it to be a fishing spot
- Henderson Bay is large protected from main lake
- Henderson Harbor tends to draw in the fisherman crowd
- Henderson has many local fishing charters and hosts tournaments. These activities bring in people
- I feel it is best known for boating and fishing activities
- I first visited HH to go sailing
- I go on Summer
- I got to enjoy water
- I have been there many times in the last 30 years
- I hear many people going fishing in the area.
- I like the water fun opportunities. Hiking the rv park
- I live on the Lake shore and the lake is full of people swimming and boating
- I love fishing there
- I love the beauty of the Harbor, restaurants, etc.
- I see many charters heading out of Henderson each and every day all summer long.
- I see the fishing motels
- I think fishing charters are what most people would think of. I live there in summer.
- I think of the water and water activities
- I think this is what they really around. But there is a lot of sailing and boating - a yacht club too
- I used to work at the Yacht Club, lots of sailing
- Immediate access to Lake Ontario, proximity to St. Lawrence River
- It is a very small area

Q9. Open Ended Responses

- It is known for fishing but also water activities which we enjoy.
- It is what most people I know participate in
- It's a beautiful area for water activities
- It's a beautiful place surrounded in water
- It's a Lake Ontario community.
- It's a seasonal area with the lake
- It's history
- It's in the name- the harbor
- It's known for some of the best fishing in upstate New York.
- It's the only reason I go, beautiful area of Lake Ontario.
- It's windy
- It's a beautiful place with a lot to enjoy
- Its best known, to me, for its boating
- It's just what I see the most. I'm happy that the world has NOT discovered HH. I love the quiet.
- It's on Lake Ontario so I chose water sports but fishing should be included
- It's on the water
- it's the central draw from outside the area
- It's the thing I notice the most
- It's what you do at HH
- I've always seen people out on the water.
- Just know if the area for water and hiking by water
- Just what I have always heard
- Lake activities
- Lake Ontario is beautiful and has many swimming and boating opportunities
- Lake Ontario proximity
- Live in the area and friends with charter owners
- Lot of water activities for all ages
- Lots of Charter advertising
- Lots of great fishing in the area
- Lots of great things to see and do
- Love waking up on the lake
- Many charters in area
- Many city dwellers attracted to Lake Ontario
- Many fishing charters in Henderson
- Many fishing tournaments are held in the area waters
- Many friends and family talk about fishing in the area
- Many of the above. Boating, kayaking, fishing including ice fishing, hunting & sailing
- Most of these but I am more of a summer person (even though I live here year round)
- n/a (3x)

Q9. Open Ended Responses

- Nice outdoor area
- Nice town to visit
- Not much to do other than fish
- Our family is mainly involved in these activities.
- Our sailboat was there for many years
- Outdoor water activities are what we all like to do there.
- Outside the area it is the answer
- Overall relation & beauty from boating, fishing, kayaking, hiking and biking along with bbqs
- People come to camp or fish.
- People go to Wheale to hike, fishing of course
- Performing arts activities
- Personal experience
- Playground for the rich
- Probably due to the existing publicity campaigns for Henderson Harbor
- Quiet harbor for adults wanting quieter atmosphere
- Recreational use of the lake
- Scenic
- Simply beautiful surroundings with an abundance of outside activities to do and enjoy
- Snooty summer people
- Sports fishing
- Such a beautiful area with so many water offerings
- Summer water views and boating. Clean fresh water
- supporting the local economy
- Take a drive through and you'll see all the boats
- That is what it is best know for from me - those are the activities I do there. May be different fo
- That is what it is known for lol
- That is what my friends do
- That is what they promote
- That's been the focus of past promotions of the town
- That's my areas of interest
- That's what I know it for
- That's what know it best for
- The area is just so beautiful
- The beautiful homes
- The beautiful view of the surrounding area- water, sunsets, etc.
- The beautiful views and vacation scene brings me joy and peace
- The harbor feels like the center of all the action. People are always out on the w in the summer
- The Harbor is currently set up perfectly for recreational boating, sailing, and fishing.

Q9. Open Ended Responses

- The lake is our main asset
- The love that emanates from it
- The sailing program my children were involved in and protected waters boaters flock to for recreation
- The water is the greatest asset; fishing, sailing, boating, etc., and what draws people to the area
- The water is the main attraction that all else revolves around. Beautiful views, sunsets, watersport
- There are marinas, charter fishing and fishermen.
- These are the activities my family primarily does
- These cover the reason(s) we visit the area.
- this is what our friends and relatives come here for
- This the home of perch and bass fishing. Several charter boats
- unspoiled nature
- Very scenic park area
- Water (3x)
- Water activities and relaxing
- Water recreation primary
- Water recreation should include fishing
- waterfront recreation area, fishing, sailing, swimming, etc.
- We eat delicious fish caught there
- We enjoy outdoor activities there
- We go annually to watch the bird migration; We love Lake Ontario
- We go for the car shows, and art festivals
- We have 66 charter Captain's, services anglers from across the globe
- We have a charter business
- We have always utilized Henderson Harbor for its easy access to Lake Ontario and it's ample marinas
- We have many state parks and outdoor activities in general
- We launch our boat exclusively at HH. I've grown up I the area and love the access to restaurants.
- We live the sunsets over the lake
- We love being on the boat
- We spend our time recreating on the lake - sailing, skiing, swimming.
- We spend the summer on the lake is are most acquainted with the water recreation activities.
- We use the town boat launch to access the lake, visit Wehle Park to bike the trails
- When im in the area, i spend my time outdoors. i love the scenery & wildlife
- wheres day shoots da birdsies and deers and turkeys and fishes for fishes.
- while there are a myriad of outdoor activities as listed above, I much prefer the arts and car shows

Q9. Open Ended Responses

- While there are lots of things to do, being right on the river, near the river, what better than that
- With over 40 charter captains bring 100s of fishermen.

Table 25. How much do you believe a fair, festival, and cultural arts venue would contribute to the quality of life available through the Henderson Harbor area?

S13 Arts-Focused Venue (n=189)	Not at All -- 1		2		3		4		Extremely 5	
	#	%	#	%	#	%	#	%	#	%
How much do you believe a fair, festival, and cultural arts venue would contribute to the quality of life available through the Henderson Harbor area?	9	5	10	5	38	20	67	35	65	34

Table 26. How likely are you to attend or use the following if offered in the Henderson Harbor area? (n = 189)

S14 Venue Use	Extremely Unlikely		Unlikely		Maybe		Likely		Extremely Likely		Mean
	#	%	#	%	#	%	#	%	#	%	
Attend a live performance	6	3	8	4	28	15	72	38	75	40	4.1
Attend an outdoor concert in an amphitheater setting	9	5	5	3	29	15	58	31	88	47	4.1
Go to an outdoor art/craft fair and festival space	15	8	4	2	31	16	63	33	76	40	4.0
Watch indoor-outdoor film	21	11	16	9	52	28	49	26	51	27	3.5
Go to outdoor/indoor art installations or galleries	24	13	17	9	43	23	51	27	54	29	3.5
Rent space for receptions, weddings, banquets	38	20	49	26	53	28	40	21	9	5	2.6
Host a class and/or meeting at an off-site location	68	36	48	25	45	24	20	11	8	4	2.2
Sign-up for music instruction (youth and adults)	71	38	55	29	35	19	15	8	13	7	2.2

S14 Venue Use	Extremely Unlikely		Unlikely		Maybe		Likely		Extremely Likely		Mean
	#	%	#	%	#	%	#	%	#	%	
Sign up for theater instruction (youth and adults)	76	40	60	32	31	16	11	6	11	6	2.1

Table 27. What is your gender identity?

S19 Gender	Overall (n = 189)	
	n	%
Man	58	31
Woman	125	67
Gender non-conforming	0	-
I would prefer to self-identify	0	-
Prefer not to answer	6	3

Table 28. What town and ZIP Code is your second home, camp, or property located in? (n = 28)

Town	Zip	#	%
Henderson	13650	10	36%
Mannsville	13661	7	25%
Adams	13605	2	7%
Sandy Creek	13145	2	7%
Henderson	13651	2	7%
Ellisburg	13650	2	7%
Sackets harbor	13685	1	4%
Pulaski	13142	1	4%
Theresa	13691	1	4%

Table 29. What is your age?

S18 Age Range	Overall (n = 189)	
	n	%
Under 18	0	-
18-24	0	-
25-34	12	6
53-44	34	18
45-54	30	16
55-64	48	26
65 and above	63	34

Table 30. What is your **total** household size?

S20. Household Size	Overall (n = 189)	
	n	%
1	17	9
2	91	48
3	25	13
4	35	19
5	16	9
6	1	1
7+	3	2

Table 31. How many **adults** live in your home?

S21. Household Size	Overall (n = 189)	
	n	%
1	28	15
2	134	71
3	21	11
4	4	2
5	1	1
6	1	1

Table 32. How many **children** (under 18) live in your home?

S 22. Children Under 18	Overall (n = 189)	
	n	%
0	134	71
1	16	8
2	24	13
3	11	6
4	2	1

Table 33. What is your annual household income?

S23. Household Income	Overall (n = 189)	
	n	%
< \$10,000	0	-
\$10,000 to \$24,999	5	3
\$25,000 to \$49,999	16	9
\$50,000 to \$74,999	22	12
\$75,000 to \$99,999	36	19
\$100,000 to \$149,999	40	21
\$150,000 and greater	44	23
Prefer not to answer	25	13

Table 34. What is the ZIP Code of your primary residence?

S1a ZIP	Overall (n = 189)	
	n	%
13650	26	14%
13027	21	11%
13601	16	8%
13651	13	7%
13605	10	5%
13090	6	3%
13219	5	3%
13685	5	3%
13212	4	2%
13661	4	2%
13624	3	2%
13214	3	2%
13088	3	2%
13634	2	1%
13069	2	1%
13036	2	1%
13142	2	1%
13206	2	1%
13035	2	1%
13209	2	1%
13082	2	1%
13215	2	1%
13066	2	1%
75965	2	1%
14616	1	1%
13114	1	1%

S1a ZIP	Overall (n = 189)	
	n	%
14624	1	1%
14514	1	1%
13132	1	1%
13044	1	1%
13021	1	1%
14613	1	1%
13135	1	1%
13204	1	1%
13208	1	1%
13039	1	1%
13120	1	1%
13421	1	1%
13220	1	1%
13203	1	1%
13126	1	1%
13030	1	1%
13057	1	1%
13026	1	1%
13060	1	1%
13041	1	1%
13205	1	1%
13207	1	1%
13104	1	1%
13152	1	1%
14482	1	1%
77381	1	1%
13367	1	1%
13210	1	1%
13626	1	1%
43950	1	1%
27810	1	1%
10023	1	1%
28377	1	1%
33946	1	1%
13636	1	1%
13606	1	1%
14450	1	1%
13031	1	1%
14610	1	1%
92656	1	1%
14617	1	1%

S1a ZIP	Overall (n = 189)	
	n	%
12065	1	1%
6824	1	1%
14651	1	1%
13611	1	1%
13032	1	1%

Appendix B: Survey Script

Henderson Harbor Community Proposed Arts Center Survey DRAFT: FINAL – Version #1

TARGET: Henderson Harbor Residents, Community Residents, Tourists, Seasonal Residents

TIMEFRAME: Send out in July 2022

Subject Line: Your Input Needed! Henderson Harbor Community Survey

Email: The Henderson Harbor Performing Arts Association (HHPAA) has commissioned Research & Marketing Strategies (RMS), a CNY research firm, to conduct a community engagement survey. We are looking for YOUR input on how to improve Henderson Harbor Community and move forward with a possible concert, festival, and/or fair facility. We are grateful for your participation in this critical survey. Your insights will help the HHPAA make strategic decisions moving forward and help with planning and strategy that aligns with the community's needs and interest. This survey should only take you between 7 to 10 minutes to complete.

Please **[click here to take the survey: \[Insert survey link\]](#)**

If you have any questions or comments, send an email to: Research@RMSresults.com and reference the Henderson Harbor survey.

SURVEY

Thank you for taking the time to complete this survey. Before we begin, we'd like to learn a bit more about you and your affiliation with the Henderson Harbor area.

1. The Henderson Harbor area is home to many, please select all that apply to you:

- I am a full-time resident of Henderson Harbor area
- I am a seasonal resident of Henderson Harbor area
- I vacation/make day trips to the Henderson Harbor area
- I am a business owner in the Henderson Harbor area
- I have a second home, camp, or property near Henderson Harbor (within 20 miles)
- I am not familiar with the Henderson Harbor Community (*disqualify*)

1b. What is the ZIP Code of your primary residence?

(Open-ended)

Q1c: Only if Q1 = "I have a second home, camp, or property near/in Henderson Harbor"

1c. What town and ZIP Code is your second home, camp, or property located in?

- Town:
- Zip Code:

Q2: Only if Q1: "I am a seasonal resident...", "I vacation to..." and/or "I have a second..."

2. What seasons do you typically visit the Henderson Harbor area?

(Check all that apply)

- Winter
- Spring
- Summer
- Fall

Q3: Only if Q1: "I am a seasonal resident...", "I vacation to..." and/or "I have a second..."

3. About how many days a year do you visit/stay in the Henderson Harbor area?

[Open ended, numbers only]

Q3: Only if Q1: “I am a seasonal resident...” & “I vacation to...”**4. Where do you typically stay when in the Henderson Harbor area?**

(Select all that apply)

- Hotel/Motel/Bed & Breakfast/Airbnb
- Campground
- Vacation rental
- Friends/Family
- Second home
- Other (Please describe): _____

Q5 – Q7: Only if Q1: “I vacation to...” and “seasonal resident”**5. Thinking about your last visit to the Henderson Harbor area, approximately how much money in total did your immediate traveling party spend as a result of your visit (lodging, food, travel, entertainment)?**

(Open-ended)

Q6: Randomize selection list**6. What is the primary reason you visit Henderson Harbor?**

(Select all that apply)

- Arts and cultural events
- Biking (mountain and road)
- Bird watching
- Boating – motor
- Boating - sailing
- Camping
- Cross country skiing
- Fishing (Charter, ice, and sport fishing)
- Hiking
- Hunting
- Snowmobiling
- Snowshoeing
- Visiting family & friends
- Water recreation (kayaking, scuba diving, waterskiing, beach)
- Other (Please specify): _____

7. How likely is it that you will return to the Henderson Harbor area?

- 5- Extremely likely
- 4
- 3
- 2
- 1- Not likely

Next, we want to learn a bit more about your perceptions of Henderson Harbor as a place to live and visit.

8. What is the first word or phrase you associate with Henderson Harbor?

(Open ended)

9. What is the Henderson Harbor area *best* known for?

- Arts and cultural events (car shows, art festivals, workshops)
- Outdoor activities (hunting, camping, bird watching, hiking, biking)
- Winter activities (Cross country skiing, snowmobiling, snowshoeing)
- Fishing (Charter, ice, and sport fishing)
- Water recreation (kayaking, scuba diving, waterskiing, swimming, motorboats, sailing)
- Other (Please specify): _____

9b. Please tell us more why you selected {enter response choice from Q9}:

(Open-ended)

10. In the past year, have you or members of your household participated in any of the following? *This activity does not need to have occurred in Henderson. Please provide the number of times you participated in the activity.*

Activity	# of times in last year
a. Attended a “live” performing arts show or concert	
b. Visited an arts or crafts gallery	
c. Participated in an arts summer camp (dancer, music, theatre)	
d. Participated in a vocational choir or theatre group	
e. Taken an arts class on the internet	
10b. Please select any activities below that you or a household member participated in:	Check all that apply
Worked as an artist	<input type="radio"/>
Been a member of an arts-related association	<input type="radio"/>
Volunteered for a nonprofit arts organization	<input type="radio"/>
Started a DIY art project	<input type="radio"/>
Actively pursue an arts hobby	<input type="radio"/>
None of the above <i>(Skip to Q12)</i>	<input type="radio"/>

11. How important are arts focused activities to you and your household?

Not at all				Extremely
1	2	3	4	5

12. Annually. How much money do you typically spend on arts related events?

(Open ended)

Now I'd like to focus on the Henderson Harbor area specifically

13. How much do you believe a fair, festival, and cultural arts venue would contribute to the quality of life available through the Henderson Harbor area?

Not at all	Not Much	Somewhat	A Good Deal	A Great deal
1	2	3	4	5

14. How likely are you to attend or use the following if offered in the Henderson Harbor area?

Randomize selection list

Items	Extremely Likely	Likely	Maybe	Unlikely	Extremely Unlikely
a) Host a class and/or meeting at an off-site location					
b) Rent space for receptions, weddings, banquets					
c) Attend a live performance					
d) Sign-up for theatre instruction (youth and adults)					
e) Sign-up for music instruction (youth and adults)					
f) Watch indoor/outdoor film					
g) Attend an outdoor concert in an amphitheater setting					
h) Go-to an outdoor art fair/crafts fair and festival space					
i) Go-to outdoor/indoor art installations or galleries					

Q14b: Only if respondent provided a score of maybe, unlikely or extremely unlikely

14b. You shared that it is either extremely unlikely, unlikely, or maybe for you to attend one of the proposed offerings in the previous question. What would increase your interest?

15. How important is it to you that the Henderson Harbor area has a concert, festival, and/or cultural venue for community use?

- 5 - Very important
- 4
- 3
- 2
- 1 - Not important

16. Do you support the development of a cultural arts facility in the greater Henderson Harbor Area?

- Yes
- No
- Undecided

Q16a: IF Q17 = "Undecided"

16a. Since you responded "undecided," what additional information would you need to make either a yes or no decision?

Before we ask some optional demographic questions, we want to give you a space to share any additional thoughts.

17. Is there anything else you'd like to add?

(Open ended)

DEMOGRAPHICS

Thank you for taking the time to complete this survey! Your responses are valuable to us and will help us in our planning to better serve the Henderson Harbor Community! We have just a few more questions to ask you. The following demographic questions are optional but would greatly help us in our planning.

18. What is your age?

- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- Above 65

19. What is your gender identity?

(Open ended)

20. What is your household size?

- 1
- 2
- 3
- 4
- 5
- 6
- 7+

21. How many adults live in your home?

22. How many children (under 18)?

23. What is your annual household Income?

- < \$10,000
- \$10 000 to \$24 999
- \$25 000 to 49 999
- \$50 000 to 74 999
- \$75 000 to 99 999
- \$100 000 to 149 999
- \$150 000 and greater
- Prefer not to answer

DISQUALIFY

Thank you for your participation. However, you do not qualify for this study.

COMPLETION PAGE

Thank you so much for completing this survey! Your input is greatly appreciated.

Please click the [red submit](#) button below to send your survey responses.

SUBMIT

Appendix C: In-Depth Interview Script

Henderson Harbor Performing Arts Association
Stakeholder IDI Script
7/11/2022

RECRUIT

Hello, may I please speak with **[INSERT NAME FROM Tracking Sheet]**? My name is Pat Fiorenza, the Research Analytics Manager at Research & Marketing Strategies, a market research company based in Baldwinsville. As you may know, RMS is partnering with the Henderson Harbor Performing Arts Association to conduct feasibility research related to building a cultural arts center and festival venue.

Part of this research includes conducting interviews with key stakeholders in the region. Your name was provided to me as someone I should speak with regarding the proposed cultural arts center.

I am requesting a 25 to 30-minute interview to learn more from you about this project and how it may impact the region. I am looking for your honest feedback, the good, the bad, barriers and opportunities. Your input will help RMS make a sound recommendation on how best move forward.

I would like to start interviews this week and complete by mid August. Please let me know when you have some availability, and we'll find a time to chat. I have your phone number as [From Tracking Sheet], is this the best number to reach you?

For the interview, I will work around your schedule. I can also speak with you in the evenings. I appreciate your support on this important research and look forward to speaking with you!

May we schedule an interview with you to assist in this effort?

- a. Yes (Schedule Interview)
- b. No (Thank and End Call)

SCREENER INFORMATION

Interviewer Name _____
Participant Name _____
Participant Email _____
Date & Time of Interview M T W T F Date _____ Time _____
Phone _____
Office Location _____
Practice Group _____
Tenure _____

INTRODUCTION

Hello, may I please speak with [INSERT NAME FROM INTERVIEW SCHEDULE]? My name is [INSERT NAME] and I am calling from Research & Marketing Strategies (RMS), the market research firm that Henderson Harbor Performing Arts Association has engaged with to conduct interviews about the cultural arts venue. We have an interview scheduled with you now, is this still a good time to speak?

IF YES: CONTINUE; IF NO: RESCHEDULE FOR ANOTHER DAY AND TIME.

{Interviewer will address any questions an Associate (interviewee) has before the formal questioning begins}

INTERVIEW

PREAMBLE: *The interview will take about 25 to 30 minutes and will focus on topics related to your involvement in the Henderson Harbor community and perceptions of the proposed cultural arts venue. The purpose of the research is to learn what key stakeholders see as the benefits, challenges, opportunities, and barriers to the venue, along with the regional economic impact. As mentioned, when scheduling the interview, the information gathered will be used as a part of a feasibility study— so your candid opinions are very valuable to us. Your name will not be tied to any findings in the final report. The final report will be a summary of themes from the interviews and any interviewee comments will be blinded.*

We will be recording this interview so that I can go back and listen to it when compiling the research report and identifying themes. Please be assured that the interview recording will only be used by the RMS team and will be deleted when the research is complete.

1. To start, please tell me a little bit about yourself – your connection to the (Henderson) area and what you do?

2. In both our survey work and interviews, we are trying to speak with a diverse group of people, we know many people visit, live, or have a second home in the Henderson area. Which of the follow fits you:

- I am a full-time resident of Henderson Harbor area
- I am a seasonal resident of Henderson Harbor area
- I vacation/make day trips to the Henderson Harbor area
- I am a business owner in the Henderson Harbor area
- I have a second home, camp, or property near Henderson Harbor (within 20 miles)
- I am not familiar with the Henderson Harbor Community (*disqualify*)

Thanks so much! This will help me guide the interview a bit as we continue through our conversation.

3. What is the first word or phrase you associate with Henderson Harbor?

4. What activities do you believe Henderson Harbor is known for?

5. What are the key economic drivers in the region?

6. What opportunities exist for Henderson Harbor to improve economic drivers (from Q5)?

7. When you think about Henderson Harbor, do you believe it competes well with similar size communities? *(Probe: How might the town improve and become more competitive in the areas you mentioned? For example, if they say that Sackets Harbor has better restaurants, follow up asking them to describe what Henderson can do to improve and better compete. Ask questions why the environment is that – something like why do you believe that restaurants are better in Sackets, what drove the businesses to open there and not Henderson?)*

Now, I want to shift gears a bit more to talk about the arts. And your involvement, if any, in the Henderson Harbor area.

8. To start, what is your current involvement in the arts?
(Let them discuss, if any, probe for associates, attending events, donorship, not engaged).

9. **How likely are you to attend or use the following services if offered in Henderson Harbor?**
(Contextualize the question based on #8, i.e., you mentioned you aren't involved, but tell me more about if you'd do any of the following or, your engagement with X sounds exciting, I want to share some arts related activities and see how likely you are to attend. Do not dismiss this question if they are not engaged in arts.)

Items	Extremely Likely	Likely	Maybe	Unlikely	Extremely Unlikely
j) Host a class and/or meeting at an off-site location					
k) Rent space for receptions, weddings, banquets					
l) Attend a live performance					
m) Sign-up for theatre instruction (youth and adults)					
n) Sign-up for music instruction (youth and adults)					
o) Watch indoor/outdoor film					
p) Attend an outdoor concert in an amphitheater setting					
q) Go-to an outdoor art fair/crafts fair and festival space					
r) Go-to outdoor/indoor art installations or galleries					

10. **How much do you believe a cultural arts center would enhance the Henderson Harbor and Jefferson County region?**

- A great deal
- Somewhat
- Neutral
- Not much
- Not at all

11. **Why did you say [Question 10 response]?**

12. **What do you see as as barriers to developing a cultural arts center in Henderson Harbor?**
(Probe more for why they think that way, what would overcome them, alternative solutions).

13. **What economic impact do you believe the cultural arts center would have in Henderson Harbor?**
(Probe for jobs, tourism, if they say limited or not, probe for why they think that)

14. **Do you support the development of a cultural arts facility in the greater Henderson Harbor Area?**

- Yes
- No
- Undecided

14a. **If Q14 yes – Thank you for sharing this, if you had the chance to “pitch” this to your elected officials, what would you say? How would you sell this?**

14b. **If Q14 no: Tell me more about your response, why did you say “no”?**
(Probe for ways to overcome barriers)

14c. **If Q14 undecided - Since you are undecided, is there more information you need? What would help you make a decision – or convince you to say either “yes” or “no”.**

15. Using a 5-point scale where 5 is “very aware”, how would you rate your awareness of The Henderson Harbor Performing Arts Association (HHPAA) and its mission?

Not at All				Very Aware
1	2	3	4	5

16. Recognizing that a project like this takes time, how would you suggest the Henderson Harbor Performing Arts Association (HHPAA) engage the community and people like you in the evaluation process?

17. Is there anything else you’d like to add?
(Open ended)

That is all the questions I have. Thank you for your feedback! As a reminder, all data will be reported in the aggregate and will remain confidential. Individual data will not be shared with HHPAA. Have a great rest of your day.

Limiting Terms and Conditions

The information contained in this study has been obtained from primary data sources. All source materials and information gathered and presented herein are assumed to be accurate, but no implicit or expressed guarantee of data reliability can be assumed. This study has been prepared in the interest of a fair and accurate report. Therefore, all the information contained herein, and upon which opinions have been based, has been gathered from sources that Research & Marketing Strategies, Inc. (RMS) considers reliable.

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Certified by: 

Date: November 15th, 2022

Mark Dengler
President
Research & Marketing Strategies, Inc.