

Rancho Cordova

Performing Arts Center Feasibility Study

City Council Update
April 30, 2019



AMS
PLANNING
& RESEARCH



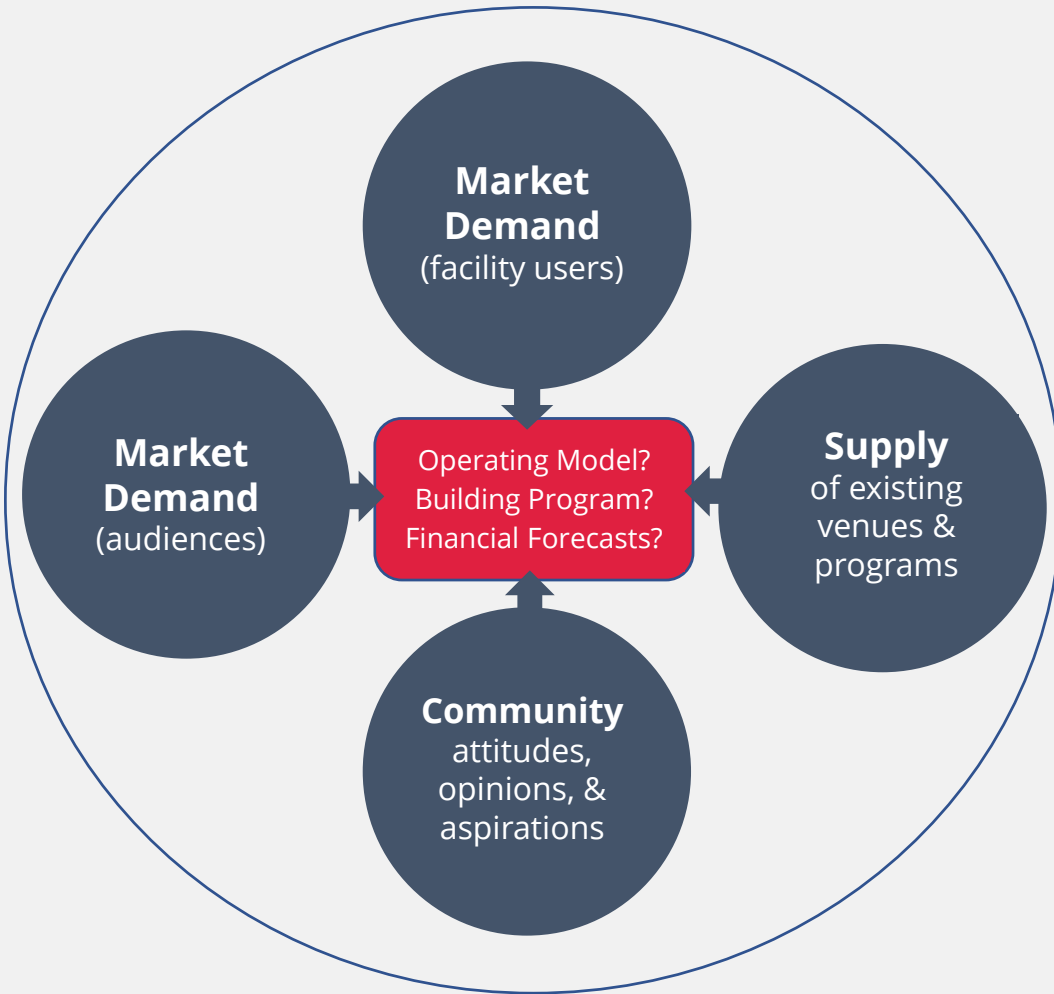
Founded on the
belief that arts and
culture impact
people's daily lives
and the communities
in which they live...

Today's Goals

1. Introduction
2. Process update
3. Preliminary Research Findings
4. Discussion
5. Looking ahead

Scope of work – Phase 1

This feasibility study would build on existing assets in Rancho Cordova, test key assumptions, and propose new strategies to maximize existing resources, while positioning the project to be an arts and entertainment resource for the entire region.



- ✓ Review background information
- ✓ Affirm planning goals
- ✓ Conduct interviews



- ✓ Market analysis
 - Survey users
 - ✓ Inventory venues



- Case studies
- Develop recommendations
- Socialize/confirm findings & direction

Scope of work – Phase 2

Based on Phase 1, AMS would outline the type of facility, the space requirements for programs, administration, and rehearsal/classroom space, and the optimal number of seats to accommodate expected audiences.



Activity Profile

- Forecast the major activities and programming of the hall
- Consider design implications



Site & Space

- Interface with architects to define spaces and consider site factors



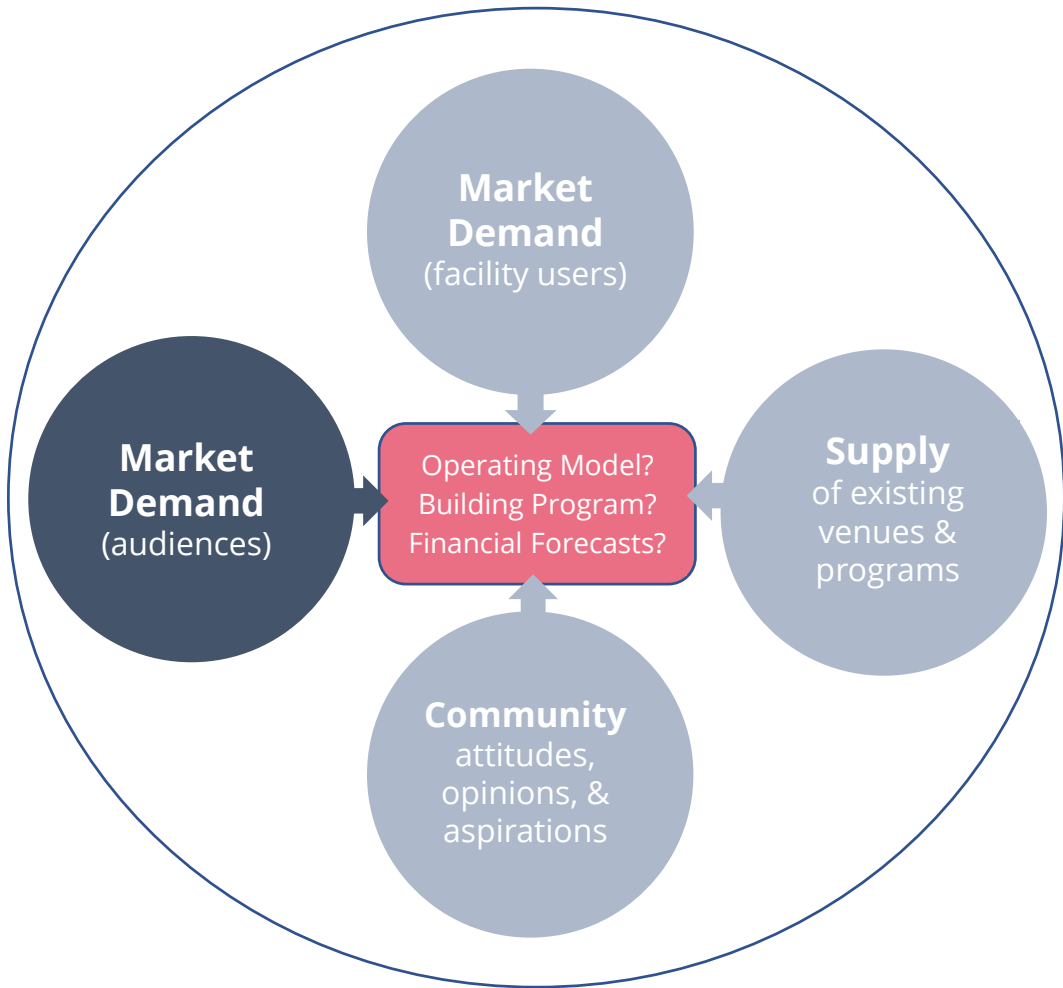
\$ Cost \$

- Develop an order-of-magnitude capital cost estimate



Report out

Report back to working group and City Council. Consider next steps – developing a business plan.



Market Analysis

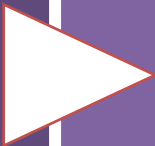


Process

A market analysis was conducted to understand the following three components of the market:

Demographics

Look at the **broader demographics** of the population in the defined primary and secondary market areas and **compare it to Regional and State data**



Segmentation

Categorize households based on demographic data, consumption patterns, and primary consumer/ market research, to develop **psychographic profiles**

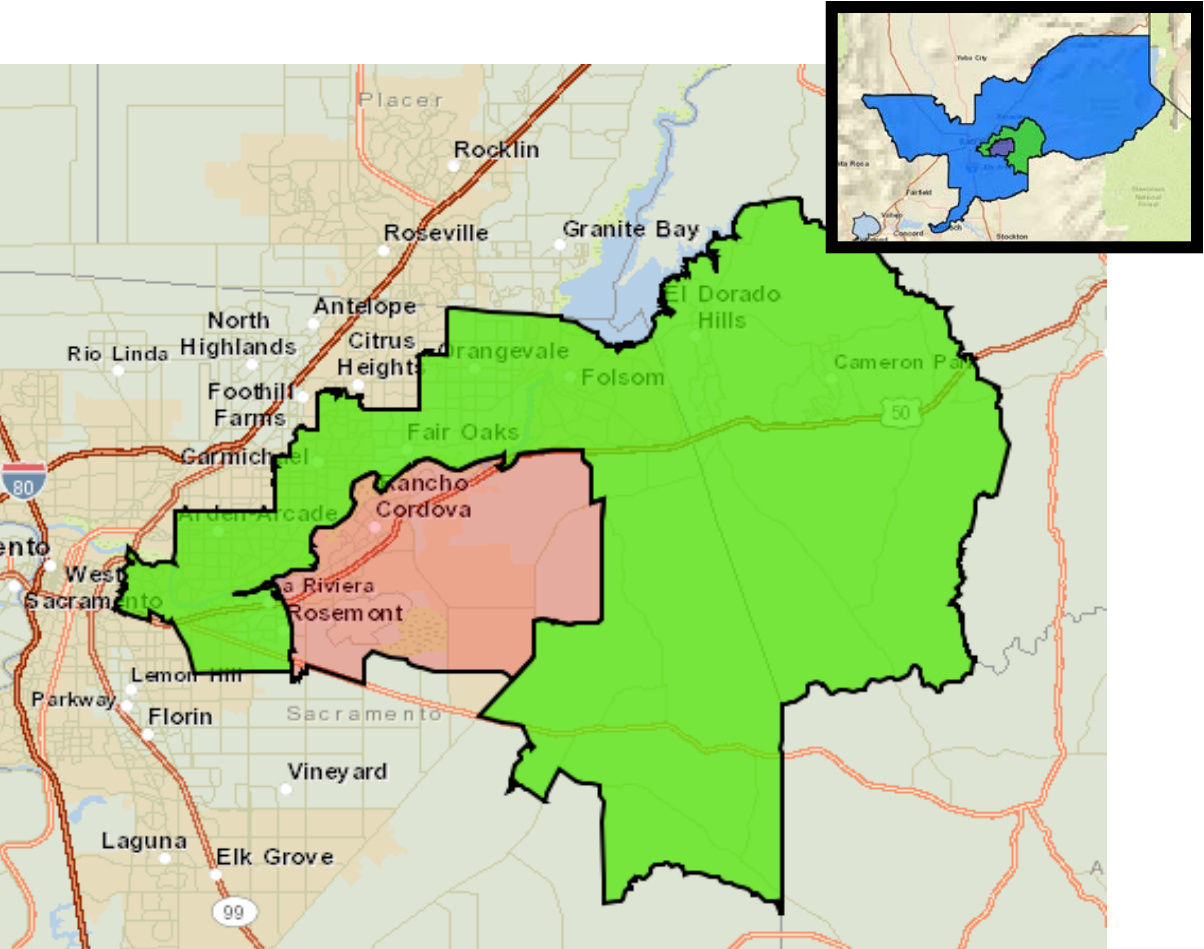


Affinities

Use national consumer research data to **identify households** in the market area **with above-average potential to attend events and activities** compared to US averages

Market Area

The analysis area focused on a primary area consisting of Rancho Cordova and an expanded area along the US-50 corridor



Primary Market

Population: 95,600
Households: 34,400

Secondary Market

Population: 417,200
Households: 164,500

Sacramento CBSA

Population: 2,353,900
Households: 856,400

Benchmark - United States

Population: 329,236,000
Households: 125,018,800

Demographic Key Findings

The Market indicates support for arts and cultural amenities

- The **population across the region is projected to grow** significantly in the next five years, with Rancho Cordova growing at an even faster rate.
- **Families with children live in the primary market**, whereas the secondary market tends to be older with no children
- The **secondary market area has significant means** and good proximity to Rancho Cordova; this, combined with high levels of education, is indicative of a supportive patron base for arts and culture
- The **primary market is significantly more racially diverse** than the secondary market, and slightly more diverse than the greater Sacramento CBSA

Segmentation Key Findings

The most represented segments in the total market area have means and a propensity toward arts and cultural activities



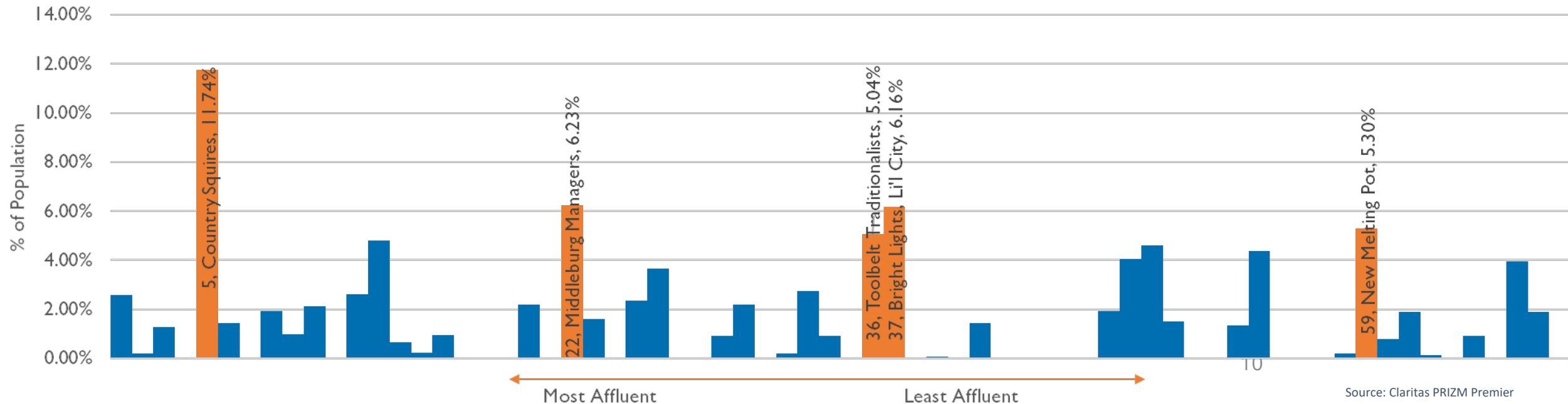
- * The dominant primary market segments indicate a significant number of **upper-middle class families with children**
- * The dominant secondary market segments are **affluent and well-educated**

Cultural Consumers – Primary Market

The primary market has representation in 70% of segments, but 35% of households are represented by the top five segments:

- (11.74%) **Country Squires | Segment #5**
- (6.23%) **Middleburg Managers | Segment #22**
- (6.16%) **Bright Lights, Li'l City | Segment #37**
- (5.30%) **New Melting Pot | Segment #59**
- (5.04%) **Toolbelt Traditionalists | Segment #36**

PRIZM Clusters (Primary Market)



Cultural Consumers – Primary Market

Primary market segments are diverse in wealth, interests, and age groups



05-Country Squires

- Recently built homes on sprawling properties
 - Median HH Income: \$118,000
- Baby Boomers who fled the city



22-Middleburg Managers

- Well-educated with white collar jobs
 - Reading and outdoor activities
 - Saving for retirement
- Median HH Income: \$103,000



37-Bright Lights, Li'l City

- Well-educated young couples
- Eating out and singing karaoke
- Median HH Income: \$68,000



59-New Melting Pot

- Young and ethnically diverse
- Work in a mix of service industry jobs
- Gospel music, wrestling, monster trucks
 - Median HH Income: \$26,000



36-Toolbelt Traditionalists

- Empty nesters
- AARP members
- Shop QVC and HSN
- Median HH Income: \$63,000

Cultural Consumers – Secondary Market

Secondary market segments are somewhat less diverse but tend toward greater affluence



02-Networked Neighbors

- Suburban, million dollar homes
- Expensive cars and exclusive clubs
- Married with children, high education
- Median HH Income: \$227,000



07-Money & Brains

- High education, white-collar jobs
- City living, married with few children
- Fashionable homes, expensive cars
- Median HH Income: \$115,000



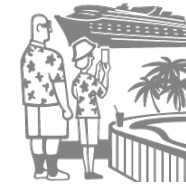
03-Movers & Shakers

- Suburban, dual-income
- Highly educated and business oriented
- Age 45-64
- Median HH Income: \$129,000



19-American Dreams

- Upper-middle class
- Multilingual and urban
- Grocery and convenience stores
- Median HH Income: \$76,000



12-Cruisin' to Retirement

- Suburban, older couples with grown children out of the house
- Vacations, golf, talk radio
- Median HH Income: \$95,000

Market Potential

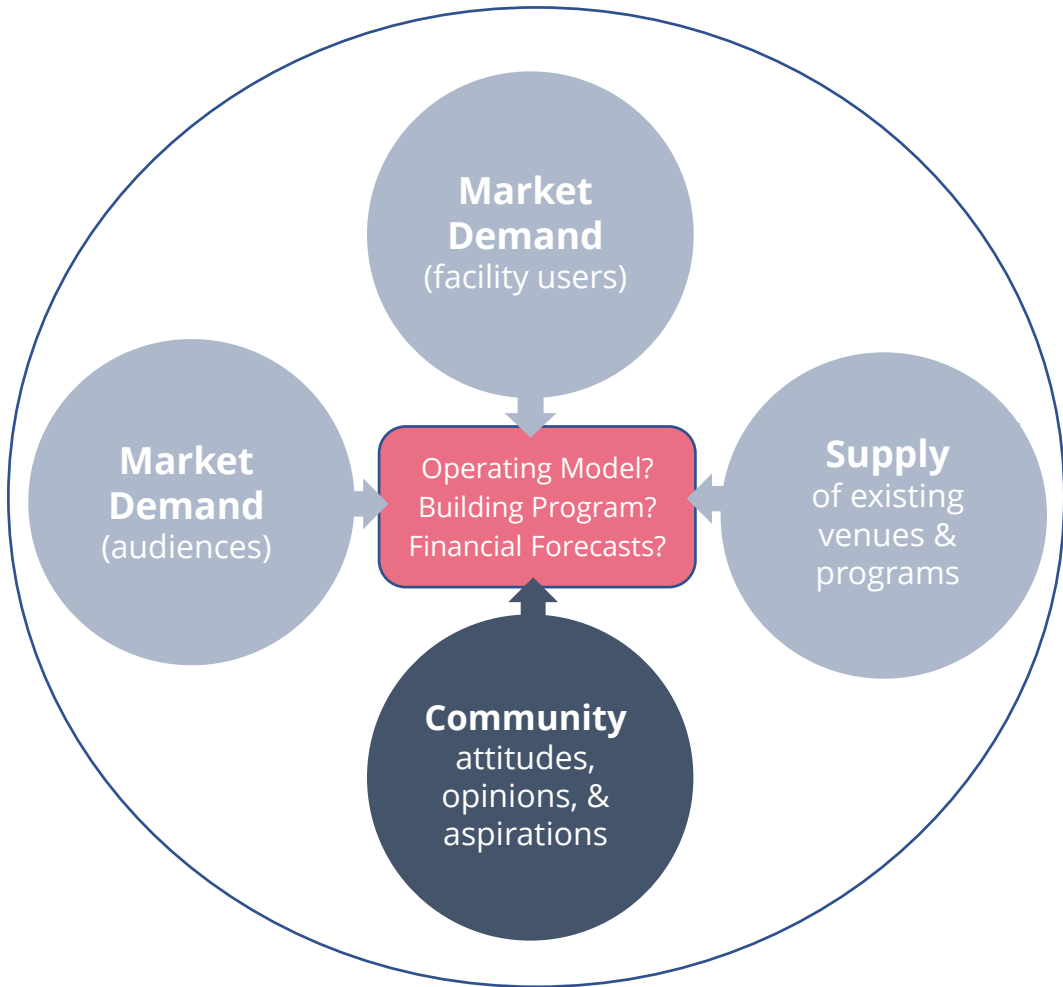
Area residents index higher than the national average in likelihood to **attend arts and cultural events**

Lifestyle Attribute	INDEX Primary Market	INDEX Secondary Market	INDEX Sac CBSA
(National Average = 100)			
Attend a Comedy Club	122	123	119
Attend an R&B/Rap/Hip-Hop Concert	119	108	120
Buy Movie Tickets on the Internet	116	131	124
Attend a Rock Concert	114	123	114
Attend Paid Music Concert	111	124	115
Attend a Symphony or Opera Performance	110	140	120
Attend the Zoo	110	108	111
Attend a Dance or Ballet Performance	109	128	117
Buy Cultural Event Tickets on the Internet	108	149	128
Visit an Art Museum	108	131	121
Attend Live Theater	107	134	117
Listen to Public Radio	107	149	129
Attend the Circus	107	95	105
Do Photography	104	110	106
Contribute to Arts/Cultural Organizations	104	148	122
Play a Musical Instrument	103	114	108
Listen to Classical Radio	102	160	133
Attend a Country Music Concert	101	95	92
Listen to Jazz Radio	94	160	148

Cultural Consumers

In a single year, an estimated:

<i>% of primary HH</i>	<i># of primary HH</i>	<i>% of secondary HH</i>	<i># of secondary HH</i>	Lifestyle attribute
57%	54,500	56%	234,700	will go to the zoo
40%	38,200	50%	208,700	will attend live theater
32%	30,500	36%	148,400	will attend a paid music concert
31%	29,400	33%	137,900	Will attend a rock concert
30%	28,400	36%	150,700	will visit an art museum
20%	18,700	18%	77,000	Will attend a country music concert
18%	17,700	19%	77,700	Will attend a comedy club
16%	14,800	20%	82,500	Will attend the symphony or opera
14%	13,500	19%	81,300	Will buy cultural event tickets on the internet
14%	13,000	16%	66,500	Will attend a dance or ballet performance
9%	8,500	12%	52,100	Will contribute to arts/cultural organizations



Community Input



What we are hearing from stakeholders

There are many visions

Ranging from **health and human services** to **art classes** to **basketball**

Visual and performing arts are envisioned @ civic center

Many interviewees spoke of visual art activities and spaces as well as performing arts

The arts are active & supported by City

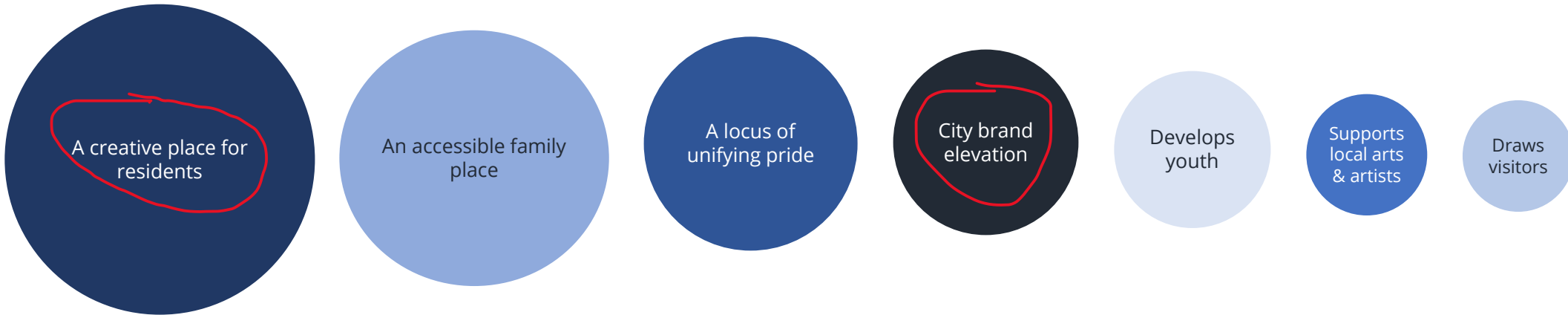
But could be more so with more + better facilities

Economic development benefits sought

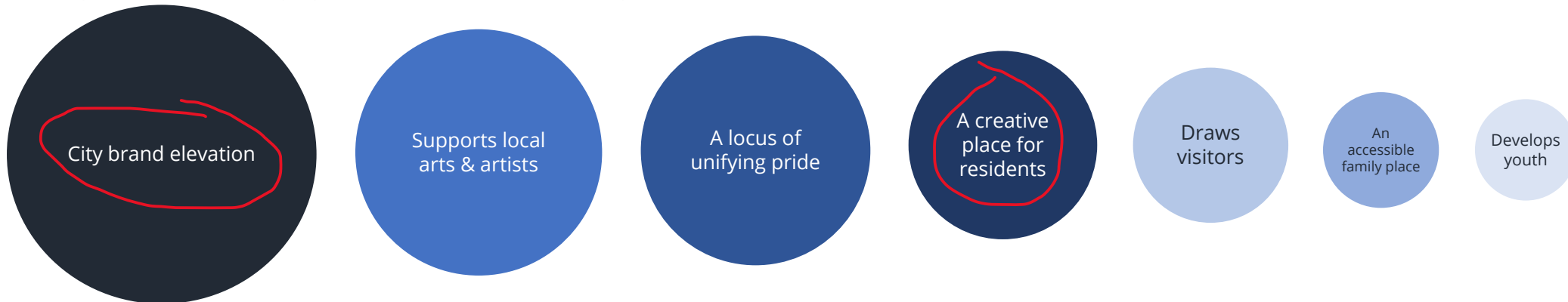
Enlivening Folsom Blvd. with civic center and amenities seen as key element of success

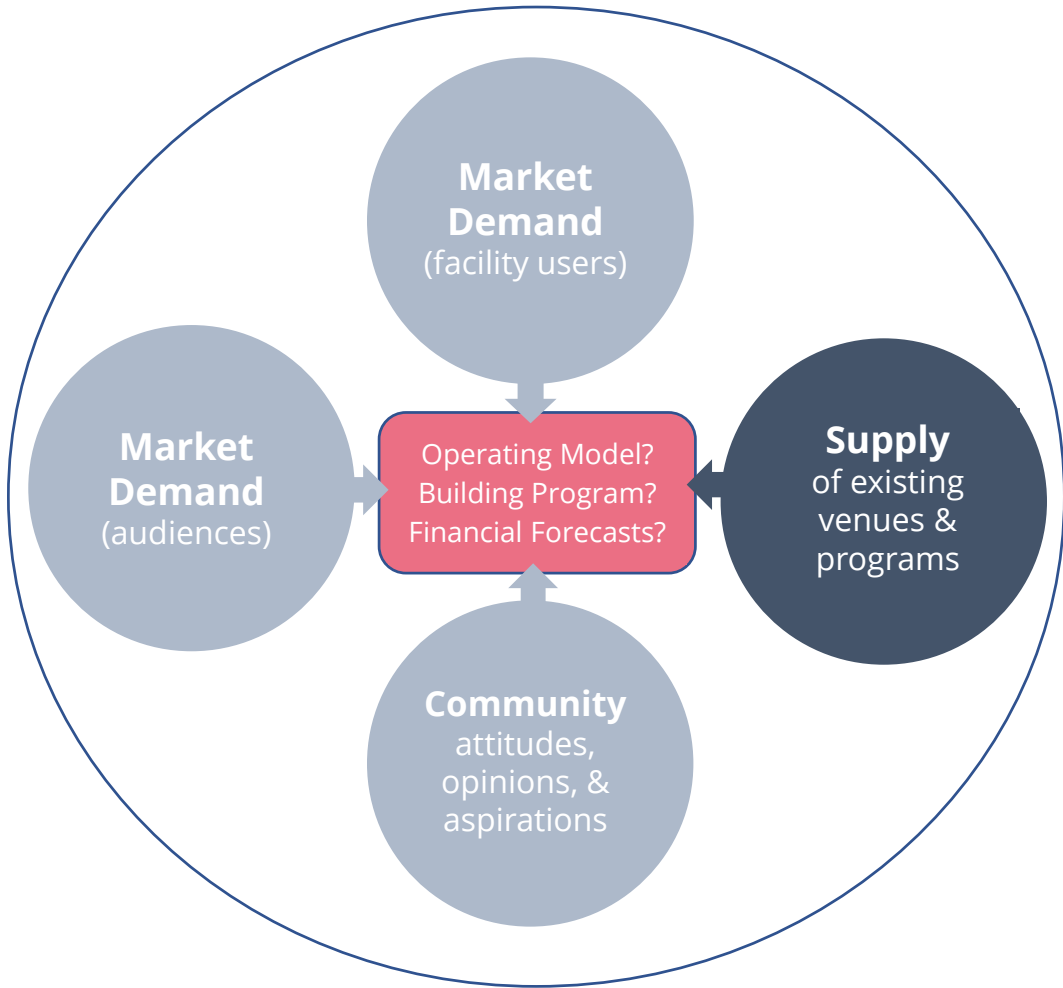
City Council members place value on serving residents and families.
Non-council respondents place value on elevating the brand and local arts organizations

CITY COUNCIL MEMBERS



NON-CITY COUNCIL MEMBERS





Environmental Scan



An inventory of over 100 performance and multi-purpose venues reveals...

Commercial own the market on multi-purpose space rental.



Is there an opportunity to provide an affordable rental option in a smaller scale space for local community organizations?

Purpose-built spaces are not as prevalent in the market area.



Does user and audience demand suggest that spaces such as galleries, recital halls and recording studios could be beneficial to the broader community?

Programming observation.

Programming question

Programming observation.

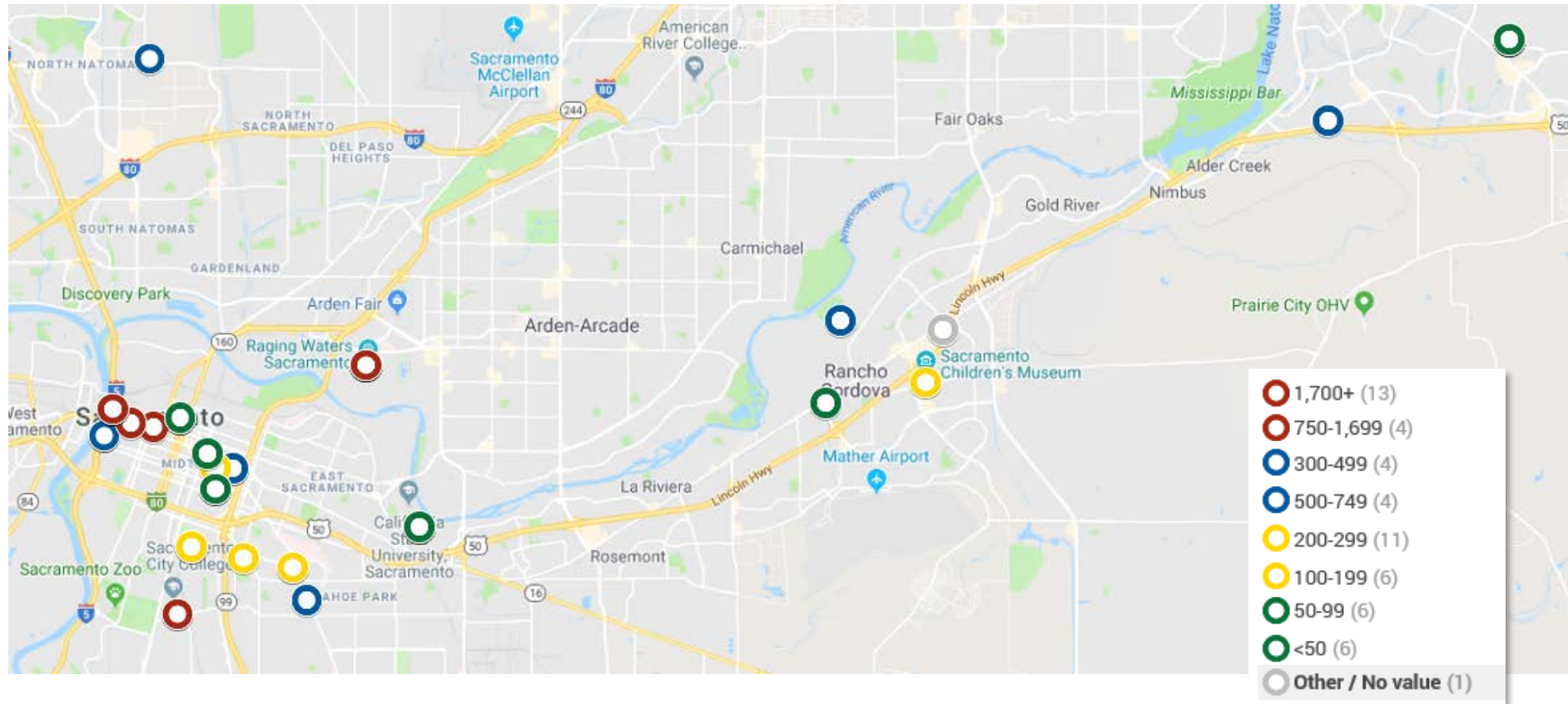
Programming question

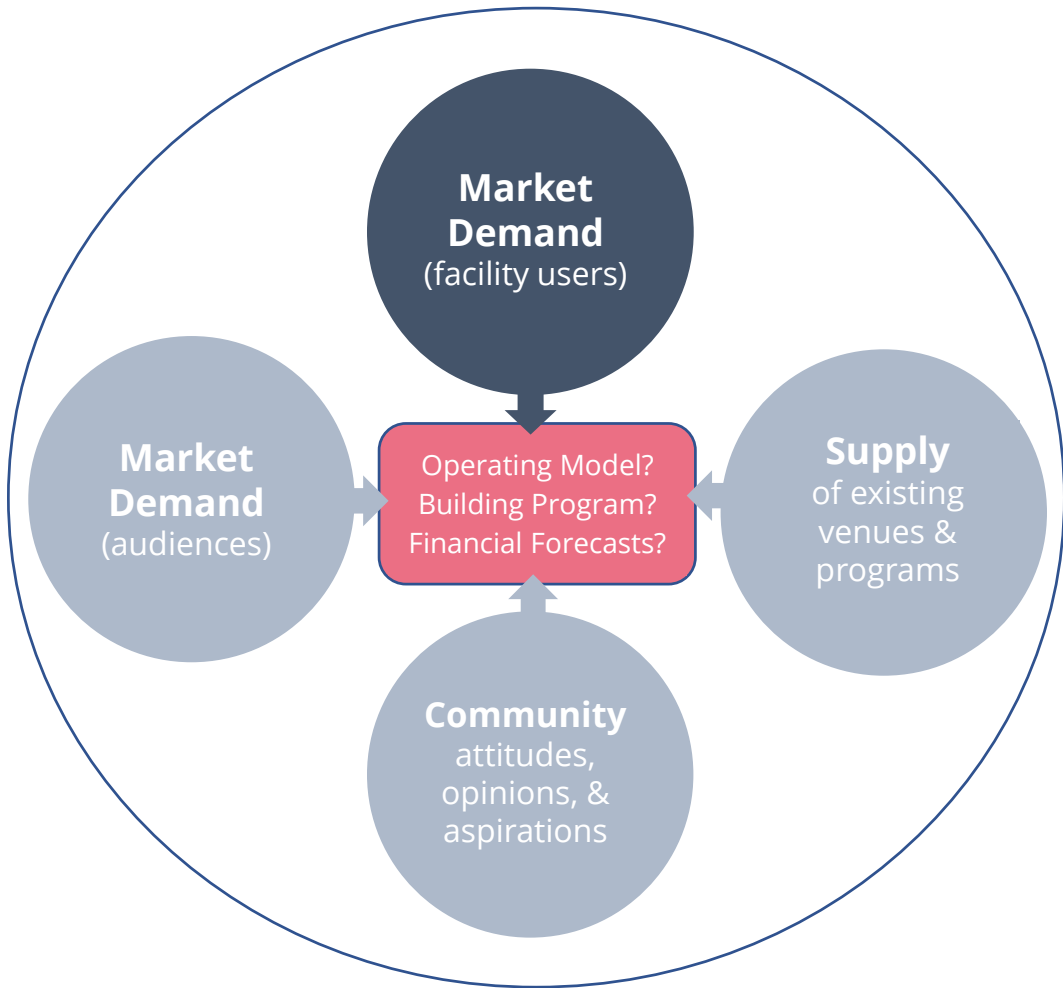
The primary market lacks venues with 750+ seats.

Does Rancho Cordova need its own larger-scale space?

How does availability of space align with user needs?

Other questions?????





User Needs Survey



Methodology

Information gathered includes:

- Minimum, optimum, maximum seating capacity
- Theater configuration (proscenium, thrust, black box, etc.)
- Equipment and space needs
- Estimated utilization
- Current and expected attendance
- Current spaces used and associated usage costs
- Background organization information

Distributed via emails and virally.

- City's own list
- SMAC & Creative Edge
- Clara Studios for the Performing Arts
- SARTA (regional theatre alliance)



22 Survey Respondents

916 Ink

Casa de Brazilian Folkloric Arts of
Sacramento

CSz Sacramento - Home of
ComedySportz

DDSO The Short Centers

Elk Grove Fine Arts Center

EMH Productions

Images Theatre Company

IMBA

Lenaea High School Theatre Festival

Rancho Cordova Arts

Rancho Cordova Chamber of Commerce

Rancho Cordova River City Concert Band

Sacramento Ballet Association

Sacramento Guitar Society

Sacramento Guitar Society

Sacramento Master Singers

Sacramento Taiko Dan

Sacramento Youth Symphony

Sinag-tala Filipino Theatre & Performing Arts
Association

Skulltronix

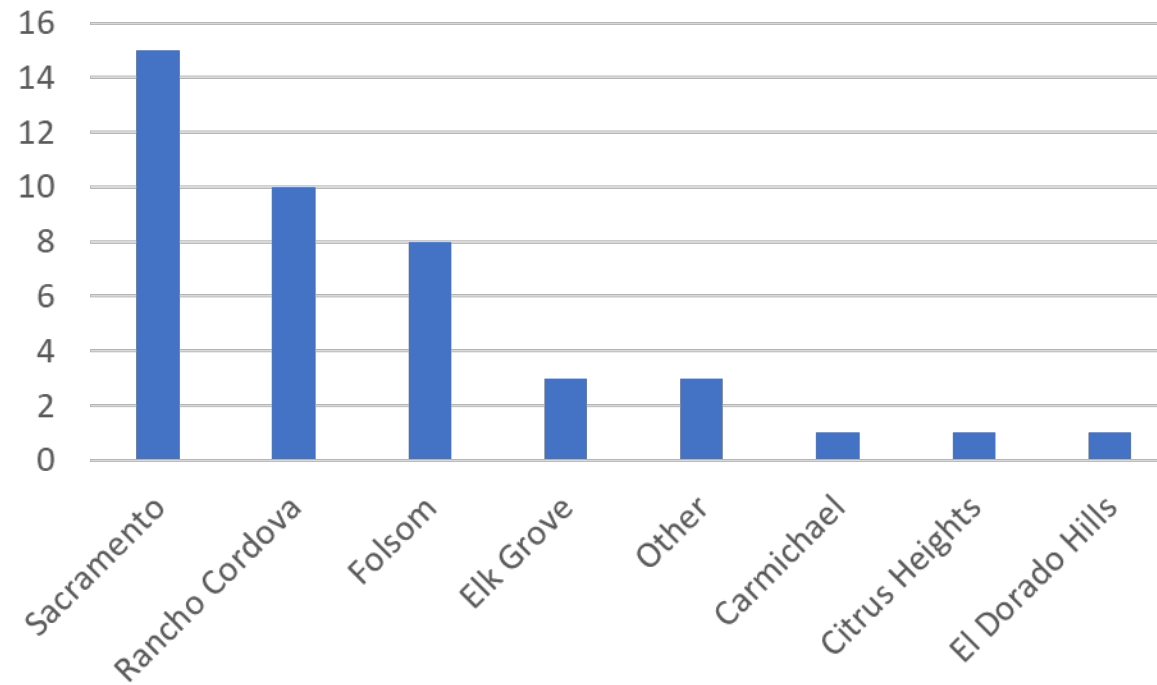
Symphony d'Oro Rancho Crodova

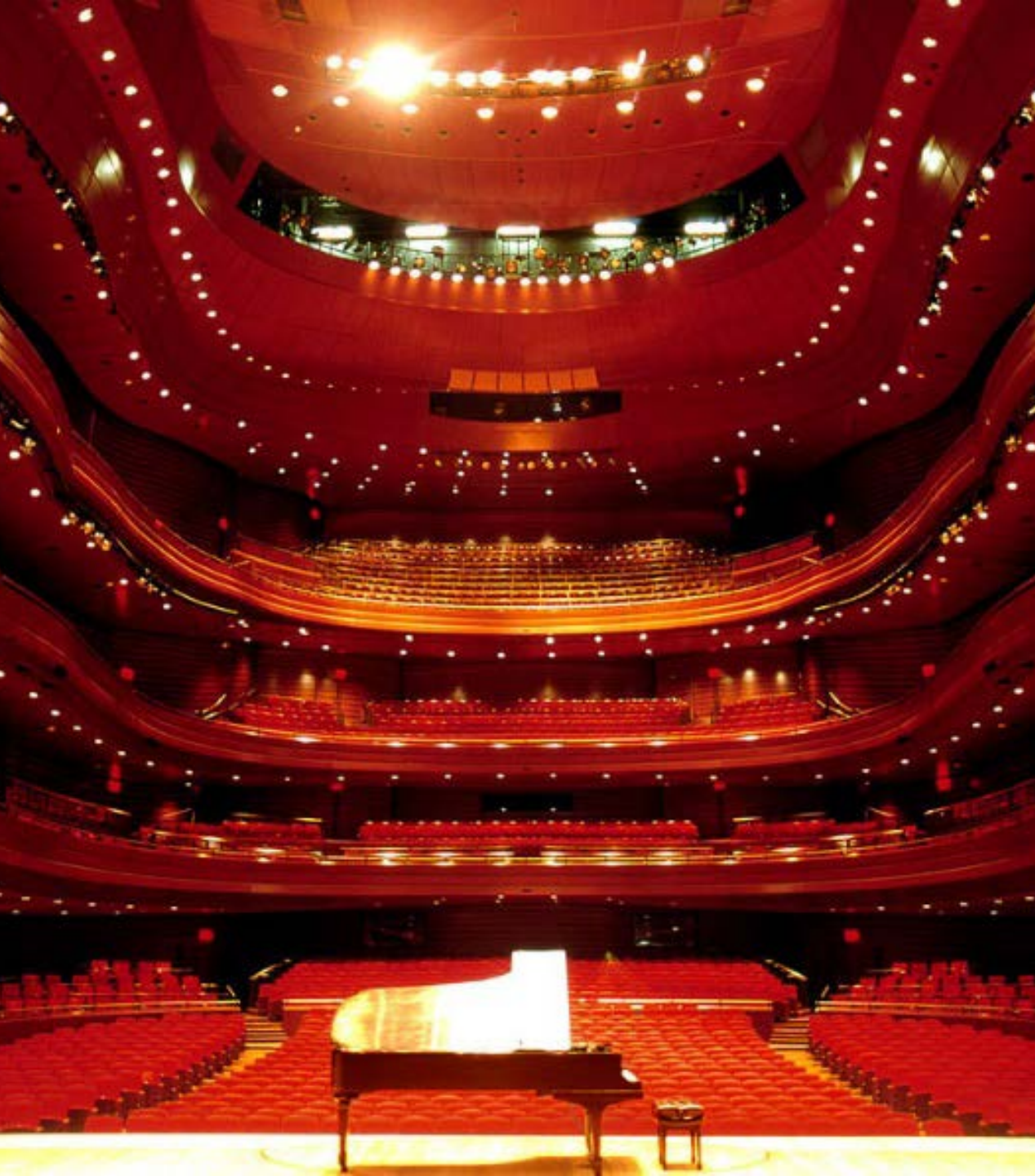
TwoPoint4 Dance Theatre

Respondent Activity Location

Most respondents indicate that they currently program in Sacramento and Rancho Cordova; some in nearby Folsom

In which cities do the majority of your programs take place? (Check up to three)

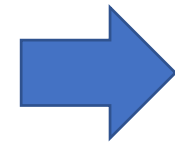




Respondents' Current Activity Varies

23

Avg # annual performances

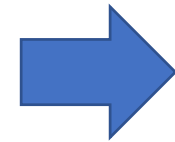


6,700

Avg annual attendance

250

Avg # annual workshops/classes



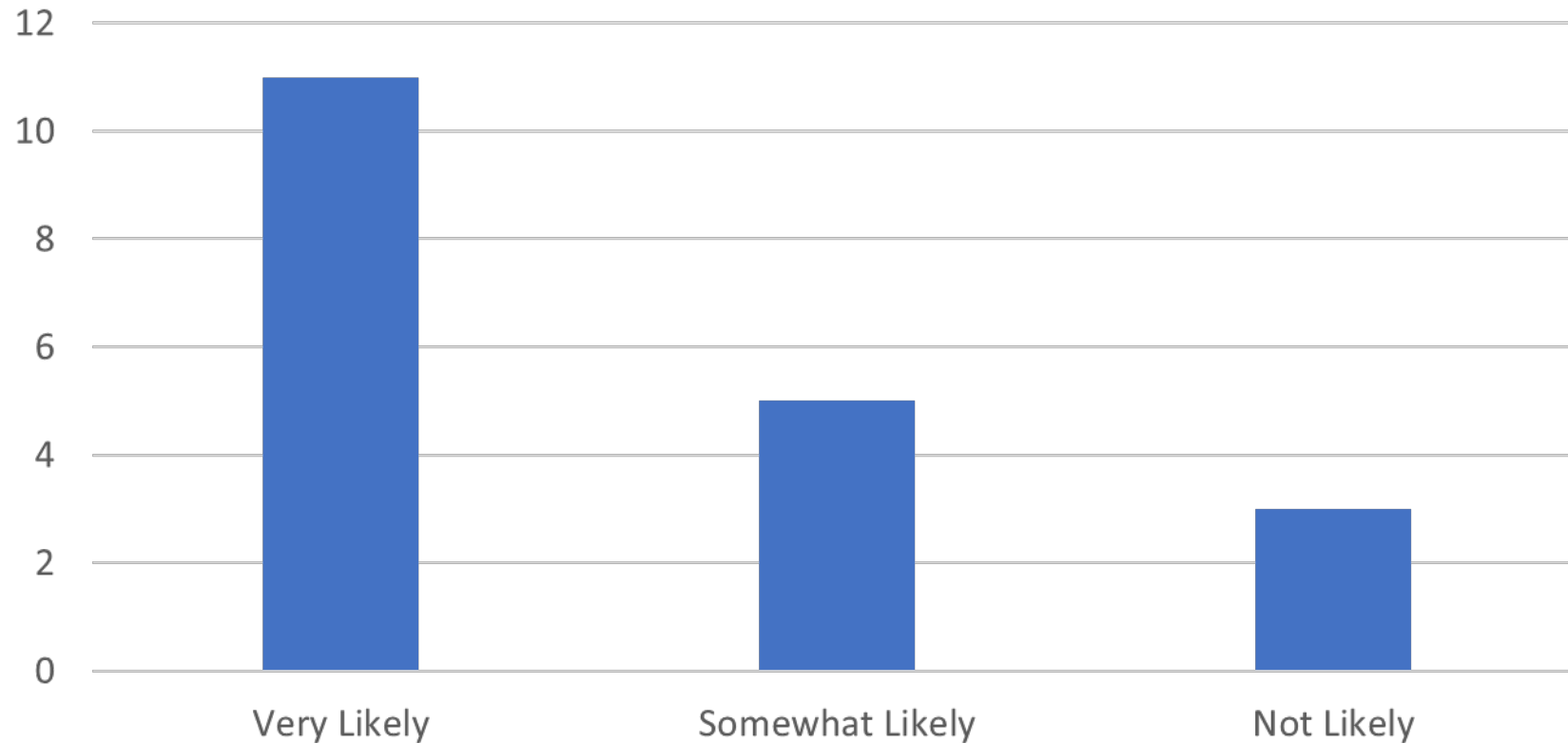
2,900

Avg annual attendance

Rancho Cordova Venue

16 respondents are likely to use a new venue in Rancho Cordova

How likely are you to use a new performance venue located in Rancho Cordova, assuming it meets your needs?



Rancho Cordova Venue

Most respondents need classroom space and a fixed proscenium



14

Classroom space



13

Proscenium stage
with fixed seating



9

Rehearsal room



8

Flexible black box

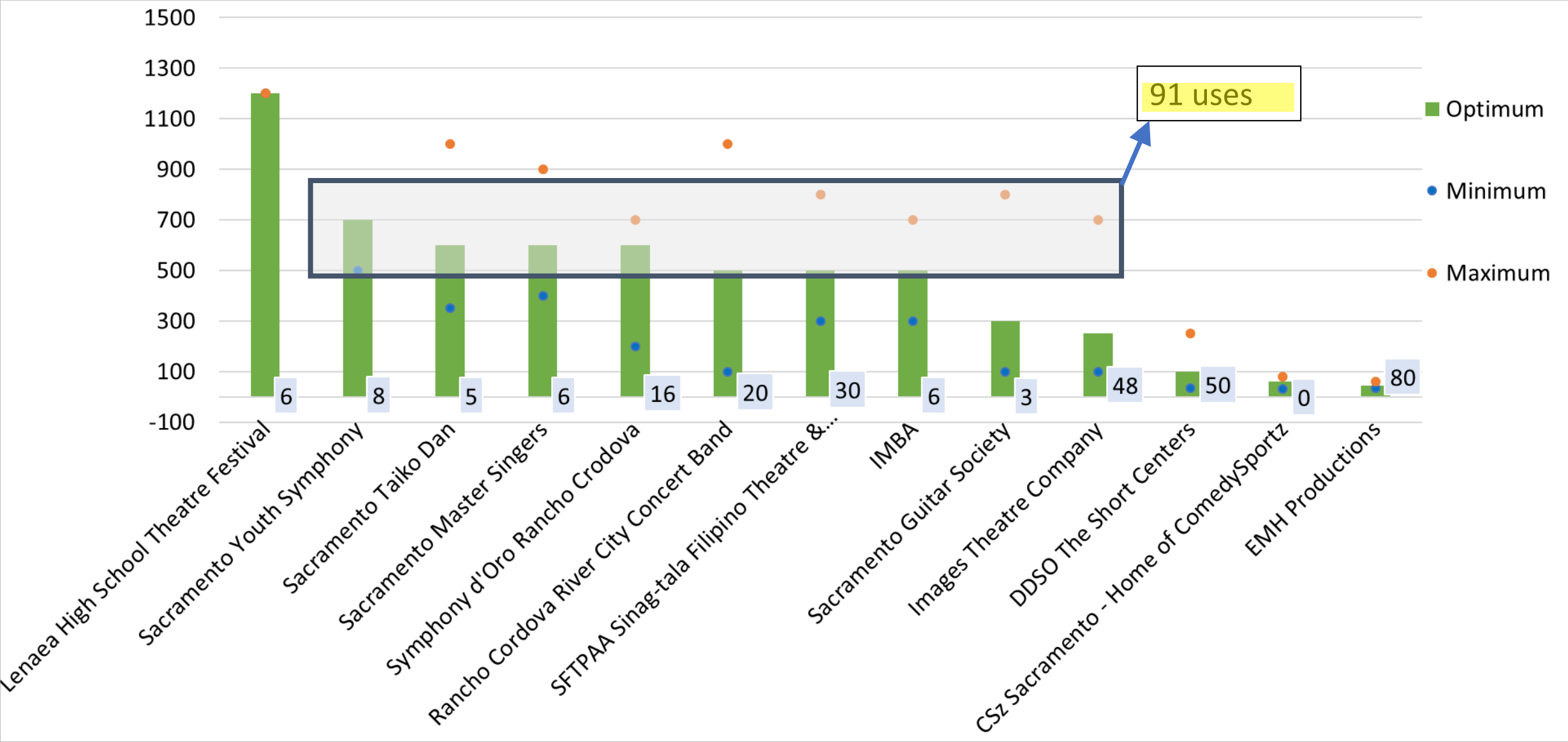


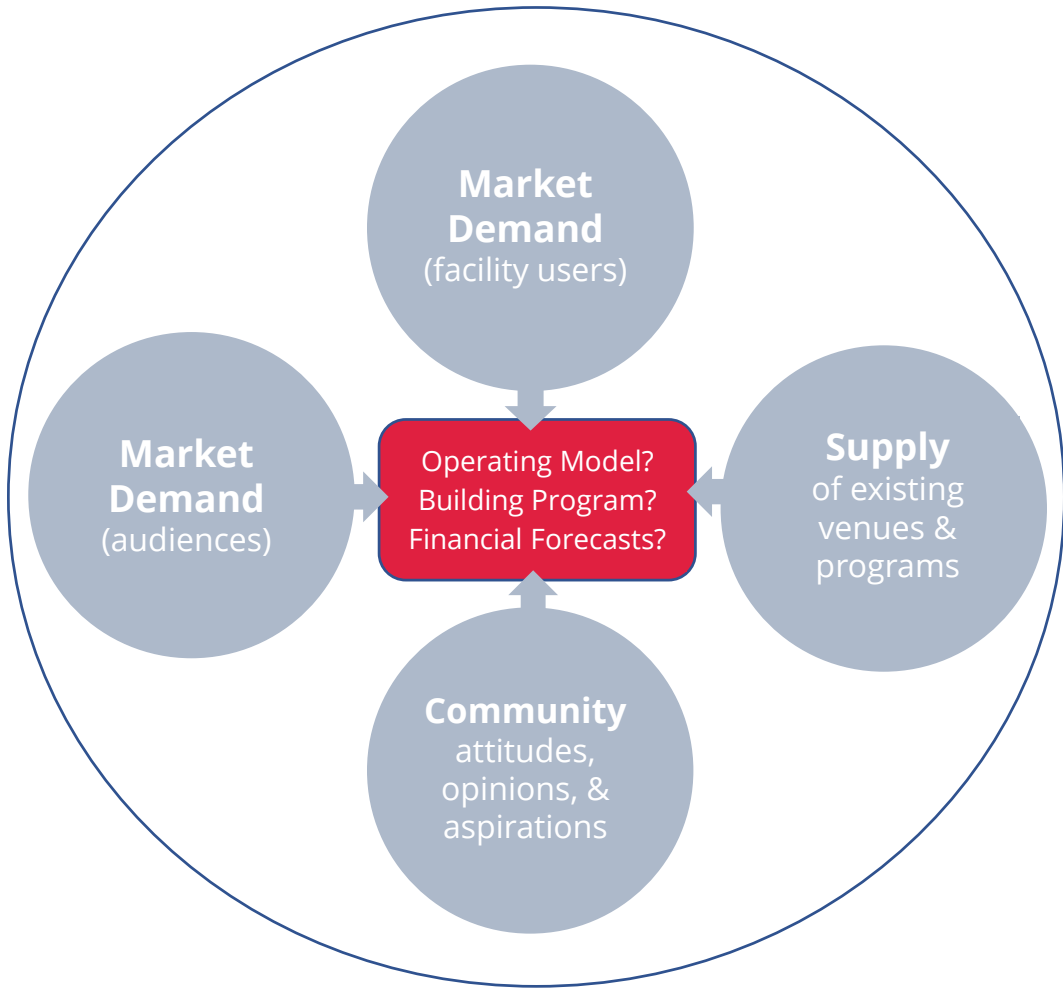
4

Thrust stage

Rancho Cordova Venue

Greatest demand is between 500 – 850 seats





Potential Direction Discussion



Directions

Performance Space



Directions

Class Space



Classes



Summer Arts Camp



Ceramic Arts (8)



Culinary Arts (1)



Dance (22)



Drama (1)



Drawing & Painting (10)



Fiber Arts (3)



Foreign Languages (3)



Healing Arts (7)



Martial Arts (6)



Music (4)

Directions

Rehearsal Space



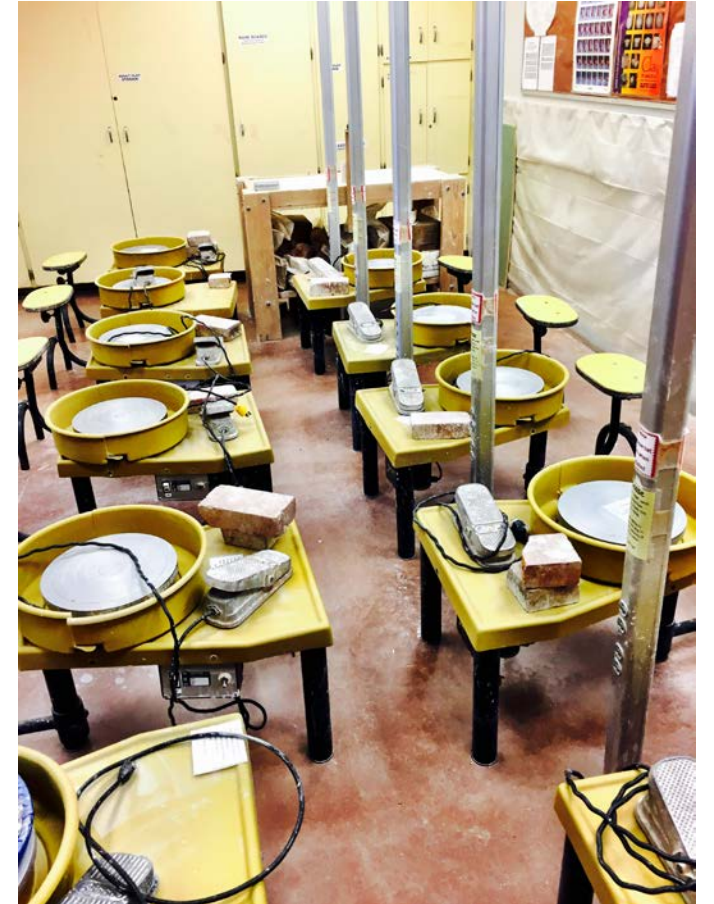
Directions

Meeting Space



Directions

Maker Space & Art Studios

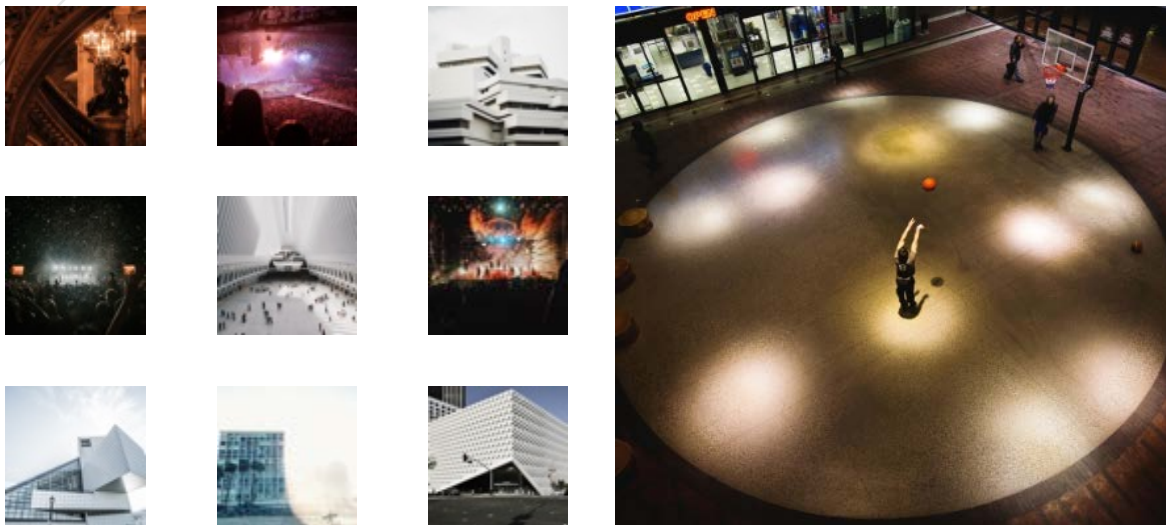


Directions

Outdoor Space



Thank you



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