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.
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

- Market Demand (audiences)
  - Community attitudes, opinions, & aspirations
- Operating Model? Building Program? Financial Forecasts?
- Supply of existing venues & programs
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 DETERMINATION

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.
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.
Consumer Segmentation

Cultural Consumers – Primary Market

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

1. (11.74%) **Country Squires | Segment #5**
2. (6.23%) **Middleburg Managers | Segment #22**
3. (6.16%) **Bright Lights, Li'l City | Segment #37**
4. (5.30%) **New Melting Pot | Segment #59**
5. (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

<table>
<thead>
<tr>
<th>Segment</th>
<th>Description</th>
<th>Median HH Income</th>
</tr>
</thead>
</table>
| **05-Country Squires** | Recently built homes on sprawling properties  
Baby Boomers who fled the city | $118,000          |
| **22-Middleburg Managers** | Well-educated with white collar jobs  
Reading and outdoor activities  
Saving for retirement | $103,000          |
| **37-Bright Lights, Li'l City** | Well-educated young couples  
Eating out and singing karaoke | $68,000           |
| **59-New Melting Pot** | Young and ethnically diverse  
Work in a mix of service industry jobs  
Gospel music, wrestling, monster trucks | $26,000           |
| **36-Toolbelt Traditionalists** | Empty nesters  
AARP members  
Shop QVC and HSN | $63,000           |
## Consumer Segmentation

### Cultural Consumers - Secondary Market

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

<table>
<thead>
<tr>
<th>Segment</th>
<th>Description</th>
<th>Median HH Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>02-Networked Neighbors</td>
<td>Suburban, million dollar homes, Expensive cars and exclusive clubs, Married with children, high education</td>
<td>$227,000</td>
</tr>
<tr>
<td>07-Money &amp; Brains</td>
<td>High education, white-collar jobs, City living, married with few children, Fashionable homes, expensive cars</td>
<td>$115,000</td>
</tr>
<tr>
<td>03-Movers &amp; Shakers</td>
<td>Suburban, dual-income, Highly educated and business oriented, Age 45-64</td>
<td>$129,000</td>
</tr>
<tr>
<td>19-American Dreams</td>
<td>Upper-middle class, Multilingual and urban, Grocery and convenience stores</td>
<td>$76,000</td>
</tr>
<tr>
<td>12-Cruisin’ to Retirement</td>
<td>Suburban, older couples with grown children out of the house, Vacations, golf, talk radio</td>
<td>$95,000</td>
</tr>
</tbody>
</table>
Area residents index higher than the national average in likelihood to **attend** arts and cultural events.

### Consumer Affinities

**Market Potential**

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

## Cultural Consumers

In a single year, an estimated:

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

Operating Model?  
Building Program?  
Financial Forecasts?  
Market Demand (audiences)  
Market Demand (facility users)  
Supply of existing venues & programs  
Community attitudes, opinions, & aspirations
What we are hearing from stakeholders

There are many visions
Ranging from health and human services to art classes to basketball

The arts are active & supported by City
But could be more so with more + better facilities

Visual and performing arts are envisioned @ civic center
Many interviewees spoke of visual art activities and spaces as well as performing arts

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.
Environmental Scan

- Market Demand (facility users)
- Market Demand (audiences)
- Operating Model? Building Program? Financial Forecasts?
- Supply of existing venues & programs
- Community attitudes, opinions, & aspirations
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

- Operating Model?
- Building Program?
- Financial Forecasts?
- Market Demand (facility users)
- Market Demand (audiences)
- Supply of existing venues & programs
- Community attitudes, opinions, & aspirations

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)
FACILITY NEEDS SURVEY

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 Cordova
TwoPoint4 Dance Theatre
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)
Facility Needs Survey

Respondents’ Current Activity Varies

Avg # annual performances | 23 | Avg annual attendance | 6,700

Avg # annual workshops/classes | 250 | Avg annual attendance | 2,900
Facility Needs Survey

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?

Very Likely

Somewhat Likely

Not Likely
Facility Needs Survey

Rancho Cordova Venue

Most respondents need classroom space and a fixed proscenium

- Classroom space: 14
- Proscenium stage with fixed seating: 13
- Rehearsal room: 9
- Flexible black box: 8
- Thrust stage: 4
FACILITY NEEDS SURVEY

Rancho Cordova Venue

Greatest demand is between 500 – 850 seats

91 uses
Operating Model? Building Program? Financial Forecasts?

Market Demand (audiences)
Market Demand (facility users)

Community attitudes, opinions, & aspirations

Supply of existing venues & programs

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