

Warren County Port Authority

Regional Arts & Culture Center Feasibility Study

Phase 1 Findings

April 21, 2008



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Contents/Agenda

- Background Materials
 - ◆ Summary of key background reports provided by WCPA
- Leadership Interviews
 - ◆ Summary of key issues from 72+ participants
- Market Analysis
 - ◆ Demographics, Lifestyles, MRI Profiles
- Competitive Analysis
- User Needs Analysis
- Potential Models/Concepts
- Observations & Discussion
- List of Interview Participants

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Background Materials

- Otterbein Homes Study, Danter Co., 2007
 - ◆ Situation analysis of assisted-living and related facilities, office and retail in the market area
 - “Based on these factors, it is our opinion that a significant market exists for a wide variety of development alternatives at the subject site.”
 - ◆ Otterbein Town Center will include:
 - Retail/Commercial, Office, Condominiums, Single Family, Rental Housing
 - Study concludes:
 - “The existing and expanded Otterbein facility will be a catalyst to develop a Town Center on the east side of State Route 741 containing retail/business and conventional residential condominiums and apartments.”
 - 7-9 year time frame for development

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Background Materials (cont'd.)

- I-75 Growth Corridor Benchmark Study
Property Advisors and BHDP Architecture, 2007
 - ◆ Considers 19-mile stretch of I-75 from Union Center in Butler County to Austin Road in Warren County
 - ◆ Vision Statement:
 - “The I-75 Growth Corridor will increase access and connectivity, making the Butler/Warren County region a destination as well as regional profit center.”
 - ◆ Six benchmarks are presented, as examples of highway interchange development, cross-jurisdictional cooperation and the right mix of development
 - ◆ Next steps
 - Market & Feasibility Study, Implementation Plan, Design Concepts for Study Areas
 - ◆ Key Concepts:
 - Increased Access/Connectivity, Destination, Balance, Livability, Cooperation
 - I-75 corridor a major focus of future regional growth

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Background Materials (cont'd.)

- Proposed New Warren County Sports Complex, KPMG Study for WCCVB, 2007
 - ◆ Vision to host youth/amateur tournaments, attract out-of-town participants
 - ◆ Proposed Facilities
 - 18 multi-purpose soccer fields, 3,000-seat stadium, 8 baseball/softball fields, multi-purpose field house, parking
 - \$80.4 million total project cost
 - ◆ Projected Use
 - 144 annual events, up to 300,000 participants/spectators a year
 - Estimated economic impact of \$74.2 million in Warren Co
 - 1,200 FTE jobs, \$670,000 in county taxes, \$2.2 million in state taxes
 - ◆ Report includes:
 - Market strengths and weaknesses
 - Other area attractions, tourism infrastructure
 - Descriptions of comparable sports complexes
 - Analysis of operating expenses, potential revenue
 - Funding strategies (case studies)

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Background Materials (cont'd.)

- Warren County Economic Development Strategic Analysis, The Kinnett Consulting Group, 2006
 - ◆ Identifies and prioritizes the most developable sites in Warren County
 - ◆ Five targeted industry clusters
 - Biotechnology/Life Science, Distribution Warehousing & Logistics, Plastics & Chemical, Aerospace, Automotive
 - ◆ Focus on:
 - Specific sites assessed and recommended for potential business/industrial development
 - Transportation corridors
 - Economic development incentives (state and local) to attract projects
 - Marketing Plan – specific steps to attract and retain business

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Leadership Interviews

- Determine mission of project
 - ◆ Many counsel that primary goal(s) of WCRACC should be determined:
 - Is it a home for Warren County groups and/or a venue for groups from the region to perform in WC?
 - “Is the goal to have a building, or to touch more people through the arts?”
 - “It doesn’t make financial sense to build a large venue for touring acts given competition from Dayton and Cincinnati, 45-70 mile blackout areas.”
 - ◆ Many cite potential convenience for WC audiences
 - People want to avoid driving to Dayton and/or Cincinnati
 - ◆ Others feel strongly that “arts should not be removed from the urban core”
 - Regional approach at something “complementary”
 - ◆ Would need to demonstrate “value” to access funds
 - ◆ What is the usage of the term “regional”?
 - Has to be seen as drawing more than just Warren County?

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Leadership Interviews (cont'd.)

- County
 - ◆ 2nd fastest growing in OH
 - No net growth in overall region
 - ◆ Dayton-Cincinnati Metroplex to become 15th largest in U.S.
 - ◆ Widespread perception of provincialism, competition between cities
 - ◆ North and south portions don't identify with Warren County
 - Springboro seen as Dayton suburb
 - Mason seen as oriented toward Cincinnati
 - ◆ Several growth-development nodes identified
 - Mostly along I-75, such as at Atrium interchange
 - ◆ County population base seen by several as “bedroom community, little interest in culture or civic activities”
 - Interest in children's schools, sports, etc.
 - “Attendance more about community support, less about passion for the arts”

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Leadership Interviews (cont'd.)

- Tourism

- ◆ WCCVB notes 6.4 million visitors

- King's Island, Great Wolf Lodge, ATP, Beach Water Park, Bike Trails, Canoe Rentals, Antiques, Festivals
- Promoting concept for Sports Complex to attract amateur and youth tournaments

- Media

- ◆ Portions of Warren Co served by Dayton and Cincinnati media

- Costly to advertise in both

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Leadership Interviews (cont'd.)

- Project Concept

- ◆ Performance venue, space for art exhibits, are considered "givens"

- Opportunity for family and children's programming noted

- ◆ Some interest in classroom space for arts education

- Many cite abundant competition:
 - Middletown, Hamilton (Fitton Center), YMCA
- Track record of Dayton groups' attempt to serve Warren Co.
- Some note after-school enrichment classes are filled K-6
 - Mason & Lebanon, at school sites

- ◆ Some cite need for meeting space to host conferences, proms, trade shows, special events

- Others note Great Wolf Lodge, Bowling & Conference Center will begin to meet these needs
- Proposed Conference Center at Austin Rd. and I-75?

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Leadership Interviews (cont'd.)

- Project Concept (cont'd.)
 - ◆ Some suggest consideration of amphitheater
 - ◆ Many suggest no need for another Schuster or Aranoff (size), but something complementary
 - Suggest 300-400, or 500-900 seats? (Dayton interviews)
 - ◆ Could host gatherings
 - Schuster lobby has become popular site for events
 - ◆ Concern about sustainability, programming vision
 - MUM presenting program “struggling” in 750-seat venue
 - ◆ Fitton Center
 - Cited as example of community art center that draws from nearby townships

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Leadership Interviews (cont'd.)

- Location
 - ◆ County could possibly provide a site
 - Armco Park near proposed sports complex?
 - Warren Co Fairgrounds?
 - ◆ Cincinnati Zoo-owned farm (seen as unlikely)
 - ◆ Somewhere along I-75 (per Corridor Study)
 - Monroe exit? Atrium area?
 - ◆ Bishop Fenwick High School
 - Currently no performance venue, but have land for development
 - ◆ Original “LTC Site” at Countryside Y
 - 3 acres site still an option for LTC through 2009 (?)
 - ◆ South of 48 & 71 (former Rivers Crossing development site)
 - Noted as ideal mid-point between Lebanon and Mason

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Leadership Interviews (cont'd.)

● Location (cont'd.)

◆ Lebanon

- City representatives tout historic downtown, restaurants, track record of festivals, some potential for limited funding

◆ San Mar Gale

- Major mixed-use development

◆ Mason

- A few cite upper income families, Mason-based arts groups

◆ Otterbein

- Vision for multi-generational, multi-use retirement community
 - “Equity-based housing with portable services”
- General consensus that it is a good, neutral site, but concerns:
 - Lack of freeway access, distance from Mason
 - Timeline, economy, to realize vision (Build out to 8,500 in 20 years?)
 - Difficult for many to see Otterbein as more than a retirement home
 - Many note arts patrons want proximate restaurants, bars, etc.

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Leadership Interviews (cont'd.)

● Funding

- ◆ County indicates it has no funds to build or operate a Center at the present time

◆ General consensus of a “tax-averse” county

- Several say it needs to be entirely privately funded

◆ Schuster benchmark

- \$100 million public (\$20M from state), \$40 million private, major coalition of politicians, businesses

◆ Funding climate very tough for arts groups

- Cincinnati arts community described as “hanging by its fiscal fingertips”

● Phasing

- ◆ County suggests project should be phased

- “Couldn’t possibly afford it all at one time – should consider a phase 1 of \$7-10 million”

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Leadership Interviews (cont'd.)

● Community Resources/Partners

◆ Education

- Sinclair College 10-classroom campus in WC
 - Could envision classes in theater, dance
- WC Learning Center will serve up to 4,000 students?
- Warren County Career Center
 - Opportunity for technical theater track

◆ Other Cultural Groups (not prospective users)

- Fort Ancient
- WC Historical Society Museum in Lebanon
- The Workshops of David T. Smith
 - Important cultural resource in Warren County

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Leadership Interviews (cont'd.)

● Community Resources/Partners (cont'd.)

◆ Countryside YMCA

- Largest in U.S., total cost of \$17 million since 1975
 - Most recent 80,000 sf addition for \$9.6 million
- 24,000 members, 30,000 participants in all programs
- (Notes on arts education program in subsequent section)

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Leadership Interviews (cont'd.)

● Programming

- ◆ Sense in order to be a “regional” draw will need competitive programming with Dayton and Cincinnati
 - Difficult due to larger houses, Broadway, blackout rules
- ◆ Key observation by many that WC groups are all amateur = lack of professional arts groups
 - Comparatively, “professional groups were ready and able to use Schuster”
 - Some cite difficulty in growing arts groups
 - Dayton Theater Guild’s 8-year effort to raise \$1.5 m, ended up with \$250k

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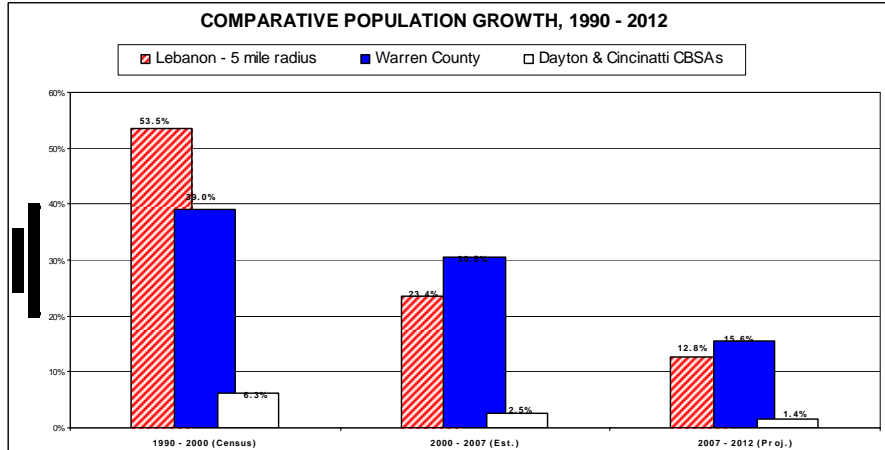
Market Analysis

| SUMMARY OF KEY DEMOGRAPHICS | | | |
|-----------------------------|-------------------------|---------------|------------------------------------|
| Variable | Lebanon - 5 mile radius | Warren County | Dayton & Cincinnati Combined CBSAs |
| 2007 Estimated Population | 41,268 | 206,750 | 2,930,639 |
| 2000 Population | 33,434 | 158,383 | 2,857,785 |
| Median Age | 34.2 | 35.6 | 37.0 |
| % Generation Y (5-17 yrs) | 21.5% | 20.8% | 21.2% |
| % Generation X (18-34 yrs) | 33.9% | 31.2% | 27.1% |
| % Baby Boomers (35-59 yrs) | 22.2% | 24.8% | 25.9% |
| % Mature (60+ Yrs) | 10.2% | 9.6% | 12.6% |
| Median Household Income | \$59,724 | \$68,489 | \$51,317 |
| % over \$75,000 | 32.4% | 40.2% | 26.9% |
| % with College Degree | 21.5% | 29.5% | 24.4% |
| Households with Children | 40.7% | 41.9% | 35.5% |
| % Black | 10.9% | 3.3% | 12.6% |
| % Asian | 1.1% | 3.1% | 1.6% |
| % Hispanic (all races) | 1.9% | 1.6% | 1.6% |

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Market Analysis (cont'd.)



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Market Analysis (cont'd.)

- Index of 100 = average
- Warren County market slightly above average on all

| Lifestyle Attribute | Lebanon | Warren County | Dayton & Cincinnati-Paradise Combined CBSAs |
|-----------------------------------|---------|---------------|---------------------------------------------|
| Belong to an Arts Association (A) | 95 | 111 | 99 |
| Buy Classical Music (A) | 90 | 102 | 100 |
| Go to Live Theater 1yr (A) | 93 | 101 | 103 |
| Go to Museum 1yr (A) | 106 | 119 | 102 |
| Go to Rock/Pop Concert (A) | 99 | 115 | 104 |
| Go to Music/Dance Performance (A) | 98 | 111 | 103 |
| Interested in the Arts (A) | 98 | 108 | 101 |

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Market Analysis (cont'd.)

- Top Prizm segments (out of 66)
- 11 segments account for 61% of population in Warren County
- 11 segments account for 81% of population in 5-mile radius

PRIZM NE PROFILE REPORT

Lebanon Place vs. Warren County

| Seg. # | Segment Title | Warren County | | Lebanon 5-Mile | | %Pen | Index |
|--------|----------------------|---------------|--------------|----------------|----------------|--------------|------------|
| | | Base Count | Base %Comp | Analysis Count | Analysis %Comp | | |
| 5 | Country Squires | 9,011 | 12.0% | 1,885 | 13.7% | 20.9% | 114 |
| 9 | Big Fish, Small Pond | 3,571 | 4.8% | 707 | 5.1% | 19.8% | 108 |
| 11 | God's Country | 4,372 | 5.8% | 756 | 5.5% | 17.3% | 94 |
| 20 | Fast-Track Families | 3,255 | 4.4% | 785 | 5.7% | 24.1% | 131 |
| 23 | Greenbelt Sports | 3,267 | 4.4% | 889 | 6.5% | 27.2% | 148 |
| 25 | Country Casuals | 3,958 | 5.3% | 488 | 3.6% | 12.3% | 67 |
| 28 | Traditional Times | 3,901 | 5.2% | 990 | 7.2% | 25.4% | 138 |
| 32 | New Homesteaders | 6,028 | 8.1% | 1,561 | 11.4% | 25.9% | 141 |
| 37 | Mayberry-ville | 4,591 | 6.1% | 1,145 | 8.3% | 24.9% | 136 |
| 42 | Red, White & Blues | 1,658 | 2.2% | 836 | 6.1% | 50.4% | 275 |
| 48 | Young & Rustic | 1,979 | 2.6% | 1,025 | 7.5% | 51.8% | 282 |
| | Total | 74,832 | 60.9% | 13,743 | 80.5% | 18.4% | 100 |

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Market Analysis (cont'd.)

05 Country Squires

The wealthiest residents in exurban America live in Country Squires, an oasis for affluent Baby Boomers who've fled the city for the charms of small-town living. In their bucolic communities noted for their recently built homes on sprawling properties, the families of executives live in six-figure comfort. Country Squires enjoy country club sports like golf, tennis and swimming as well as skiing, boating and biking.

Group: [Landed Gentry](#)

CY2002 Statistics:

US Households: 1,976,217 (1.83%)

US Population: 6,137,628 (2.14%)

Median HH Income: \$91,046

Lifestyle Traits

1. Have broadband Internet access
2. Go skiing
3. Read USA Today
4. Watch The Disney Channel
5. Drive a GMC Denali

Demographics Traits:

Ethnic Diversity: Mostly White
 Family Types: Families
 Age Ranges: 35-64
 Education Levels: College Grad+
 Employment Levels: Professional
 Housing Types: Homeowners
 Urbanicity: Town
 Income: Wealthy



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Market Analysis (cont'd.)

09 Big Fish, Small Pond

Older, upper-class, college-educated professionals, the members of Big Fish, Small Pond are often among the leading citizens of their small-town communities. These upscale, empty-nesting couples enjoy the trappings of success, belonging to country clubs, maintaining large investment portfolios and spending freely on computer technology.

Group: Landed Gentry

CY2002 Statistics:

US Households: 2,865,814 (2.66%)
US Population: 7,523,707 (2.62%)
Median HH Income: \$70,908

Lifestyle Traits

1. Go cross-country skiing
2. Own a vacation/wknd home
3. Read Southern Living
4. Listen to classical radio
5. Drive a Cadillac de Ville

Demographics Traits:

Ethnic Diversity: Mostly White
Family Types: Couples
Age Ranges: 45+
Education Levels: College Grad+
Employment Levels: Professional
Housing Types: Homeowners
Urbanicity: Town
Income: Upscale



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Market Analysis (cont'd.)

11 God's Country

When city dwellers and suburbanites began moving to the country in the 1970s, God's Country emerged as the most affluent of the nation's exurban lifestyles. Today, wealthier communities exist in the hinterlands, but God's Country remains a haven for upper-income couples in spacious homes. Typically college-educated Baby Boomers, these Americans try to maintain a balanced lifestyle between high-power jobs and laid-back leisure.

Group: Landed Gentry

CY2002 Statistics:

US Households: 1,771,463 (1.64%)
US Population: 4,767,937 (1.66%)
Median HH Income: \$73,663

Lifestyle Traits

1. Travel to the Caribbean
2. Use Internet to trade stocks
3. Read Airline magazines
4. Listen to Wall St Journal radio
5. Drive a Porsche

Demographics Traits:

Ethnic Diversity: Mostly White
Family Types: Couples
Age Ranges: 35-64
Education Levels: College Grad+
Employment Levels: Professional
Housing Types: Homeowners
Urbanicity: Town
Income: Upscale



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Market Analysis (cont'd.)

20 Fast-Track Families

With their upper-middle-class incomes, numerous children and spacious homes, Fast-Track Families are in their prime acquisition years. These middle-aged parents have the disposable income and educated sensibility to want the best for their children. They buy the latest technology with impunity: new computers, DVD players, home theater systems and video games. They take advantage of their rustic locales by camping, boating and fishing.

Group: [Landed Gentry](#)

CY2002 Statistics:

US Households: 1,598,118 (1.48%)
US Population: 4,878,024 (1.7%)
Median HH Income: \$65,054

Lifestyle Traits

1. Own a power boat
2. Belong to book clubs
3. Read Country Living
4. Watch New Yankee Workshop
5. Drive a GMC Yukon

Demographics Traits:

Ethnic Diversity: White
Family Types: Families
Age Ranges: 25-54
Education Levels: H.S./College
Employment Levels: Prof, White-Collar
Housing Types: Homeowners
Urbanicity: Town
Income: Upper Middle



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Market Analysis (cont'd.)

23 Greenbelt Sports

A segment of middle-class exurban couples, Greenbelt Sports is known for its active lifestyle. Most of these middle-aged residents are married, college-educated and own new homes; about a third have children. And few segments have higher rates for pursuing outdoor activities such as skiing, canoeing, backpacking, boating and mountain biking.

Group: [Country Comfort](#)

CY2002 Statistics:

US Households: 1,820,922 (1.69%)
US Population: 4,607,310 (1.61%)
Median HH Income: \$51,151

Lifestyle Traits

1. Go mountain biking
2. Buy self-help books
3. Read Self
4. Watch Professional wrestling
5. Drive a Ford F-super duty

Demographics Traits:

Ethnic Diversity: Mostly White
Family Types: Mix
Age Ranges: 25-54
Education Levels: H.S./College
Employment Levels: WC, BC, Farm
Housing Types: Homeowners
Urbanicity: Town/Rural
Income: Midscale



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Market Analysis (cont'd.)

25 Country Casuals

There's a laid-back atmosphere in Country Casuals, a collection of middle-aged, upper-middle-class households that have started to empty-nest. Workers here -and most households boast two earners- have well-paying blue- or white collar jobs, or own small businesses. Today these Baby-Boom couples have the disposable income to enjoy traveling, owning timeshares and going out to eat.

Group: Landed Gentry

CY2002 Statistics:

US Households: 1,425,813 (1.32%)
US Population: 3,962,169 (1.38%)
Median HH Income: \$59,421

Lifestyle Traits

1. Buy collectibles by mail/phone
2. Belong to a civic club
3. Read Hunting/fishing mags
4. Watch Country Music TV
5. Drive a Dodge Ram pickup

Demographics Traits:

Ethnic Diversity: Mostly White
Family Types: Couples
Age Ranges: 35-64
Education Levels: H.S./College
Employment Levels: WC, BC, Farm
Housing Types: Homeowners
Urbanicity: Town/Rural
Income: Upper Middle



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Market Analysis (cont'd.)

28 Traditional Times

Traditional Times is the kind of lifestyle where small-town couples nearing retirement are beginning to enjoy their first empty-nest years. Typically in their fifties and sixties, these middle-class Americans pursue a kind of granola-and-grits lifestyle. On their coffee tables are magazines with titles ranging from Country Living and Country Home to Gourmet and Forbes. But they're big travelers, especially in recreational vehicles and campers.

Group: Country Comfort

CY2002 Statistics:

US Households: 2,863,285 (2.66%)
US Population: 7,113,839 (2.48%)
Median HH Income: \$46,150

Lifestyle Traits

1. Own a stationary bike
2. Eat at Bob Evans
3. Read Country Home
4. Watch Hallmark Hall of Fame
5. Drive a Buick Park Avenue

Demographics Traits:

Ethnic Diversity: Mostly White
Family Types: Singles/Couples
Age Ranges: 55+
Education Levels: H.S./College
Employment Levels: WC, BC, Farm
Housing Types: Homeowners
Urbanicity: Town/Rural
Income: Midscale



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Market Analysis (cont'd.)

32 New Homesteaders

Young, middle-class families seeking to escape suburban sprawl find refuge in New Homesteaders, a collection of small rustic townships filled with new ranches and Cape Cods. With decent-paying jobs in white-collar and service industries, these dual-income couples have fashioned comfortable, child-centered lifestyles, their driveways filled with campers and powerboats, their family rooms with PlayStations and Game Boys.

Group: [Country Comfort](#)

CY2002 Statistics:

US Households: 1,865,389 (1.73%)
US Population: 5,429,431 (1.89%)
Median HH Income: \$50,213

Lifestyle Traits

1. Buy toys by mail and phone
2. Play volleyball
3. Read Woman's World
4. Watch Wonderful World Disney
5. Drive a Pontiac Montana minivan

Demographics Traits:

Ethnic Diversity: White, AmInd
Family Types: Families
Age Ranges: 25-44
Education Levels: High School
Employment Levels: WC, Service, BC
Housing Types: Homeowners
Urbanicity: Town
Income: Midscale



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Market Analysis (cont'd.)

37 Mayberry-ville

Like the old Andy Griffith show set in a quaint picturesque berg, Mayberry-ville harks back to an old-fashioned way of life. In these small towns, middle-class couples and families like to fish and hunt during the day, and stay home and watch TV at night. With lucrative blue-collar jobs and moderately priced housing, residents use their discretionary cash to purchase boats, campers, motorcycles and pickup trucks.

Group: [Country Comfort](#)

CY2002 Statistics:

US Households: 2,078,248 (1.93%)
US Population: 5,493,964 (1.92%)
Median HH Income: \$44,194

Lifestyle Traits

1. Eat at Cracker Barrel
2. Own a satellite dish
3. Read Field & Stream
4. Watch NASCAR Winston Cup
5. Drive a full-size Ford pickup

Demographics Traits:

Ethnic Diversity: Mostly White
Family Types: Mix
Age Ranges: 35-64
Education Levels: High School
Employment Levels: Blue-Collar, Farm
Housing Types: Homeowners
Urbanicity: Rural
Income: Midscale



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Market Analysis (cont'd.)

42 Red, White & Blues

The residents of Red, White & Blues typically live in exurban towns rapidly morphing into bedroom suburbs. Their streets feature new fast-food restaurants, and locals have recently celebrated the arrival of chains like Wal-Mart, Radio Shack and Payless Shoes. Middle-aged, high school educated and lower-middle class, these folks tend to have solid, blue-collar jobs in manufacturing, milling and construction.

Group: [Middle America](#)

CY2002 Statistics:

US Households: 898,091 (0.83%)

US Population: 2,261,041 (0.79%)

Median HH Income: \$38,895

Lifestyle Traits

1. Support environmental causes
2. Do drawing and painting
3. Read Hot Rod
4. Watch TVLand
5. Drive a Chevy Tracker

Demographics Traits:

Ethnic Diversity: White

Family Types: Mix

Age Ranges: 25-44

Education Levels: High School

Employment Levels: Service, Blue-Collar

Housing Types: Homeowners

Urbanicity: Town

Income: Lower Middle



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Market Analysis (cont'd.)

48 Young & Rustic

Like the soap opera that inspired its nickname, Young & Rustic is composed of young, restless singles. Unlike the glitzy soap denizens, however, these folks tend to be lower income, high school-educated and living in tiny apartments in the nation's exurban towns. With their service industry jobs and modest incomes, these folks still try to fashion fast-paced lifestyles centered on sports, cars and dating.

Group: [Rustic Living](#)

CY2002 Statistics:

US Households: 1,544,504 (1.43%)

US Population: 3,787,904 (1.32%)

Median HH Income: \$31,061

Lifestyle Traits

1. Play basketball
2. Eat convenience store meals
3. Read Motorcycle magazines
4. Watch Days of Our Lives
5. Drive a Ford Escort

Demographics Traits:

Ethnic Diversity: White, AmInd

Family Types: Mix

Age Ranges: <35

Education Levels: High School

Employment Levels: Service, Blue-Collar

Housing Types: Renters

Urbanicity: Town

Income: Downscale



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Competitive Analysis

| Venue | Location | Seats | Notes |
|-----------------------------|-------------|-------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dayton Area | | | |
| Fraze Pavilion | Kettering | 4,300 | <ul style="list-style-type: none"> Outdoor amphitheater |
| Mead Theater (Schuster) | Dayton | 2,325 | <ul style="list-style-type: none"> Multiple presenting series (Broadway) Managed by Victoria Theater Association Typical blackout area of 45-70 miles 6-12 months after |
| Centreville High School | Centreville | 1,217 | <ul style="list-style-type: none"> Opened December 2007, will begin rentals soon |
| Victoria Theater | Dayton | 1,152 | <ul style="list-style-type: none"> Home to Variety Series, part of Broadway Series |
| University of Dayton | Dayton | 800 | <ul style="list-style-type: none"> Recently announced plans to develop, with black box Stated intent to help "meet needs of the Dayton region" |
| Stivers School for the Arts | Dayton | 600 | <ul style="list-style-type: none"> Public magnet school, hall opened February 2008 |
| Loft Theater | Dayton | 219 | <ul style="list-style-type: none"> Home to Human Race Theater Company |
| Warren County | | | |
| Lebanon Junior High | Lebanon | 1,100 | <ul style="list-style-type: none"> Rented by Symphony, dance schools, 6-12 times/year |
| Lebanon Entertainment Ctr. | Lebanon | 1,000 | <ul style="list-style-type: none"> Banquet and bowling center opening summer 2008 |
| Franklin High School | Springboro | 900 | <ul style="list-style-type: none"> Used twice monthly by outside renters |
| La Commedia Dinner Thtr | Springboro | 612 | <ul style="list-style-type: none"> 8 shows/week, 6 productions annually |
| Springboro High School | Springboro | 600 | <ul style="list-style-type: none"> Infrequent rentals to outside groups (dance recitals) |
| Lebanon Presbyterian | Lebanon | 450 | <ul style="list-style-type: none"> Used by Lebanon Symphony, 1-2 times/year |
| Shoe Factory Antique Mall | Lebanon | 102 | <ul style="list-style-type: none"> Home to Lebanon Theater Company |
| Mason | | | |
| Mason HS | Mason | 1,174 | <ul style="list-style-type: none"> Rentals for recitals, community theater (Mason Players), cultural events, as available |
| Great Wolf Lodge | Mason | 1,036 | <ul style="list-style-type: none"> Theater-style seating in conference center |
| Mason Middle School | Mason | 740 | <ul style="list-style-type: none"> Rentals for recitals, community theater (Mason Players), cultural events, as available |

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Competitive Analysis (cont'd.)

| | | | |
|-------------------------------------------|------------|-------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Cincinnati | | | |
| Springer Auditorium (Music Hall) | Cincinnati | 3,516 | <ul style="list-style-type: none"> Home to CSO, Opera, May Festival Chorus |
| P&G Hall (Aranoff) | Cincinnati | 2,719 | <ul style="list-style-type: none"> Multiple resident companies, presenting seasons, Broadway |
| Marx Theater | Cincinnati | 624 | <ul style="list-style-type: none"> Playhouse in the Park resident theater company |
| Memorial Hall | Cincinnati | 612 | <ul style="list-style-type: none"> Home to CSO Chamber Players |
| Jarson-Kaplan Theater | Cincinnati | 437 | <ul style="list-style-type: none"> Multiple resident companies, at Aranoff Center |
| Shelterhouse Theatre | Cincinnati | 229 | <ul style="list-style-type: none"> Playhouse in the Park resident theater company |
| Fifth Third Bank Studio | Cincinnati | 150 | <ul style="list-style-type: none"> At Aranoff Center |
| Other (Butler County) | | | |
| Blue Ash PA & Conference Ctr | Blue Ash | 1,200 | <ul style="list-style-type: none"> Recently announced plans for 40k sf center, \$35 million budget, 130 acre city site near airport, seeking state funding |
| Fairfield High School | Fairfield | 800 | <ul style="list-style-type: none"> Used by summer theater program |
| Sorg Opera House | Middletown | 750 | <ul style="list-style-type: none"> |
| Finkleman Auditorium - Miami U Middletown | Middletown | 749 | <ul style="list-style-type: none"> Home to Middletown Symphony Concerts |
| Parrish Auditorium - Miami U Hamilton | Hamilton | 450 | <ul style="list-style-type: none"> Over 80 dates per year, community theater, rentals |
| Fairfield Community Art Ctr | Fairfield | 237 | <ul style="list-style-type: none"> Part of center with gallery, community rooms |
| Fitton Center | Hamilton | 160 | <ul style="list-style-type: none"> Resident theater company, modest music presenting series |

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Competitive Analysis (cont'd.)

- Countryside YMCA Arts classes
 - ◆ 2,093 students in arts and education classes
 - 83 classes offered, some multiple sessions
 - Majority are dance (43 classes), all ages, multiple disciplines
 - 200 students in children's ballet classes
 - Visual Art: Drawing, animation, pottery,
 - Music: SW OH Home school band, pre-school music
 - Theater: Acting, musical theater for kids
 - ◆ Average costs \$32-45 for 5 weeks, 45-60 minute classes

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User Needs Analysis

- 21 Potential User Group Responses
 - ◆ Survey e-mailed to lists of arts/cultural organizations in Warren County, Dayton (by CultureWorks), Cincinnati (by FAF)
 - Augmented through personal and telephone interviews
 - ◆ Space Needs
 - 17 want Performance Space (4 No)
 - 8 want Rehearsal Space (13 No)
 - 6 want Classroom Space (15 No)
 - Dance Studio, Visual arts classroom
 - 5 want Office Space (16 No)

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User Needs Analysis (cont'd.)

- Individual Users

- ◆ Lebanon Symphony

- Currently performs 5-6 concerts annually
 - At Lebanon Jr. High (1,100 seats), Urban Crest Baptist Church (up to 1,400 seats)

- ◆ WCAC envisions presenting

- Currently runs Arts Festival, scholarship program
- Would require 800 to 1,200 seats, up to 5-10 events/year

- ◆ Cincinnati Art Museum

- If developed space with proper climate control and security, would consider loan as to any other institution

- ◆ Kingdom Arts International

- Interest in resident company status

- ◆ Cincinnati Symphony

- 7% of audiences from Warren County, might use occasionally
 - No input on size, configuration

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User Needs Analysis (cont'd.)

- Individual Users (cont'd.)

- ◆ Dayton Groups

- Bach Society
 - Run-outs would place extra demands on singers
 - Problem with County arts grants only for local programs
- Opera
 - No touring – trying to draw regionally to Dayton
- Ballet
 - No margin in run-outs, would require guarantee against loss
- DCDC
 - Being presented at Universities (underwritten by donors)
- Human Race Theater
 - Wouldn't bring a show to WC due to cost, perception that audience is no different

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User Needs Analysis (cont'd.)

- Individual Users (cont'd.)
 - ◆ Dayton Groups (cont'd.)
 - City Folk
 - 15-20 concerts at UD, Victoria, Masonic
 - Draw from WC for Bluegrass
 - Potential for 1-5/year in 600-700 seat venue
 - Philharmonic
 - Potential for smaller scale series, up to 5/year
 - Kettering Children's Choir
 - Once a year at 500-1,000 seats
 - Victoria Theatre Association
 - 4.3% of audiences from Warren County
 - Input from Dayton should not be seen as “negative”
 - Suggestion that smaller (200-300) is better to serve local groups, or up to 500-600 to attract some Dayton-Cincinnati producing companies
 - Joint booking, management opportunities if larger hall is developed

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User Needs Analysis (cont'd.)

- Individual Users (cont'd.)
 - ◆ Acting Up
 - Currently use Mason HS Theater (1,200 seats), but hard to access dates
 - Would envision 2-3/year at 750 seats
 - ◆ Middletown Symphony
 - Potential use depends on size, location, cost of use
 - “Lost shirts” performing in Mason, “no audience there”
 - ◆ Mason Area Arts Council
 - Completed survey, did not indicate prospective usage
 - ◆ YMCA potential usage of 500-600 seat venue
 - Some concern about potential rental costs, location
 - “Huge demand for end of session performances, recitals”

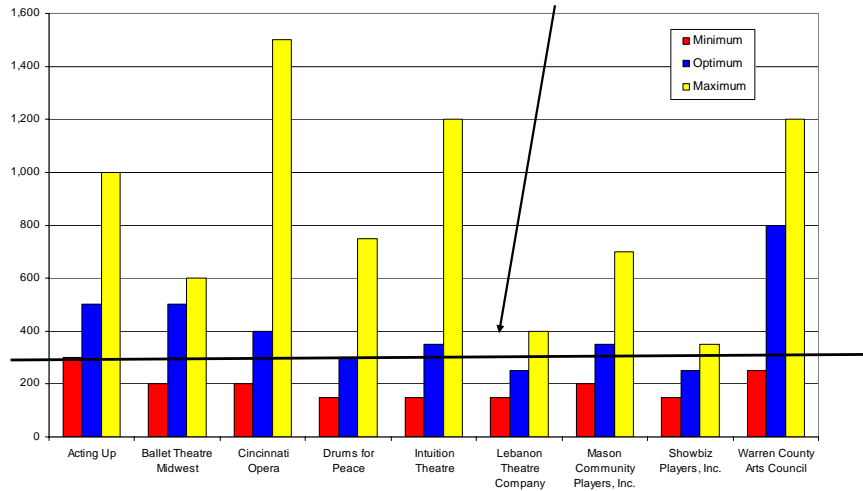
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User Needs Analysis (cont'd.)

- Smaller Capacity – Preferred # of Seats

- 300-350 seats would accommodate most users



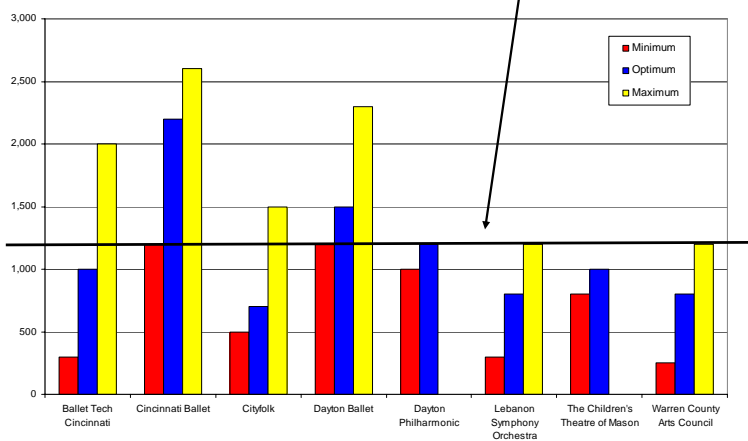
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User Needs Analysis (cont'd.)

- Larger Capacity – Preferred # of Seats

- 1,200 seats would accommodate most users



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User Needs Analysis (cont'd.)

• Smaller Capacity – Potential Annual Usage

| Organization Name | Performance | | Rehearsal/Tech | |
|-------------------------------|-------------|------|----------------|------|
| | Low | High | Low | High |
| Acting Up | 8 | 12 | 10 | 15 |
| Ballet Theatre Midwest | 6 | 12 | 12 | 24 |
| Cincinnati Opera | 3 | 10 | 2 | 3 |
| Drums for Peace | 1 | 5 | 3 | 15 |
| Intuition Theatre | 2 | 20 | 1 | 5 |
| Lebanon Theatre Company | 20 | 35 | 60 | 60 |
| Mason Community Players, Inc. | 20 | 30 | 21 | 35 |
| Showbiz Players, Inc. | 8 | 16 | 21 | 35 |
| Warren County Arts Council | 5 | 10 | 5 | 10 |
| | 73 | 150 | 135 | 202 |

- Warren County Arts Council strongly prefers larger venue to make it's envisioned presenting activity economically viable (see following page).

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User Needs Analysis (cont'd.)

• Larger Capacity – Potential Annual Usage

| Organization Name | Performance | | Rehearsal/Tech | |
|---------------------------------|-------------|------|----------------|------|
| | Low | High | Low | High |
| Ballet Tech Cincinnati | 3 | 3 | 1 | |
| Cincinnati Ballet | 6 | 12 | 18 | 48 |
| Cityfolk | 1 | 5 | 1 | 5 |
| Dayton Ballet | 3 | 5 | 1 | 2 |
| Dayton Philharmonic | 1 | 5 | 1 | 5 |
| The Children's Theatre of Mason | 4 | 8 | 5 | 10 |
| Warren County Arts Council | 5 | 10 | 5 | 10 |
| | 23 | 48 | 32 | 80 |

- Dayton Ballet would only use on a guaranteed no-risk basis (e.g., being "presented" by venue or some other entity).
- Children's Theater of Mason most likely only interested if building were to be built in Mason.
- Warren County Arts Council envisions growing to become a presenting organization.

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User Needs Analysis (cont'd.)

- User Need Issues
 - ◆ Concern about use being expensive for local groups to afford
 - Survey notes average rent willing to pay per performance of \$325
 - Input from BOTH large and small capacity prospective users
 - ◆ Warren County Arts Council concerns/issues
 - Envisioning future programming
 - “Impossible to specify square footage, rents, in a meaningful way”
 - Advocating “comprehensive and deliberative cultural planning process” before facility input can be realistically made
 - Seeking to “appropriately bring the arts community together to co-develop this important programming piece”
 - Vision for WCAC to “serve the broader local arts community with common marketing, administrative, and fundraising support”

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User Needs Analysis

- Most important factors to prospective users (rank order):
 1. Parking
 2. Cost of Use
 3. Safety/Security, Comfort
 4. Aesthetics and ambiance
 5. Ease of Access from Interstates
 6. Availability of nearby dining facilities
 7. Specific Location (little preference for Mason, Lebanon, Otterbein, Springboro)

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Potential Models/Concepts?

- Jeanne B. McCoy Community Center for the Arts, New Albany Center
 - ◆ WRL Architects, opened 2008, cost of \$15 million
 - ◆ Facility
 - 35,000 sq. ft., 786-seat auditorium (with balcony), partial fly loft, lobby for gallery space and events, classrooms, black box rehearsal studio, dance studio, scene shop, three dressing rooms
 - ◆ Governance Structure
 - Jointly owned and run by school district, Village of New Albany and Plain Township
 - Priority use for school district functions
 - ◆ Programming
 - New Albany Community Foundation establishing “Endowed Series in the Arts”
 - Private donations for guest lecturers and artist performances and workshops
 - ◆ Capital Cost
 - \$5 million from New Albany-Plain Local School District (2001 bond issue)
 - \$5 million from the Village of New Albany (Tax Increment Financing)
 - \$3 million from Plain Township (TIF)
 - \$2 million from the New Albany Community Foundation
 - \$1.5 million value of land (donated by New Albany Company)

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Potential Models/Concepts? (cont'd.)

- Carmel, Indiana
 - ◆ Mixed-use redevelopment project in downtown Carmel
 - \$300 million total project cost (\$200m private, \$100m public)
 - \$80m bond paying for concert hall/theater, plus private fundraising
 - Slated for 2010 completion
 - ◆ Planned Arts Facilities
 - 1,600-seat concert hall, 500-seat theater
 - 2 separate buildings, different acoustic needs
 - ◆ Programming
 - No plans yet other than a general idea that it will house local groups and also traveling performance

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Potential Models/Concepts? (cont'd.)

- Great Lakes Shakespeare Festival (WRL)
 - ◆ "Party Suites" at balcony/mezzanine level



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Potential Models/Concepts? (cont'd.)

- Great Lakes Shakespeare Festival (WRL)



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Observations & Conclusions

● Key Issues

- ◆ What is primary mission?
 - Serve and nurture local groups, and/or bring in (“present”) regional and touring artists for convenience of Warren County audiences?
- ◆ Sufficient demand for use by local, regional groups?
- ◆ Sufficient differentiation from Dayton and Cincinnati venues and programs?
- ◆ Appears to be significant demand at 350-seat level (e.g. LTC, Mason Players, etc.)
 - Is there sufficient potential usage to justify expansion to 500-600 seats or does that compromise intimacy of 350-seat capacity?
 - Should 800-1,200 seat venue be considered as a second phase?

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Observations & Conclusions (cont'd.)

● Key Issues (cont'd.)

- ◆ Logical partnerships and/or sources of operating funding?
 - What would potential role(s) of higher education be?
 - Owner and operator role would be beneficial
- ◆ Location
 - Otterbein okay geographically, but concerns about realization of retail and restaurant development
 - Several other potential sites suggested
 - Especially if accommodation of Mason producing groups is important (Mason Players, Children’s Theater, etc.)
- ◆ Extensive low-priced competition for arts education
 - Is there a role for a new player in this area?
- ◆ It’s more about “product” than “audience”
 - Yes, nice to have something local, but what’s going to take place there?

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Interviews

- Scott Anderson, Springboro Councilman
- Sara Ansenau, Lebanon Chamber
- Jerry Banks, Attorney
- Thomas Bankston, Dayton Opera
- Claudia Rudolf Barrett, Ballet Tech Ohio
- Pat Belisle, Middletown Arts Center
- Jane Black, Dayton Visual Arts Center
- Michele Blair, City of Mason
- Stephen Bonadies, Cincinnati Art Museum
- Amy Brewer, Lebanon Mayor
- Otto Budig, OH Arts Facilities Commission
- Dermot Burke, Dayton Ballet
- Ken Burns, Lebanon Police Dept
- Lauren Catlin, Mason Community Players
- Chris Celek, Cox Ohio Publishing
- Josh Chambers, Morrow Councilman
- Sherie Cooper-Darragh, Franklin Chamber
- Charles Cornett, Retired School Superintendent
- Becky Corstanje, Acting Up
- Dick Craig, Warren County Convention & Visitors Bureau
- Natalie DeHorn, Kettering Children's Choir
- Carmon DeLeone, Middletown Symphony & Cincinnati Ballet
- Sally Derrick, Warren County Convention & Visitors Bureau
- Brent Devery, Ohio Dept Public Safety
- David Donovan, Lebanon Symphony Orchestra & Chorus
- Georgia Dunn, Lebanon Community Theatre
- Wayne Dunn, Lebanon Community Theatre
- Linda Fisler, Middletown Art Center Board
- Dave Grupe, Bach Society of Dayton
- Michael Hannigan, Lebanon Fire Chief
- John Harris, Cityfolk
- Ronita Hawes-Saunders, Dayton Contemporary Dance Co.
- Marty Heide, Congressman Turner's office
- Pastor Barb Hobe, Bethany United Church of Christ
- Mary Karr, Muse Machine
- Dionne Kennedy, Victoria Theatre Assn.
- Chris Kershner, Dayton Chamber
- Bruce Lewis, Springboro Intermediate School
- Steve Liles, Franklin City Schools
- Curtis Long, Dayton Philharmonic Orchestra
- Mike McMurray, Business Owner
- Chris Milligan, Cincinnati Opera
- Rick Milligan, Lebanon Christian School
- Steven Monder, Cincinnati Symphony Orchestra
- Jeff Monroe, Lebanon Councilman
- Kevin Moore, The Human Race Theatre
- Ann Mort, Administration Business Service
- Cathy Mulligan, Bishop-Fenwick High School
- John Newsom, Warren County Sheriff's Office
- Rod Nimitz, Miami University Middletown
- Mike Parks, Dayton Foundation
- James Payne, Community Volunteer
- Dick Philpot, Waynesville Councilman
- Meredith Raffel, Mason Area Arts Council
- Denise Rehg, Culture Works
- Matthew Rodriguez, Lebanon Councilman
- Dan Sack, The Fourth R
- Pastor Kevin Schwieger, Turtlecreek Community Church
- Dave Seyer, Director of Development, Culture Works
- Larry Simms, Chief Deputy, Warren County Sheriff's office
- Lyrica Joy Smith, Kingdom Arts International
- Jerri Stanard, K12 Gallery for Young People
- Larry Stone, Founder Warren County Arts Council
- Barb Stonerock
- Sally Struthers, Sinclair Community College
- Arla Tannehill, Area Progress Council of Warren County
- Bill Trick, Chamber of Commerce
- Andy Tsitouris, Warren County Virtual Community School
- Pastor Terri Tyson, Journey Church of Christ
- Tom Wheeler, Abilities First
- Noreen Wilhelm, Rhythm In Shoes
- Georgie Woessner, Dayton Public Radio