



7

Building Program Recommendations



7. Building Program Recommendations

Overview

The purpose of this analysis is to evaluate the physical characteristics and amenities that are recommended to be included as part of the Theater renovation. To make recommendations of potential building program elements, an analysis was conducted through a review of comparable facility characteristics, industry trends and key event promoter feedback in the context of the facility utilization estimates previously outlined.

The remainder of this section provides an assessment of potential building program elements for the renovated Theater according to the following categories:



SEATING CAPACITY

Seating capacity of a live entertainment facility is among the most critical factors that will determine whether a promoter will book a certain venue. Seating capacity plays a key role in setting ticket prices for a show and must be balanced against potential demand.



PREMIUM SEATING

Premium seating, including VIP seats and boxes, constitutes an important revenue-generating component of entertainment venues. The level of premium seating that is supportable in the marketplace is impacted by a variety of factors, including the depth and breadth of the local corporate base, the income characteristics of the local population, the drawing power of the venue's events, and the venue's overall event mix.



OTHER AMENITIES

Ancillary venue amenities, including patron and artist support spaces such as parking, restrooms, concession stands, green rooms and dressing rooms, can play a critical role in cultivating a venue's 'favorable' or 'unfavorable' reputation amongst talent and potential attendees.

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Seating Capacity

An analysis of population per seat at comparable facilities was conducted to examine the appropriate capacity of the renovated Theater. As shown in the table on the right, the average market population per comparable amphitheater seat ranges from approximately 77 to over 2,300, with an average of 653.0 residents per seat. When considering those amphitheaters located in markets most similar to San Antonio in terms of population size, the average market population per comparable amphitheater seat decreases to 386.6.

This comparable market venue penetration analysis indicates that the market could support a Theater capacity of between approximately 3,900 and 6,589, which contains the existing capacity of the Sunken Garden Theater (5,000).

Additionally, discussions with promoters indicated that maintaining the current capacity of approximately 5,000 could fill the perceived market gap within the San Antonio market. Promoters also indicated that much of the market for concerts available in the San Antonio area could be accommodated by a venue of approximately 5,000 capacity, indicating that constructing additional seating likely would not be worth the few additional concerts that could be hosted.

This penetration result, as well as discussions with local live music promoters identifying a market gap in certain-sized local venues, suggest the Theater's current capacity of 5,000 is appropriate for the market.

POPULATION PER SEAT - COMPARABLE VENUES				
Amphitheater	Location	Total Capacity	Metro Population	Population Per Seat
Cuthbert Amphitheater	Eugene, OR	5,000	385,571	77.1
Santa Barbara Bowl	Santa Barbara, CA	4,563	450,084	98.6
Daily's Place	Jacksonville, FL	5,500	1,565,102	284.6
Ascend Amphitheater	Nashville, TN	6,800	1,986,283	292.1
Moody Amphitheater	Austin, TX	5,000	2,231,469	446.3
Charlotte Metro Credit Union Amphitheater	Charlotte, NC	5,000	2,616,243	523.2
Filene Center at Wolf Trap	Vienna, VA	7,024	6,249,043	889.7
Toyota Music Factory	Irving, TX	8,000	7,715,602	964.5
Greek Theatre	Los Angeles, CA	5,870	13,507,681	2,301.1
AVERAGE		5,862	4,078,564	653.0
AVERAGE - COMPARABLE MARKETS		5,575	2,099,774	386.6
ESTIMATED CAPACITY - AVERAGE		3,900	2,547,033	653.0
ESTIMATED CAPACITY - COMPARABLE MARKET AVERAGE		6,589	2,547,033	386.6

Note: Bolded rows indicate comparable markets to San Antonio.

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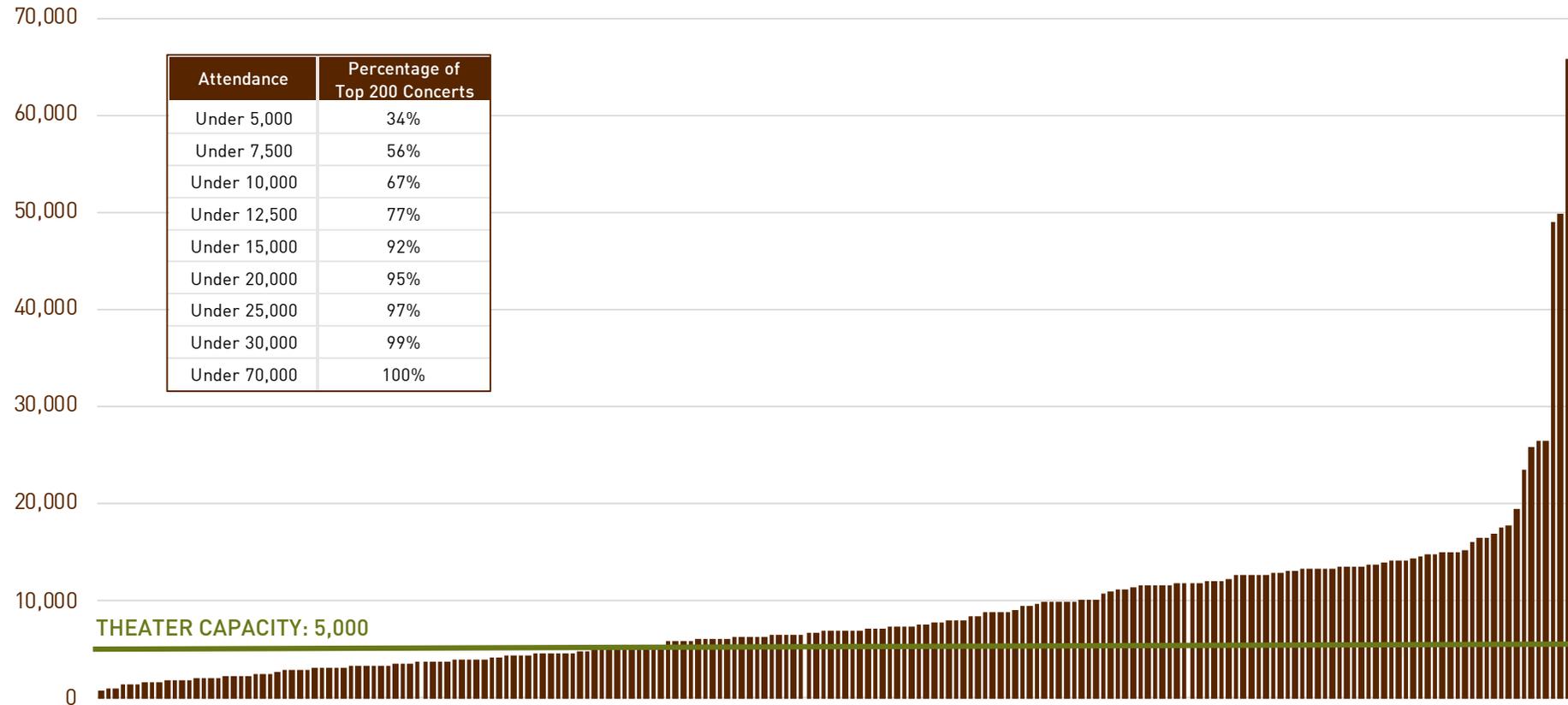
Seating Capacity

To assess appropriate capacity for the renovated Theater, it is also useful to understand the ticket sales of top touring acts, as defined by Pollstar. As previously detailed, the concert industry has undergone significant changes over the past several years as the rise of new musical genres and the increasing segmentation of musical acts has resulted in fewer acts capable of selling out venues with large capacities.

The chart on the right illustrates the average attendance for each of the top 200 concerts in North America by ticket sales in 2019. These top 200 tours played in a wide range of facilities with varying capacities including theaters, amphitheaters, arenas and stadiums.

As shown, the Theater's current and recommended future capacity of 5,000 could have effectively accommodated approximately one-third (34 percent) of major concert tours in the United States during 2019. Additionally, promoters indicated that outdoor venues are increasingly hosting smaller acts, such as comedy shows or live podcast recordings, which can help supplement concert utilization.

TOP 200 TOURING CONCERTS IN NORTH AMERICA BY TICKET SALES



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Seating Composition

In addition to total Theater capacity, it is important to consider the type of seating made available to patrons. Amphitheaters traditionally feature either fixed seats, general admission grass berm seating, or a combination.

The chart to the right depicts the seating composition among identified comparable facilities. As shown, seating composition ranges from 100 percent permanent fixed seats (Greek Theatre, Daily’s Place, and Santa Barbara Bowl) to 100 percent berm seating (Moody Amphitheater). On average, 56 percent of total capacity is dedicated to permanent fixed seating.

According to concert and other event promoters, there is a desire for a renovated Theater to include a mix of seating types. Some promoters indicated that more fixed seats, especially those covered by a roof or canopy, would be more conducive to the San Antonio weather and would allow for better future planning.

Given this typical amphitheater arrangement, as well as feedback from local live music promoters, it is recommended that 40 percent of the proposed Theater’s capacity (a total of 2,000 seats) feature grass berm seating.

The remaining 60 percent of capacity (3,000 seats) is recommended to include fixed seating to offer promoters the ability to sell higher-priced ticketed seats.

SEATING COMPOSITION				
Amphitheater	Location	Total Capacity	Permanent Fixed Seats	Berm Capacity
Filene Center at Wolf Trap	Vienna, VA	7,024	3,800	3,224
Toyota Music Factory	Irving, TX	8,000	4,000	4,000
Ascend Amphitheater	Nashville, TN	6,800	2,300	4,500
Greek Theatre	Los Angeles, CA	5,870	5,870	0
Daily's Place	Jacksonville, FL	5,500	5,500	0
Charlotte Metro Credit Union Amphitheater	Charlotte, NC	5,000	2,000	3,000
Cuthbert Amphitheater	Eugene, OR	5,000	1,500	3,500
Moody Amphitheater	Austin, TX	5,000	0	5,000
Santa Barbara Bowl	Santa Barbara, CA	4,563	4,563	0
AVERAGE (#)		5,862	3,281	2,580
AVERAGE (%)		100%	56%	44%

Note: Sorted by total capacity, then by total fixed seats.

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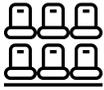
Premium Seating

When available, premium seat offerings at amphitheaters typically consist of season seats, VIP boxes and/or event-by-event VIP decks.

- **CLUB SEATS** generally consist of individual seats that are padded and provide a fixed seat location as compared to general admission seating areas. Club seat holders typically have access to a private bar, restrooms and entrance located near their seats.
- **VIP BOXES**, sometimes referred to as loge boxes, are typically configured in four- to eight-seat semi-private seating areas and can include upscale seating and food and beverage service. Box seating can be sold on a seasonal basis and can include tickets and parking passes to all venue events.
- **GROUP DECKS** typically accommodate a limited number of standing-room-only VIP patrons and include limited lounge seating, a private bar and private restrooms accessible to VIP ticket holders. These areas are typically sold on an event-by-event basis.

The chart on the right summarizes seasonal premium seating inventory at previously-identified comparable venues. These inventories are considered in the context of the Theater’s utilization to determine an appropriate premium seating program for the facility on the following page.

It should be noted that premium seating inventories at major outdoor Texas amphitheaters range from 150 club seats at the Toyota Music Factory (Dallas) to 725 total premium seats at Cynthia Woods Mitchell Pavilion (Houston) over 61 small group tables and 481 club seats.

		 CLUB SEATS	 VIP BOXES
	<i>Charlotte Metro Credit Union Amphitheatre</i>	--	30
	<i>Ascend Amphitheater</i>	--	35
	<i>Daily's Place</i>	770	--
	<i>Greek Theater</i>	--	15
	<i>Filene Center at Wolf Trap</i>	--	48
	<i>Toyota Music Factory</i>	150	--

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Premium Seating

In order to examine the market’s ability to accommodate a premium seating program at the Theater, an analysis of high income households per premium seat at comparable facilities in similar markets to San Antonio was conducted. The number of high income households (income greater than \$150,000) in a market represents an indicator of the number of individuals with the discretionary income necessary to purchase premium seating at local music venues.

As shown in the table on the right, the average number of high income households per comparable market amphitheater premium seat ranges from approximately 84 to 867, with an average of approximately 492 households per seat. This comparable venue penetration analysis indicates that the market could support approximately 200 premium seats at a renovated Theater.

Based on this analysis of comparable amphitheater inventories, as well as conversations with potential event promoters, it is recommended that the renovation of the Theater include a total of 240 premium seats, consisting of 150 club seats and 15 6-seat VIP boxes (90 total seats).

HIGH INCOME HOUSEHOLDS PER PREMIUM SEAT - COMPARABLE MARKET VENUES				
Amphitheater	Location	Total Premium Seats	High Income Households	Households Per Seat
Daily's Place	Jacksonville, FL	770	65,000	84.4
Ascend Amphitheater	Nashville, TN	200	105,000	525.0
Charlotte Metro Credit Union Amphitheatre	Charlotte, NC	165	143,000	866.7
AVERAGE		378	104,333	492.0
MEDIAN		200	105,000	525.0
ESTIMATED DEMAND - AVERAGE		203	100,000	492.0
ESTIMATED DEMAND - MEDIAN		190	100,000	525.0

240
RECOMMENDED PREMIUM SEAT INVENTORY



150
CLUB SEATS



15
VIP BOXES
(6 Seats)

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Other Amenities

Other building program components that are integral to the success of any live entertainment venue include, but are not limited to:



Sufficient parking spaces to ensure ease of patron ingress/egress. Patrons' experiences with parking and access represent their first and last impressions of a venue when attending an event. Therefore, the quantity and convenience of a venue's parking facilities can impact patrons' willingness to make return visits for future events. Industry standards dictate that there should be approximately one parking space for every 4.0 seats (or approximately 1,250 parking spaces for a 5,000-capacity amphitheater).



Covered roof or other shaded structures throughout the premises to protect patrons from heat during mid-summer events.



Sufficient concession points of sale to maximize per capita revenues. Industry standards dictate that there should be approximately one concession point of sale for every 300 seats (or 17 points of sale in a 5,000-capacity amphitheater).



Sufficient restrooms to ensure an enjoyable and comfortable patron experience. Industry standards dictate that there should be one water closet per 50 seats and one urinal per 100 seats (or 100 water closets and 50 urinals in a 5,000-capacity amphitheater).



Sufficient number and quality dressing rooms including multiple air-conditioned star dressing rooms and small dressing rooms.



Sufficient loading docks (up to two) to efficiently move in/out stage equipment.



State-of-the-art audio, video and lighting equipment, sufficient power for stage equipment and buses, and sufficient storage space for equipment, materials, supplies and other needs.



Ticket or box office space for walk-up sales, will call and other ticketing needs.

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Summary of Recommendations

Based on the results of the various market analyses reviewed in this section, as well as a review of estimated Theater utilization and key promoter feedback, recommended building program elements for the renovated Theater are summarized below:



SEATING CAPACITY

5,000 (up to 6,500)
(including approximately 60 percent being fixed seats)



PREMIUM SEATING

240 total premium seats
150 club seats
15 VIP boxes
(6 Seats per box)



OTHER AMENITIES

1,250 parking spaces
17 concessions points-of-sale
100 WCs & 50 urinals
2 star dressing rooms

As facility planning progresses, it will be important that project architects experienced in live entertainment design work closely with concert promoters and facility management to create a design that would maximize the market and revenue potential of the facility.