

CAPITAL REGION ★ DEVELOPMENT AUTHORITY

Hartford Connecticut New & Transformed Arena PROGRAM DEVELOPMENT & CONSTRUCTION FEASIBILITY

February 19, 2015

Capital Region Development Authority's (CRDA's) GOALS & OBJECTIVES

CRDA's goal is to understand:

- Multi-use Spectator Arena design industry trends.
- The ideal Building Program for a Hartford facility.
- The feasibility to renovate & build new on the XL Center Site, & there relative advantages.

XL Center BACKGROUND

- 1975 - Opened.
- 1978 - Roof collapse.
- 1997 - Whalers leave.
- Today
 - Global Spectrum is facility manager.
 - Events & activities.
 - Recent renovations.
 - Present condition.

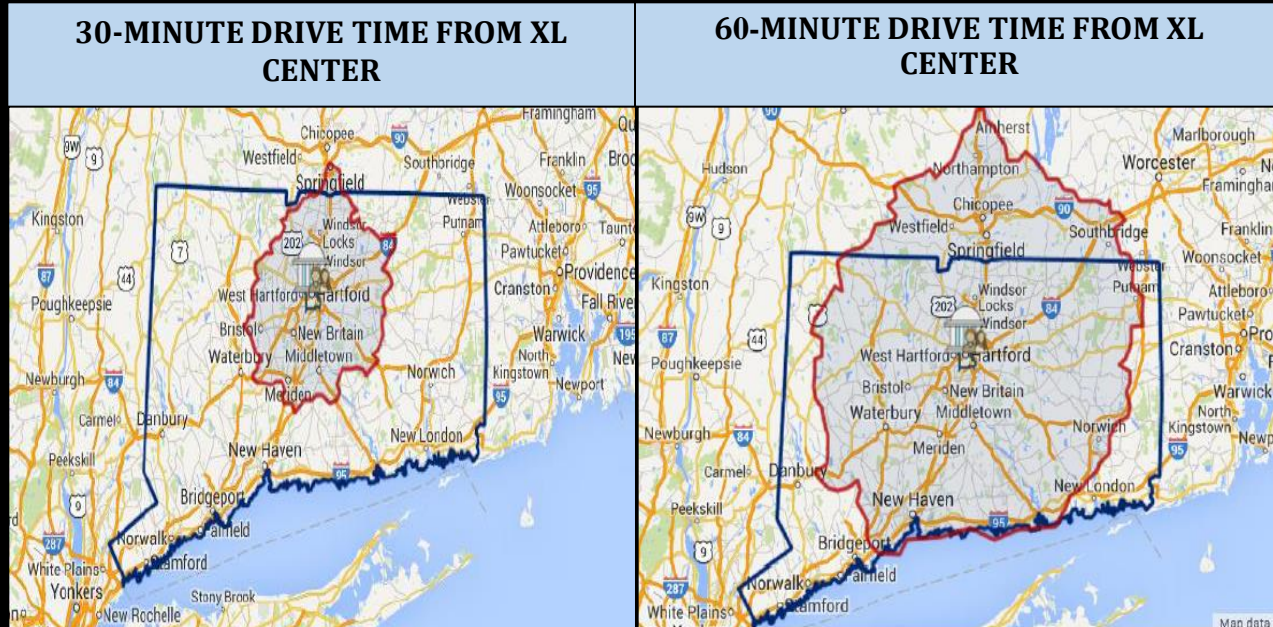
METHODOLOGY

- To develop the best Building Program:
 - Hartford Region demographic information.
 - Comparable facilities.
 - Collect info and interview UConn, companies, etc.
 - Understand UConn & NHL's key building features.
- Confirm that an expanded existing site is large enough.
- Develop best XL Center renovation plan and identify where it doesn't meet the Program.
- Generate the best constructability solutions.
- Bench against other arenas & renovations.

Stafford Sports Assignment

- Stafford Sports assignment was to conduct a Market Study that would determine the required facility program for a New or Transformed Arena, to be located at the existing site of the XL Center. Stafford evaluated:
 - The Facility Program in Comparable and Competitive Venues.
 - Facility Program Requirements from User Groups and Stakeholders.
 - Demographic and Economic Indicators to determine event support for the Arena.
 - The ability of the Corporate and Business Community to support Commercial Opportunities.

Hartford Regional Market



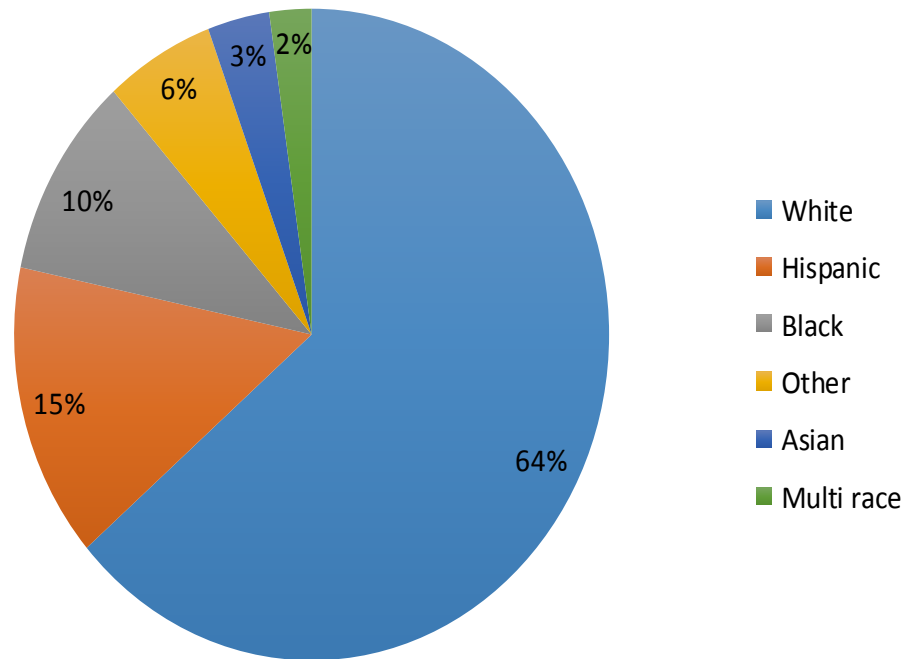
- Stafford Sports evaluated demographic and economic indicators in the Greater Hartford Region based on thirty and sixty minute drive radius from the site.

Population: 30 & 60 Minute Driving Radius

- The Hartford market, within a 30 minute radius, is more than 1.2m, which is slightly larger than markets such as Buffalo, Raleigh and Salt Lake, all of which have major arenas.
- The Hartford Regional market within a 60 minute radius, is more than 3.1m, and will draw residents of New Haven, Middlesex and Litchfield Counties.
- The population base can support a New Arena that is comparable in size (17,000-18,000 seats) to the venues in these markets.

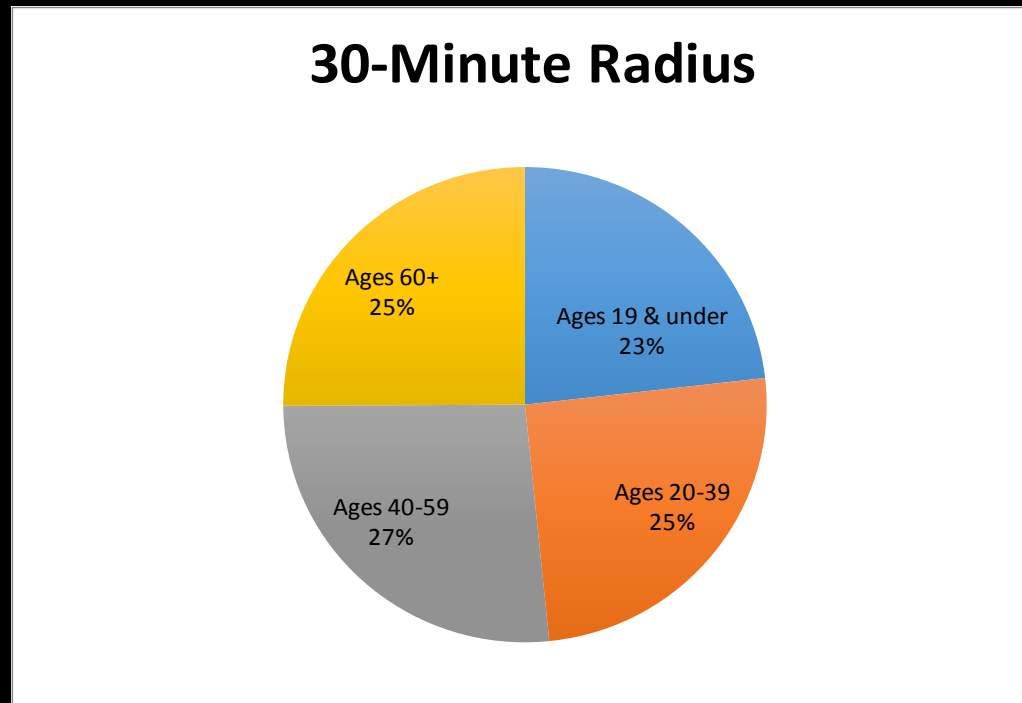
Population by Race

30-Minute Driving Radius



- The market's diversity creates opportunities to present events that serve diverse audiences.

Population by Age



- Residents between the ages of 20 and 59 are the most frequent purchasers of tickets. More than 50% of the market is comprised of residents in these age groups which is a positive indicator of ticket sales support.

Household Income

- The average household income is above the national average.
- The number of more affluent households in the Greater Hartford Region indicates that residents can support events with higher ticket prices and a wide variety of venue amenities.

Additional Support Infrastructure

- The plentiful availability of parking within the downtown is an asset that will support Arena events. Control of operating hours and rates will be necessary to optimize the Arena's potential.
- The mass transit system is another positive asset in support of Arena events with operating hours that match the venue's event schedule.

Support for Commercial Success

- The market's number of Fortune 500 companies compares favorably with similar markets.
- Other top employers and growth companies in the region are likely targets for seat offerings such as club seats, loge boxes and terrace seats.

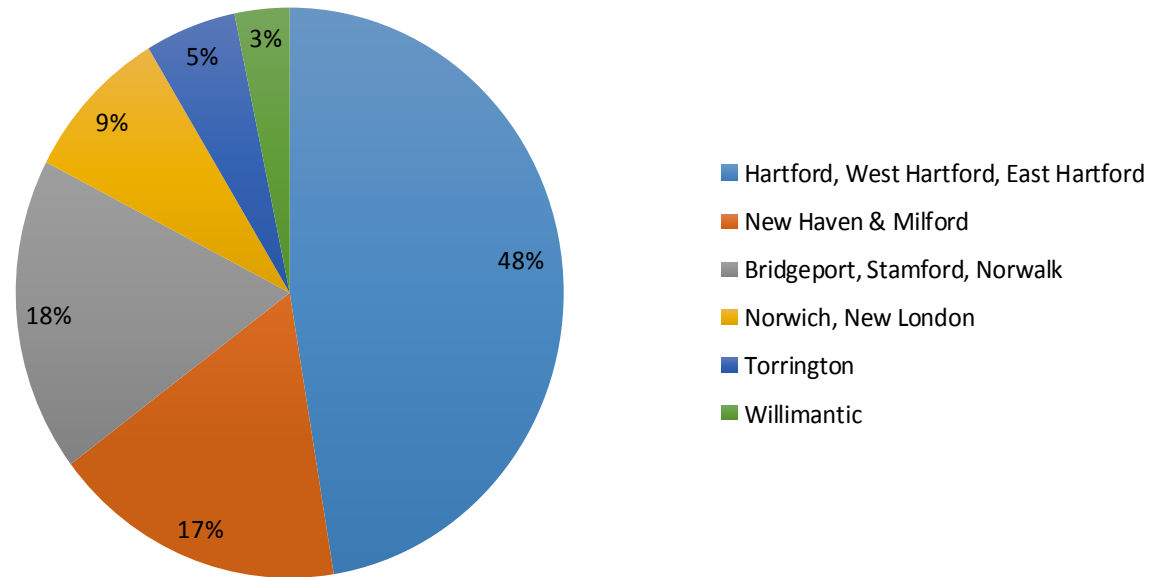
Public Sector and University Partnerships

- Major arenas that host major collegiate programs have fan amenities that are of the highest quality and similar to those found in professional sports. These amenities appeal to a broad range of constituents including donors, alumni, student population and fans.
- Louisville and Creighton are examples of universities that are prime tenants in recently built arenas. Both universities are long-term partners with the public sector and each school expanded its sales and marketing resources in order to maximize available sources of revenue in new venues.

Public Sector and University Partnership

- The University of Connecticut can become the prime tenant with the Arena and its ownership. This partnership would require the University to undertake a significant change in which games are played in the Arena, how games are sold and marketed and how revenue streams are monetized.
- As prime tenant, the University would need to commit to playing a minimum of ten games each for men's and women's basketball and men's hockey at the Arena. These games would need to include a significant majority of marquee opponents.
- The University stands to gain financially with a long-term commitment to this partnership.

University of Connecticut Alumni by Region



- The University has a built-in audience for its games with more than 80,000 alumni in Hartford and New Haven Counties.

Source: Metro Hartford Alliance

Future Opportunities

- Arenas in comparably sized NHL markets were surveyed regarding their facility program to ensure that the Arena could accommodate the needs of any future NHL ownership group that might consider Hartford for relocation.
- The recommended facility program for the Arena is similar to these NHL venues with a capacity of 17,000, loge boxes, club seating, terrace seats, lounges and restaurants.
- The Arena's seating capacity is comparable in size to venues that have hosted major NCAA events.

Stakeholder/User Group Interviews

Facility Program Requirements

- Stakeholders and User Groups agreed that the XL Center is unattractive due to the operation of the adjacent mall by Northland Investment Corp. The empty storefronts/lobby and poor connection to the adjacent garage are unwelcoming and a major deterrent to ticket buyers.
- User groups indicated that XL Center is the most expensive building in the region because of labor costs and work rules. The current XL Center is considered to be average for event profitability given venue cost structure and average ticket sales.

Stakeholder/User Group Interviews

Facility Program Requirements

- Industry user groups recognize that the State's renovation has improved XL's infrastructure, HVAC systems, amenities, concourse and signage.
- Collegiate and amateur athletic administrators consider a new arena to be ideal for hosting invitational events in basketball and hockey as well as scholastic championships.
- Music industry executives indicated that casino guarantees for concert artists will continue to accelerate with the new casino in Springfield. Given the aggressive approach by the casino industry, a new arena would host a limited number of annual concerts.

Stakeholder/User Group Interviews

Facility Program Requirements

- Stakeholders and industry user groups concur that the Hartford region would benefit from a modern arena.
- An arena should be consistent with other recently constructed venues and feature a new lobby, wide concourses, modern restrooms, unique food and beverage options, comfortable seating/sightlines and more functional back of the house spaces.

BEST UCONN/AHL HARTFORD BUILDING PROGRAM

- 17,000 in hockey & 18,000 in basketball.
- Bowl reduction curtaining for different modes – especially hockey.
- Seating:
 - More seats in Lower Bowl.
 - 30 Mid-Level, 8 Bunker & 3 Party Suites.
 - 30 Loges Boxes.
 - 500p Terrace Club.
 - 1000p Event Level Club.
- Modern standards for:
 - Comfortable seating.
 - Concourses, Restrooms F&B Points of Sale.
 - Secure & safe entry.
 - Convenient vertical circulation.
 - ADA compliant.
 - Mechanical, electrical & fire protection systems.

BEST UCONN/NHL HARTFORD PROGRAM

Same as UCONN/AHL except:

- More Club Seats.
- More Loge Boxes.
- New NHL Locker Room.

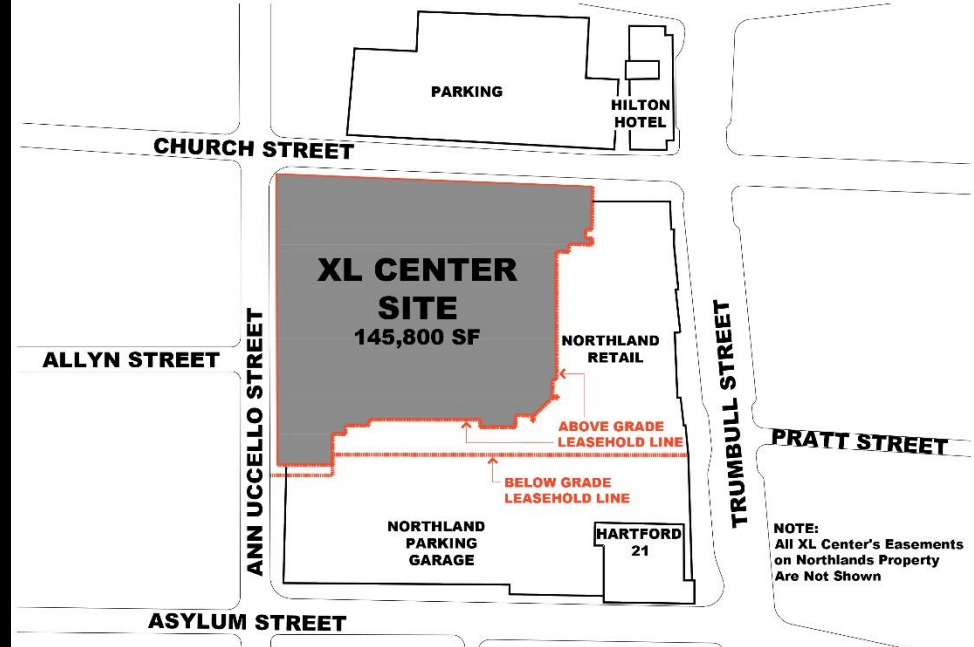
TOTALLY NEW ARENA on LARGER SITE

- Adequate site area.
- Provides all Program components.

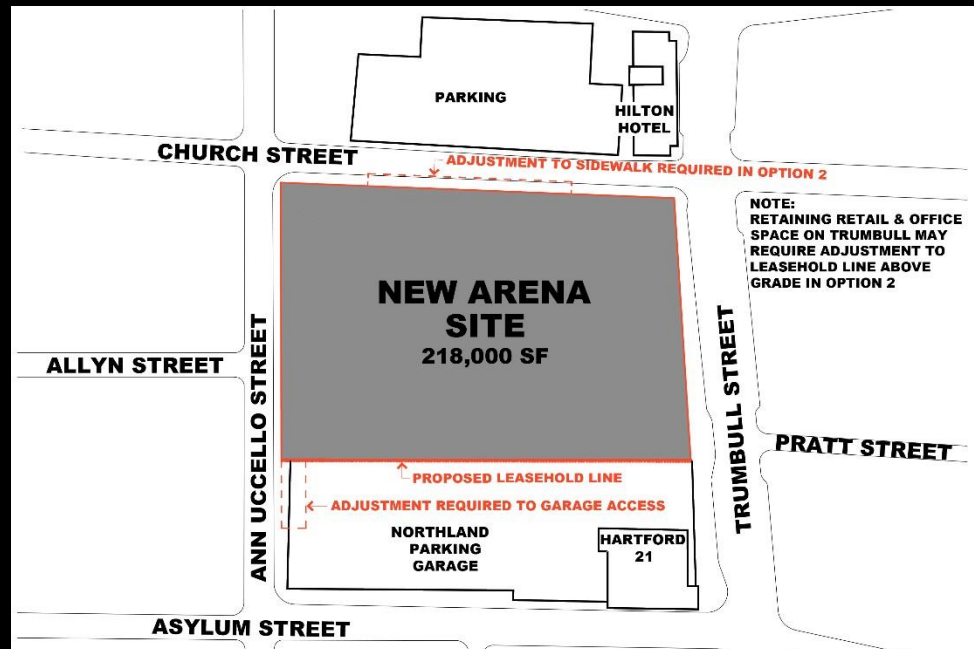
TOTALLY NEW ARENA on LARGER SITE

- Adequate site area.
- Provides all Program components except:
 - smaller event load-in & out area.
 - 12% fewer seats in the lower bowl.

EXISTING & OPTION 3 EXHIBIT A



OPTIONS 1 & 2 EXHIBIT B



OPTION 2

EXHIBIT C



TD GARDEN - BOSTON



ACC - TORONTO



MADISON SQUARE GARDEN - NY



ROGERS ARENA - VANCOUVER



XL CENTER - HARTFORD

Arena Bowl
Footprint
Comparison

OPTIONS 1 & 2

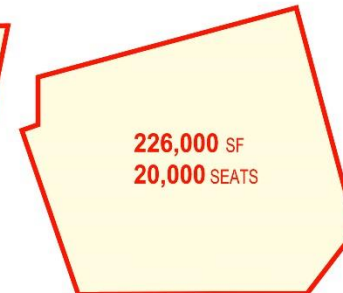
EXHIBIT D



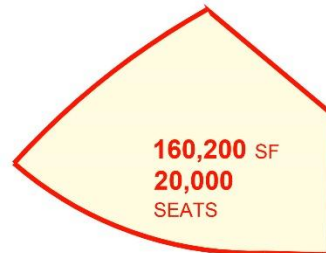
TD GARDEN - BOSTON



ACC - TORONTO



CONSOL ENERGY CENTER -
PITTSBURGH

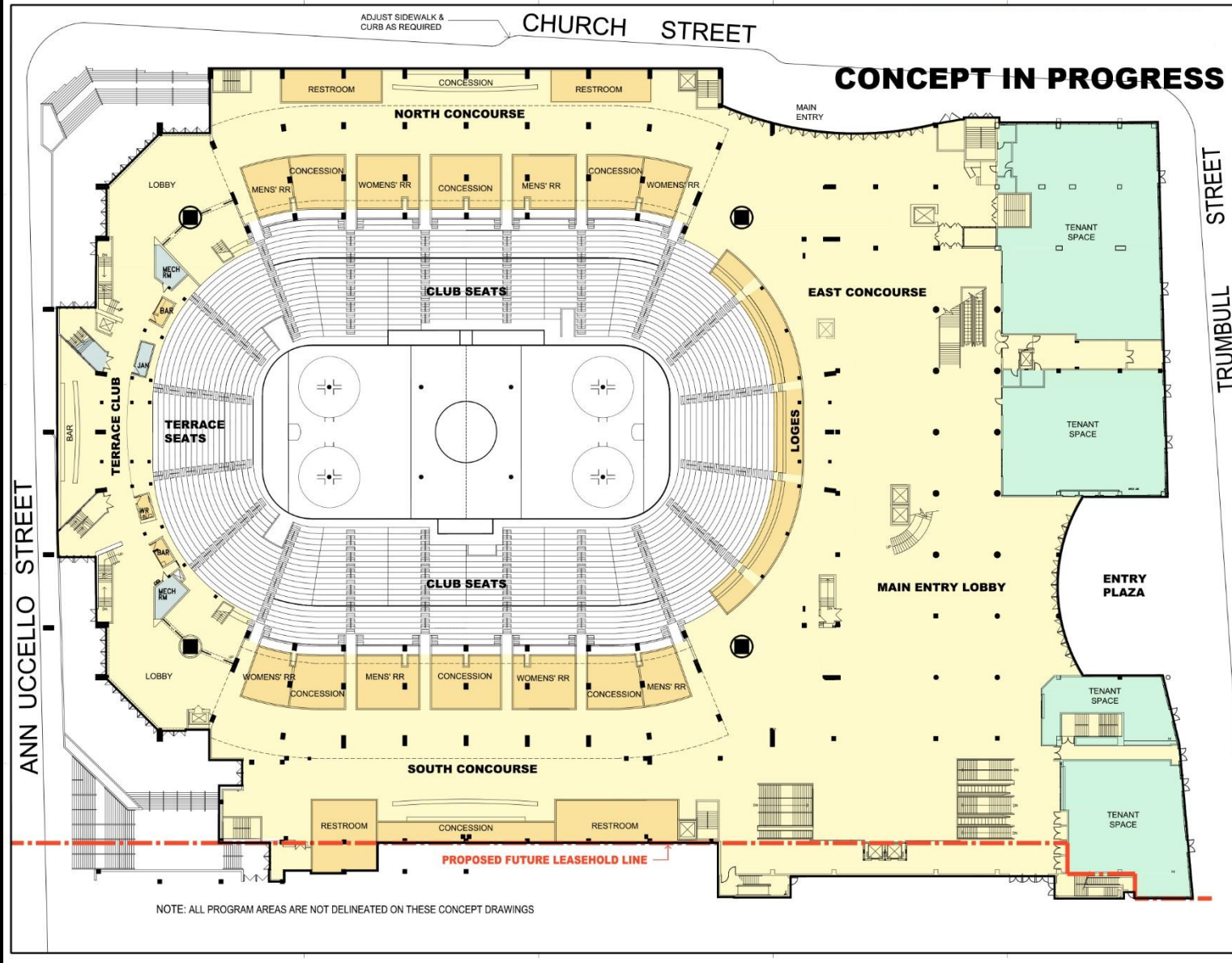


ROGERS ARENA - VANCOUVER



XL CENTER - HARTFORD

Site
Comparison



XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

**NEW ARENA
USING
EXISTING
STRUCTURES
WITHIN
NEW
LEASEHOLD
LINE**

**EXHIBIT
E**

BASE BACKGROUND DOCUMENT
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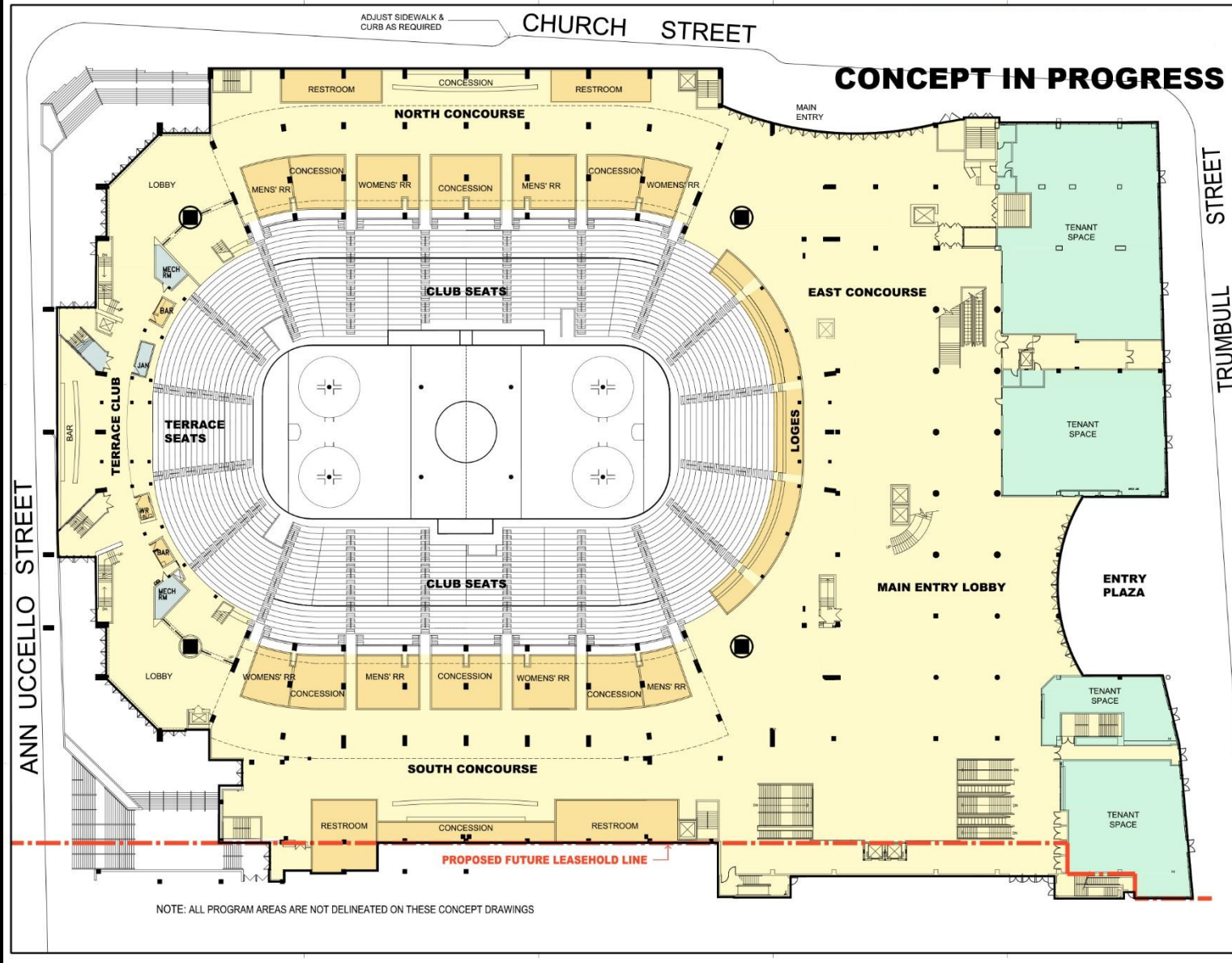
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**CONCOURSE
LEVEL 61**

A-130

EXHIBIT E





XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

**NEW ARENA
USING
EXISTING
STRUCTURES
WITHIN
NEW
LEASEHOLD
LINE**

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**CONCOURSE
LEVEL 61**

A-130

EXHIBIT E

NEW ARENA USING EXISTING STRUCTURES WITHIN NEW LEASEHOLD LINE

EXHIBIT E

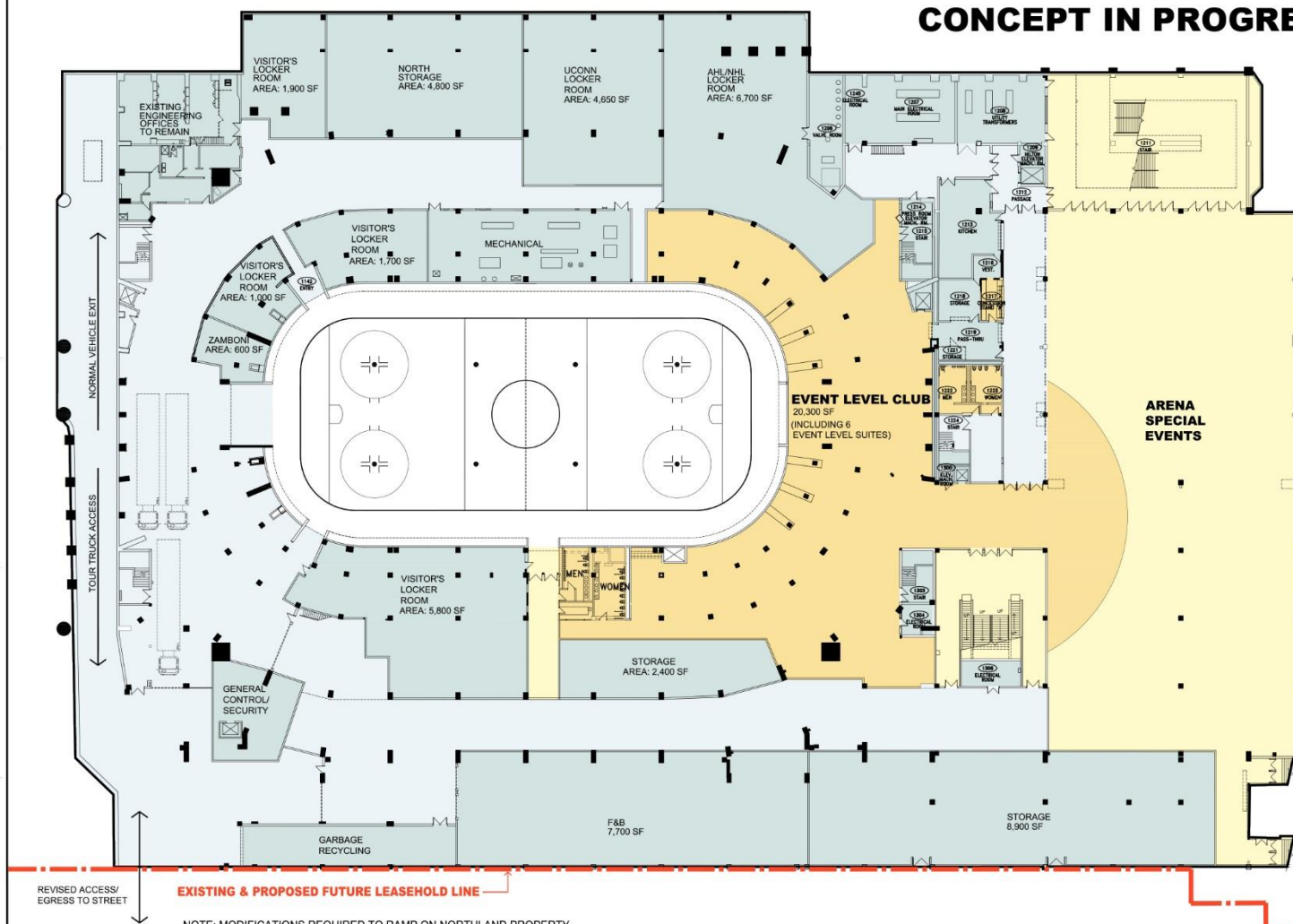
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**EVENT
LEVEL 31**

A-110

CONCEPT IN PROGRESS



EXISTING & PROPOSED FUTURE LEASEHOLD LINE

NOTE: MODIFICATIONS REQUIRED TO RAMP ON NORTHLAND PROPERTY
TO ALLOW EXITING OF LARGE TRUCKS
NOTE: ALL PROGRAM AREAS ARE NOT DELINEATED ON THESE CONCEPT DRAWINGS

EXHIBIT E

XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

**NEW ARENA
USING
EXISTING
STRUCTURES
WITHIN
NEW
LEASEHOLD
LINE**

EXHIBIT E

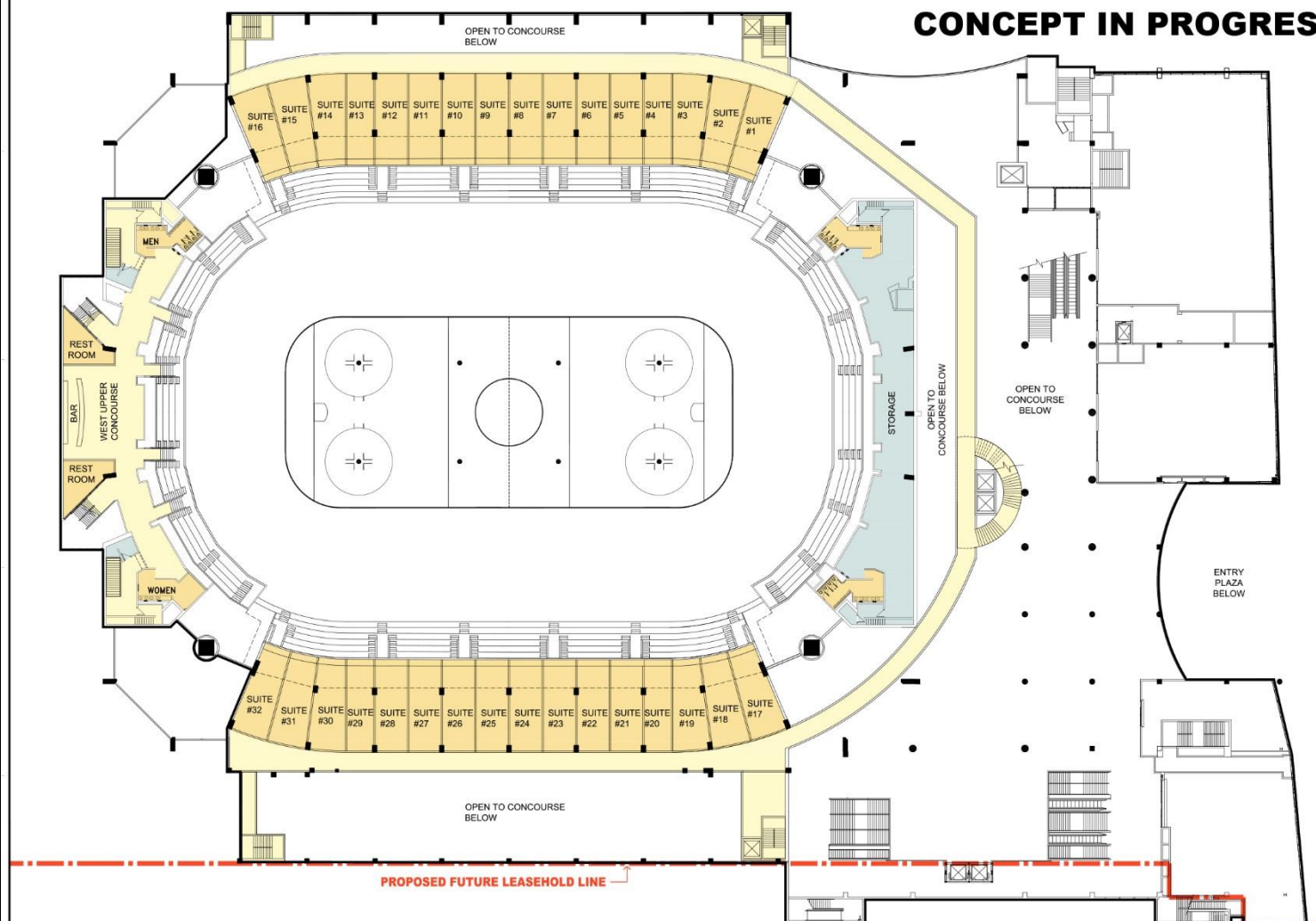
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**UPPER
CONCOURSE
LEVEL 71**

A-140

CONCEPT IN PROGRESS



NOTE: ALL PROGRAM AREAS ARE NOT DELINEATED ON THESE CONCEPT DRAWINGS

EXHIBIT E

XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

**NEW ARENA
USING
EXISTING
STRUCTURES
WITHIN
NEW
LEASEHOLD
LINE**

EXHIBIT E

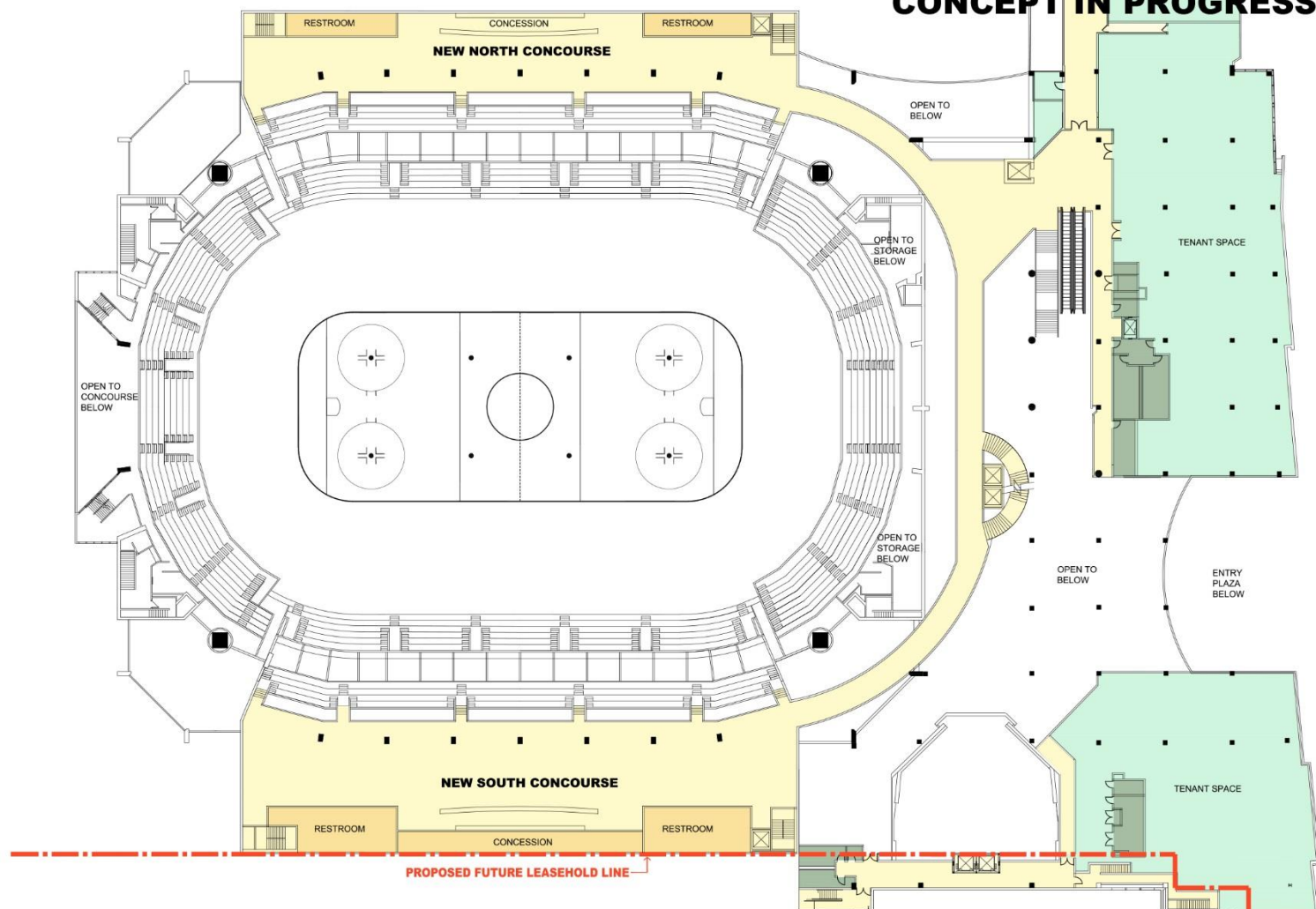
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**NEW UPPER
CONCOURSE
LEVEL 80 & 82**

A-150

CONCEPT IN PROGRESS



NOTE: ALL PROGRAM AREAS ARE NOT DELINEATED ON THESE CONCEPT DRAWINGS

EXHIBIT E

XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

**NEW ARENA
USING
EXISTING
STRUCTURES
WITHIN
NEW
LEASEHOLD
LINE**

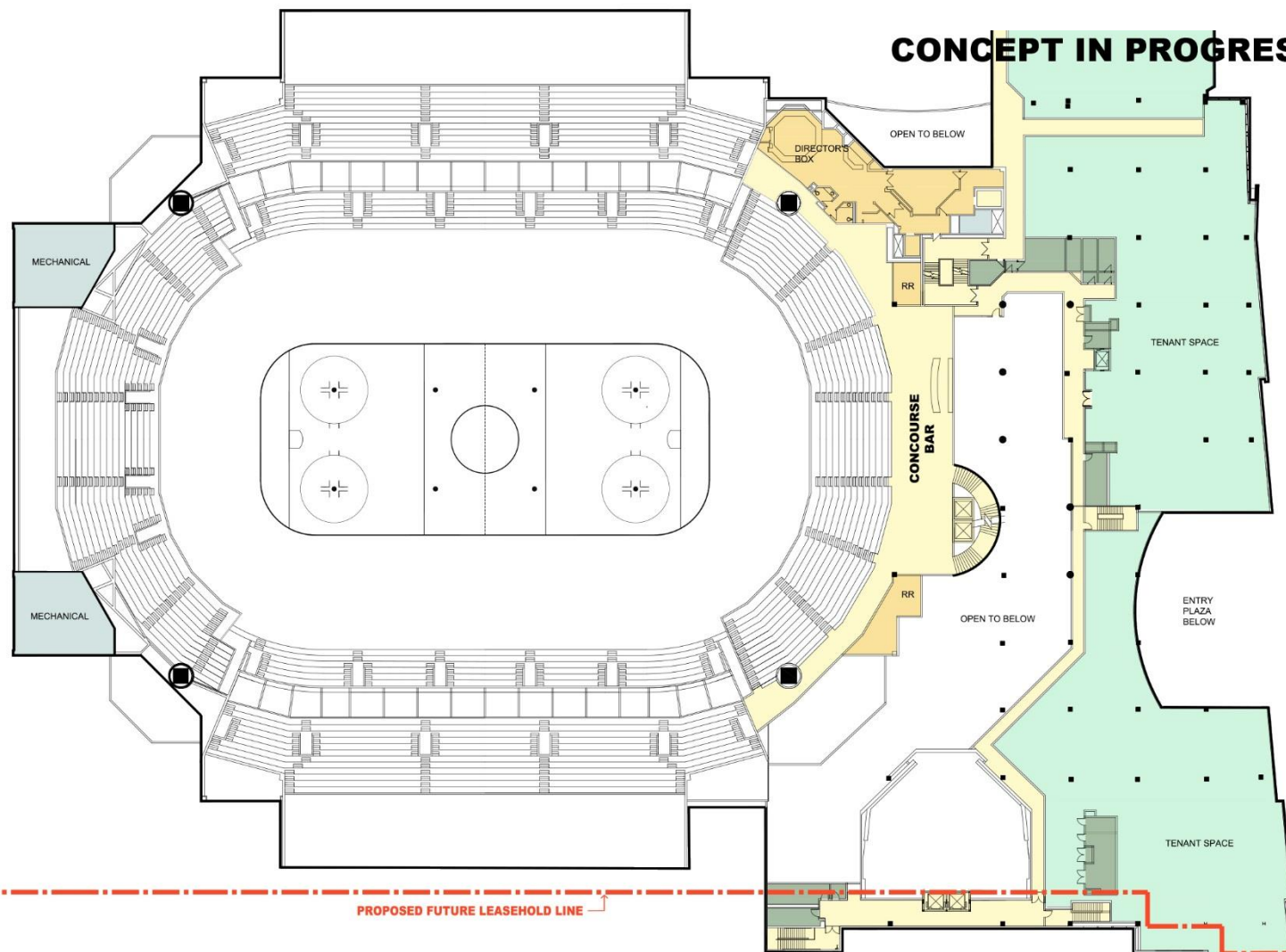
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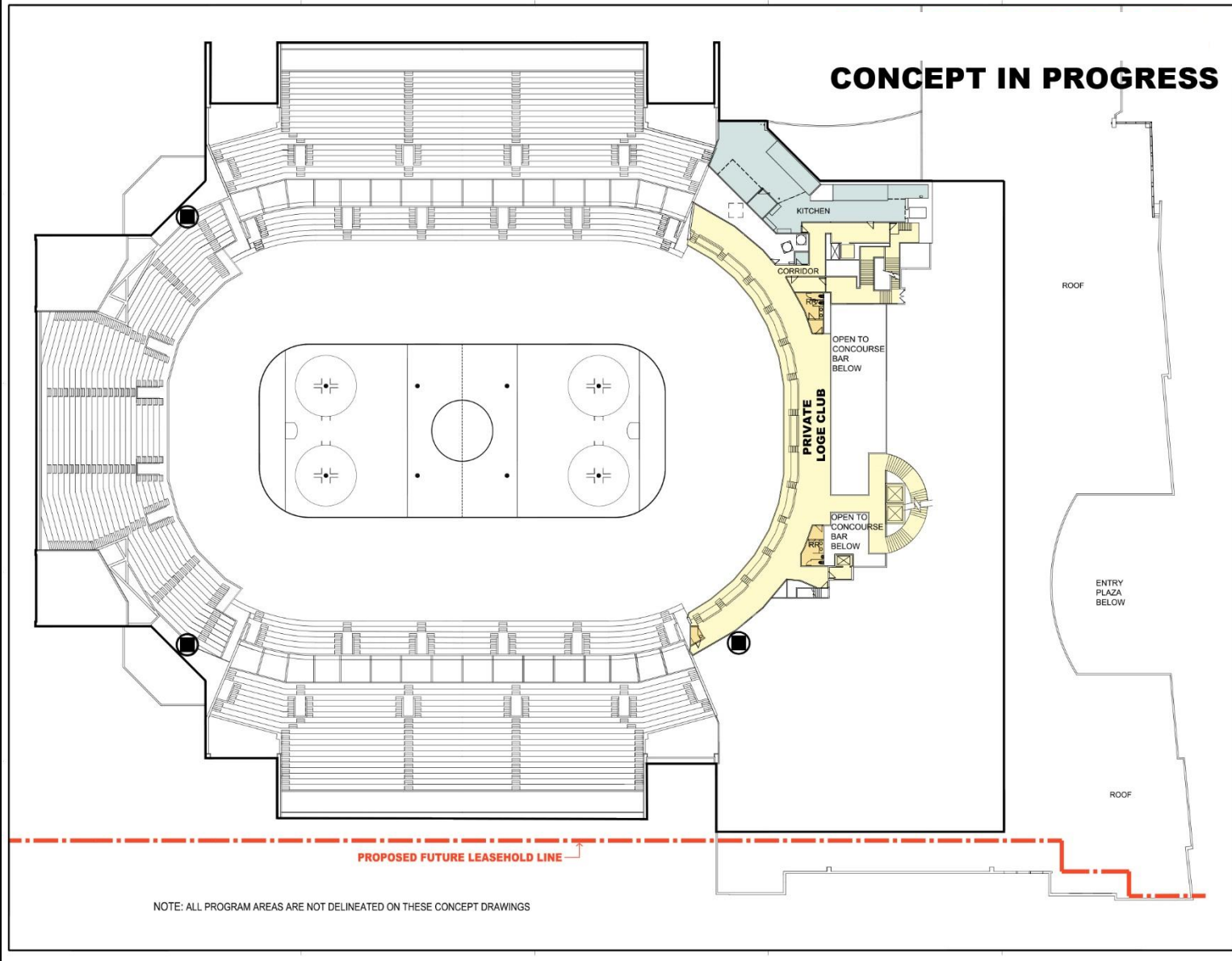
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**NEW UPPER
CONCOURSE
BAR
LEVEL 95**
A-160

CONCEPT IN PROGRESS



NOTE: REFER TO PROGRAM AREAS FOR SPECIFIC AREAS TO BE USED IN ESTIMATE
NOTE: ALL PROGRAM AREAS ARE NOT DELINEATED ON THESE CONCEPT DRAWINGS

EXHIBIT E



XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

**NEW ARENA
USING
EXISTING
STRUCTURES
WITHIN
NEW
LEASEHOLD
LINE**

**EXHIBIT
E**

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**LOGE CLUB
LEVEL 107**

A-170

EXHIBIT E

**1 CIVIC CENTER PLAZA
HARTFORD, CT 06103**

**NEW ARENA
USING
EXISTING
STRUCTURES
WITHIN
NEW
LEASEHOLD
LINE**

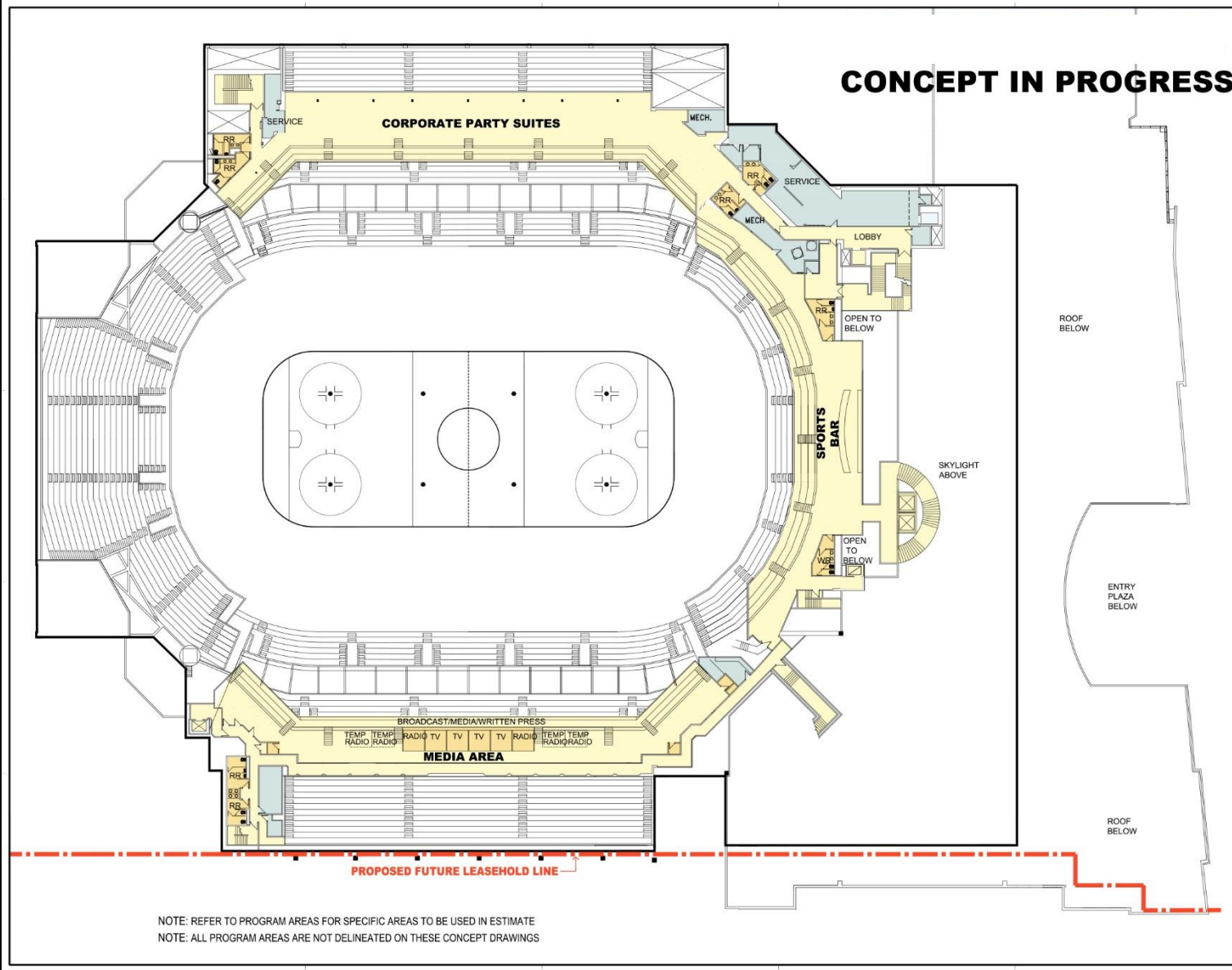
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**MEDIA AREA
 LEVEL 118**

A-180



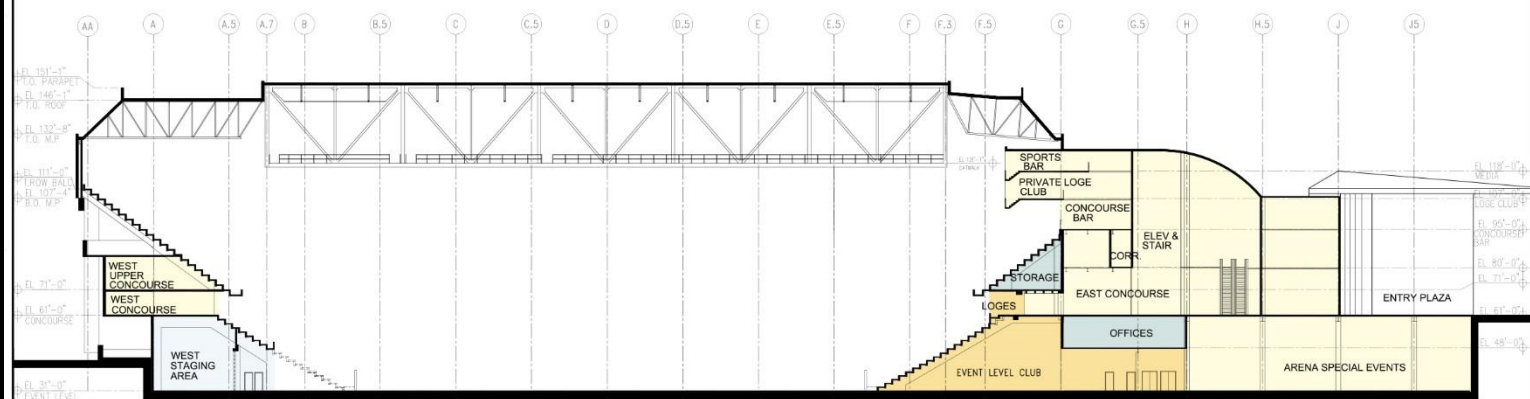
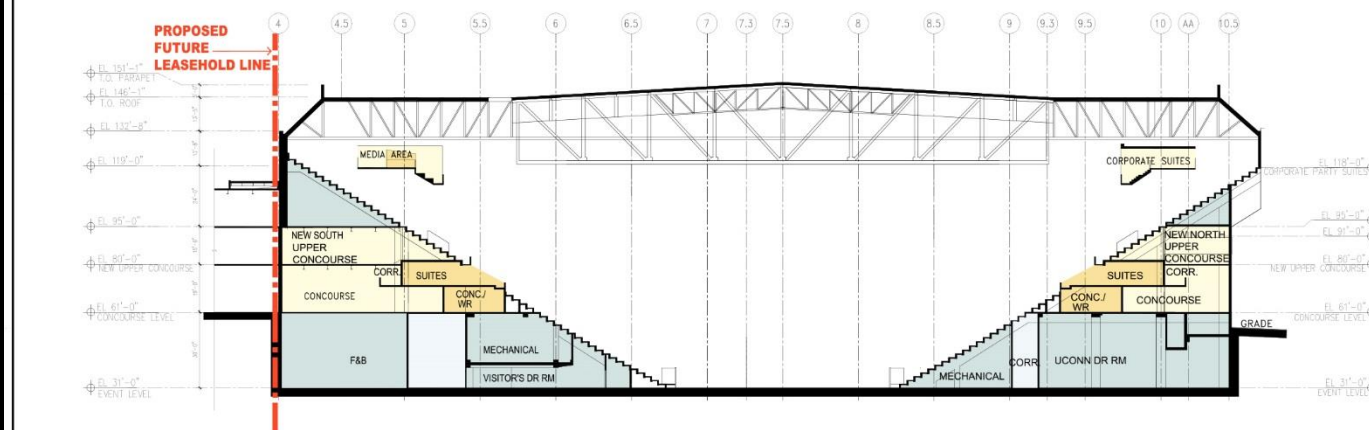
XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

CONCEPT IN PROGRESS

**NEW ARENA
USING
EXISTING
STRUCTURES
WITHIN
NEW
LEASEHOLD LINE**

**EXHIBIT
E**



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**BUILDING
SECTIONS**

A-190

EXHIBIT E

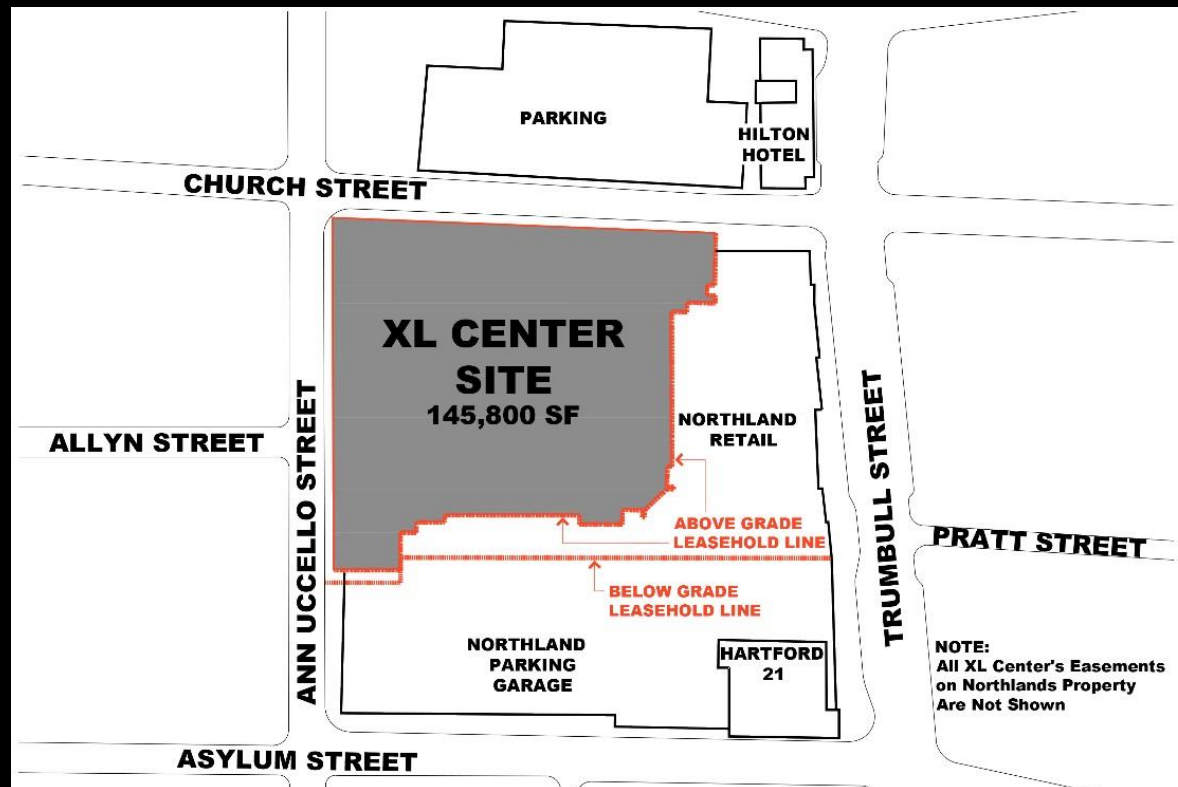






TRANSFORMED ARENA ON EXISTING XL CENTER SITE ISN'T POSSIBLE

- Even with existing ROW & easements.



ADVANTAGES of TOTALLY NEW & TRANSFORMED ARENAS

- Totally New Arena:
 - Better Truck Load-in.
 - More seats in the Lower Bowl.
- Transformed Arena:
 - \$200m to \$250 less cost.
 - No displacement of UConn Games in Hartford.
 - Less demolition of tenant office space.
 - Much of recent renovation work is retained.
 - Less required landfill.
 - Less negative impact on surrounding businesses.

URBAN IMPACT

A new or transformed arena will have a significant positive impact to revitalize downtown Hartford.

- More people downtown in the evenings.
- More economic activity for existing businesses.
- The region's #1 Community Center.
- A 365 day Public Gathering Place and Urban Link.
- A Positive New Civic Symbol.

KEY TRENDS in MULTI-USE SPECTATOR ARENAS

- Urban locations.
- Smaller (17,000 to 18,000) Capacities.
- Reduced number of Private Suites.
- More varying types of Clubs, Loges & Party Suites.
- More Adventure Seating.
- Bigger Video & Better Acoustics.
- Gourmet & Specialty Food & Beverage Offerings.
- A wide array of other Guest Services.
- Connectivity to Guests.





Existing Plans if Required for Reference

XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

EXISTING
ARENA
WITHIN
EXISTING
LEASEHOLD
LINE

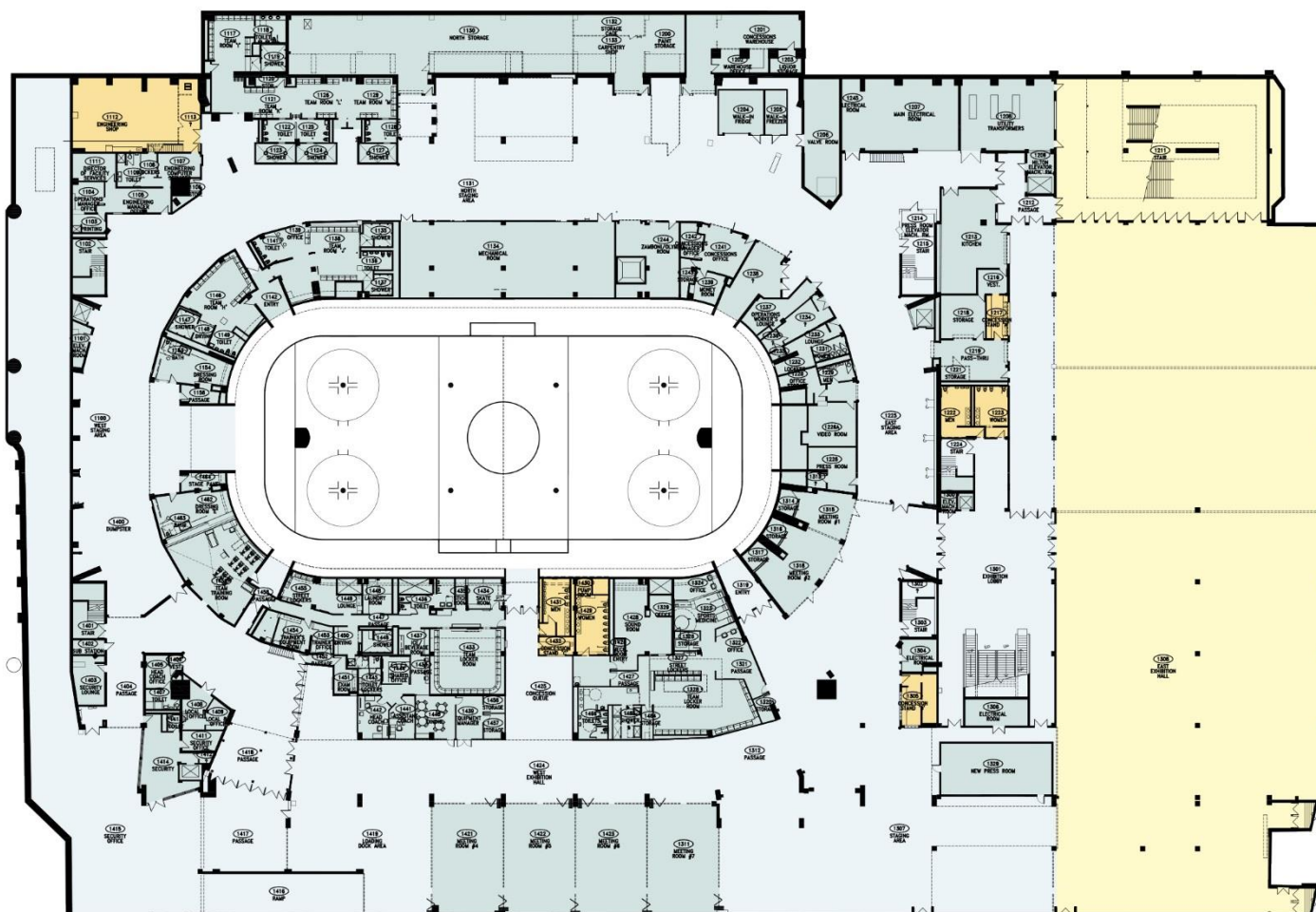
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LOWER PLAN
LEVEL 31

A-110



LEASEHOLD LINE

EXHIBIT H

XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

EXISTING
ARENA
WITHIN
EXISTING
LEASEHOLD
LINE

EXHIBIT
H

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MEZZANINE
PLAN
LEVEL 48

A-120

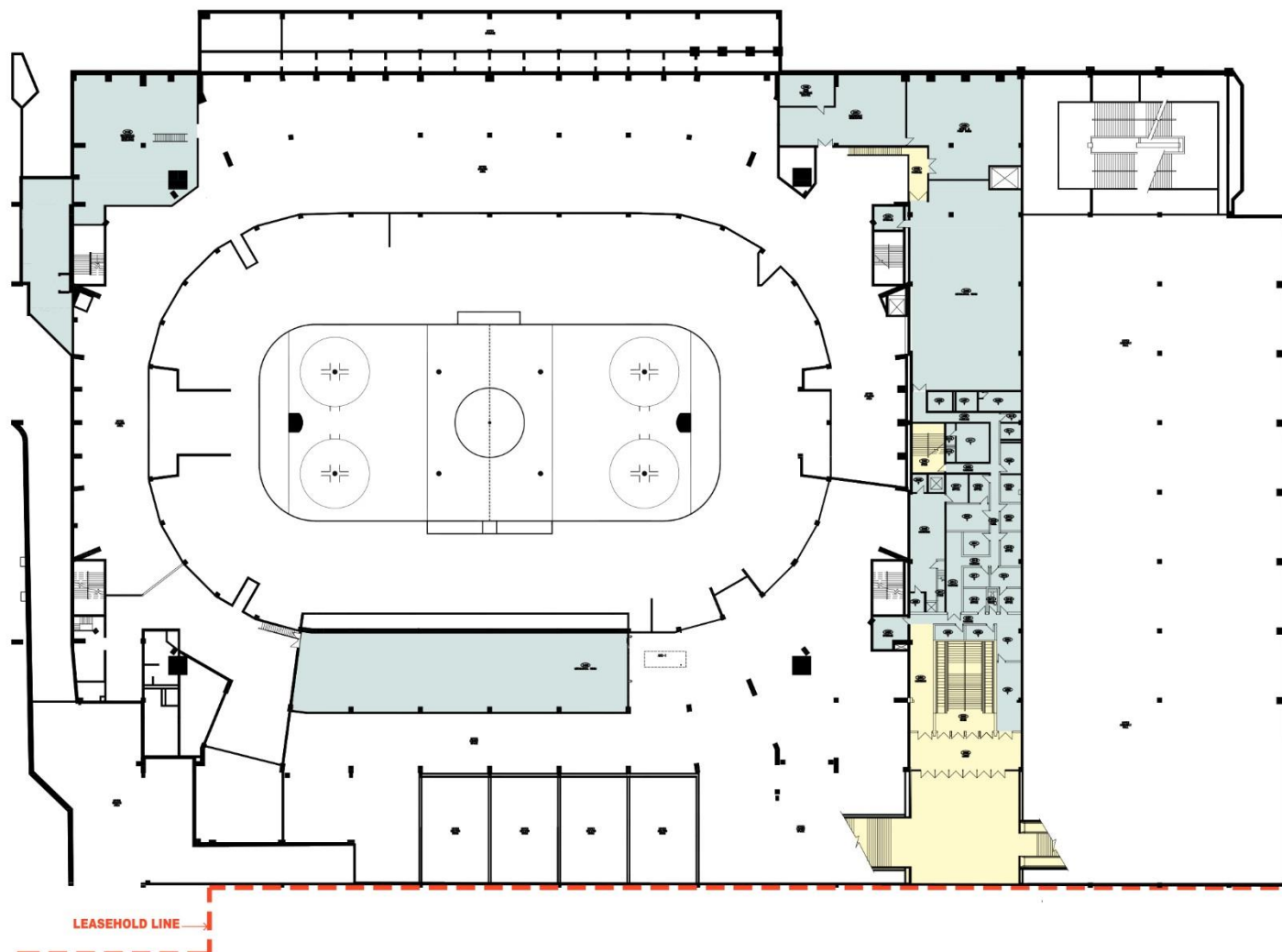
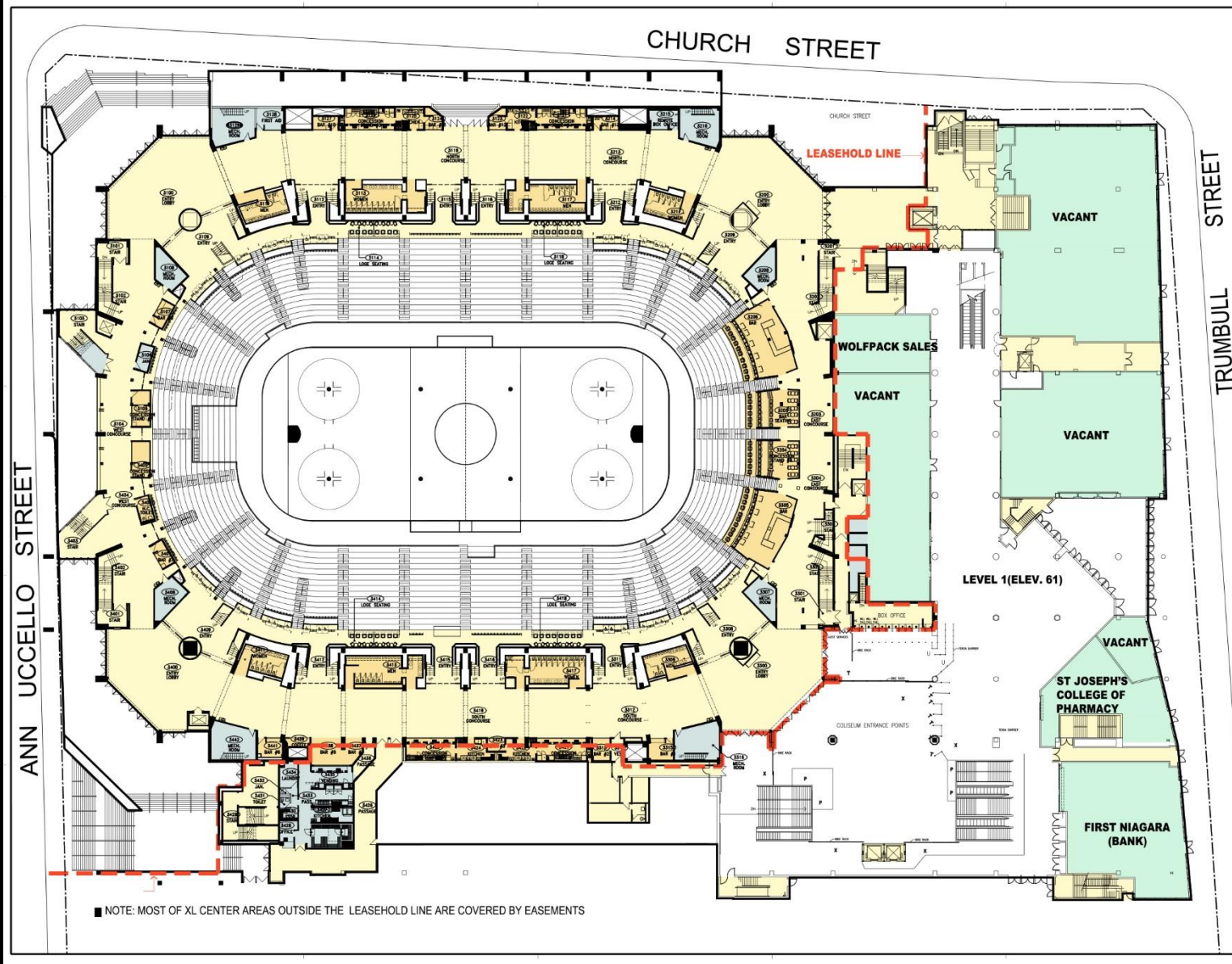


EXHIBIT H



XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

**EXISTING
ARENA
WITHIN
EXISTING
LEASEHOLD
LINE**

**EXHIBIT
H**

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**CONCOURSE
PLAN
LEVEL 61**

A-130

EXHIBIT H

XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

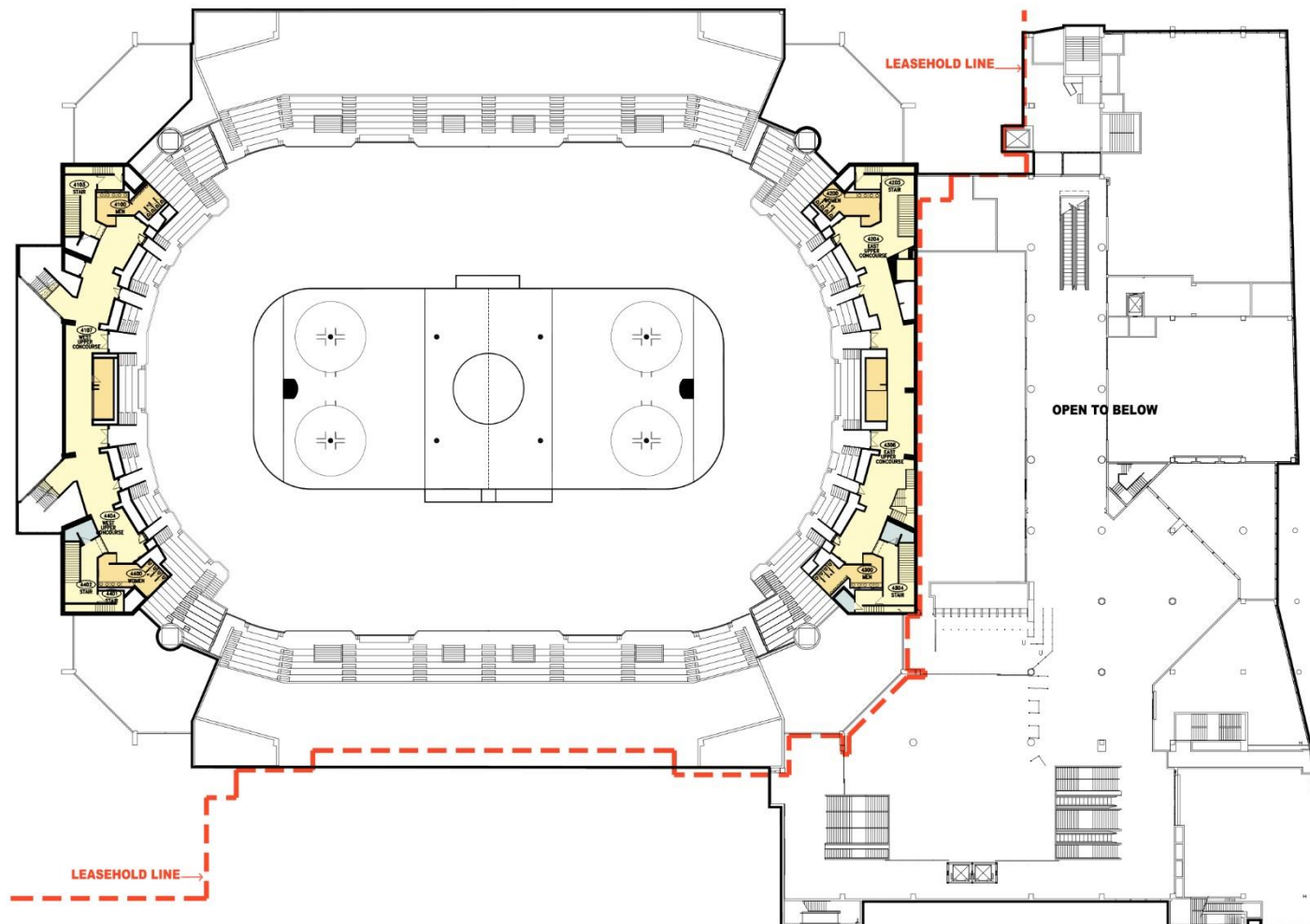
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WITHIN
EXISTING
LEASEHOLD
LINE**

**EXHIBIT
H**

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**UPPER
CONCOURSE
PLAN
LEVEL 71**
A-140



NOTE: MOST OF XL CENTER AREAS OUTSIDE THE LEASEHOLD LINE ARE COVERED BY EASEMENTS

EXHIBIT H

XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

EXISTING ARENA WITHIN EXISTING LEASEHOLD LINE

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UPLAND
TENANT
PLAN
LEVEL 80

A-150

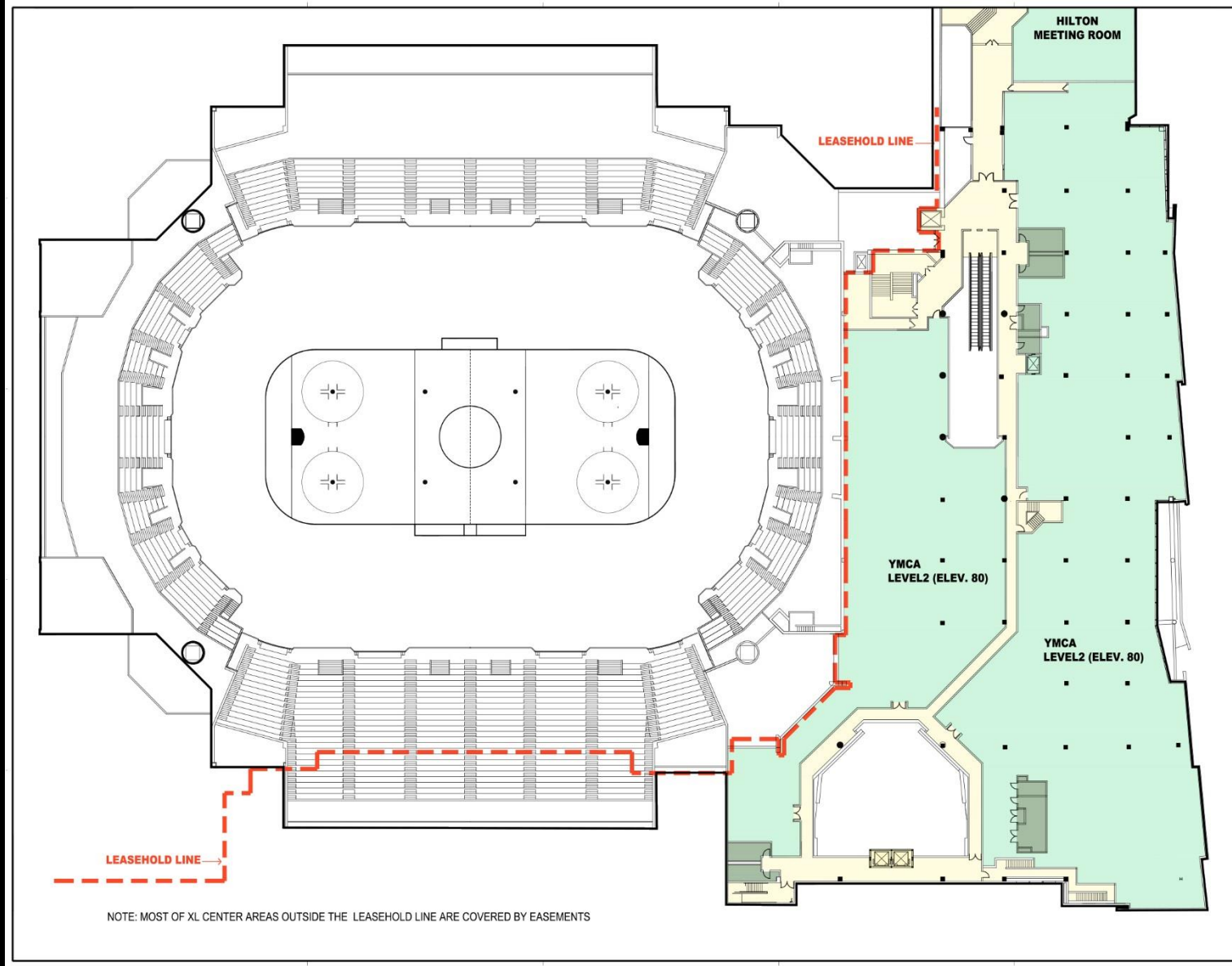


EXHIBIT H

XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

**EXISTING
ARENA
WITHIN
EXISTING
LEASEHOLD
LINE**

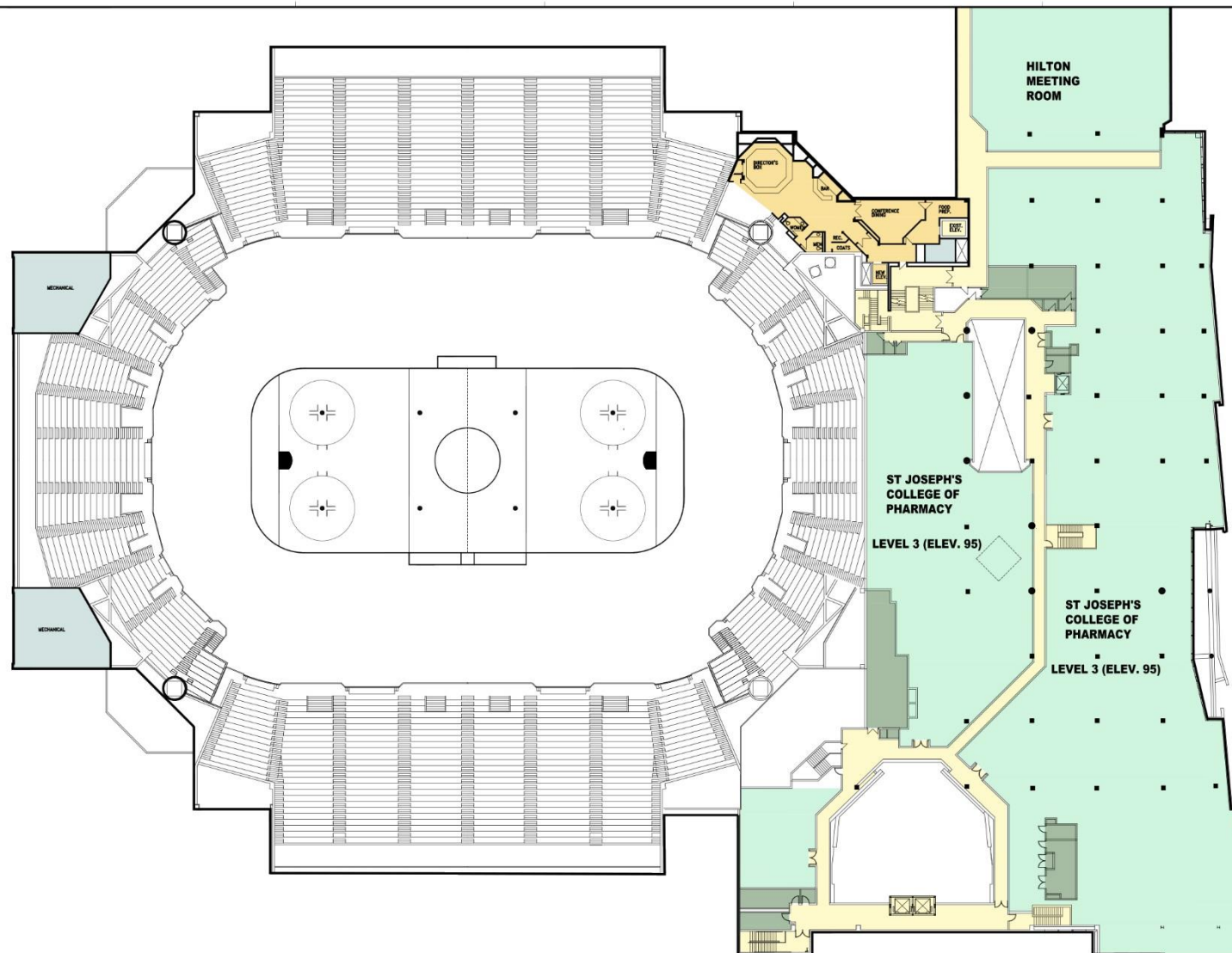
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**DIRECTOR BOX
PLAN
LEVEL 103/95**

A-160



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EXHIBIT H

XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

EXISTING ARENA WITHIN EXISTING LEASEHOLD LINE

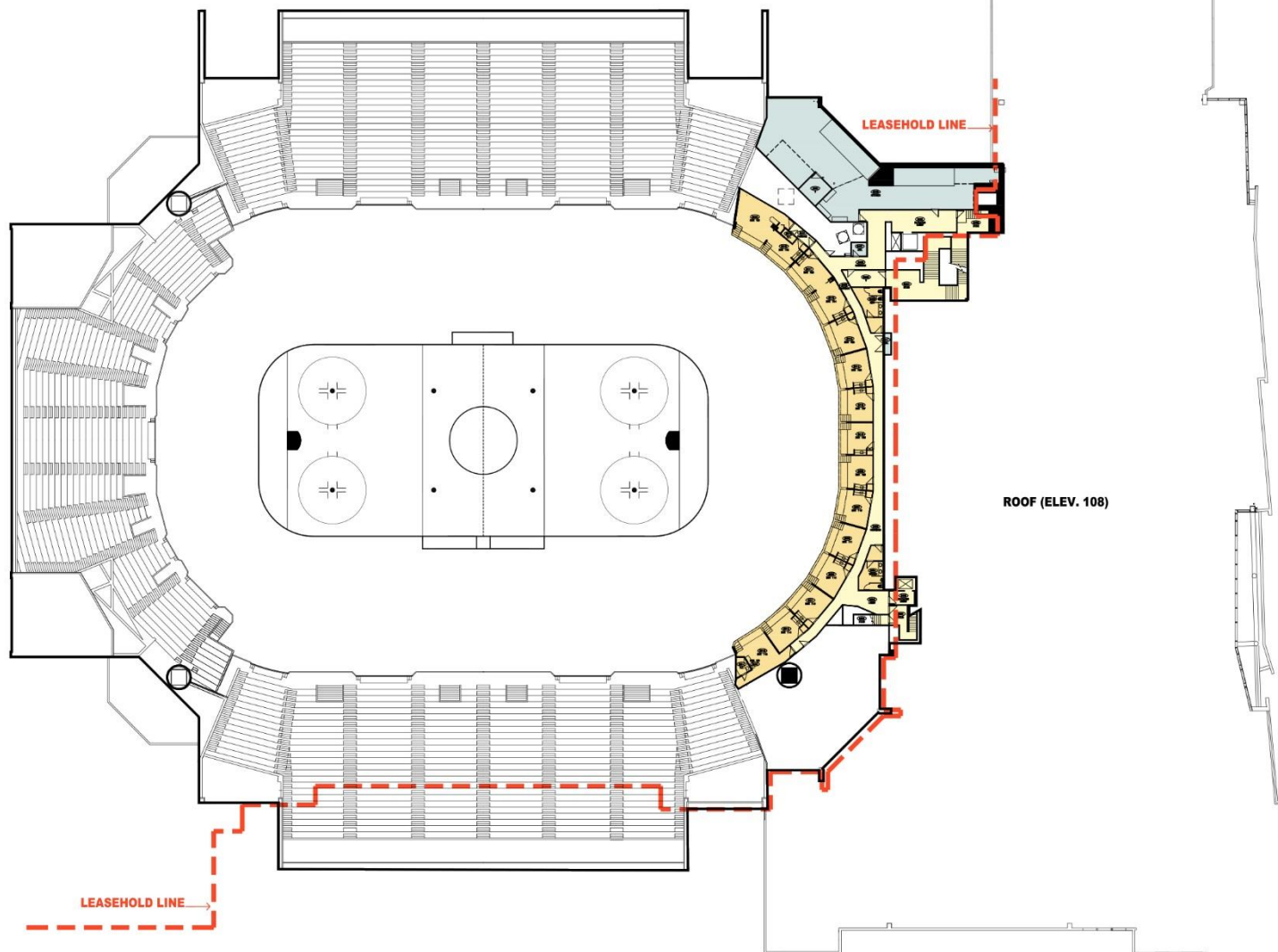
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**LOWER BOX
SUITES PLAN
LEVEL 107**

A-170



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EXHIBIT H

XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

**EXISTING
ARENA
WITHIN
EXISTING
LEASEHOLD
LINE**

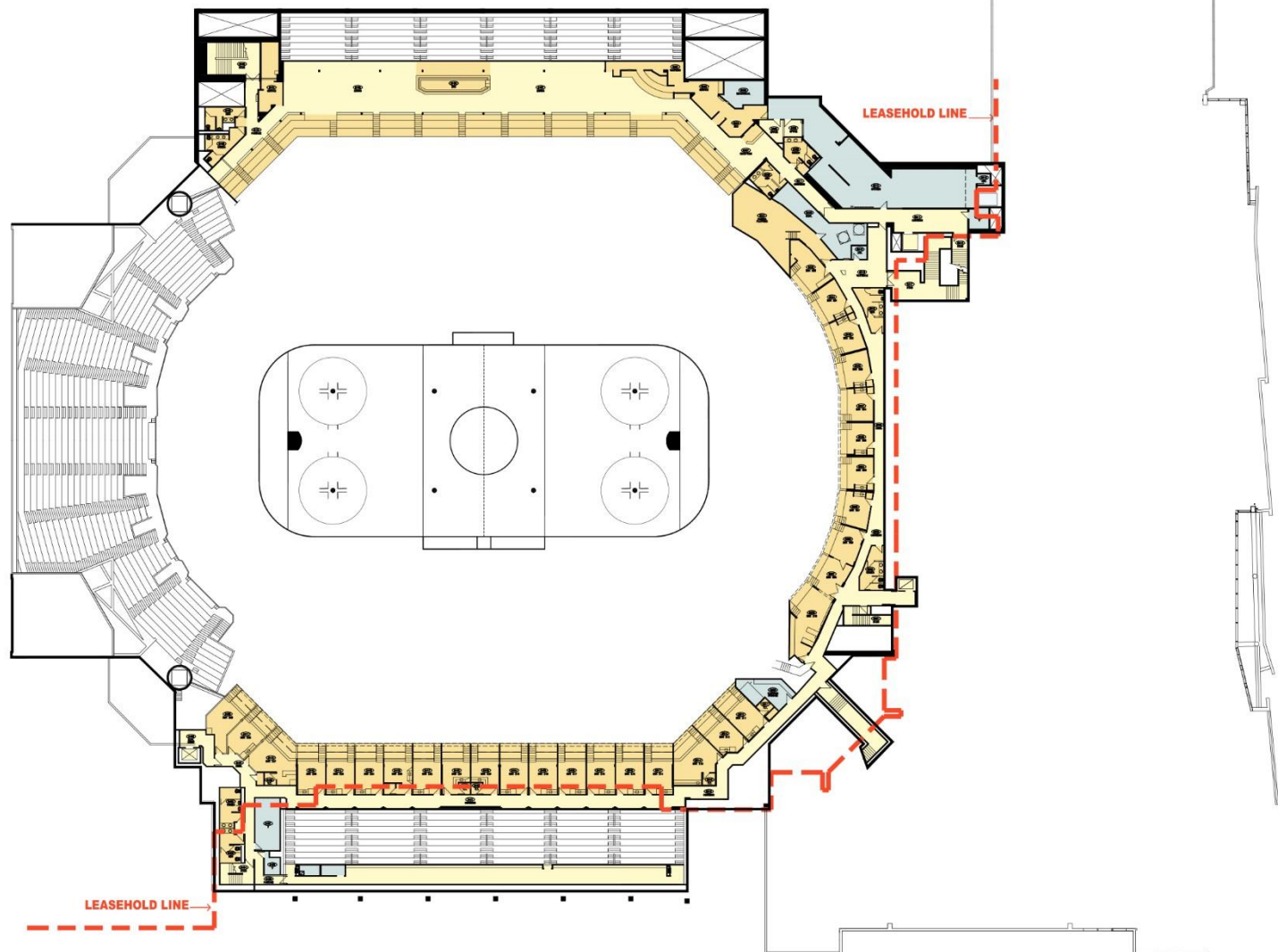
**EXHIBIT
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DATE: 11/10/2015
**UPPER BOX
SUITES PLAN
LEVEL 118**

A-180



NOTE: MOST OF XL CENTER AREAS OUTSIDE THE LEASEHOLD LINE ARE COVERED BY EASEMENTS

EXHIBIT H

**1 CIVIC CENTER PLAZA
HARTFORD, CT 06103**

**EXHIBIT
H**

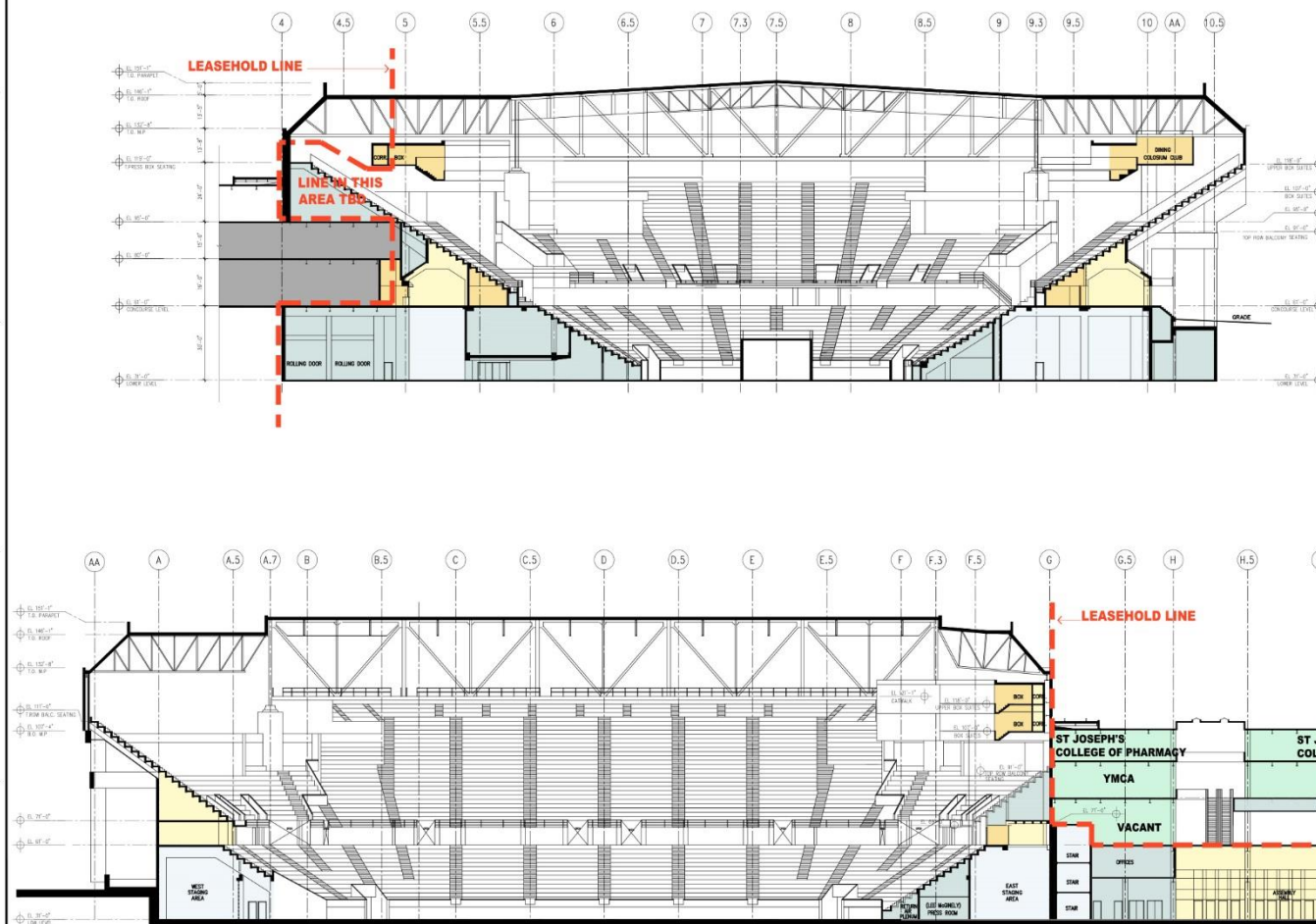
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**BUILDING
SECTIONS**

A-190



NOTE: MOST OF XL CENTER AREAS OUTSIDE THE LEASEHOLD LINE ARE COVERED BY EASEMENTS

EXHIBIT H



Placeholder for rendering

Placeholder for rendering

Placeholder for rendering

Placeholder for rendering

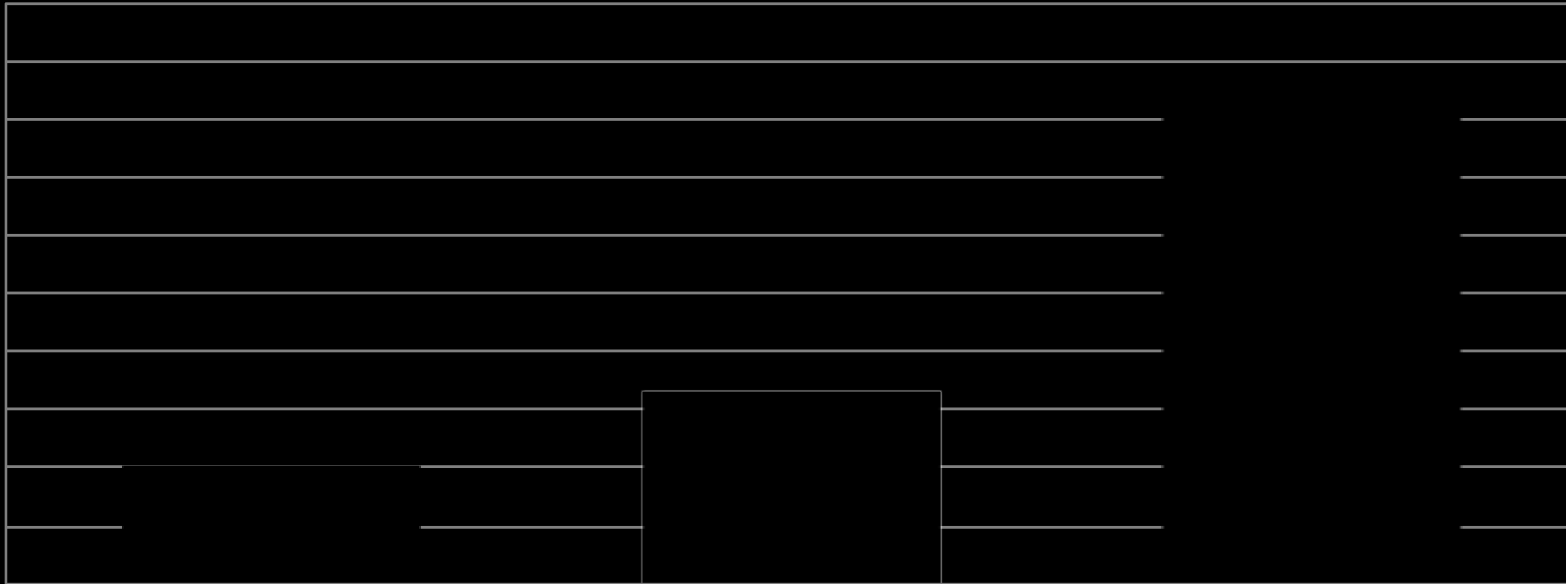
ADVANTAGES of NEW ARENA

- Larger load-in & out area.
- More seats in lower bowl.

ADVANTAGES of NEW ARENA

- \$200m to \$250m less capital cost.
- Reduced impact on events, especially UConn games.
- Much of recently completed reno is retained.
- Less demolition of existing tenant office space.
- Reduced impact on surrounding businesses.
- Less demo resulting in less required landfill.

Household Income: 30-Minute Radius



- The number of more affluent households indicates that residents can support events with higher ticket prices and facility amenities.

Support for Facility Amenities

MEDIAN INCOME							
HARTFORD COUNTY		NEW HAVEN COUNTY		MIDDLESEX COUNTY		LITCHFIELD COUNTY	
Simsbury	\$117,577	Woodbridge	\$137,216	Durham	\$109,969	Morris	\$89,688
Avon	\$111,798	Cheshire	\$110,587	Killingworth	\$106,964	Harwinton	\$89,429
Marlborough	\$110,718	Bethany	\$109,564	East Hampton	\$93,083	Barkhamsted	\$84,861
Glastonbury	\$106,872	Middlebury	\$97,996	Portland	\$92,344	New Hartford	\$85,598
Burlington	\$106,756	Guilford	\$95,745	East Haddam	\$91,146	Litchfield	\$84,063
Granby	\$97,851	Prospect	\$95,325	Haddam	\$89,184	Watertown	\$80,889

- High net worth individuals in the region's communities are a positive indicator of a market that can support a wide variety of venue amenities.

Population: 60-Minute Driving Radius

- The Arena will be regional in nature and will draw residents of New Haven, Middlesex and Litchfield Counties.

Population: 30-Minute Driving Radius

- The Hartford MSA is slightly larger than markets such as Buffalo, Raleigh and Salt Lake, all of which have major arenas. Hartford's population base can support a New Arena that is comparable in size (17,000-18,000 seats) to the venues in these markets.

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Stafford Sports

MARKET STUDY ARENA PROGRAM DEVELOPMENT

February 19, 2015

METHODOLOGY

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CAPITAL REGION ★ DEVELOPMENT AUTHORITY

Stafford Sports

MARKET STUDY ARENA PROGRAM DEVELOPMENT

February 19, 2015

XL CENTER

1 CIVIC CENTER PLAZA
HARTFORD, CT 06103

**NEW ARENA
USING
EXISTING
STRUCTURES
WITHIN
NEW
LEASEHOLD
LINE**

EXHIBIT E

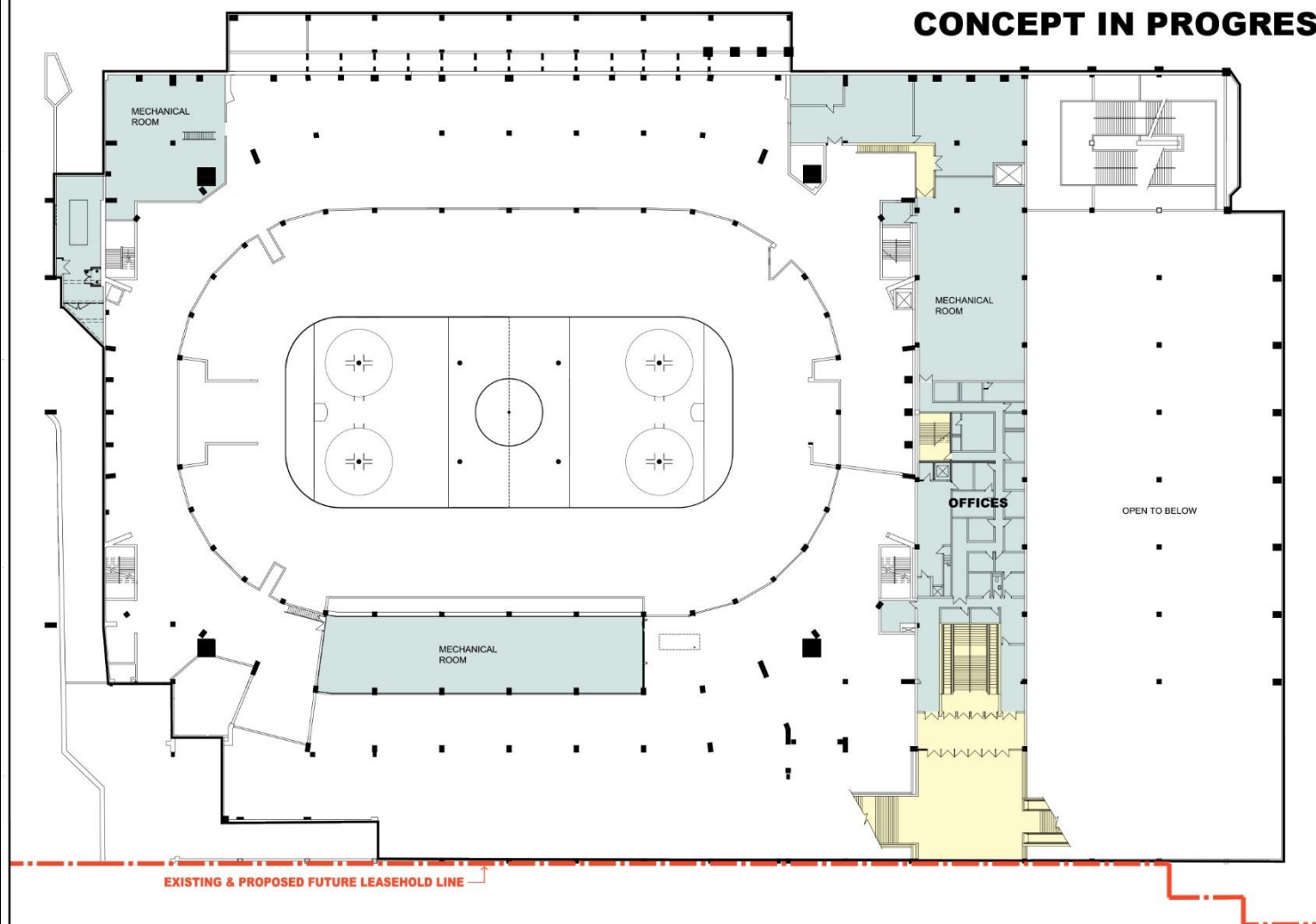
BASE BACKGROUND DOCUMENT
RECEIVED FROM
JCJ ARCHITECTURE



DATE: FEB 10/2015
**MEZZANINE
LEVEL 48**

A-120

CONCEPT IN PROGRESS



NOTE: ALL PROGRAM AREAS ARE NOT DELINEATED ON THESE CONCEPT DRAWINGS

EXHIBIT E