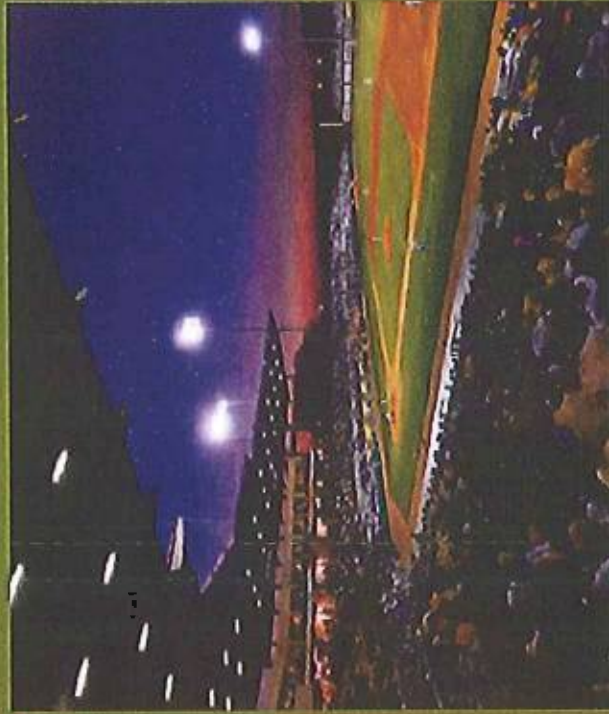


CONNECTICUT MUNICIPALITY  
NEW BALLPARK PLANNING STUDY

PROJECT UPDATE  
April 4, 2014



# Brailsford & Dunlavey

Paul Brailsford

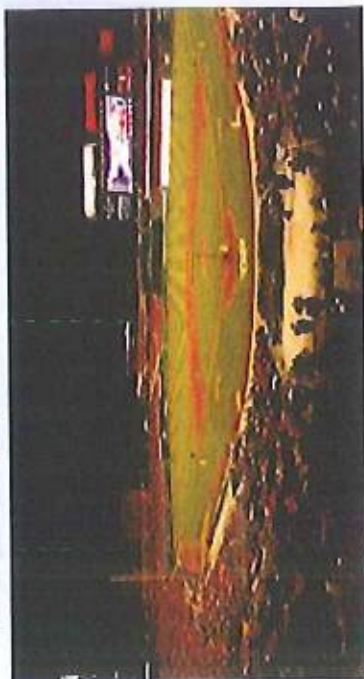


Chris Dunlavey



## Relevant Experience:

- ❖ 20 Years Serving the Sports Venue Industry
- ❖ 110 Employees, 8 Offices
- ❖ Worked for over 125 Governmental Entities
- ❖ Consulted or Managed on Sports Venues Worth over \$3 Billion in Completed Construction Value
- ❖ Provided Services for Over 60 Ballpark Projects at Every Level of Baseball



# Brailsford & Dunlavey

Rich Neumann, Vice President – Major Accounts

- ❖ 26 Years of Experience in Professional Sports and Facility Management
- ❖ 12 Years as President of Development - Mandalay Baseball Properties, Owner/Operator of 5 MiLB Teams
- ❖ Evaluated Over 50 Potential MiLB Markets and Ballpark Projects



Jason Thompson, Regional Vice President

- ❖ 13 Years of Experience in Sports Planning and Implementation
- ❖ Managed a Majority of B&D's Baseball Planning and Management Contracts
- ❖ Directs Two B&D Venues Midwest Offices



# Pendulum

## Jonathan Cole, AIA, NCARB, NOMA

- ❖ 20 Years of Professional Sports Design and Planning Experience
- ❖ Experience with 15 MiLB Ballparks and 2 MLB Ballparks
- ❖ Based in Kansas City, MO



# MiLB Market

- ❖ Affordable Family Entertainment Targeting:
  - ❖ Families
  - ❖ Community Groups
  - ❖ Neighborhood Associations
  - ❖ Company Outings
  - ❖ Retirees
  - ❖ Baseball Fans
- ❖ Game Presentation Includes:
  - ❖ Pre- and Post- Game Activities
  - ❖ Between Inning Promotions
  - ❖ In-Game Contests & Exhibitions
- ❖ Full Complement of Food and Beverage Options
- ❖ MLB Teams have Implemented Many of the Entertainment Concepts Pioneered in MiLB



# Comparable Markets

Among the largest,  
wealthiest, and  
economically active  
AA baseball markets

Market	Total Population	Market	Retail Expenditures	Market	Average Household Income
Bowie, MD	5,900,994	Bowie, MD	\$69,100	Bowie, MD	\$102,613
Trenton, NJ	5,382,513	Trenton, NJ	\$53,200	Manchester, NH	\$88,250
Frisco, TX	4,225,498	Frisco, TX	\$39,500	Trenton, NJ	\$84,408
Akron, OH	2,748,452	CT Municipality	\$24,700	Frisco, TX	\$80,572
CT Municipality	2,531,911	Akron, OH	\$24,300	Richmond, VA	\$78,277
San Antonio, TX	2,028,072	Reading, PA	\$16,100	CT Municipality	\$78,097
Reading, PA	1,747,098	San Antonio, TX	\$15,900	Reading, PA	\$75,599
Manchester, NH	1,515,414	Manchester, NH	\$15,500	Midland, TX	\$72,679
Jacksonville, FL	1,335,324	Harrisburg, PA	\$12,100	Harrisburg, PA	\$69,922
Harrisburg, PA	1,309,888	Jacksonville, FL	\$11,900	Jacksonville, FL	\$69,205
Richmond, VA	1,202,138	Richmond, VA	\$11,800	Birmingham, AL	\$68,668
Birmingham, AL	1,002,480	Birmingham, AL	\$9,020	Portland, ME	\$68,538
Tulsa, OK	914,851	Tulsa, OK	\$7,970	Huntsville, AL	\$67,553
Kodak, TN	859,181	Kodak, TN	\$7,170	Tulsa, OK	\$65,067
Chattanooga, TN	763,085	North Little Rock, AR	\$6,200	San Antonio, TX	\$64,983
North Little Rock, AR	719,671	Chattanooga, TN	\$6,130	North Little Rock, AR	\$62,991
Huntsville, AL	608,724	Huntsville, AL	\$5,520	Akron, OH	\$62,751
Mobile, AL	606,555	Portland, ME	\$5,200	Pearl, MS	\$62,738
Pensacola, FL	553,865	Mobile, AL	\$4,790	Springdale, AR	\$61,455
Pearl, MS	544,268	Pensacola, FL	\$4,640	Pensacola, FL	\$60,971
Portland, ME	543,240	Pearl, MS	\$4,380	Montgomery, AL	\$60,712
Springfield, MO	487,343	Springfield, MO	\$3,890	Corpus Christi, TX	\$60,161
Springdale, AR	478,705	Springdale, AR	\$3,830	Binghamton, NY	\$59,144
Corpus Christi, TX	430,058	Montgomery, AL	\$3,330	Kodak, TN	\$58,200
Montgomery, AL	412,499	Corpus Christi, TX	\$3,320	Chattanooga, TN	\$55,120
Erie, PA	381,933	Binghamton, NY	\$3,140	Mobile, AL	\$57,742
Binghamton, NY	369,192	Erie, PA	\$3,030	Erie, PA	\$56,260
Altoona, PA	368,343	Altoona, PA	\$2,880	Springfield, MO	\$55,172
Midland, TX	291,815	Midland, TX	\$2,520	Altoona, PA	\$53,307
Jackson, TN	252,473	Jackson, TN	\$1,890	Jackson, TN	\$51,611

# Target Market

Market [1]	Total Population	0-19	20-24	25-34	35-44	45-54	55-64	65+	% of Market Age 20-34	Target Market Population
Akron, OH	2,748,452	25.0%	6.5%	11.8%	12.1%	14.9%	13.9%	15.8%	18.3%	502,967
Birmingham, AL	1,002,480	26.3%	6.5%	13.9%	13.1%	14.1%	12.8%	13.3%	20.4%	204,506
Frisco, TX	4,225,498	29.9%	6.7%	15.0%	15.0%	14.1%	10.2%	9.1%	21.7%	916,933
Harrisburg, PA	1,309,888	25.0%	6.0%	12.0%	12.7%	14.9%	13.7%	15.6%	18.0%	235,780
Jacksonville, FL	1,335,324	26.2%	7.0%	13.8%	13.2%	14.7%	12.5%	12.5%	20.8%	277,747
Manchester, NH	1,515,414	26.0%	6.4%	11.5%	13.4%	16.7%	13.3%	12.8%	17.9%	271,259
Reading, PA	1,747,098	26.8%	6.2%	11.7%	12.8%	14.9%	12.7%	14.8%	17.9%	312,731
Richmond, VA	1,202,138	25.9%	6.9%	13.4%	13.2%	14.9%	12.9%	12.9%	20.3%	244,034
San Antonio, TX	2,028,072	29.9%	7.5%	14.4%	13.2%	13.2%	10.8%	11.1%	21.9%	444,148
Trenton, NJ	5,382,513	25.8%	7.1%	13.4%	12.7%	14.7%	12.4%	13.9%	20.5%	1,103,415
<b>Comparable Average</b>	<b>2,249,688</b>	<b>26.7%</b>	<b>6.7%</b>	<b>13.1%</b>	<b>13.1%</b>	<b>14.7%</b>	<b>12.5%</b>	<b>13.2%</b>	<b>19.8%</b>	<b>451,352</b>
<b>CT Municipality</b>	<b>2,531,911</b>	<b>25.3%</b>	<b>7.1%</b>	<b>12.1%</b>	<b>12.5%</b>	<b>15.3%</b>	<b>13.2%</b>	<b>14.8%</b>	<b>19.2%</b>	<b>486,127</b>
<b>Comparable Rank</b>	<b>4th</b>	<b>9th</b>	<b>3rd</b>	<b>7th</b>	<b>10th</b>	<b>2nd</b>	<b>4th</b>	<b>4th</b>	<b>7th</b>	<b>4th</b>

NOTES:

[1] - Markets with AA Baseball Team



# Market Wealth

Market [1]	Total Households	Average Household Income	Households by Household Income				
			\$0 to \$14,999	\$15,000 to \$24,999	\$25,000 to \$49,999	\$50,000 to \$99,999	\$100,000+
Akron, OH	1,123,176	\$62,751	13.8%	11.3%	28.1%	29.5%	17.3%
Birmingham, AL	393,850	\$68,668	13.2%	10.7%	27.3%	28.5%	20.3%
Frisco, TX	1,552,479	\$80,572	9.1%	9.3%	25.3%	29.3%	27.0%
Harrisburg, PA	518,186	\$69,922	8.8%	8.7%	25.9%	35.0%	21.5%
Jacksonville, FL	517,075	\$69,205	12.1%	9.2%	26.5%	32.5%	19.7%
Manchester, NH	567,286	\$88,250	8.2%	7.4%	19.8%	31.4%	33.2%
Reading, PA	656,051	\$75,599	9.1%	9.0%	24.3%	32.0%	25.6%
Richmond, VA	468,409	\$78,277	9.3%	8.2%	25.1%	31.6%	25.8%
San Antonio, TX	720,130	\$64,983	13.3%	10.1%	26.7%	30.9%	19.0%
Trenton, NJ	2,019,252	\$84,408	11.8%	8.6%	21.7%	28.0%	29.8%
<b>Comparable Average</b>	<b>853,589</b>	<b>\$74,264</b>	<b>10.9%</b>	<b>9.3%</b>	<b>25.1%</b>	<b>30.9%</b>	<b>23.9%</b>
<b>CT Municipality</b>	<b>982,789</b>	<b>\$78,097</b>	<b>11.3%</b>	<b>9.3%</b>	<b>22.5%</b>	<b>29.9%</b>	<b>26.9%</b>
<b>Comparable Rank</b>	<b>4th</b>	<b>5th</b>	<b>6th</b>	<b>5th</b>	<b>9th</b>	<b>7th</b>	<b>4th</b>

[1] - Markets with AA Baseball Team



# Consumer Spending

Market [1]	Expenditures [2]		
	Total	Retail	Entertainment
Akron, OH	\$56,700	\$24,300	\$3,140
Birmingham, AL	\$21,100	\$9,020	\$1,170
Frisco, TX	\$92,700	\$39,500	\$5,180
Harrisburg, PA	\$28,400	\$12,100	\$1,580
Jacksonville, FL	\$27,900	\$11,900	\$1,550
Manchester, NH	\$36,400	\$15,500	\$2,040
Reading, PA	\$37,700	\$16,100	\$2,100
Richmond, VA	\$27,600	\$11,800	\$1,540
San Antonio, TX	\$37,100	\$15,900	\$2,070
Trenton, NJ	\$124,900	\$53,200	\$6,990
<b>Comparable Average</b>	<b>\$49,050</b>	<b>\$20,932</b>	<b>\$2,736</b>
<b>CT Municipality</b>	<b>\$57,800</b>	<b>\$24,700</b>	<b>\$3,220</b>
<b>Comparable Rank</b>	<b>3rd</b>	<b>3rd</b>	<b>3rd</b>

[1] - Markets with AA Baseball Team

[2] - 1,000,000 of dollars

# Corporate Market

Market [1]	Business Establishments by Employment [2]						
	Total Establishments [2]	1-49	50-99	100-249	250-499	500-999	1,000+ 50+
Akron, OH	16,402	15,344	582	359	81	26	10 1,058
Birmingham, AL	25,246	23,739	837	472	130	40	28 1,507
Frisco, TX	141,069	131,894	4,943	2,972	794	318	148 9,175
Harrisburg, PA	13,352	12,480	453	295	64	43	17 872
Jacksonville, FL	33,538	31,854	922	538	137	66	21 1,684
Manchester, NH	10,635	9,987	368	215	45	13	7 648
Reading, PA	8,177	7,658	277	177	47	13	5 519
Richmond, VA	30,539	28,891	923	517	123	56	29 1,648
San Antonio, TX	40,516	37,944	1,460	770	206	93	43 2,572
Trenton, NJ	9,615	9,021	321	189	54	16	14 594
<b>Comparable Average</b>	<b>32,909</b>	<b>30,881</b>	<b>1,109</b>	<b>650</b>	<b>168</b>	<b>68</b>	<b>32 2,028</b>
<b>CT Municipality</b>	<b>29,007</b>	<b>27,213</b>	<b>936</b>	<b>643</b>	<b>132</b>	<b>46</b>	<b>37 1,794</b>
<b>Comparable Rank</b>	<b>5th</b>	<b>5th</b>	<b>3rd</b>	<b>3rd</b>	<b>4th</b>	<b>5th</b>	<b>3rd 3rd</b>

**NOTES:**

[1] - Markets with AA Baseball Team

[2] - Within MSA



# Income Growth

Market [1]	Average Household Income		
	2013	2018 (Projected)	% Change
Akron, OH	\$62,751	\$65,258	4.0%
Birmingham, AL	\$68,668	\$71,917	4.7%
Frisco, TX	\$80,572	\$84,633	5.0%
Harrisburg, PA	\$69,922	\$72,403	3.5%
Jacksonville, FL	\$69,205	\$71,878	3.9%
Manchester, NH	\$88,250	\$95,605	8.3%
Reading, PA	\$75,599	\$79,156	4.7%
Richmond, VA	\$78,277	\$81,143	3.7%
San Antonio, TX	\$64,983	\$67,563	4.0%
Trenton, NJ	\$84,408	\$89,920	6.5%
<b>Comparable Average</b>	<b>\$74,264</b>	<b>\$77,948</b>	<b>4.8%</b>
<b>CT Municipality</b>	<b>\$78,097</b>	<b>\$82,914</b>	<b>6.2%</b>
<b>Comparable Rank</b>	<b>5th</b>	<b>4th</b>	<b>3rd</b>

**NOTES:**

[1] - Markets with AA Baseball Team

## DRAFT Outline Program

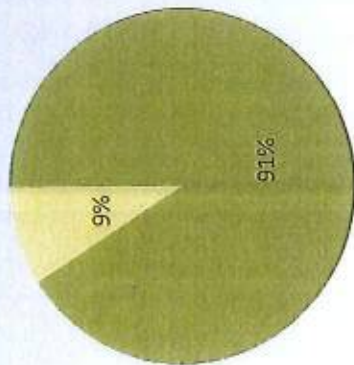


- ❖ 8,998 Capacity
  - » 300 Club / Loge Seats
  - » 6,600 Fixed Seats
  - » 24 Suites
  - » 4 Party Suites
  - » Picnic Area (750 Tickets)
  - » Berm Area (1,000 Tickets)
- ❖ 220,000 SF

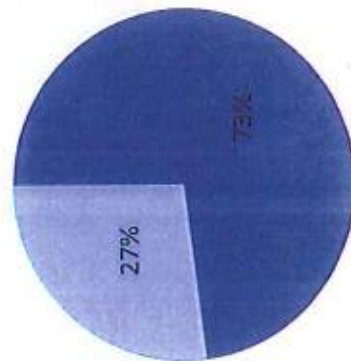
# Site Analysis

# Funding Trends

## Financing



## Funding



Ballpark	Market	Level	Opening	Public Financing	Private Financing	TOTAL	Annual Team Payments
Regions Field	Birmingham, AL	AA	2013	\$64,000,000	\$0	\$64,000,000	\$715,000
ONEOK Field	Tulsa, OK	AA	2010	\$52,600,000	\$0	\$52,600,000	\$150,000
Coolray Field	Lawrenceville, GA	AAA	2009	\$45,000,000	\$0	\$45,000,000	\$550,000
BB&T Ballpark	Winston-Salem, NC	A	2009	\$28,000,000	\$20,700,000	\$48,700,000	\$850,000
Huntington Park	Columbus, OH	AAA	2009	\$58,800,000	\$0	\$58,800,000	NA
Aces Ballpark	Reno, NV	AAA	2009	\$36,500,000	\$18,500,000	\$55,000,000	NA
Bowling Green Ballpark	Bowling Green, KY	A	2009	\$25,000,000	\$0	\$25,000,000	\$100,000
Parkview Field	Fort Wayne, IN	A	2009	\$25,000,000	\$5,000,000	\$30,000,000	\$250,000
Coca Cola Park	Allentown, PA	AAA	2008	\$50,250,000	\$0	\$50,250,000	\$700,000
Arvest Ballpark	Springdale, AR	AA	2008	\$52,600,000	\$0	\$52,600,000	\$150,000
				<b>AVERAGE:</b>	<b>91%</b>		<b>9%</b>

# Benefits Analysis

- ❖ Projected Ballpark Operations
  - ❖ Projected Development Budget
  - ❖ Construction Impacts
    - ❖ Direct
    - ❖ Indirect
  - ❖ Recurring Operating Impacts
    - ❖ Direct
    - ❖ Indirect
    - ❖ On-site and Off-site
  - ❖ Qualitative Impacts
- } Employment  
Wages  
Economic Activity  
Fiscal Benefits

# Benefits Analysis

- ❖ One-Time Construction Impacts
  - Supports **903 Jobs**
  - Supports **\$22M in Earnings**
  - **\$2.2M** in Tax Revenues
- ❖ Recurring Annual Operating Impacts
  - Supports **665 Jobs**
  - Supports **\$9.1M in Earnings**
  - **\$1.7M** in Annual Tax Revenues
  - 30-Year Present Value of **\$35M**
- ❖ Other Benefits
  - Generates **23,700 Annual Room Nights**
  - Supports **\$3.5M in Annual Hotel Spending**
  - Supports **\$4.9M in Annual Food and Beverage Spending**



# Planning Case Study

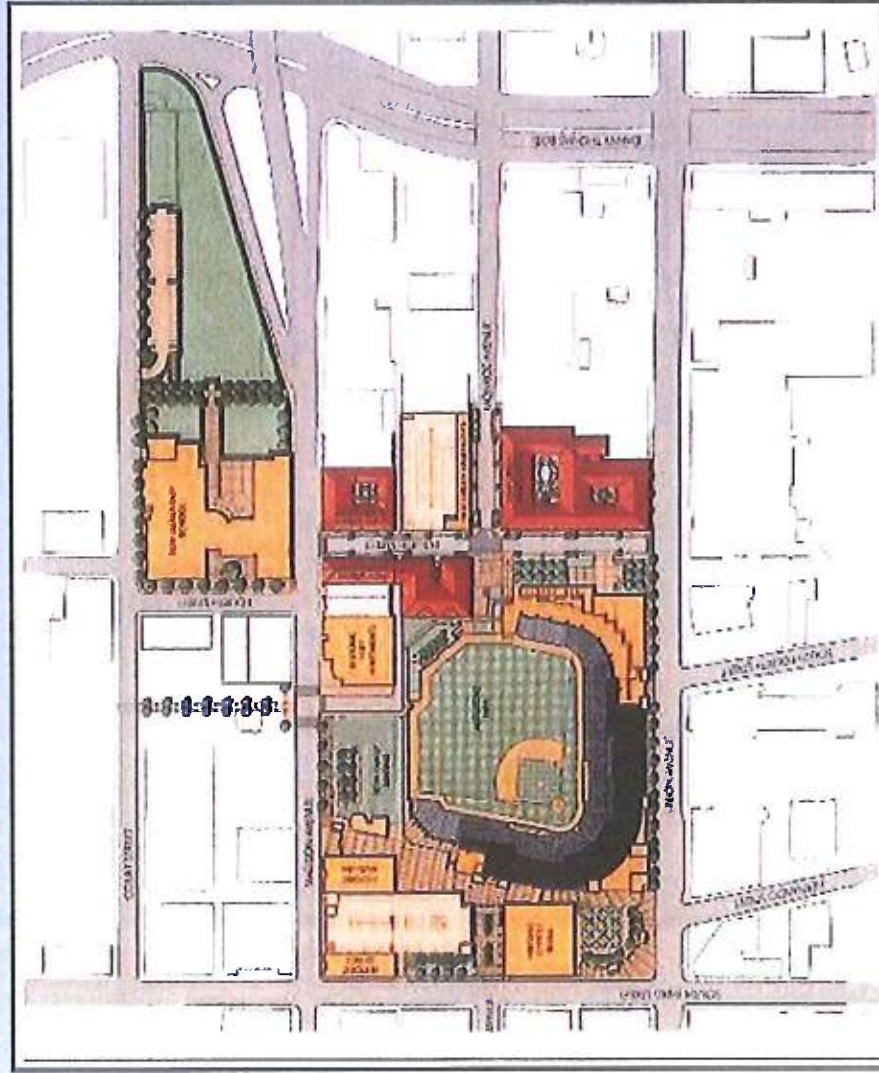
## Autozone Park (AAA)



Capacity: 14,200  
Opened: 2000  
Suites: 48  
Architect: Looney Ricks Kiss



# Planning and Design



- ❖ 14,200 Seats
- ❖ 20,000 Spaces Within Walking Distance
- ❖ Outfield Boardwalk

# Planning Case Study

## Ancillary Development



- Central Business Improvement District
- Downtown population increased 33%
- 400 residential units built adjacent to the ballpark
- Moore Building redeveloped into 220,000 SF of class A office space
- Minor League Baseball Museum
- New elementary school

# Planning Case Study

## Fifth Third Field (A)



Capacity: 7,230  
Opened: 2000  
Suites: 30  
Architect: HNTB



# Planning Case Study

## Planning and Design

- Respects existing public rights-of-way
- Upper deck general admission seats
- Connection to street activity in the outfields
- Strategic site selection
- 6,900 spaces within .25 miles



# Planning Case Study

## Ancillary Development

- Component of riverfront improvement initiative
- \$100 M in downtown investment since opening
- 15% increase in retail activity on game days
- Four loft projects added 290 residential units
- Relzon Company building \$26 M headquarters adjacent to the ballpark



# Quality of Life Benefits



# Conclusion - Q & A

