



amarillo  
 civic center  
complex

FACILITY NEEDS ASSESSMENT STUDY  
MAY 2012  
VOLUME I

# Amarillo Civic Center Complex Facility Needs Assessment Study Volume I

City of Amarillo  
Project No. 02-11

Produced for:

The City of Amarillo  
509 SE Seventh Avenue  
Amarillo, TX 79101

## City of Amarillo

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### **Elected Officials**

Paul Harpole  
*Mayor*

Brian J. Eades  
*City Commissioner*

Ellen Robertson Green  
*City Commissioner*

Lilia Escajeda  
*City Commissioner*

Jim Simms  
*City Commissioner*

### **City Management**

W. Jarrett Atkinson  
*City Manager*

Vicki Covey  
*Assistant City Manager*

Dean Frigo  
*Assistant City Manager*

### **Civic Center Management**

Sherman Bass  
*Civic Center Manager*

Bo Fowlkes  
*Assistant Civic Center Manager*





## Project Team



Amarillo, TX

D/P/S has served public clients for over 50 years. We are committed to supporting local institutions by providing the information needed to make good decisions and the design expertise to create functional, beautiful buildings. Our staff of over 130 includes architects, interior designers, planners, structural engineers, landscape architects, and experts in sustainable design. We focus on collaborating with our clients and expert consultants to create functional, comfortable, and stimulating places.

DONALD GRINBERG, FAIA

ARCHITECTURE+ PLANNING+

Boston, MA / San Francisco, CA

Mr. Grinberg, a national leader in the planning and design of public assembly facilities, has worked on more than fifty convention and sports projects in the US and abroad. He has particularly strong skills in assisting clients with pre-design project start-up tasks, such as feasibility and programming studies. His perspective on industry trends is regularly reported in national industry press, and he is a frequent speaker on a variety of topics of concern to civic leaders, building managers and other industry participants.



HVS Convention, Sports & Entertainment Facilities Consulting provides specialized expertise necessary to analyze and implement public facilities projects, including convention centers, hotels, arenas, civic centers, fairgrounds, and museums. Our service delivery methods set the industry standard with techniques based on sound economics and rigorous analytical methods.

RLB | Rider Levett Bucknall  
Las Vegas, NV

Rider Levett Bucknall is a leading professional advisory firm providing clients with unbiased, independent, expert advice and management for all aspects of feasibility, cost and time of major construction projects, from project conception and site acquisition to final completion and commissioning. Established in 1785, Rider Levett Bucknall has grown into a truly global practice with more than 80 offices around the world.



Brown Consulting Engineers, Inc. has considerable experience with renovations of existing buildings, including the existing Amarillo Civic Center. Careful consideration is given to designing a new mechanical, electrical and plumbing system which must be coordinated with existing conditions and meet new energy standards. This coordination can only be achieved by thorough and knowledgeable surveys of existing facilities, and a substantial knowledge of building systems.



Amarillo, TX

J. Shehan Engineering, P.C., Mr. Shehan has provided consulting engineering services in the Amarillo area since 1994, his past experience includes public projects for school districts, municipalities, institutions, and private projects for residential and commercial developments. Understanding and navigating the development approval process is critical to any projects success, as well as coordination of all parties involved. JSE provides clients needs with state-of-the art computer based tools that are fundamental to modern civil engineering.



Amarillo, TX

Page & Associates Contractors, Inc. is a premiere Amarillo Contractor/Contract Manager in the industry. Established in 1939, many facilities in Amarillo including the original facility for the Amarillo Civic Center have been built under their guidance. Page and Associates provide services to assist the client from the beginning, at project conception, in achieving budgetary goals and project duration.



Amarillo Civic Center Complex

Facility Needs Assessment Study  
Volume I



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## Executive Summary

### Overview

Recognizing the value of planning and the importance of sustaining the quality of civic services both today and into the future, the City of Amarillo retained a consultant team led by Dekker/Perich/Sabatini (D/P/S) to conduct an interdisciplinary Facilities Needs Assessment of the Amarillo Civic Center Complex (ACCC). The purpose of the study, which commenced in April 2011, was to investigate the ACCC's usability, functionality and condition, as well as determining if there were additional space requirements to satisfy market demand. The recommendations presented in this study develop upon the recently approved Phase One Civic Center Area of Downtown Amarillo Revitalization Plan prepared by private sector developer Wallace-Bajjali, and respect the adopted Downtown Amarillo Urban Design Standards.

The Dekker/Perich/Sabatini team was supported by Donald Grinberg, FAIA, HVS Convention Sports & Entertainment (HVS), RLB, and local consultants, Brown Consulting Engineers, Inc., J. Shehan Engineering, and Page & Associates. This document summarizes analysis of the existing facility and the market analysis.

### Ownership and Management

The City of Amarillo, Texas owns the ACCC. Originally opened in 1968 as a 4,870-seat Coliseum and a 2,324-seat Auditorium, the ACCC underwent a major expansion in 1978 with the addition of the 10,000 square foot Regency Room meeting block and the 27,000 square foot South Exhibit Hall. The 25,000 square foot North Exhibit Hall and the 21,000 square foot Heritage Room were added in 2003. The most recent major addition on the ACCC campus took place in 2006 with the opening of the Globe-News Center for the Performing Arts. The Globe-News Center is a 1,300-seat Auditorium with related spaces which are home to the Amarillo Symphony, Amarillo Opera, and the Lone Star Ballet.

The City of Amarillo operates the ACCC through a single management and operations staff.

### Existing Facility Assessment Process

The consultant team provided the services summarized below and documented in greater detail in the body and appendices of this report.

- *D/P/S, Donald Grinberg, Brown Consulting Engineers, and J. Shehan Engineering conducted a physical inventory and an assessment of the existing Civic Center Complex.*
- *D/P/S, Donald Grinberg, Brown Consulting Engineers, and J. Shehan Engineering consulted with staff, user focus groups and the public in a series of data-gathering meetings.*
- *D/P/S, Donald Grinberg, Brown Consulting Engineers, and J. Shehan Engineering prepared a Facilities Needs Assessment, including consultation with City staff, Civic Center administration, user focus groups, and the community.*
- *HVS staff traveled to Amarillo, Texas in April 2011 to tour the facility, perform a site inspection, meet with facility management and other key industry participants, and gather relevant data.*
- *HVS analyzed the economic and demographics that indicate whether and the extent to which the local market area is supportive of the ACCC.*
- *HVS interviewed current and potential users of the ACCC to understand their event needs, their overall impressions of Amarillo and the ACCC, and the likelihood of booking events in the facility.*
- *HVS reviewed and analyzed historic demand, attendance, and financial data provided by the ACCC.*
- *HVS compiled data on 21 competitive and comparable regional venues to inform and test the reasonableness of the building program recommendations and demand forecasts.*
- *HVS recommended a facility space program for expansion based on the above steps.*





**Existing Facility** Opened in 1968, the ACCC has undergone several expansions to become a multi-functional meeting and entertainment complex. The facility is the primary exhibit and meeting venue for residents of Amarillo and throughout the Texas Panhandle. It also hosts professional sports events, concerts and family entertainment, performing arts, and community functions, such as graduations, job fairs, and social events. The following table provides an overview of the current facility elements at the ACCC.

ACCC CURRENT FACILITY PROGRAM & CAPACITIES

<u>Function Space</u>	<u>Size/Capacity</u>
Exhibit Hall (SF)	
North Exhibit Hall	24,565
South Exhibit Hall	26,700
Coliseum Floor	<u>17,000</u>
Total Exhibit	68,265 SF
Meeting & Ballroom Space (SF)	
Heritage Room	20,725
Regency Room	10,080
Grand Plaza	16,000
Hospitality Room	5,100
Gilliland Center *	<u>1,750</u>
Total Meeting & Ballroom	53,655 SF
Performance Seating	
Coliseum	4,870
Auditorium	2,324
Emeny Performance Hall *	<u>1,237</u>
Total Performance	8,431 Attendees

\* Located in the Globe-New Center for the Performing Arts

The Market Analysis concluded that the ACCC has the potential to serve a greater market and better serve the needs of its existing clients through a multi-pronged expansion program focusing primarily on convention/exhibition/meeting facilities. Simultaneous with the analysis of the market demand for events, the Needs Assessment team conducted a detailed evaluation of the existing facilities. While the ACCC enjoys a special position as one of the few public assembly facilities with “everything under one roof,” the building is very dated and deficient with respect to the quality and organization of many of its spaces, technology, freight delivery, food service operations, and pedestrian relationship to downtown. The market analysis also concluded that these deficiencies should be addressed as part of a facility improvement program.



**EXISTING  
CONDITIONS**

**Exhibit Halls**



**Coliseum**



**Auditorium &  
Grand Plaza**



**Heritage Room -  
Meeting Set-up**



**Regency Room**



**Comparable Venue Assessment** HVS analyzed 11 competitive venues in Texas and 10 comparable venues in similarly sized cities across the U.S. In addition to the market analysis, this comparable analysis provides a basis for programming recommendations. The analysis compares the function spaces and other amenities in each of the facilities along with other characteristics of the markets that are relevant to the success of the venue. Key findings include the following:

- While Amarillo has an average to above-average amount of total function space, the layout is disjointed, and the venue does not have an adequate amount of contiguous exhibit space to compete successfully for many larger convention and trade shows events.
- Amarillo does not currently have an adjacent convention hotel. For the competitive in-state set, adjacent hotels are relatively small properties averaging less than 200 rooms. Integrated hotel properties are more common and generally larger for the comparable national set with an average of just over 300 rooms.
- When compared to the metro population of Amarillo, the number of arena seats at the ACCC Coliseum is well below average when compared to both the in-state competitive venues and the national comparables.
- Approximately half of the in-state competitive set has some form of premium seating available for lease with an average of just over 200 seats. While fewer of the national comparable venues have premium seating, those that do offer a greater number of premium seats, with an average of approximately 330 seats.
- As compared to the in-state competitive set, Amarillo has a below average population. However, unlike Amarillo and other cities in West Texas, which are several hundreds of miles from any major population center, many of the national comparable face competition from venues in nearby major metropolitan areas. As the economic and population hub in the panhandle of West Texas, Amarillo's potential is similar to that of metropolitan areas with greater population.
- Amarillo has a greater number of business establishments as compared to many of its in-state competitors, suggesting stronger potential support from local corporations for ACCC events and space rentals.
- Air passenger volume in Amarillo is well below average as compared to the national comparable set. Amarillo's relative inaccessibility from locations outside of Texas may limit its ability to book regional and national events.

**Recommended Function Space Program**

HVS relied on in-depth current and potential user interviews, an analysis of the Amarillo market, a site inspection, review of comparable convention and civic centers, analysis of historical operations at the ACCC, and knowledge of industry practices to recommend a facility program for the proposed expansion of the ACCC. This facility program serves as a guide for subsequent physical planning aimed at providing the desired program elements.

To address the functional, aesthetic and system deficiencies that are present in the existing facility, HVS recommends new and renovated building infrastructure such that the proposed ACCC's total civic center facility package includes approximately:

- Up to 100,000 square feet of total exhibit space with a 50,000 to 75,000 square foot contiguous, column-free exhibit hall and connected to approximately 25,000 square feet of arena floor space.
- Flexible wall systems to allow a 25,000 square foot portion of the main exhibit hall to serve as banquet and meeting space in a variety of configurations.



**Recommended Function Space Program (cont.)**

- A minimum of 50,000 square feet of flexible meeting and ballroom space, with approximately 30,000 square feet for a multi-purpose subdivided ballroom and 20,000 square feet of break-out meeting space.
- A 5,500 to 7,500 seat arena including 200 to 300 premium seats in various suite configurations.
- A 2,300-seat auditorium theater (same as existing capacity).

The following figure presents a comparison of the recommended versus existing function spaces at the Amarillo Civic Center Complex.

ACCC EXISTING vs. RECOMMENDED FUNCTION SPACE

Function Space	Exhibit Space	Meeting/ Ballroom	Arena Seating	Auditorium Seating
Existing ACCC Size (SF)	68,265	51,905	4,870	2,324
Existing Configuration	2 Separate Halls + Arena Floor	Heritage Room Grand Plaza Regency Hospitality	Single Concourse	
Proposed Size (SF)	up to 100,000	Min. 50,000	5,500-7,500	2,324
Proposed Configuration	Single Exhibit Hall + Arena Floor	Heritage Room plus new/renovated space	Single or Double Concourse, 200 - 300 Premium Seats	

**Demand Projections**

Based on the Recommended Function Spaces presented above, historical demand at the ACCC, user interviews, the market and comparable facility analysis, HVS projects the following demand for the proposed building program for ACCC. HVS based demand projections on the completion of a new exhibit hall in October 2014. Completion of the remaining function space improvements to the ACCC, including what could be a re-configuration of existing ACCC program areas into meeting and ballroom space, would take place in October 2016. HVS estimates that incremental event demand would ramp up following the completion of a new exhibit hall and stabilize by fiscal year 2018-19, two years after construction of the recommended function spaces. For this analysis, HVS assumes that only minor A/V improvements to the Cal Farley Coliseum would take place.



**Demand Projections (cont.)**

The following table presents the projected event demand and attendance through the first year of stabilized demand, 2018/19. The expanded ACCC would generate approximately 40 new events and 80,000 new event attendees.

**PROJECTED EVENT DEMAND AND ATTENDANCE**

	New Exhibit Hall Opens		Renovations Completed			
	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19
<b>Events</b>						
Conventions	5	7	8	9	10	10
Tradeshows	18	18	19	20	21	21
Consumer Shows	41	41	41	41	41	41
Meetings & Conferences	72	72	72	81	81	90
Banquets	123	92	92	104	104	115
Tenant Sports	44	44	44	44	44	44
WRCA Ranch Rodeo	1	1	1	1	1	1
Other Sports	7	13	14	14	15	15
Concerts & Entertainment	53	55	59	62	65	65
Assemblies	27	27	27	27	27	27
Other	38	38	38	38	38	38
<b>Total</b>	<b>429</b>	<b>407</b>	<b>413</b>	<b>440</b>	<b>446</b>	<b>467</b>
<b>Average Attendance</b>						
Conventions	1,500	1,600	1,600	1,600	1,600	1,600
Tradeshows	2,000	2,100	2,100	2,100	2,100	2,100
Consumer Shows	2,300	2,600	2,600	2,600	2,600	2,600
Meetings & Conferences	225	225	225	300	300	300
Banquets	400	400	400	500	500	500
Tenant Sports	1,400	1,400	1,400	1,400	1,400	1,400
WRCA Ranch Rodeo	14,750	14,750	14,750	14,750	14,750	14,750
Other Sports	1,500	1,500	1,500	1,500	1,500	1,500
Concerts & Entertainment	1,600	1,600	1,600	1,600	1,600	1,600
Assemblies	2,100	2,100	2,100	2,100	2,100	2,100
Other	525	525	525	525	525	525
<b>Total Attendance</b>						
Conventions	7,500	11,200	12,800	14,400	16,000	16,000
Tradeshows	36,000	37,485	39,690	41,895	44,100	44,100
Consumer Shows	94,300	105,300	105,300	105,300	105,300	105,300
Meetings & Conferences	16,200	16,200	16,200	24,300	24,300	27,000
Banquets	49,200	36,800	36,800	51,750	51,750	57,500
Tenant Sports	61,600	61,600	61,600	61,600	61,600	61,600
WRCA Ranch Rodeo	14,750	14,750	14,750	14,750	14,750	14,750
Other Sports	10,500	19,125	20,250	21,375	22,500	22,500
Concerts & Entertainment	84,800	88,400	93,600	98,800	104,000	104,000
Assemblies	56,700	56,700	56,700	56,700	56,700	56,700
Other	19,950	19,950	19,950	19,950	19,950	19,950
<b>Total</b>	<b>450,000</b>	<b>470,000</b>	<b>480,000</b>	<b>510,000</b>	<b>520,000</b>	<b>530,000</b>

HVS calculated the potential generation of room nights by the recommended function spaces. These room nights represent new, induced demand into the Amarillo market as a direct result of the expansion and redevelopment to the ACCC. The introduction of the expanded ACCC would result in a greater number of citywide conventions and higher impact meetings and conferences in the Amarillo market. Larger conventions would bring a greater number of out-of-towners requiring lodging for extended periods. Meetings, conferences, and amateur sports competitions would similarly bring a greater percentage of attendees from outside the local market.



### Demand Projections (cont.)

The following table presents the resulting room night generation through 2018/19, the first year of stabilized demand. The expanded ACCC would generate approximately 30,000 additional room nights over current levels.

Total	2013/14	2014/15	2015/16	2016/17	2017/18
Conventions	3,800	15,700	17,900	20,200	22,400
Tradeshows	10,800	14,100	14,900	15,700	16,500
Consumer Shows	9,400	10,500	10,500	10,500	10,500
Meetings & Conferences	2,400	3,600	3,600	5,500	5,500
Banquets	1,500	1,100	1,100	1,600	1,600
Tenant Sports	1,800	1,800	1,800	1,800	1,800
WRCA Ranch Rodeo	7,400	7,400	7,400	7,400	7,400
Other Sports	300	1,000	1,000	1,100	1,100
Concerts & Entertainment	2,500	2,700	2,800	3,000	3,100
Assemblies	1,700	1,700	1,700	1,700	1,700
Other	600	600	600	600	600
<b>Total</b>	<b>42,200</b>	<b>60,200</b>	<b>63,300</b>	<b>69,100</b>	<b>72,200</b>

### Operations Assessment

The City of Amarillo owns the ACCC and manages the complex through an in-house city department. Management structure, staff organization, and level of operating subsidy are all consistent with similar-sized venues throughout the country.

The current management team in place at the ACCC possesses substantial experience and skills in the field of facility management. A private management firm would not necessarily provide a team with as much, or more, industry experience than the current management structure. HVS suggests that the City consider minor adjustments to the current staff arrangement to place additional emphasis on event sales. Although the Amarillo Convention and Visitors Council (ACVC) takes primary responsibility for selling and marketing the ACCC beyond a 24-month booking window, there are still very important sales efforts that could either supplement the ACVC's role or focus on more aggressive event sales within the 24-month booking window.

Additionally, HVS recommends that ACCC management enhance communication with the City through an annual report. This report should include, at a minimum, a description of events and attendance at the ACCC as well as a description of operating revenue and expenses associated with managing the venue. Other information may include data regarding room nights generated by ACCC events and key strategic goals for the coming year.

The ACVC structure and staffing levels are also consistent with the size and breadth of Amarillo's current convention marketing efforts. The ACVC has demonstrated success in attracting several new groups during the recent years which have brought a significant number of room nights to local hotels. The potential future expansion or redevelopment of the ACCC should be coordinated with the creation of additional sales manager positions and an expansion of the convention services staff. Moreover, HVS recommends that the shared support staff positions also expand to better serve all clients and maintain the two websites that the ACVC currently hosts.

### Conclusion

Based on the analysis of the market and the review of the existing facility, it is clear that an expansion of the ACCC would enhance the marketability of the venue and increase demand significantly. Revitalizing the Civic Center Complex will address current and future needs, improve community services, strengthen the community character and identity, and stimulate private reinvestment in the downtown area. The Amarillo Civic Center Complex has a bright, growing future that will dramatically improve its business and enhance Amarillo's downtown, the city as a whole, and the region.





## Study Scope & Methodology

### Overview

The Needs Analysis study scope and methodology are part of a logical and rigorous process that has created a road map for the future of the Amarillo Civic Center Complex. Understanding the need for a thorough, objective and practical vision, the City commissioned this Facility Needs Assessment. The study's scope was structured to aid City policymakers in moving forward to make Amarillo's Civic Center Complex, the Convention Center of the Panhandle and West Texas, and to address other short and long-term improvements needed to secure this facility's successful future.

The study consisted of analyzing the market, financial, operational, and physical issues that could be limiting the success of the facility to maximize attendance, event days, and economic impact. The approach to the Needs Assessment was based on a fundamental commitment to the principle that physical improvements to the Civic Center Complex must be market-driven. Unlike almost all other facilities built by the public sector, the Civic Center Complex is in a competitive business, and any improvements program must grow out of a thoughtful and rigorous consideration of the market. There are also more subjective factors that were taken into account in this Needs Analysis, such as attendee comfort, civic pride and stimulating other downtown development and revitalization.

The first phase of the Needs Assessment process consisted of two major task areas, organized as follow:

#### Task I: Architectural and Engineering Study of Existing ACCC

This portion of the Needs Assessment was carried out by the architectural, landscape architectural, and engineering members of the team; this work overlapped the Phase I Market Analysis. The review considered the exterior and interior of the existing complex, its systems and site, as well as the nearby surrounding off-site conditions. Site walkthroughs, extensive photographic documentation, interviews of operations staff, and a user group focus meeting were the primary means of data collection for this task.

The architectural and engineering study considered strengths and deficiencies of the leasable spaces, lobbies and circulation spaces, food services spaces, support spaces, and the facility's exterior. Within these spaces, a comprehensive investigation noted existing conditions for accessibility, lighting, mechanical/electrical/plumbing, audio-visual, as well as finishes, fixtures/furniture and equipment, and graphics/signage. The investigation of the exterior of the facility covered topography, drainage, surface, vegetation, lighting, graphics, parking, and site amenities. Task I was focused on identifying physical needs.

#### Task II: Market Study

This work, primarily the responsibility of HVS, consisted of a comprehensive market study of Amarillo's meeting and events industry, an analysis of Civic Center Complex financial performance, a review of Civic Center Complex management, marketing, and operating procedures, and an assessment of economic and fiscal impacts. The market study, the first task upon which the entire project is based, consisted of an analysis of historic demand and attendance at the Civic Center Complex, a demographic and socioeconomic analysis of the Amarillo market, a review of comparable and competitive facilities, interviews with existing and potential users, program recommendations regarding increases in the supply of leasable space, and the preparation of event and attendance projections for the recommended expansion based on demand projections for the expanded and renovated facility. The market study serves as the basis for the recommended function space program.







## Existing Facility Assessment

### Introduction

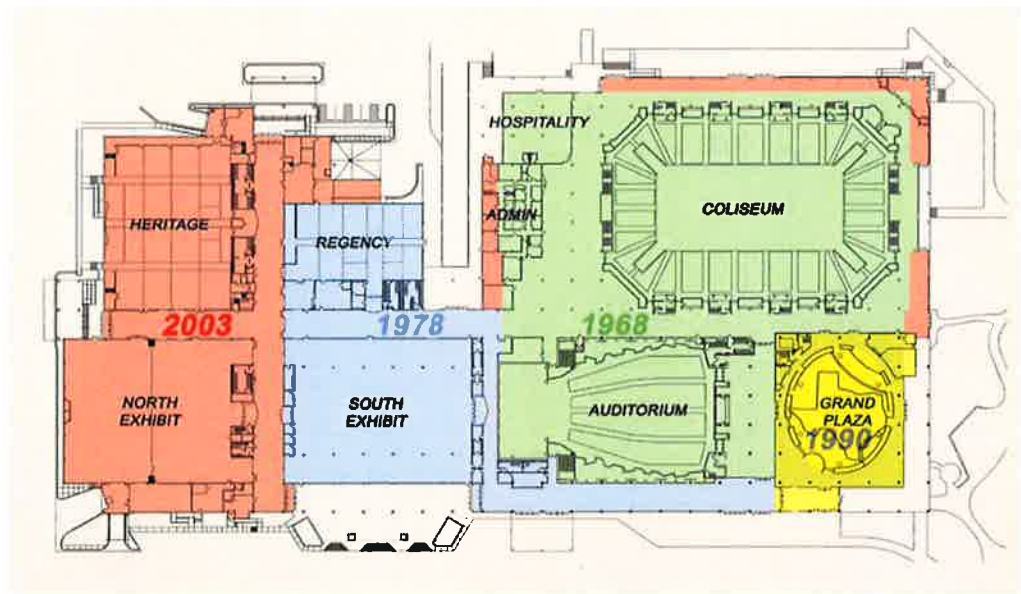
The Amarillo Civic Center Complex is a multi-purpose set of public assembly venues of various types tied together in one facility under a single roof; the total gross area of the facility is approximately 354,000 SF. The Complex hosts a wide variety of event types, ranging from concerts, sporting events, rodeos and consumer gate shows to trade shows, conferences, banquets, meetings, weddings and other local events. The facility serves the population of Amarillo, the Texas Panhandle, and periodically, state-wide and regional events.

The facility occupies a site of approximately 15 acres on six blocks in downtown Amarillo, adjacent to City Hall. The site is defined by Buchanan Street on the west, East Third Avenue on the North, Johnson Street on the East and Centennial Plaza on the south. East 6th, East 5th and East 4th Avenues, once extending through the site, terminate at Johnson and Buchanan Streets.

Originally constructed in 1968, the facility has undergone two subsequent expansions, one in 1978, and the most recent in 2003. The two expansions have added exhibition and meeting space, while the Auditorium and Coliseum have remained basically unchanged since they were originally constructed. Other smaller improvements, such as the enclosure of the Grand Plaza (1990) have taken place at other times.

The current Needs Assessment has focused on evaluating the existing facilities relative to their ability to function in response to the current marketplace for the various event types housed in the Civic Center Complex. This analysis is an extension of and compliment to the initial assessment conducted by HVS as part of their market analysis that identified quantitative enlargement of some of the facilities. This Needs Assessment, focusing on functional and qualitative issues, has involved the evaluation of the facility so that there is a good data base of information for subsequent studies of potential expansion and renovation based on the market study conducted by HVS. This Needs Assessment has also looked at the facility from the perspective of industry standards and its overall aesthetic condition.

The process of collecting information in this Needs Assessment included on-site observations, interviews with facility staff, and a focus group meeting involving approximately 12 'high volume' users. This report is organized by first considering the site, and then by functional space within the facility. Narratives about these topics are presented, followed by annotated photographs; additional room data sheet information can be found in the appendix.



First Floor by Addition Year



**SITE**

**Vehicular  
Circulation and  
Parking**

The building is set back from streets approximately 130' on its east and west sides, and 50-90' feet on the northern side at 3rd Avenue. Areas for buses and other vehicles dropping off and picking up passengers are provided on three sides of the complex.

The site has multiple vehicular entries (8) from the surrounding streets that serve the multiple loading docks, entries, and parking areas. The curb cuts are distributed as follows:

- Buchanan Street: (3) curb cuts
- Johnson Street: (3) curb cuts
- 3rd Avenue: (2) curb cuts
- Centennial Park: separates the complex from City Hall

The Civic Center Complex site itself includes (687) regular parking spaces of which (67) are handicapped spaces, as well as (5) reserved spaces, (15) short term parking and (5) service parking spaces. For events with a large attendance, the parking supply supporting the complex extends in all directions, and is generally a "first-come, first-served" operation. Regardless of the supply of parking in the surrounding area of the complex (1379± off-site parking spaces), there is often a perception that there is not enough. Some event promoters have described the need to delay the start of shows because of the parking problem. For some sporting events tailgating activities take place in the parking areas. The open parking areas also support temporary structures for some events, such as pens for the rodeo.

The physical condition of the parking lots themselves vary from location to location. Parking lots on the East side of the Civic Center Complex are beginning to show wear and possible sub-base breakdown from the weight of heavy vehicles accessing the loading dock and trash collection.

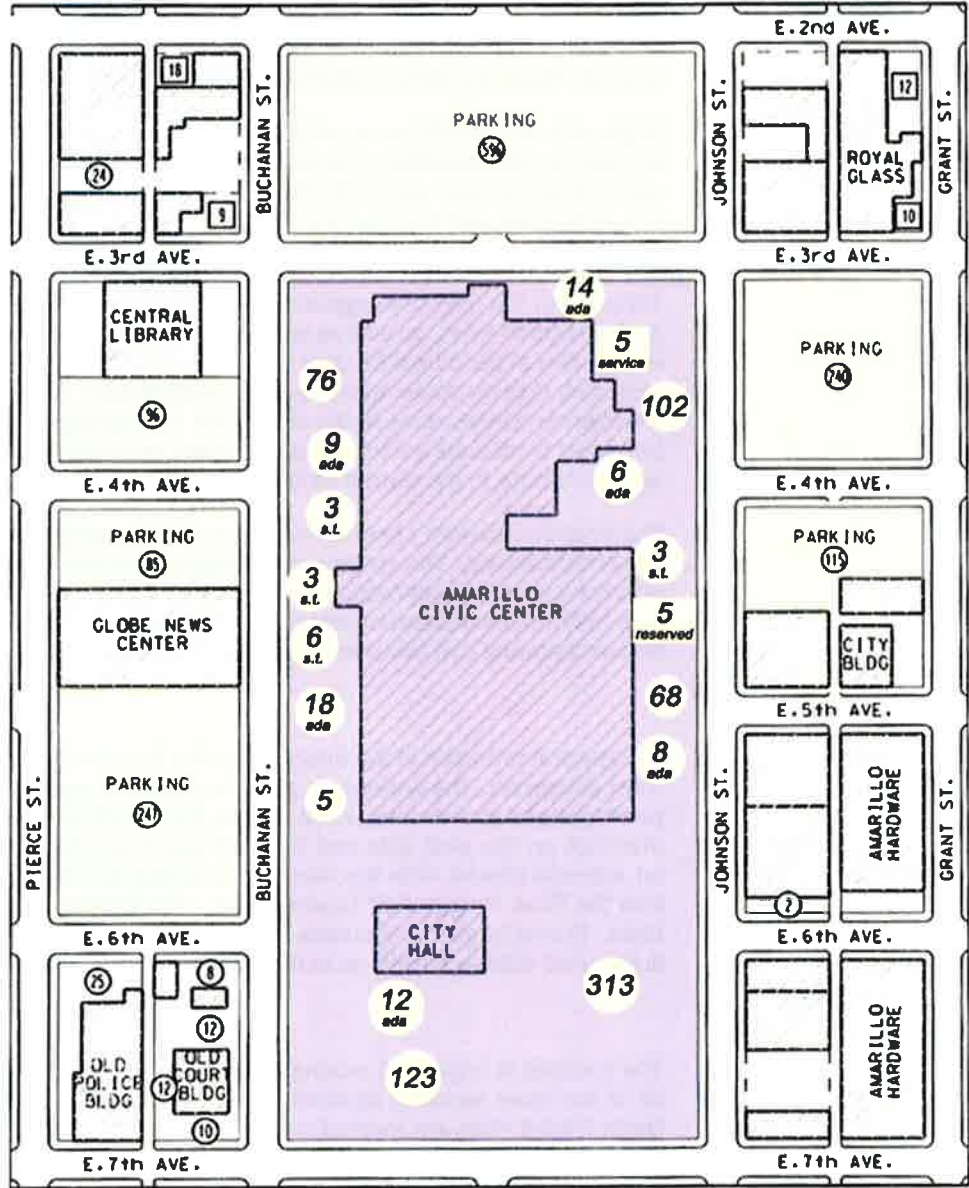
**Pedestrian  
Access**

The complex is visually blocked and separated from public sidewalks by parking lots, drop off/pick up areas and service zones. There is minimal direct pedestrian access to the complex or connection to the Globe-News Center for the Performing Arts.



SITE

Vehicular  
Circulation and  
Parking  
(cont.)



Available Parking Around Civic Center Complex



**SITE**

**Open Space and Landscaping**

The majority of the site, exclusive of the building itself, consists of the parking lot and paved circulation. There is a small park located between the Civic Center Complex and City Hall which is periodically utilized by event goers and the public. Within the park and other open spaces, there are some historical markers and public art installations.

In general, the facility lacks outdoor gathering space for drop-off and pick-up waiting areas and pre- or post-event function areas or plazas. At most of the entrances, there are minimal paved areas to lead users into the facility. These areas are utilitarian in nature and do not encourage the user to spend any time in the space. They also lack the following in amenities (seating, designated smoking areas, waste/ash urns, sun/rain protection, etc.).

Throughout the site, the vegetation consists of mostly turf grass interspersed with shade and evergreen trees, as well as some shrubs used as foundation plantings. The vegetation is generally in good health. Over the years though, some vegetation has died and not been replaced, leaving some areas sparse. In particular, the front of the Civic Center Complex (Buchanan Street side) lacks significant landscaping typical of a facility such as this. Improved landscape could assist new users with way finding and locating main entrances and contribute to the overall ambiance of downtown.

The irrigation system consists mainly of pop-up spray heads with some areas of soaker/sweat-type piping. The system is working with no obvious over watering or under watering occurring (visual observation). Some areas of turf grass are on steeper slopes, which can be a maintenance issue; mowing on a side slope can be dangerous and irrigation overspray or over watering can occur at the bottom of the slope.

**Drainage**

The general condition of the drainage for the Amarillo Civic Center Complex is satisfactory in most situations. The drainage is generally from the roof to storm sewer and from the site to parking areas and streets, which convey the runoff to inlets and into the storm sewer. The drainage on the west side and the east side from the alley between 5th and 6th Avenue on Johnson breaks, with the north contributing to the storm drain system that discharges into the Ross Rogers Golf Course Lake. The southeast runoff is directed to Tee Anchor Lake. During large storm events the capacity is insufficient to convey the runoff and there is reported drainage back up in the Coliseum.

**Overall Building Organization**

The complex is organized around a north/south circulation spine, off of which are located all of the main leasable assembly spaces. The Grand Plaza, Auditorium and South and North Exhibit Halls are located on the west side of the spine, while the Coliseum, Regency Room and Heritage Room are on the spine's eastern side. Various east/west lobbies and circulation zones connect the central spine to the building's exterior on both the east and west sides. This overall circulation system in some ways mimics the street grid of Amarillo, but this idea is not properly exploited in the way the building works and feels. The Coliseum and Auditorium are multi-level, with their seating areas built into the ground, but the rest of the complex is a one-story facility.



**BUILDING OVERVIEW**

**Public Entrances** There are nominally 11 entrances to the complex (numbered 1-12, with #9 not used). These entrances are individually signed as follows:

- 1 South Exhibit Hall/Box Office (West; aligns with entrance #5 to east);
- 2 South Exhibit Hall/North Exhibit Hall (West; aligns with entrance #4 to east);
- 3 North Exhibit Hall/Heritage Room (North; aligns with entrance #10 to south);
- 4 Heritage Room/Regency Room (East; aligns with entrance #2 to west);
- 5 South Exhibit Hall/Regency Room (East; aligns with entrance #1 to west);
- 6 Administrative Offices (East);
- 7 Cal Farley Coliseum (East);
- 8 Cal Farley Coliseum (SE corner);
- 9 not used;
- 10 Cal Farley Coliseum (South; aligns with entrance #3 to north);
- 11 The Grand Plaza (West);
- 12 Auditorium (West; serves lobby between Auditorium and Grand Plaza

While for the regular user and repeat attendee of the facility this system is reasonably comprehensible and functional areas within the Complex can be found relatively easily, for the newcomer this organization with so many multiple entrances poses significant problems. The entrances are relatively undifferentiated from each other, there is little hierarchy, and there is no single main entrance. Entrances are located on all sides of the complex – there is minimal sense of front or back. What attempt there is at architectural articulation at entrances is limited to undistinguished porte-cochères (at entrances #1, #3 and #4), or reddish stucco treatments at the SE corner at entrance #8 to the Coliseum, SW corner at entrance #11 to the Grand Plaza, and exterior entrance to Visitor Center by entrance #2. The inadequate exterior signage system makes finding the appropriate entrance even more difficult.

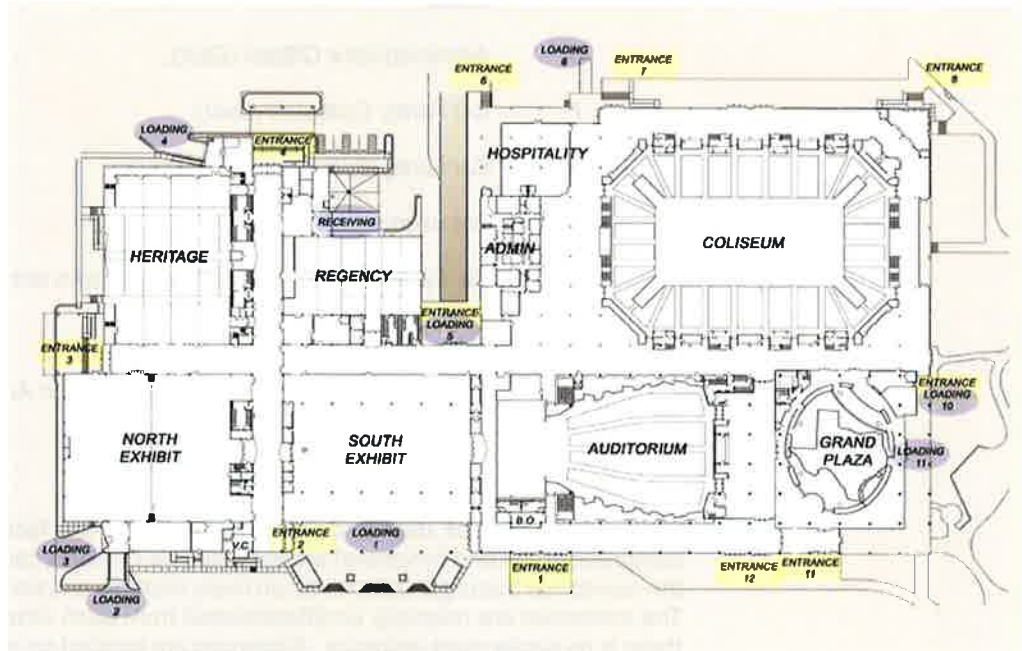
The character of the public entrances is very understated for a building of this civic importance. Some have the quality of flat, undifferentiated “storefronts,” while others are recessed and somewhat dark, even on a sun lit day. The multiple entrances do offer the advantage of being able to use parts of the building while other sections remain closed.



**BUILDING OVERVIEW**

**Service Entrances/  
Loading Docks** The system of public entrances is further complicated by the fact that some of them are located directly adjacent to service entrances/loading docks. This is particularly true of entrances # 5, #6 and #7 on the east, which are either near dumpsters or the service ramp that serves the Coliseum and Auditorium below grade. The service entrance at the northwestern corner of the complex occupies a key corner in the city's street grid, and is unfortunately particularly visible to patrons accessing entrances #2 and #3.

The conflict between public and service entrances/loading docks grows out of the fact that the facility does not have a dedicated back-of-house service zone in the manner that is typically found in public assembly facilities. The result is that exhibit move-in/move-out, catering operations, trash and garbage handling have to be distributed around the building on almost all sides, with service vehicles having access near to the spaces that they are serving.



First Floor – Entrances (yellow) Loading Docks (purple)



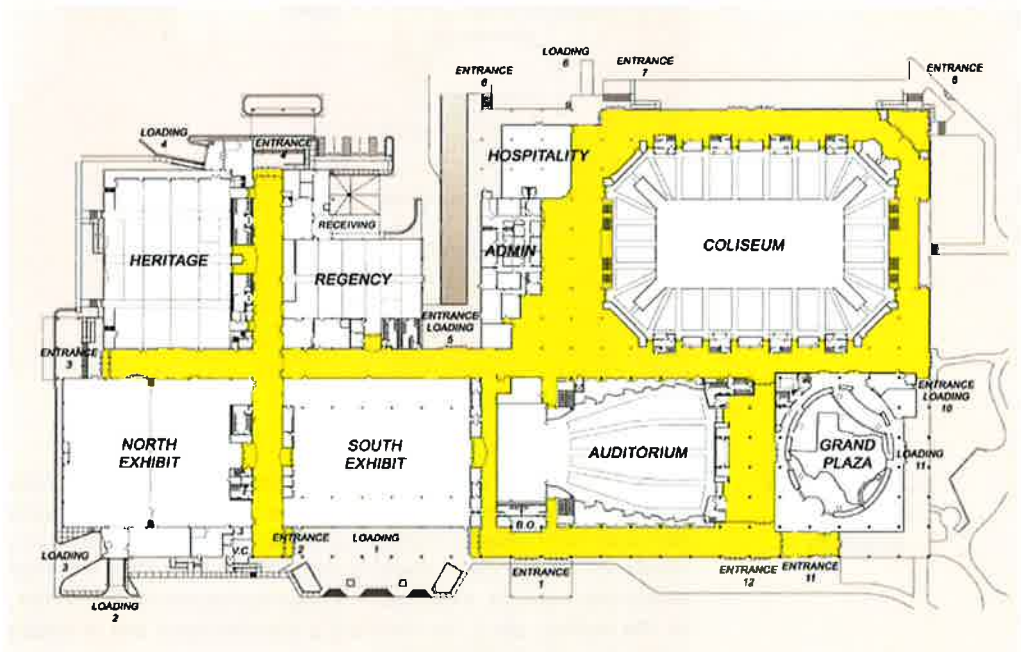
**BUILDING OVERVIEW**

**Lobbies and Internal Circulation**

A positive feature of the internal circulation system of the complex is that it ties all of the assembly spaces together under one roof, and from a marketing and programming perspective that is of great advantage and distinguishes Amarillo from most of its competitors. However, there are particular challenges with this attempt to integrate and connect the facilities to each other.

For the Coliseum, serving the largest number of patrons at one time, its location on the southeastern side of the complex, away from downtown, means that many patrons have to pass the exhibit halls, Auditorium and/or the Grand Plaza on their way to and from the Coliseum. The largest section of the Coliseum's circulation concourse is internalized (away from entrances #1 and #7). Operations staff members report that most patrons attending the Coliseum come from the northwest, which is diametrically opposed to the Coliseum's exterior orientation on the southeast side of the complex.

The north/south central circulation spine is utilitarian and lacks pre/post function space to properly serve as the organizing element of the complex. Lacking natural light, and with incidental intersections with the east/west circulation zones (three to the west, and three to the east), this organizing element is too narrow. Functional use of this space needs to include registration, concessions, networking space and occasionally some exhibits. Experientially, movement along the north/south circulation axis is monotonous, uninviting and cold.



*Main Level – Public Circulation (yellow)*





**BUILDING OVERVIEW**

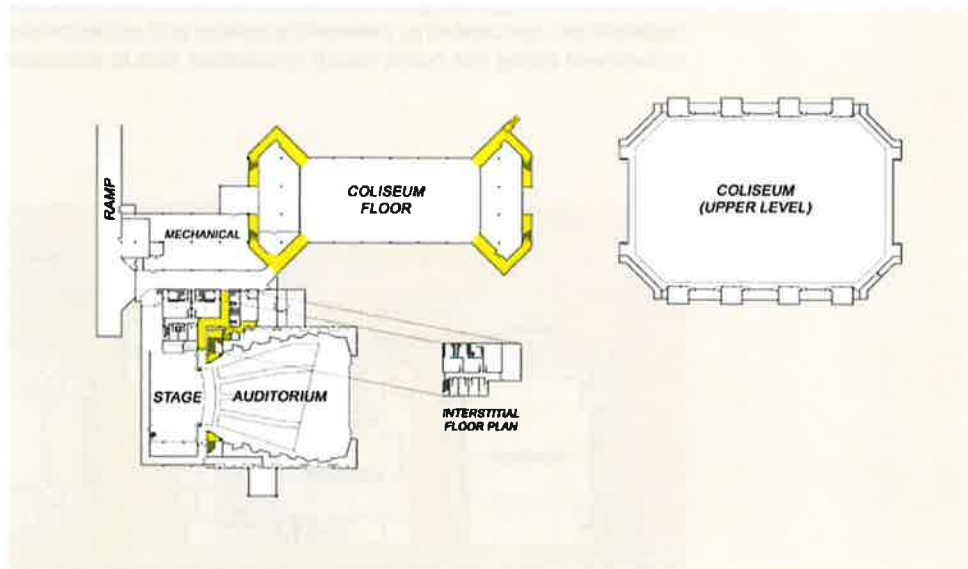
**Lobbies and Internal Circulation (cont.)**

Event planners are particularly concerned about the small width of the circulation spaces. The main north/south spine is 29' feet wide, the east/west circulation areas (with the exception of the Auditorium lobby) are this size or smaller and serve as the pre/post function space for leasable spaces on both sides. The difficulty of carrying on conversations and networking in these spaces was noted by some users.

With the variety of activities that need to take place in the public circulation areas – registrations, exhibits, and concessions – there is often not enough electrical power in the required locations. The IT backbone faces the same challenges in the public areas.

The lobby of the Auditorium on the west side of the complex is particularly dark, but there is a distinct glare problem at its exterior face. Users report that there is inadequate electrical power serving this space.

Another circulation problem reported by users is the challenge of attendee access to the Coliseum floor when it is used for exhibits.



*Lower Level – Public Circulation (yellow)*

**Graphics and Wayfinding - Interiors**

Once beyond the exterior entrance markers, the pedestrian does not encounter localized signage to reinforce his or her sense of direction. The minimal architectural character of the assembly venues themselves, where they abut the internal circulation system, does not reinforce a potentially positive experience along the internal circulation spine. Orientation clues are minimal, especially the signage system. Too small and often misplaced (too high, at the ceiling, etc.), the building's interior signs are of widely varying fonts and sign types, and not properly illuminated.

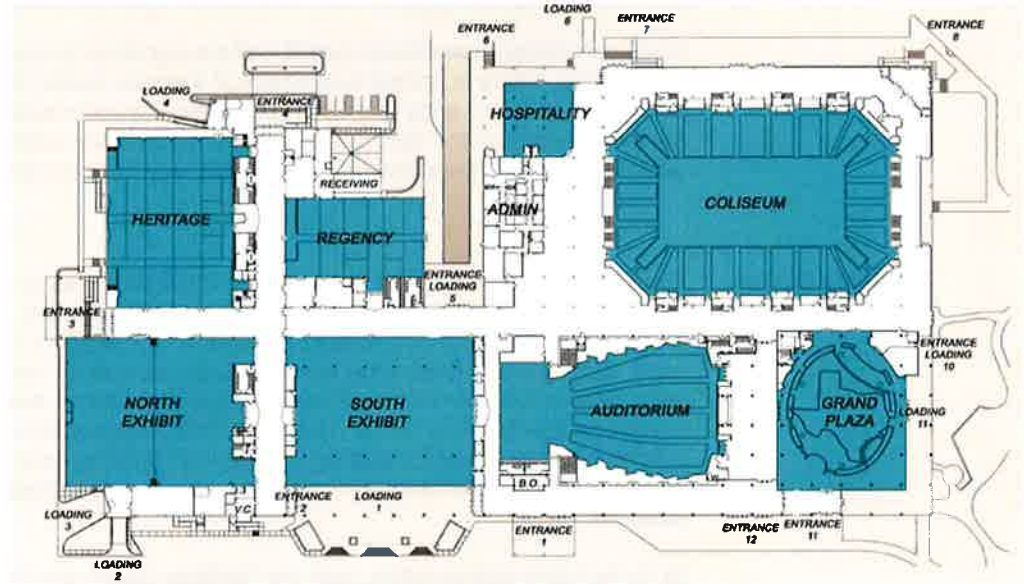
As with the pedestrian experience at the exterior entrances, the repeat visitor to the Civic Center Complex apparently overcomes these deficiencies, while the first-time attendee is challenged by the insufficient way finding system at the Complex's interior. First-time attendees at events typically require extra assistance to find their way through the complex. Several event planners have reported having to produce and deploy large amounts of their own temporary event signage.



**LEASABLE SPACES**

**Introduction**

The size and quantity of the leasable spaces of the Amarillo Civic Center Complex have been reviewed by HVS, and these spaces have been evaluated with respect to market and utilization potential. The D/P/S team undertook a complementary physical needs assessment of the leasable areas from the perspectives of functionality, industry standards and the more qualitative factors of character, ambiance and aesthetics.



*Main Level - Leasable Spaces*

**Exhibition Hall**

The two primary Exhibit Halls, south and north, were built at different times to quite different standards. Each is close to the same area (south - 26,700 SF; north - 24,565 SF), but the South Exhibit Hall has a very limited ceiling height of only 14' clear. The North Exhibit Hall's vertical clearance dimension is 25', still below the industry standard of 30'. The limited ceiling height in the South Exhibit Hall compromises some exhibits, limits rigging, and hinders audio-visual presentations. The South Exhibit Hall is also compromised because of the presence of columns on a 30' x 30' grid; this is a limiting factor for booth layout and plenary sessions with audio-visual presentations. It appears that with the exception of a gun show that prefers the South Exhibit Hall because of the ability to better control attendees' access, the market prefers the newer North Exhibit Hall.

A key dilemma in the layout of these two exhibition halls is that the spaces cannot be joined to become a single larger exhibit hall. While three pairs of entrances to each are aligned opposite each other across the east/west corridor, they operate, look and feel as distinct spaces. The location of the restroom blocks between the two exhibit halls limits the ability to locate exhibits in the interstitial corridor space. Furthermore, the corridor accessed from entrance #2 is one of the main paths of travel to the Heritage and Regency Rooms to the East.

The differences in the design of the ceilings of the two exhibition halls further contribute to their sense of being distinct and separate. South Exhibit Hall's 2x4 acoustic tile ceiling with flush fluorescent fixtures is more typical of office or retail space, whereas the exposed structure (good for rigging) and metal halide lighting in the North Exhibit Hall are much more appropriate to the types of uses that take place here. Other finishes at the floors and walls are more consistent between the two spaces, but they are very basic - functional enough for an exhibit hall, but not necessarily appropriate if the spaces are used for plenary sessions or large banquets.



**LEASABLE SPACES (cont.)**

**Exhibition Hall  
(cont.)**

HVAC systems in the North Exhibit Hall have the ability to provide greater amounts of outside air ventilation to facilitate events such as move-in/move-out when engine driven equipment is used. In addition, the HVAC systems utilize heat recovery in the outside air ventilation cycles to improve the energy efficiency of this space. HVAC systems in the South Exhibit Hall are in poor condition. The roof mounted air unit cabinets are aged and do not seal properly, resulting in excessive outdoor air infiltration and dust contamination in this space. Controls have been upgraded, but still do not allow for close temperature control.

Electrical utilities in the South Exhibit Hall are significantly inadequate compared to the North Exhibit Hall. There is limited availability of 3 phase power, and even single-phase 208-volt power. In addition, data and communication infrastructure is limited, with most of these utilities available in the floor boxes located in the center portion of the room – the perimeter walls of the space have limited power, data, and communication capabilities.

**Meeting Rooms**

Just as the two Exhibit Halls were built at different times and have different standards, so too are the Regency and Heritage meeting room complexes. The Heritage Room at 20,725 SF (divisible into up to 20 smaller spaces) is the larger of the two meeting rooms, and is more appropriately finished to contemporary convention center standards. The carpeted floor, decorative wainscot, and coffered ceiling contrast dramatically with the more basic finishes of the Regency Room. The 10,080 SF Regency Room divides into up to 10 smaller spaces but with a low 12' ceiling, terrazzo tile flooring, unarticulated flat ceiling, and hard walls is overly simple/utilitarian and not as conducive to host quality meetings, educational sessions, etc.

By being highly sub-divisible, both the Heritage Room and Regency Rooms are particularly dependent on air wall hardware and the residual circulation corridors created when the moveable walls are deployed. The STC (Sound Transmission Class) rating for these walls is not known to the study team, but anecdotally it has been ascertained that there is significant noise transfer among subdivisions during simultaneous events. As is typical with highly subdivided meeting spaces that are attempting to achieve this level of flexibility, the circulation corridors tend to be undersized, and not particularly pleasant and conducive to attendees easily finding their intended meeting breakout spaces.

Like the South Exhibit Hall, HVAC systems in the Regency Room are in poor condition. The roof mounted air unit cabinets are in poor condition and do not seal properly, resulting in excessive outdoor air infiltration and dust contamination in this space. Electrical utilities in the Regency Room are also significantly inadequate. There is limited availability of 3 phase power, and even single-phase 208-volt power. In addition, data and communication infrastructure is limited. Electrical utilities in the Heritage room are considerably better with single-phase 120 and 208 as well as 3 phase power provided every 20-30 feet around the perimeter of the room and floor box receptacles provided in each subdivided space. Cat 5E is also provided around the perimeter of the room and in each sub-divided space.



**LEASABLE SPACES (cont.)**

**Auditorium**

The Auditorium is arguably the one space in the Civic Center Complex that has best stood the test of time since its initial construction. After more than 40 years, the Auditorium still has a degree of elegance and quality befitting its uses. While the long proportions of its four-section 2,324 permanent seating area, top-only attendee access system, average acoustics, and condition of its seating are not fully state-of-the-art, the space well serves the events it hosts. The proscenium is 24'-tall and 55'-wide. The 52'-deep stage was redone about a decade ago at the same time a new electronic curtain/scene pulley system was installed. However, even with updates the rigging, stage lighting, and sound system/controls are out-dated and in need of attention. The biggest challenges that this assembly space faces are deficiencies in its back-of-house support spaces.

**Coliseum**

Having a seating venue of the size of the Coliseum in close proximity to the other types of public assembly spaces in the Civic Center Complex is a competitive advantage when comparing Amarillo to most other cities. However, the 4,870 permanent seat Cal Farley Coliseum appears to be the most dysfunctional and challenging space to meet its users' functional requirements in the Civic Center Complex. An intimate arena with excellent sight lines, the Coliseum's ceiling structure at only 38' clear. The 84' x 185' ice sheet is smaller than current hockey standards (NHL and minor league ice sheet dimensional standard is 86' x 200'). The quantity and quality of concessions, lockers, storage, service access and other support spaces are substandard, and the Coliseum lacks the income-producing luxury-type seating that is now found in the typical arena, even of small seating capacity. There are positions that have been modified for handicapped seating; however, they are all located on one-level, which does not meet current Texas Accessibility Codes. The low ceiling height also limits the ability to accommodate a centrally hung scoreboard, and there is a distinct lack of video boards that are typically found in the contemporary arena. Producing a broadcast in the Coliseum is difficult. Finally, there is a distinct lack of support space for competitors, actors, etc., such that, for instance, rodeo contestants have to muster outside the facility.

The structural system consists of steel box trusses spanning 183' across the Coliseum floor and bleachers, supporting bar-joists and deck. This super-structure is supported by steel columns bearing on concrete piers. Concrete bleachers are cast directly over grade on the east and west sides, and framed with concrete beams on the north and south ends. Due to this configuration, opportunities for expansion are very limited.

HVAC systems in the Coliseum are original equipment. Although controls upgrades were completed in the past 5 years, the HVAC equipment is old and well worn. Air unit casings are not tight, and result in significant energy losses. Outside air capabilities are inadequate and not accurately and effectively controlled. In addition, the original design of the facility located the return air intakes near the floor. During rodeo events, hockey and football games, fencing or other barriers are used to define the Coliseum floor and often block the return air paths to these units, particularly on the north side. Additionally, return air intakes near the floor can cause the ice near these intakes to melt during hockey events.

Electrical capabilities in the Coliseum are inadequate to allow this space to function properly for trades shows, where booths with power, data and communications needs are located. Electrical panels in the coliseum are original equipment, and parts are no longer available for this equipment.



**LEASABLE SPACES (cont.)**

**Grand Plaza**

The Grand Plaza was originally built in 1968 as open air, but was enclosed as a multi-purpose function space in 1990. An elliptical space located at the south-west corner of the complex adjacent to the Auditorium and Coliseum, the 16,000 SF Grand Plaza serves as a venue for weddings, receptions, presentations, meal functions, etc. This space is a good functional complement to the adjacent Auditorium and Coliseum. Its ambiance of a “Texas flavor” and unique shape give it a somewhat ceremonial character. The space is considered relatively easy to decorate and more functional for dinners than for events with audio-visual presentations.

The chief functional deficiencies of this space involve the difficulty of using it as meeting space with or without food and beverage functions – both because of its remoteness from the Civic Center Complex assembly spaces located to the north at the other end of the complex and because of the effort and expense required to darken out the room at the clerestory glass just below the roof structure. The space is inadequately served by dedicated back-of-house catering and serving corridor space, and there is shortage of electrical power. Outside the Grand Plaza there is no proper adjacent or nearby access for service or catering vehicles, which often inappropriately park under the arcade at the southern end of the Civic Center Complex adjacent to Centennial Park. Conflicts with noise from catering operations were reported by some users; the catering kitchen is located directly behind the stage wall.



**SUPPORT SPACES**

**Administration/  
Offices**

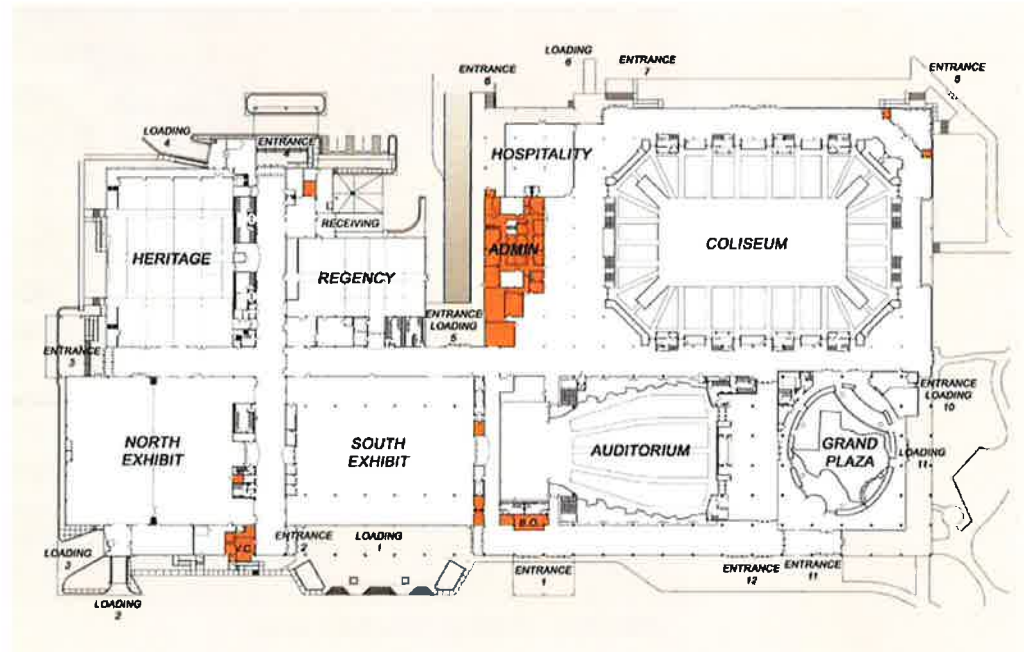
The Administration offices for Civic Center Complex staff are located at Entrance 6, overlooking the ramp to the lower level and the receiving dock. This space was initially coliseum concourse built with the original Civic Center Complex in 1968. During the 1978, 1999 & 2003 renovations, a portion of the north end concourse and covered walk on the exterior was constructed to become the new centrally located administration offices. Three entrances from the Coliseum Concourse can access the Administrative area from the south.

As the Civic Center Complex programs have grown, the administration offices have outgrown its dedicated space, forcing offices to be retrofitted into unused concessions and closets throughout the complex.

**Box Office**

The central box office is located at entrance #1 and was added to the Civic Center Complex in 1978. Other than the street identification marker for entrance #1, there is no other signage or architectural significance to acknowledge its location. It is located inside the West corridor with no exterior walk-up or drive-up window access points. The box office signage itself is dependent on printed posters and display boards to show events and times. There are no electronic displays or stand-alone automated touch-screen kiosks.

An additional box office was added to the SE corner of the Coliseum in 2003. It is used on days of large events for the Coliseum only. There are no signage markers to alert the public that this box office even exists much less its hours of operation.



Main Level – Administration space, Box Office & Visitor Center



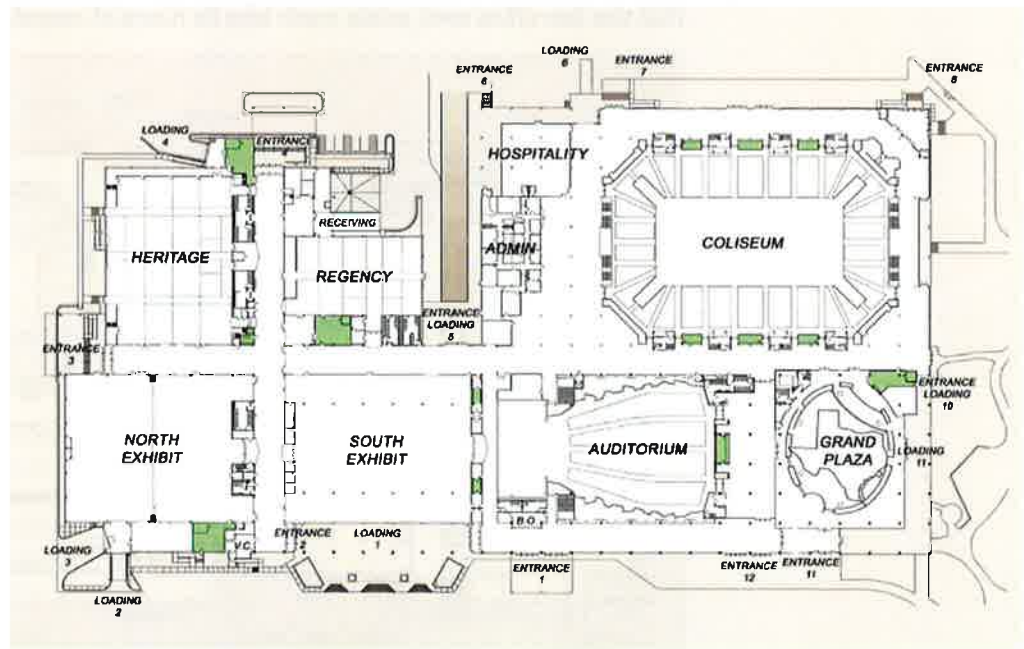
**SUPPORT SPACES (cont.)**

**Food Service**

There are several types of food service provided at the Civic Center Complex. Coliseum-related concessions use built-in concessions stands as well as portables; convention type activities have receptions and banquets, and there are other types of events such as weddings that use catering services. The building utilizes an “open catering” system, which means that there is not a single exclusive food service operator. Event managers are free to go to the catering business marketplace in the region and bring in their selected catering operation to service an event. This works very well for smaller events, but larger banquets are more challenged because of limitations of the physical facility’s truck docks, lack of back-of-house service corridors and preparation areas.

The facilities to support the open catering policy at the complex are basic at best. Food is prepared off site and trucked in, with the result that quality can vary widely from event to event. The catering support facilities (plumbing, refrigeration, work areas) are very basic, and especially call on the creativity and strong quality control of the individual caterer. It is typical of convention centers of this size to have a dedicated central kitchen for the facility, even when there is an open catering policy.

The Heritage room has an 8-foot wide back-of-house corridor that abuts the east side of the Heritage room and can be used for catering support space when the space is set up for banquets. However, when this space is set up as break out meeting space this 8-foot wide back-of-house corridor doubles as the fire exit. The Heritage room’s catering kitchen and loading dock has access to the 8-foot wide back-of-house corridor.



Main Level – Catering / Concession space

Heritage Catering	1032 SF	Regency Catering	1058 SF
Heritage Concession	193 SF	Coliseum Concession	1280 SF
Grand Plaza Catering	774 SF	Auditorium Concession	365 SF
South Exhibit Concession	258 SF	North Exhibit Catering	969 SF

TOTAL CATERING / CONCESSION – 5,929 SF



**SUPPORT SPACES (cont.)**

**Food Service (Cont.)**

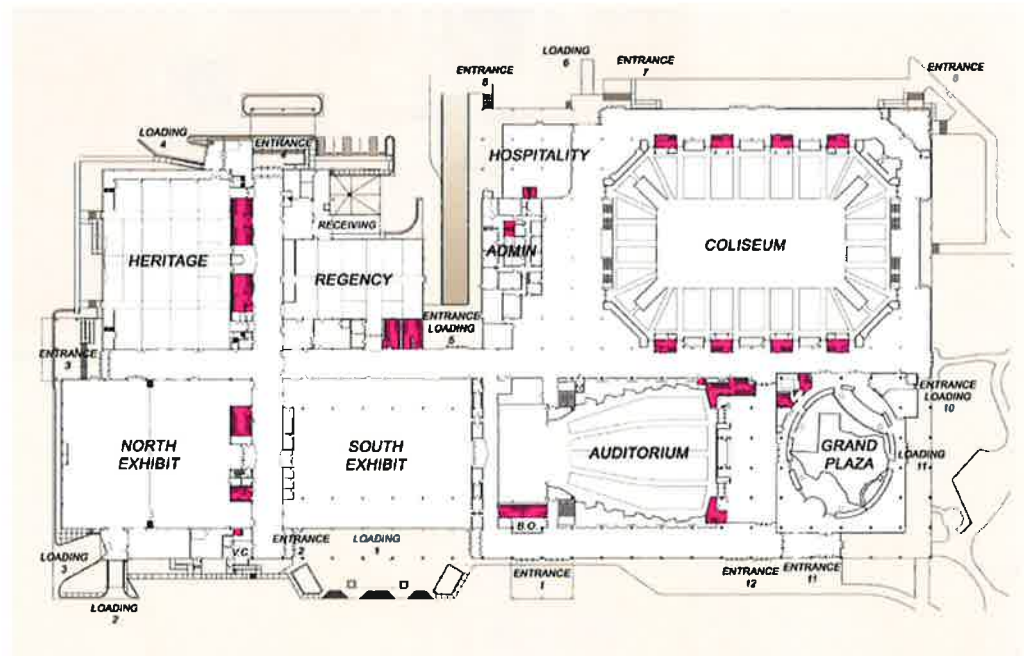
The (6) fixed concession spaces for the Coliseum, located in the public circulation concourse, are problematic in that they are too small and lack basic amenities such as ventilation, sink and floor drain plumbing. There are inadequate storage and food preparation areas as well as equipment. This is very constraining on the types of food that can be offered, and limits the resultant revenue stream. Without a central catering kitchen, it is also impossible to offer luxury seat catering services.

Concession operations located in the public circulation concourses are also problematic because of dimensional constraints and the typical lack of electrical power. For events held on the Coliseum floor, attendee access to concessions on the concourse is also difficult.

**Restrooms**

The new restrooms at the North Exhibit Hall and the Heritage room, from the 2003 addition, are TAS code compliant and are finished to contemporary convention center standards. The Regency and South Exhibit spaces share restrooms located between the two spaces accessed off the north-south corridor. These restrooms have been updated to be TAS code compliant and are finished to contemporary convention center standards. The Auditorium Lobby women’s restroom was renovated with an addition in 2003. The finishes for the men’s restroom in the Auditorium Lobby were cosmetically updated with no addition.

The Grand Plaza added restrooms during the renovation from courtyard to multi-purpose function space in 1990. These restrooms are TAS code compliant and are finished to contemporary convention center standards. The Coliseum Concourse restrooms have two sets of men and women’s on the east and west side totaling eight facilities. Each side has retrofitted a facility for men and women to comply with TAS standards. The finishes of the restrooms on the Coliseum Concourse, behind the Box Office and the public restrooms serving the lower seats in the Auditorium show an immense amount of wear and seem difficult to maintain to a clean appearance.



Main Level – Restrooms





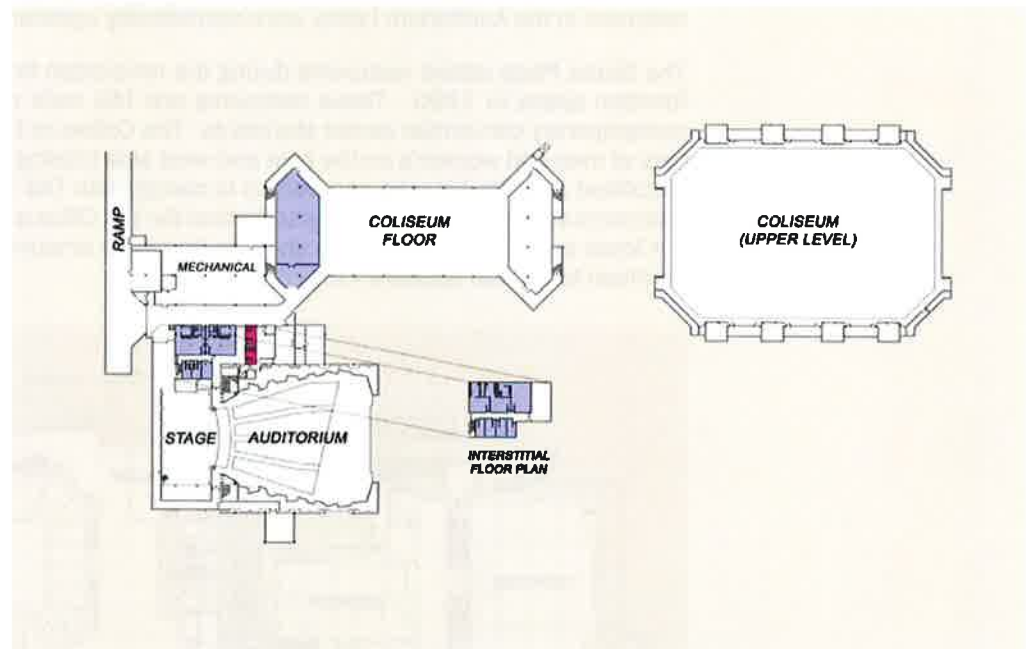
**SUPPORT SPACES (cont.)**

**Locker/Dressing Rooms**

The number and size of the Coliseum-related lockers is inadequate. Territorial overlap and lack of privacy between two competing teams is sometimes present, and it is difficult to host multi-team tournaments and competitions without more locker suites. There are only 3 locker rooms in the facility at present, with one of these lacking the basic toilet and shower amenities.

The same inadequate situation exists for the Auditorium with (9) dressing rooms on two different levels, neither of which are at the same level as the stage itself. Seven of the dressing rooms are accessed by a 5' wide hallway which narrows to a 4'-wide staircase, further challenging large productions. The loading dock floor itself has been used as dressing room space for large productions, further complicating move-in and out when the Coliseum and Auditorium have competing events. The dressing rooms have low ceilings, are under powered and lighted, and have dated finishes.

The lower level locker rooms and dressing rooms are out-of-date and non-code compliant. These facilities also show an immense amount of wear and appear to have been painted several times to maintain a clean appearance.



Lower Level - Restrooms (magenta) Locker Room / Dressing Rooms (lilac)



**SUPPORT SPACES (cont.)**

**Loading & Service Corridors** One of the most peculiar characteristics of the Amarillo Civic Center Complex is its lack of a dedicated back-of-house loading complex that would normally include truck-parking positions, a dedicated service loading dock (ideally ca. 25'-wide), receiving and security offices, and amenities for temporary workers (e.g., restrooms, a break room and perhaps lockers). With the array of the various assembly venues on the site oriented in all directions, it follows that loading functions are equally scattered, with the resultant conflicting between public areas and support spaces. Some users report that there are conflicts between event move-in/out operations, ticketed and other live events going on in the facility.

The current truck loading capabilities are as follows:

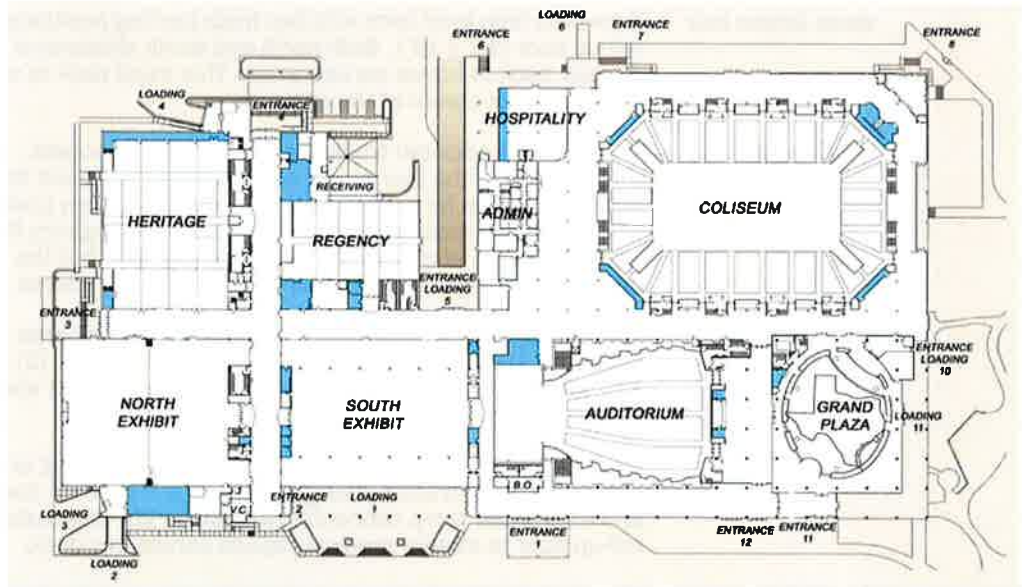
- North Exhibit Hall** A covered high level dock with two truck parking positions (one leveler) at 21'-wide, one roll-up door (16' x 16'). Both north and south divisions of the North Hall are served from a small back-of-house service area. This truck dock is very visible from the exterior at the northwest corner of the complex.
- South Exhibit Hall** There is no dedicated truck service parking or access. All freight has to be delivered through one of the four public corridors that surround the South Exhibit Hall. A roll-up door on the west for drive-in access is inappropriately under the arcade at entrance #1 & #2. The freight receiving area to the east of the Regency Room can be used for exhibition freight going to and from the South Exhibit Hall, but the relationship is not convenient and requires the use of the public circulation concourse.
- Heritage Room** The Heritage Room is served by a covered loading area at the northeast corner of the complex. This facility has a high-level dock that has (2) truck parking positions and is 17'- wide. The receiving area connects to an 8'-foot wide back-of-house corridor that abuts the east side of the Heritage Room.
- Regency Room** This space is served by a dedicated freight receiving area just south of entrance #4. There are three truck parking positions, a high-level dock for (2) trucks (one leveler), and a vehicular ramp connecting the raised 20'-deep exterior dock to grade. A 12' x 12' roll-up door to interior receiving space serves this dock.
- Auditorium** The dock for the Auditorium stage is accessed by the 25'-wide subterranean truck driveway on the east side of the Civic Center Complex. Trucks accessing the Auditorium stage loading position have to back down the ramp. The angled geometry at the bottom of the ramp is such that a truck serving the Auditorium stage effectively blocks further vehicular access to the Coliseum at this lower level. Movement of sets to and from the Auditorium stage at this location is particularly difficult and expensive from a labor utilization perspective.
- Coliseum** Truck movements to the Coliseum share the same 25'-wide subterranean ramp (from and to grade) as used by the Auditorium dock, however, truck access is even more difficult to and from the Coliseum. The single service access way between the bottom of the ramp and the Coliseum floor is configured with a 90 degree turn as to make truck maneuvering very difficult. The existence of only one compromised truck access way to the arena floor negatively impacts event worker productivity and the speed with which an event can be moved in and out of the Coliseum. Typically, freight is off-loaded from trucks (maximum two at a time, although unlikely due to the narrow sub-grade ramp) parked at the bottom of the ramp onto fork lifts that then make their way to the arena floor, which is 215' feet from the unloading area.
- Grand Plaza** When the Grand Plaza is served by catering vehicles or for other reasons, its only access is under the arcade to the south side of the complex adjacent to Centennial Park. Locating service vehicles here is an inherent conflict with the park setting, and bollards actually had to be installed to prevent service trucks from driving on the park's grass surface.
- Trash** Trash and garbage operations at the Civic Center Complex are also extremely decentralized. At each dock the truck parking capacity is often reduced by the need to locate a dumpster and/or provide garbage or trash vehicle access.



**SUPPORT SPACES (cont.)**

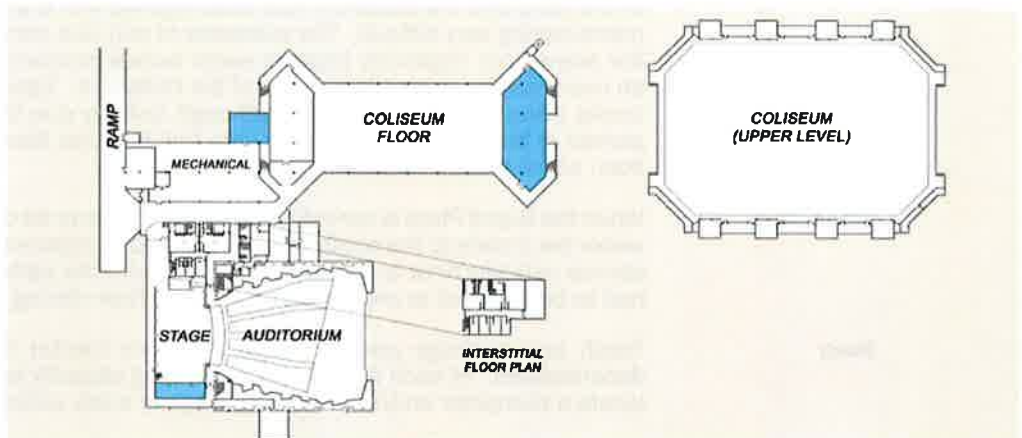
**Storage**

From the operations staff, event managers and from our own observations, the assessment team learned that the building does not have enough storage. Because of the multi-purpose nature of many of the leasable spaces, chairs, tables and staging have to be stored when not needed for events. The shortage of storage space is evidenced by the periodic use of catering spaces for furniture storage. The lack of adequate amounts and placement of storage most likely translates into higher amounts of labor required to move furniture to and from the various venues. The lack of storage in the complex itself has also necessitated the provision of off-site storage warehouses some blocks east of the Complex. Turf, the basketball floor and other larger FF&E items are stored off-site, whereas tables and chairs are stored in the facility and shifted as needed.



Main Level - Storage space

Heritage Storage	1297 SF	Regency Storage	2795 SF
Hospitality Storage	193 SF	Coliseum Storage	1629 SF
Grand Plaza Storage	175 SF	Auditorium Storage	208 SF
North Exhibit Hall	1791 SF	South Exhibit Hall	679 SF
<b>TOTAL STORAGE - 8,767 SF</b>			



Lower Level - Storage space



## MECHANICAL/ELECTRICAL/ PLUMBING SYSTEMS

### MEP Engineering Overview

With few exceptions, HVAC systems throughout the facility are 4-pipe chilled water and heating water systems, served from a central plant located at the basement level of the original facility. Air handling systems are generally central station air units located throughout the building, typically in the areas they serve. Exceptions are the administration offices, visitor information center offices, and catering rooms serving the South Exhibit Hall. These are served by roof-mounted packaged units. In addition, the Grand Plaza has a dedicated air cooled chiller which was installed when the space was enclosed.

### Chilled Water System

The central chilled water system is located in the original basement mechanical room, located east of the service access ramp that provides lower level access to the Coliseum. The system currently consists of two 390 ton York screw compressor chillers (installed in 1991 and 1994) and one 560 ton York centrifugal chiller (installed in 2001). The two screw chillers are served by two cooling towers located on the roof, and piped together to act as one condenser water system. The centrifugal chiller has a dedicated cooling tower located on the roof.

The chilled water system was converted to a primary/secondary system during the 2003 renovation and North Exhibit Hall project, and utilized existing piping systems in the original building design to continue to serve each zone. The chillers are piped in a primary-secondary arrangement; that is each chiller has a dedicated primary pump, and secondary pumps distribute chilled water to each area of the building. There are five secondary chilled water pumps. The five areas served by the secondary pumps are the original North Concourse (area located between the Administration offices and the Coliseum), original East and West Concourse (area on the east and west of the Coliseum), the Auditorium, the Coliseum, and the Exhibit Hall additions. In addition to these zones, there is a dedicated transfer pump that is utilized to serve City Hall with chilled water from the Civic Center Complex central plant.

As a result of a controls upgrade project in 2005, all cooling coils in the facility were converted to two-way valves, and the chilled water secondary pumps operate with variable flow to each area.

During the controls upgrade, it was proposed to serve the Grand Plaza from the main central plant and maintain the air cooled chiller as a backup. However, this work was not performed, and the Grand Plaza continues to be served only by its dedicated air cooled chiller. This machine is original equipment and near the end of its useful life.

There is currently adequate capacity to serve the entire facility with the existing chilled water system.

The existing chillers are in good condition, the older screw chillers that utilize HCFC-22 are being phased out. These machines are about 20 years old, and they are well through their useful life. They can be expected to provide several more years of service as long as they are maintained, but should be considered for replacement within the next 10 years.

### Heating Water Systems

The central heating water system is also located in the basement mechanical room, adjacent to the chiller plant. The original heating water system consisted of two Scotch Marine style boilers. Both boilers have been replaced with modular boilers. In 1994, a project was performed to replace one boiler with nine modular boilers, each with a capacity of 1,000,000 Btuh input. In 2002, a project was completed that replaced the remaining original boiler with six modular boilers, each with a capacity of 1,700,000 Btuh.



## **MECHANICAL/ELECTRICAL/ PLUMBING SYSTEMS (cont.)**

### **Heating Water Systems (cont.)**

The heating water system originally consisted of a primary heating water pump and two building pumps. During the 2002 project, the main heating water pump and differential pressure valve were removed, and the two main heating water pumps remained. As a result of a controls upgrade project in 2005, all heating coils in the facility were converted to two-way valves, and the heating water pumps were converted to variable speed pumps and operate with variable flow to each area. A separate heating water pump is dedicated to deliver heating water to Grand Plaza.

The boiler system is connected to a variable speed automatic chimney draft system to assist in venting the boilers from the basement mechanical room to the roof. Without this system, the modular style boilers would not operate properly in their location in the basement.

There is currently adequate capacity to serve the entire facility with the existing heating water system.

### **Air Handling Systems**

Most of the air handling units are served by the heating and chilled water systems of the central plant. The air units and the areas they serve are described as follows:

*AHU 1:* Original air unit - 1968. Provides heating and ventilation for lower level central plant mechanical room. Single zone air unit with heating coil only. Outside air for the unit comes through a louver located in the sidewall of the lower level, near the bottom of the ramp. Air is relieved from the boiler room through a grille in the ceiling located near the boiler stacks.

*AHU 2:* Original air unit - 1968. Provides air conditioning to the kitchen and lower level dressing rooms at the Auditorium. The unit is a two-deck multi-zone air unit with four zones. The air unit also provides outside air to the space. An exhaust fan serves the toilet areas served by this air unit.

*AHU 3:* Original air unit - 1968. Provides air conditioning to the upper level dressing rooms at the Auditorium. The unit is a two-deck multi-zone unit with five zones. Zone five from this air unit serves the individual dressing rooms. Separate supply air branch ducts for each of these rooms have an electric duct heater for individual room control. Each electric duct heater is controlled by a thermostat in the room. The electric duct heaters are 2kW each, 120v/1ph. The air unit is served with outside air from a louver located in the upper outside wall of the auditorium. An exhaust fan serves the toilet areas served by this air unit.

*AHU 4 & 5:* Original air units - 1968. These two air units are essentially identical, and provide air conditioning to the Auditorium. Units are both single zone units. The air units each have a heating water coil and a chilled water coil. Supply air is served to the auditorium space from the ceiling. Return air is brought back to the air units through underfloor ducts connected to floor inlets, located below the seating. Outside air for each air unit is provided through a louver located in the upper sidewall of the auditorium, above the lower roof level. The room which contains the air unit serves as the outside air / return air plenum.

*AHU 7 & 8:* Original air units - 1968. Provides air conditioning to the north concourse. Units are multi-zone units with 6 zones each. Supply air from each air unit is delivered overhead from the ceiling. Return air back to the units enters the mechanical rooms through return air grilles in the side walls to the mechanical rooms where the air units are located. There are two return air grilles for each air unit. There are sound baffles located on the back of each return grille. The sound baffles consist of high density insulation boards inserted in a frame at opposing angles. Each air unit has a heating water coil and a chilled water coil.



**MECHANICAL/ELECTRICAL/ PLUMBING SYSTEMS**

**Air Handling Systems (cont.)**

*AHU 9, 10, 11, 12, 13, 14, 15 & 16:* Original air units - 1968; Provides air conditioning to the Coliseum. Units are single zone units. There are four units located on each side at the top of the Coliseum. Supply air from each unit is delivered through ductwork located in the top of the Coliseum. Return air for each air unit enters the duct from grilles located near the Coliseum floor. The duct runs beneath the Coliseum seating and up to the air units. Outside air for each unit comes from an intake vent located on the roof of the mechanical room. The mechanical room is used for a return air and outside air plenum; the return and outside air are not ducted to the air unit. Roll filters are mounted on each air unit. Each unit has a heating coil and a chilled water coil.

*AHU 17:* Original air unit - 1968; Provides air conditioning for the east concourse. Unit is a single zone air unit with heating water coils and chilled water coils. Air unit has a chilled water coil and a heating water coil. Large grilles or openings above the ceilings of the space served allow return air back to the air unit. Return air is ducted to the air unit, and outside air from a louver on the side wall of the building is ducted to the return air plenum. Roll filters are located in the return air plenums.

*AHU 18:* Original air unit - 1968; Provides air conditioning for the south concourse. The unit is the same in operation and configuration as AHU 17.

*AHU 19:* Original air unit - 1968; Provides air conditioning for the northwest concourse. The unit is the same in operation as AHU 17. The unit served the north outside entry until this was covered by the exhibit hall addition in 1978. There are electric duct heaters in the supply ducts at the entry. The air unit does not currently serve any outside exposure areas.

*AHU 20:* Original air unit - 1968; Provides air conditioning for the Auditorium lobby. The unit is the same in operation as AHU 17. The air unit previously served the south exposure of the auditorium lobby. This exposure was eliminated with the addition of Centennial Plaza in 1990.

*AHU 21:* Original air unit - 1968; Provides air conditioning for the west concourse. The unit is the same in operation as AHU 17. The air unit served the west exposure on the south end of the west concourse. This exposure was eliminated with the addition of Centennial Plaza in 1990.

*AHU 1(78) & 1A(78):* Exhibit Hall Addition - 1978; Provides air conditioning for the exhibit halls located on the west side of the 1978 addition. Each unit has a chilled water coil, a heating water coil, a filter section and a DWDI fan with inlet vanes. The units are located on the roof. Each air unit has outside air and return air dampers. Air is relieved through a barometric damper. The units serve single duct terminal units located above the ceiling. Static pressure controllers vary the position of the inlet vanes on the air units to maintain a constant pressure in the main supply ducts. There are hot water heating coils located in the terminal units which serve perimeter areas.

*AHU 2(78):* Exhibit Hall Addition - 1978; Provides air conditioning to the meeting rooms located on the east side of the 1978 addition. Unit has a chilled water coil, a heating water coil, a filter section and a DWDI fan with inlet vanes. The unit is located on the roof. The air unit has outside air and return air dampers. Air is relieved through a barometric damper. The units serve single duct terminal units located above the ceiling. Static pressure controllers vary the position of the inlet vanes on the air units to maintain a constant pressure in the main supply ducts. There are hot water heating coils located in the terminal units which serve perimeter areas.



**MECHANICAL/ELECTRICAL/ PLUMBING SYSTEMS (cont.)**

**Air Handling  
Systems  
(cont.)**

*AHU 3(78):* Exhibit Hall Addition - 1978; Provides air conditioning to the new west corridor located along the west side of the complex, adjacent to the auditorium. Unit has a chilled water coil, a heating water coil, a filter section, a DWDI supply fan with inlet vanes and twinned forward curved return fans. The unit is located on the roof. The air unit has outside air and return air dampers. Air is relieved through a barometric damper. The units serve single duct terminal units located above the ceiling. Static pressure controllers vary the position of the inlet vanes on the air units to maintain a constant pressure in the main supply ducts.

*MZ 1 & 2:* Grand Plaza Addition - 1990; Units provide air conditioning to the Grand Plaza addition. Units are three-deck multi-zone units. MZ-1 has six zones, while MZ-2 has five zones. Units have a chilled water coil and a heating water coil. The units are served with outside air from a roof mounted intake hood. Air is relieved from the space by two exhaust fans mounted on the roof of the structure.

*AHU 1, 2, 3, & 4:* North Exhibit Hall Addition – 2003; Provide air conditioning to the North Exhibit Hall. Each unit is a roof mounted single zone unit with a chilled water and heating water coil. The units are capable of 100% outside air economizer cycle. Each unit also has a heat-pipe heat recovery coil to condition the potentially high ventilation loads during high occupancy or purge ventilation of the space. Supply from these units is located overhead in the structural space, and return is located in a high sidewall position.

*AHU 5 & 6:* Heritage Room Addition – 2003; Provide air conditioning to the Heritage Room. Each unit is a roof mounted single duct variable air volume unit with a chilled water and heating water coil. The units are capable of 100% outside air economizer cycle. Each unit also has a heat-pipe heat recovery coil to condition the potentially high ventilation loads during high occupancy. Supply from these units is located overhead in the structural space, serving single duct VAV terminal units with HW reheat coils. Return is located overhead in the plenum space. A VAV terminal is dedicated to each of the individual spaces that can be created by installing the moveable partitions in the space.

*MZ 7 & 8:* East-West Main Concourse – 2003; Units provide air conditioning to the East-West concourse between the North and South Exhibit Halls, and the Heritage and Regency Rooms, as well as the toilets and concession areas located along this concourse. Each unit is a roof mounted three-deck multi-zone with five zones each. Units have a chilled water coil and a heating water coil. The units are capable of 100% outside air economizer cycle.

*AHU-10:* North Exhibit Hall Kitchen – 2003; Unit is a single zone indoor horizontal air unit suspended in the space above the kitchen on the west side of the North Exhibit Hall. The unit has a chilled water and heating water coil. The unit is capable of 100% outside air economizer cycle.

*AHU-11:* Heritage Room Kitchen – 2003; Unit is a single zone roof mounted air unit located above the kitchen on the east side of the Heritage Room. The unit has a chilled water and heating water coil. The unit is capable of 100% outside air economizer cycle.



**MECHANICAL/ELECTRICAL/ PLUMBING SYSTEMS (cont.)**

**Air Handling Systems (cont.)**

Some air units are not connected to the central chilled water / heating water system. These are typically packaged rooftop units serving different areas of the facility.

*RTU-1:* Visitor Center – 2003; Unit is a packaged electric heat pump unit with a duct mounted hot water coil. Unit is a single zone unit serving only the Visitor Center.

*RTU-2 / RTU-3:* Administration Offices – 2003; Units are packaged gas/electric roof mounted single zone air units serving the renovated Administration Offices. These units were installed to replace the original AHU-6 rooftop packaged unit installed as a part of the original construction. RTU-2 serves the exterior offices, and RTU-3 serves the interior offices.

*RTU-4:* Electrical Room – North Exhibit Hall – 2003; Unit is a packaged cooling only rooftop unit which serves the electrical room.

*RTU-5:* Electrical Room – Heritage Room – 2003; Unit is a packaged cooling only rooftop unit which serves the electrical room.

**Ventilation Fans/ Smoke Exhaust Fans**

Ventilation fans are located on the roof of the Coliseum. These fans were installed to be manually operated to ventilate engine exhaust fumes, smoke and dust from the Coliseum when required. The only source for adequate makeup air when these fans are in operation is by opening the overhead door to the main ramp which leads into the Coliseum.

The Heritage Room has smoke exhaust fans that operate automatically to ventilate this space in the event of a fire. These fans were installed as a code requirement due to the potential high occupancy of this space.

**Temperature Controls/Energy Management Systems**

In 2005, a comprehensive Energy Management System Upgrade project was completed. The scope of this project was to extend the EMS to include all air units and mechanical systems in the facility and connect them to the EMS system that was started during the 2003 Renovation and Addition project. As a result, the entire facility is connected to the Andover EMS system in place at most city properties and managed by Facilities.

The project also included flow control valves and electric temperature control valves installed at every chilled water and heating water coil in the facility to help balance the flows throughout the facility. Also included was conversion of main circulating pumps to variable speed to improve energy efficiency in the facility.

**Condition of Mechanical Systems**

The air units serving the original facility include the Coliseum, the Coliseum Concourses, and Auditorium are in fair condition, considering their age. However, they should be considered for replacement if any work is performed in the Coliseum, particularly if there is a change in use of any of the spaces. The systems lack a controlled method of providing adequate ventilation outside air. Excessive leakage in unit casings results in a decrease in overall operating efficiency. However, since the air units are generally located in the return air path, the leaked air is simply recirculated through the unit. The result may be diminished capacity delivered to the space since the air is recirculated before it makes it to the space, and therefore decreases the operating efficiency since the air is not delivered to the space. There are typically no complaints of insufficient cooling or heating capacity in these areas, so the units appear to be keeping up with heating and cooling requirements, although inefficiently. Additionally, in general, the ductwork is not sealed and results in excessive air leakage into the plenum space.





**MECHANICAL/ELECTRICAL/ PLUMBING SYSTEMS (cont.)**

**Condition of  
Mechanical  
Systems  
(cont.)**

The Coliseum air units have return ducts located beneath the seating on the east and west side of the floor. They draw air into the ducts near the floor. When the floor is set up for hockey or rodeo events, these air inlets are typically blocked off and the air units cannot get adequate airflow. This results in diminished capacity to the space, and the air unit rooms are under a high negative pressure. In some rooms, outside air louvers and dampers are not sealing, so the result is excessive infiltration of outside air into the space.

At all air units in the original building, the systems do not have the ability to operate with an outside air economizer cycle. The units have the ability to bring in limited outside air for ventilation, but it is not able to be controlled properly. There is no positive means to relieve air to allow for an effective operation of an economizer cycle. As a result, the system must depend on mechanical cooling from the central plant at all times of the year.

Roof mounted air units serving the 1978 addition – specifically AHU 1(78), 1A(78), and 2(78) – are considered to be in poor condition. These units have excessive leakage in their casings and dampers. Access doors are difficult to close properly, and many components within the units are well worn. These units should be considered for immediate replacement. When they are replaced, new technologies need to be incorporated, such as utilizing variable frequency drives for the fans instead of inlet vanes and discharge dampers for capacity control.

Although these air units have the ability to provide an outside air economizer cycle, the existing dampers in the units are worn out, and will not operate properly, even with new damper actuators and controls. These units do not have a means to provide purge ventilation when required to remove fumes such as when vehicles are moved in and out of the facility.

VAV terminals in the 1978 addition were retrofitted with new controls and airflow sensors during the 2005 EMS upgrade project. However, these units are also in poor condition and leak excessively. The controls upgrade for these units was more of a fix, due to limited funds. These terminal units should be replaced with new units to minimize leakage and improve controllability.

The remaining air units installed in the 2003 project are in good to excellent condition. The original quality of these units was a good long life commercial equipment, and will serve the facility for many more years.

Heating Water System: Boilers installed in 1994 are nearing the end of their useful life. These units have experienced some failures and do require continual maintenance. In general, the heating water system is functioning satisfactorily. However, the location of the boiler room in the basement has required additional ventilation systems to allow the boilers to operate properly. It is recommended that the boilers and main heating equipment be relocated if possible to locate them where they can be properly vented directly outdoors and eliminate the boiler ventilation system.

Chilled Water System: During the 2003 renovation project, the refrigeration room housing the chillers was incorporated to meet new mechanical codes. The system is operating satisfactorily, but relocating the chilled water system and particularly the chiller equipment may be advantageous to provide greater separation of this equipment from adjacent occupied spaces, and particularly the boilers. This could also improve the serviceability of this equipment, by moving it to a location that was more accessible to service vehicles.



**MECHANICAL/ELECTRICAL/ PLUMBING SYSTEMS (cont.)**

**Condition of Mechanical Systems (cont.)**

Finally, there could be some efficiency improvements if the chilled water system were converted to a variable primary flow system. This would eliminate several pumps, and allow the chillers to be more evenly loaded. This should be considered especially if new chillers were installed to operate in a variable flow system.

Connecting the Grand Plaza chilled water system to the central chilled water system is also recommended. As stated earlier, the air cooled chiller serving Grand Plaza is near the end of its useful life, and requires significant maintenance. If this chiller were to fail, Grand Plaza would be without cooling until a replacement chiller could be purchased and installed.

**Power**

Electrical power enters the facility at the bottom of the service ramp on the north side of the original facility. Two 1500 kVA transformers owned by Xcel Energy are located in vault which opens to the ramp. Since the original facility was constructed, the electrical service entrance into the building has been upgraded. During the 2003 north expansion project, the service was upgraded starting at the main utility transformers.

The 2003 renovation project included a new 5000 amp bus from the transformers to a new 5000 amp main switchboard. The new switchboard replaced the original switchboard in the same location, at the north end of the basement mechanical room. The new switchboard was reconnected to existing loads in the Auditorium, Coliseum, South Exhibit Hall and Regency Room, and also fed new loads in the North Exhibit Hall and Heritage Room. A separate switchboard for the 2003 addition loads is located in the upstairs electrical room on the south end of the North Exhibit Hall. This switchboard is fed from the main switchboard.

Motor control centers for pumps and other equipment located in the central plant as well as cooling tower fans are fed from the main switchboard. In addition, the three chillers are fed directly from the switchboard.

An 85 kW natural gas generator is located in the basement mechanical room, adjacent to the main switchboard. This generator is original equipment, and serves emergency lighting loads in the Coliseum and Auditorium, and surrounding concourse areas.

A 150 kW diesel generator, installed in 2003 project, is located on the new dock on the east side of the Regency Room. This generator serves emergency lighting loads in the 2003 addition as well as smoke emergency fans located over the Heritage Room.

Original panel and motor control centers installed in 1968 still serve the Coliseum and Auditorium. This equipment is located in the upper service area around the Coliseum, and in an electrical room on the east side of the Auditorium.

Panels for the Regency Room and South Exhibit Hall are in electrical rooms located on the concourse between the South Exhibit Hall and the Regency Room.

The Grand Plaza, although physically connected to the Civic Center Complex, is fed electrically from the transformers located at City Hall. The transformers are located on the NE corner of the City Hall building at the basement level in a vault, at the bottom of the service ramp. A feed runs across the lawn between the two buildings and terminates in an electrical room on the south side of Grand Plaza.

In general, the bulk of the electrical gear is in good condition, since the main electrical equipment and feeders were replaced in 2001. The only exceptions are original panels serving the Auditorium and Coliseum. This equipment is obsolete, so it is difficult and expensive to maintain.



## **MECHANICAL/ELECTRICAL/ PLUMBING SYSTEMS (cont.)**

### **Power (cont.)**

Power available for building users varies from space to space. In general, there is inadequate power in the older portions of the facility to support 208/240 volt equipment, and any 3 phase equipment. Also, there is inadequate 120 volt power in these areas to support smaller displays. In several locations, particularly in the concourse between the auditorium and coliseum, power has been added. But extension cords are still required to support any requirements that are not along the wall

#### **Auditorium**

- Minimal convenience outlets, approx. (3) per side.

#### **Coliseum**

- Minimal power available on the floor:  
(5) 20A, 120VAC & (5) 30A, 240VAC on East and West walls  
(2) 20A, 120VAC & (2) 30A, 240VAC on North and South walls.
- All electrical panels are located in electrical rooms on the upper level of the Coliseum, panels are original.

#### **Grand Plaza**

- Minimal convenience outlets, approx. (3) per side

#### **South Exhibit Hall**

- Utility floor boxes installed in 2001 addition - 2 columns, 5 rows, located on either side of center of room, spaced on 30' x 30' grid.
- Each floor box contains:  
(2) 120VAC, 20A duplex receptacles  
(1) 208VAC / 1ph., 2W, 20A receptacle  
(1) 120/208 VAC / 3ph., 4W, 100A receptacle
- (6) rows of (2) columns, each with:  
(1) 120VAC, 20A duplex receptacle  
(1) 208VAC, 1ph., 30A receptacle at ceiling
- East and West walls:  
(5) 120VAC, 20A receptacle  
(2) 208VAC, 1ph., 30A receptacle
- South wall:  
(4) 120VAC, 20A receptacles
- North wall:  
(7) 120VAC, 20A receptacle

#### **North Exhibit Hall**

- Utility floor boxes: 4 columns, 5 rows, spaced on 30' x 30' grid
- Each floor box contains:  
(2) 120VAC, 20A duplex receptacle  
(1) 208VAC / 1ph., 2W 20A receptacle  
(1) 120/208VAC / 3ph., 4W, 100A receptacle
- Perimeter walls: located approx. every 10'-0" o.c.  
(2) 120VAC, 20A duplex receptacle
- Perimeter Walls: located approx. every 30'-0" o.c.  
(1) 208VAC / 1 ph., 2W, 20A receptacle  
(1) 120/208VAC / 3ph., 4W, 100A receptacle



**MECHANICAL/ELECTRICAL/ PLUMBING SYSTEMS (cont.)**

**Power  
(cont.)**

**Heritage Room**

- Located in each sub-divided space:  
 (1) 120VAC / 1ph., 20A duplex receptacle
- Perimeter of room, located approx. every 20' - 30':  
 (2) 120VAC / 1ph., 20A duplex receptacle  
 (1) 208VAC / 1ph., 2W, 20A receptacle  
 (1) 120/208VAC / 3ph., 4W, 50A receptacle

**Regency Room**

- Minimal electrical power available  
 (5) 120VAC, 20A receptacles on East wall  
 (2) 120VAC, 20A receptacles on South wall  
 (1) 208VAC / 1ph. on South wall  
 (6) 120VAC, 20A receptacles on West wall  
 (2) 120VAC, 20A receptacles on North wall  
 (1) 208VAC / 1ph. on North wall  
 (8) locations 120/208VAC / 1ph. in ceiling

**Hospitality Room**

- (3) columns with:  
 (2) 120VAC, 20A receptacles  
 (2) 120/208VAC, 1ph. receptacles

In general, there is sufficient power in the 2003 addition which included the North Exhibit Hall and the Heritage Room, and the concourse areas constructed during this project. However, the Regency Room and South Exhibit Hall, along with the Coliseum Concourse and West Concourse have very limited power available for space users.

The Grand Plaza is the most limited, as there is no power available higher than 120 volt in the space, so this limits the types of exhibits that can utilize the space. There is a power panel on the outside of the building, on the south side of Grand Plaza. This was originally intended to service concerts in the lawn area, but has been utilized to service production and sound equipment in the Grand Plaza. Use of this power requires the user to bring their own equipment to connect to the panel.



**MECHANICAL/ELECTRICAL/ PLUMBING SYSTEMS (cont.)**

**Lighting**

- Auditorium** House lighting is original incandescent can fixtures located in the high ceiling. Although the fixtures are original, a dimming system for the house lights was replaced approximately 15 years ago. The dimmer rack is an ETC sensor dimmer, located in the Auditorium booth at the back of the auditorium. Stage lighting has been upgraded and a new dimming system was installed in 1998 for the stage lighting system. Step lighting was also replaced approximately 15 years ago.
- Coliseum** Original lighting was replaced approximately 20 years ago. Current lighting configuration consists of 400W metal halide lighting mounted high against the roof, between the trusses, and 1000W metal halide fixtures mounted at the bottom of the trusses. These fixtures are switched in groups at various locations around the concourse. Fixtures over the seating areas are 250W metal halide with quartz re-strike.
- Heritage Room** The Heritage Room has the most diverse lighting system in the facility. It consists of 150W metal halide (switched), 250W incandescent down lights (on dimming system), fluorescent cove lights (switched), suspended chandeliers (on dimming system) and 120W halogen wall sconces. Control panels and ETC sensor dimmers are located in the electrical space at the south end of room. The lighting control system allows grouping of fixtures depending on room layout. Portable controllers that are connectable in floor boxes located in each interior sub-divided space. Perimeter rooms with permanent walls have a dimming control box located in the wall.
- Regency Room** Original lighting consisted of 2x4 fluorescent troffers mounted in the ceiling. These fixtures remain and are switched. In 2010, dimmable incandescent can fixtures were added along with a dimming system. ETC dimming rack is located in the storage area at the north end of the room. LCD control panels allow grouping and programming of lighting to correspond to the layout of the moveable partitions in this space.
- South Exhibit Hall** Lighting in this room consists of the original 2x4 fluorescent recessed ceiling mounted troffers. Lights are switched in groups.
- North Exhibit Hall** Lighting consists of a combination 400W metal halide high bay fixtures and 500W incandescent. The metal halide fixtures are switched in groups, while the incandescent fixtures are on a dimming system. Control panels and ETC sensor dimmers are located upstairs in M/E space on south end of room. In addition, 50W fluorescent wall sconces accent the space.
- Coliseum Concourse** Lighting in the concourse areas consists of fluorescent troffers mounted in the ceiling. All lighting in the concourses was replaced in the 2003 renovation project. The lighting is non-dimmable.
- Exhibit Hall Concourse** Lighting in the concourse areas is 2x4 fluorescent lighting.
- Exterior Lighting** All lighting around the perimeter of the building is relatively new. The north, east and west sides of the facility have new pole lights that were installed approximately 10 years ago. The parking lot to the north of the Civic Center Complex has new pole lighting that was installed approximately 10 years ago. Finally, new lighting in the parking lot south of the Civic Center Complex and east of City Hall was installed in 2010.



**MECHANICAL/ELECTRICAL/ PLUMBING SYSTEMS (cont.)**

**Data and Phone** A detailed listing of available data and phone outlets for each space is included in the room data sheets in the Appendix. Once again, in general, the areas included in the 2003 addition, specifically the Heritage Room and the North Exhibit Hall and associated concourse area, have data and phone outlets regularly spaced or available in floor boxes to serve exhibitors throughout these spaces.

Phone and Data is especially limited in the Coliseum Concourse and the West Concourse. There is no phone or data available in the Coliseum or Grand Plaza, which again limits the usability to potential exhibitors in these spaces. Wireless data services are available in these areas, but phone outlets do not exist.

**Auditorium**

- No data/telephone within the space

**Coliseum**

- No data/telephone within the space

**Grand Plaza**

- No data/telephone within the space

**South Exhibit Hall**

- Utility floor boxes installed in 2001 addition - 2 columns, 5 rows, located either side of center of room, spaced on 30' x 30' grid.
- Each floor box contains:
  - (6) RJ-45 data outlets, CAT 5E
  - (2) RJ-45 telephone outlets, CAT 5E
 All terminated in data rack located in electrical room on north end of room.

**North Exhibit Hall**

- Utility floor boxes: - 4 columns, 5 rows, spaced on 30' x 30' grid.
- Each floor box contains:
  - (6) RJ-45 data outlets, CAT 5E
  - (2) RJ-45 telephone outlets, CAT 5E
- Perimeter walls: Located approx. every 10'-0" o.c.
  - (2) RJ-45 data outlets, CAT 5E
  - (2) RJ-45 telephone outlets, CAT 5E
 All terminated in data rack located in M/E room on south end of room, upstairs

**Heritage Room**

- Located in each sub-divided space:
- Each floor box contains:
  - (2) RJ-45 data outlets, CAT 5E
  - (2) RJ-45 telephone outlets, CAT 5E
- Perimeter of room, located approx. every 20'-30':
  - (2) RJ-45 data outlets, CAT 5E
  - (2) RJ-45 telephone outlets, CAT 5E



**MECHANICAL/ELECTRICAL/ PLUMBING SYSTEMS (cont.)**

**Data and Phone  
(cont.)**

Regency Room

- Perimeter of room, located in each sub-divided space:
- East wall:
  - (3) RJ-45 data outlets, CAT 5E
  - (3) RJ-45 telephone outlets, CAT 5E
- South wall:
  - (1) RJ-45 data outlets, CAT 5E
  - (1) RJ-45 telephone outlets, CAT 5E
- West wall:
  - (4) RJ-45 data outlets, CAT 5E
  - (4) RJ-45 telephone outlets, CAT 5E
- North wall:
  - (2) RJ-45 data outlets, CAT 5E
  - (2) RJ-45 telephone outlets, CAT 5E

Hospitality Room

- Limited data - installed by CC personnel for specific purposes. Not permanently installed.

**Sound Systems**

The Heritage Room includes a sound system that is configurable to serve the different room layouts that can be achieved by positioning the moveable partitions. Sound system jacks are available in floor boxes and wall outlets.

The North Exhibit Hall also has multiple sound system inputs and adequate speakers. This system was originally designed to tie to the Heritage Room sound system, and a tie back to the sound system located in the Administration offices was also included. However, this did not allow input from the Heritage Room or North Exhibit Hall to broadcast to the Coliseum, Concourses, South Exhibit Hall or Regency Room.

A project completed in the past few years has resulted in a complete loop throughout the facility which allows sound from any location to be broadcast throughout the facility. New speakers have been installed in the Concourse areas, South Exhibit Hall and Regency Room to improve the quality of these systems, along with new amplifiers and joiners.

In addition, the speakers and sound system in the Coliseum were replaced, and are approximately 4 years old. The sound system and speakers for the Auditorium have recently been upgraded.



## MECHANICAL/ELECTRICAL/ PLUMBING SYSTEMS (cont.)

### Plumbing

#### *Domestic Water*

Domestic Water enters the facility in two locations. The main water supply for the original building is a 10 inch line which enters the basement mechanical room adjacent to the service ramp. This water supply serves the Coliseum, Auditorium, Administration offices and the 1978 addition of the South Exhibit Hall and the Regency Room. This water supply also provided water to fire protection sprinkler systems in the basement and fire hose cabinets in the original facility.

A second 4 inch water supply enters the building in a mechanical room on the east side dock of the Regency Room. This supply serves the Heritage Room and the North Exhibit Hall. A 12 inch water main is located in the parking lot just east of the Regency Room and Heritage Room. This line continues north and crosses to the parking lot to the north. This water main serves both the original 10 inch feed and the 4 inch feed to the north addition.

Hot water is provided by water heaters in each location where the main water supplies enter the building. The division of hot water service is the same as the domestic cold water service. A gas fired water heater and storage tank located in the basement mechanical room serves the original building including the Coliseum and Concourse areas, Auditorium and Administration, as well as the Grand Plaza addition and the South Exhibit Hall and Regency Room. A separate gas fired water heater and storage tank located in the mechanical space just east of the Regency Room serves the North Exhibit Hall, Heritage Room and the Concourse toilets located adjacent to these rooms.

#### *Sewer*

There are several sewer connections from the facility. The dressing rooms at the basement level as well as at the Auditorium all discharge into a sewage ejector located in the basement mechanical room. From here, the sewer connects to a gravity line that runs east under the Administration area and connects to a city main running along the east side of the Coliseum.

Toilets and other plumbing facilities located on the east side of the Coliseum also run out and connect to the city main on the east side. Toilets and other plumbing facilities located on the west side of the Coliseum are connected to a main that runs south under the West Coliseum Concourse and extends to outside the building. From here, the sewer turns and runs west to connect to a city main on the SW corner of the Grand Plaza. Auditorium toilets and the Grand Plaza toilets and other plumbing facilities in these areas are connected to the main sewer line running under the West Concourse.

The sewer serving the toilets located behind the Box Office runs north and ties into a new 10 inch city main which is running west to east under the South Exhibit Hall. This main line continues to the east side of the Complex. Toilets adjacent to the Regency Room, as well as the kitchen area adjacent to the Regency Room, connect to this 10 inch line on the east side, just outside the Regency Room. Sewer service to the Heritage Room toilets and kitchen extends east and exits the building, where it ties to a 12 inch city main. Sewer service from the North Exhibit Hall toilets and kitchen exit the building on the west side, and tie into a city main located in the west parking area outside the North Exhibit Hall.

In addition to sewer service, drains located in the utility boxes in the floor of the North Exhibit Hall and the South Exhibit Hall are connected to the city main on the west side of the Complex. These drain lines are not trapped or vented; they discharge into a collection basin on the outside of the facility, which is connected to the sewer. The collection basins are trapped and vented.





**MECHANICAL/ELECTRICAL/ PLUMBING SYSTEMS (cont.)**

**Plumbing**

**Gas** Natural gas service enters the basement mechanical room from a gas meter located near the bottom of the service ramp. The line extends into the basement and serves the boilers and a generator located in the basement mechanical room. With the exception of some gas outlets located in the Coliseum North Concourse, there is no other gas service to the building.

**Toilets** *Facilities:* Refer to the Room Data Sheets in the Appendix for a summary of toilet facilities in each area.

*Coliseum* – Toilet rooms located around the Coliseum are original, and have had very little work other than maintenance and painting since the facility was constructed.

*Auditorium* – The toilets located in the Auditorium lobby are not original to the building. They were added in 1986 to meet the demands of the Auditorium while simultaneous events were occurring in the Coliseum. During the 2003 renovation, the women’s toilet area was upgraded and more fixtures were added.

*Dressing Rooms (Auditorium)* – Dressing rooms located in the mezzanine are on the east side of the Auditorium consist of private rooms with a toilet and shower, and larger dressing rooms with gang toilets and showers. These facilities have remained untouched since they were built during the original Civic Center Complex project. The city is currently pursuing a project to renovate these toilet rooms. The renovations will update fixtures to comply with TAS and ADA.

*Dressing Rooms (Coliseum)* – Dressing rooms located in the basement level, off the service ramp to the Coliseum, were constructed during the original project. These facilities have had minor upgrades that were completed in 2011.

*Toilets behind Box Office* – Men’s and women’s toilets were located behind the ticket office during the 1978 addition project.

*Regency Room* – Toilet rooms located on the concourse outside the Regency Room were constructed as part of the 1978 addition project. These facilities have also been upgraded in the last 5 years to meet TAS requirements.

*Heritage Room* – Men’s and Women’s toilet rooms are located on the Concourse on the south end of the Heritage Room. These were constructed during the 2003 expansion project. These facilities are in good condition and meet TAS requirements.

*North Exhibit Hall* – Men’s and Women’s toilet rooms are located on the Concourse on the south end of the North Exhibit Hall. These were constructed during the 2003 expansion project. These facilities are in good condition and meet TAS requirements.



## CONCLUSION

### **Aesthetics and Ambiance**

As discussed above in reviewing some of the functional spaces, much of the Civic Center Complex is dated with respect to its aesthetic ambiance. Especially in its public circulation areas, the building feels more like an older high school than an important public, civic building. The lack of natural light, very basic types of artificial lighting, conventional flat acoustic tile ceilings and generally below-average level of finishes contribute to the sense of a dated, somewhat boring ambiance. Typically for facilities of this type, arenas and exhibit halls have simpler and more durable finishes whereas convention centers and theaters have more upscale and hospitality finishes. The hotel industry has dramatically influenced the design of convention centers over the past several decades, and attendees have come to expect a higher level of comfort and ambiance in ballroom and meeting spaces.

The aesthetic issues of the ACCC's exterior are primarily ones of scale, articulation and monotony. Having a single set of building materials used on a facility that covers almost six city blocks inherently results in an almost monochromatic composition that lacks hierarchy, distinction and form. Entrances do not create a sense of individual place that suggest the uses they serve. The visual composition is almost exclusively horizontal which makes the building seem even larger than it actually is, especially when experienced as a pedestrian.

While it is obvious that great effort was expended to make each of the two major expansions of 1978 and 2003 blend with earlier constructed work, the continuity and sameness result in a "lowest common denominator" attitude. Functional seamlessness and continuity are clearly desirable attributes as a facility expands over the years, but it is clear that the next expansion that responds to the HVS market study findings needs to break new ground and find a way of being good 21st century public architecture, rather than looking backwards to what is there already.

### **Conclusion**

While many of the deficiencies noted above can be overcome, the greatest challenges are the lack of back-of-house areas, the generally obsolete nature of the Coliseum, and the unequal and inadequate non-contiguous Exhibition Halls.

Despite the deficiencies and challenges of the existing facility that have been enumerated above, it must be stressed that the Amarillo Civic Center Complex has many strengths and positive features that can serve as the basis for the facility's continued success. Event planners and promoters like the "all under one roof" attribute and the fact that the facility is basically on a single level. The diversity and variety of event spaces housed in one facility, its downtown location, available land for expansion, and basically sound infrastructure are significant positives that will underlie the success as the next improvement project moves forward.





### Narrative & Annotated Photographs

#### COLISEUM

- Access to large truss for riggers
- 13' feet deep truss
- Glare condition at vomitories
- Return air louvers blocked
- 38' from floor to underside of structure
- Difficult to access floor seating from main entry level



- Upper balcony-not accessible to public; used for lighting, projection, etc.
- Also provides access to air handlers and electrical rooms
- Handicap seating section



**COLISEUM-  
ROOF STRUCTURE**

Truss bears on  
steel column inside  
masonry wall

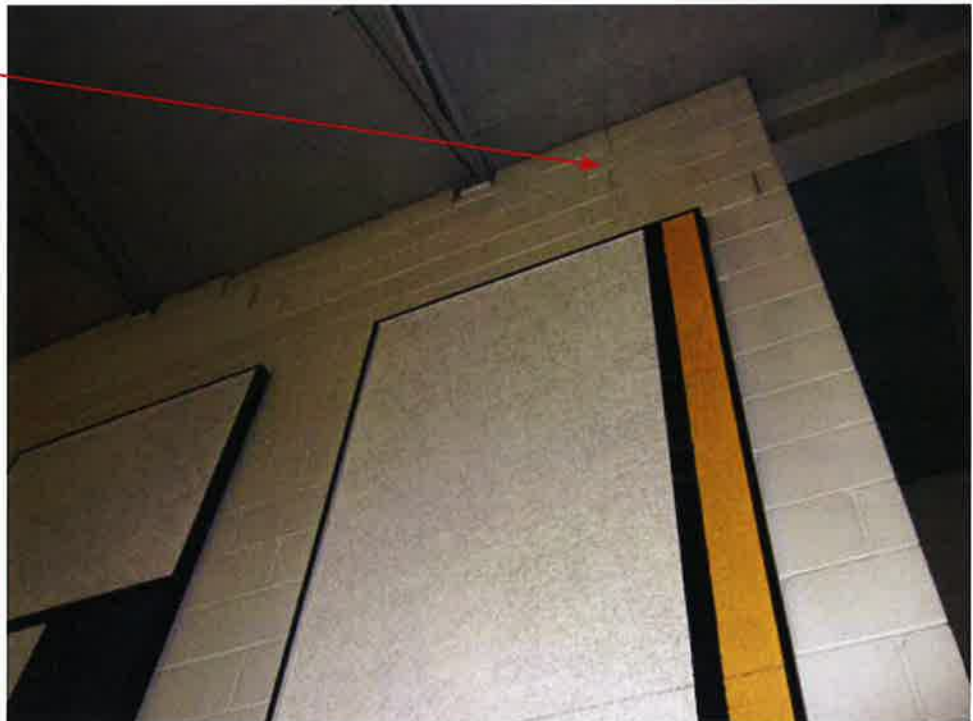


**COLISEUM**

Damage to brick at  
Coliseum vomitory



Cracks in cmu  
wall possibly due  
to foundation  
settlement



**COLISEUM  
CONCESSION**

No mechanical  
ventilation; minimal  
cooking allowed

Too small-  
inadequate size

Cluttered;  
inadequate storage



Inadequate lighting

Dedicated liquor  
storage not used

Not code compliant

No hand-wash sinks

Inadequate  
plumbing



**COLISEUM  
HOSPITALITY ROOM**

Columns limit furniture layout and AV setup

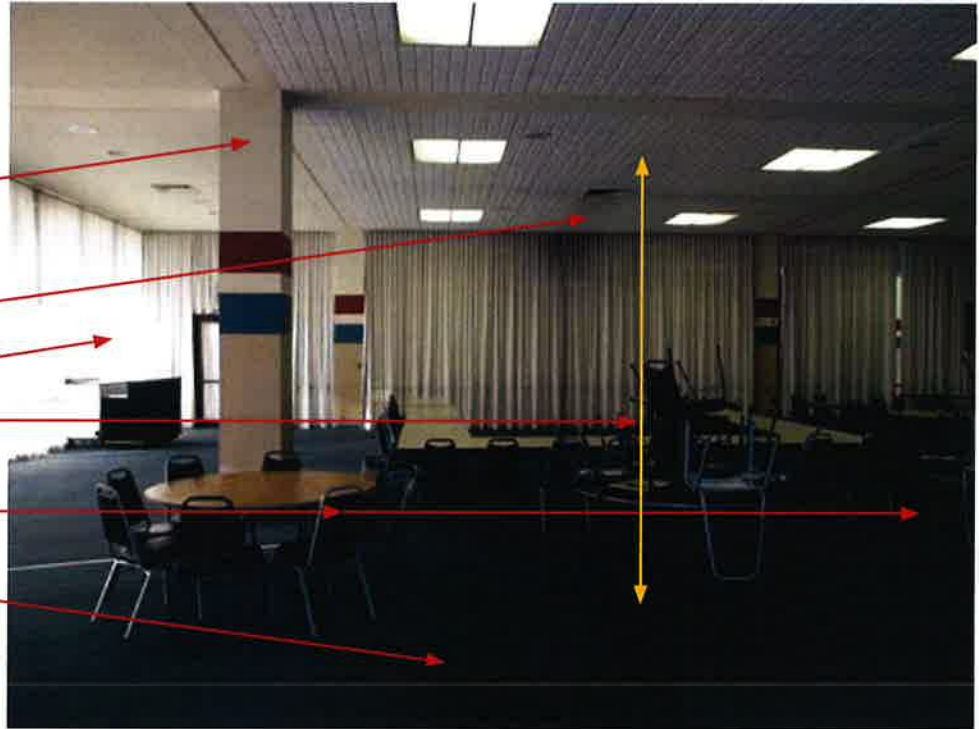
Dirt from air louver

Glare

14' from floor to ceiling

Widely varying light levels across room

Good location near entrance & Coliseum



Re-Used air walls separate hospitality room from storage.

Adjacent storage at exterior wall





**GRAND PLAZA**

Clerestory natural light periodically requires black-out provisions

Glare condition

Working catering area behind conflicts with stage location

Amarillo/Texas design features



Lack of back-of-house support spaces

Room served by dedicated chiller not connected to main chiller plant

Inadequate 120v power in space to support light exhibits and other needs

No data or phone available



**AUDITORIUM**

Challenging to maintain lighting

2,234 fixed seats;  
128 portable seats



No dressing rooms at stage level

24' high proscenium opening

No cooling on stage; all air comes from seating area.

50'-6" deep stage



**SOUTH EXHIBIT HALL**

No rigging points at ceiling

6 columns (3 per side) have valve box with water

Lighting control- only on/off

14' from floor to ceiling/light fixtures

Utility floor boxes on 30' x 30' grid



Columns spaced on a 30' x 90' Grid



Damaged column enclosures



**SOUTH EXHIBIT HALL-  
UTILITY FLOOR BOX**

Heavy Floor Box  
Cover



Each Floor Box  
Contains:

- (2) 120VAC - 20A  
Duplex receptacles
- (1) 208VAC/1 phase  
2W, 20A receptacle
- (1) 120/208VAC,  
3 phase, 4W, 100A  
receptacle
- (6) CAT 5E Data
- (2) CAT 5E Phone



**NORTH EXHIBIT HALL**

Metal halide lighting

14' x 14' and 16' x 16'  
roll up doors

25' from floor  
to underside of  
structure



Air wall storage

10' x 10' roll-up  
doors



**REGENCY ROOM**

- Track for operable partitions
- Parabolic troffers and dimmable compact fluorescent downlights
- 12' from floor to ceiling/light fixtures



- Inconsistent typography and sign type
- Darker, recessed entry
- Restroom at major room entry



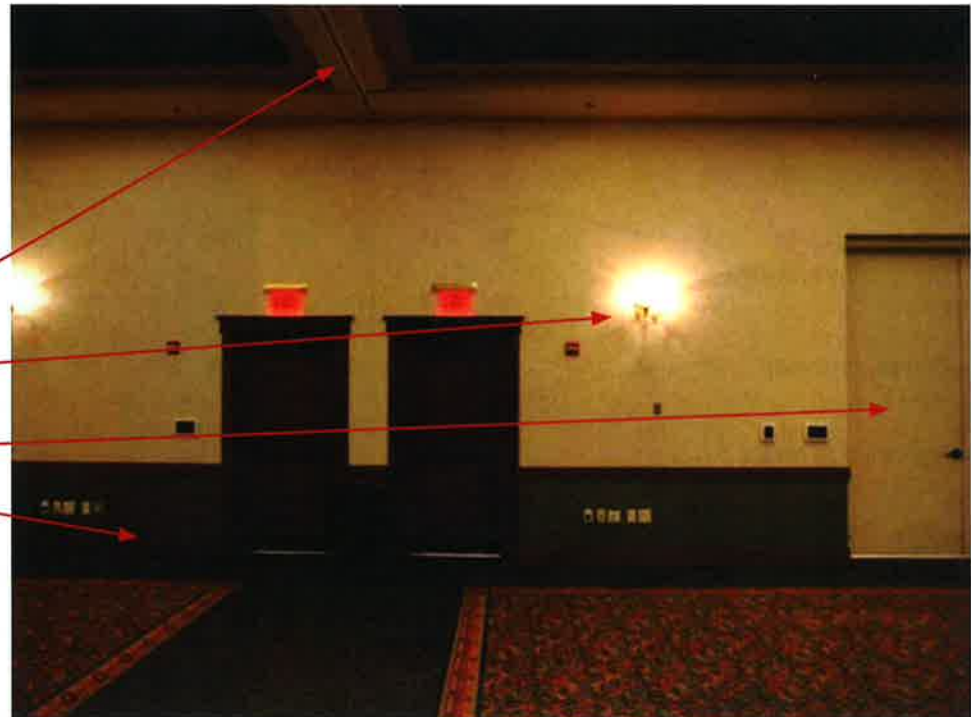
**HERITAGE ROOM**

- Recessed cove lighting
- Lighting controllable by each subdivided space through floor box controller (hand held portable)
- 14' floor to ceiling height
- Carpet pattern reflects room subdivision layout



**DOORWAYS TO HERITAGE ROOM AT CONCOURSE**

- Recessed track for air walls
- Bright incandescent sconces
- Service door
- Decorative wainscot



**COLISEUM  
CONCOURSE**

Unarticulated ceiling  
(former exterior  
stucco soffit)

No east side  
sun protection

Dated and difficult  
to read graphics

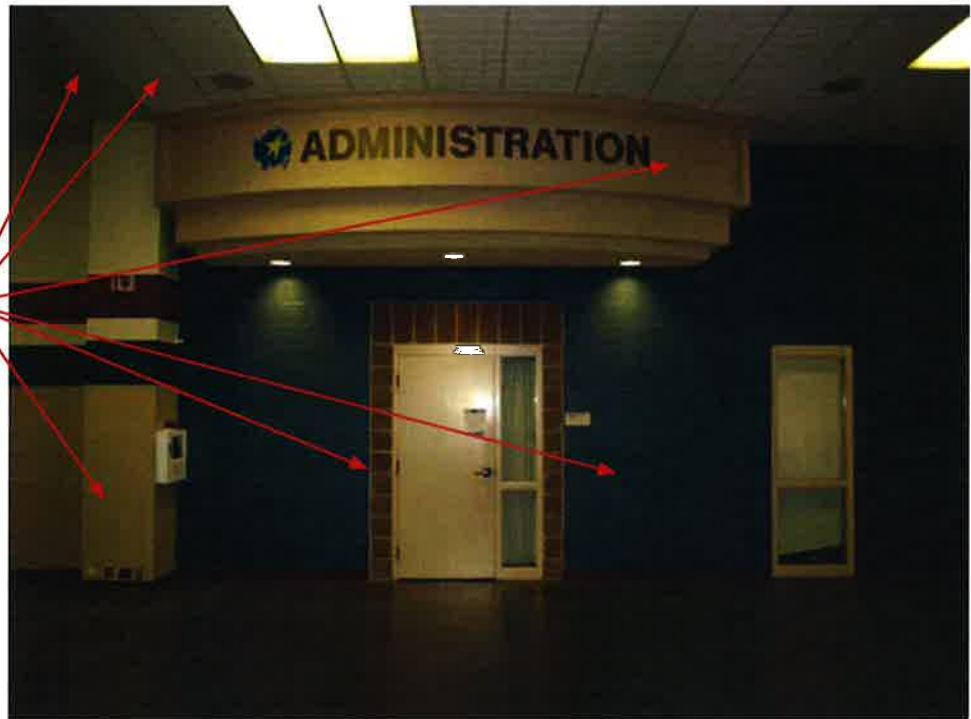
“Storefront”  
type fenestration

Polished concrete  
floor; on-grade  
slab with some  
differential  
settlement

Unpolished exterior  
concrete



Confusion of design  
elements



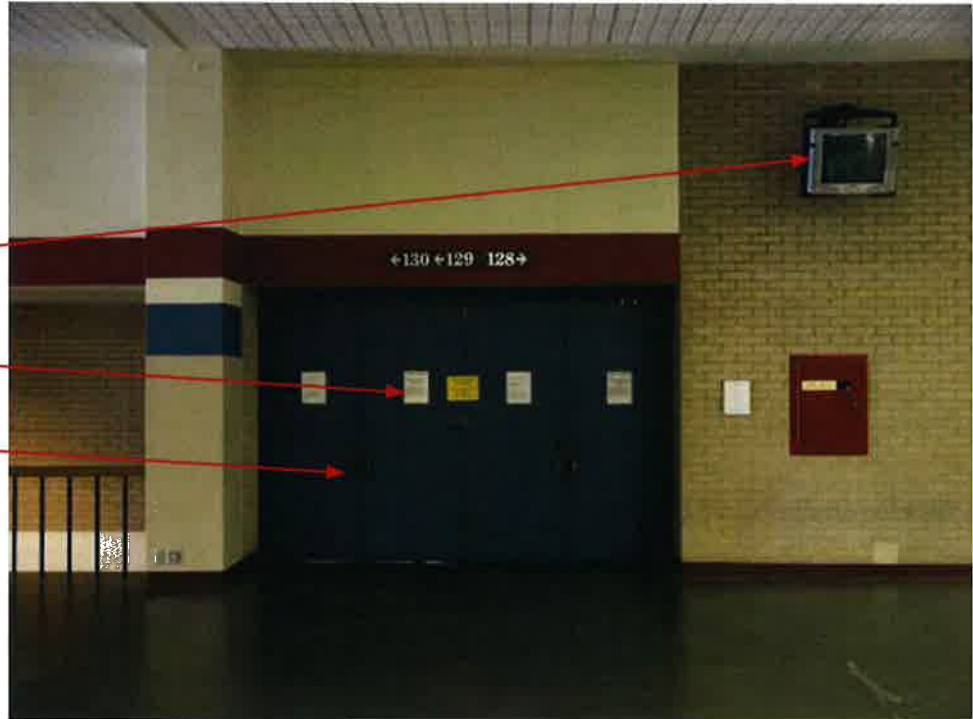


**COLISEUM  
CONCOURSE**

Difficult to view TV monitor (height and reflection issues)

Confusing temporary signage

Generally uninviting entry condition



Overall aesthetic similar to Regency Room

Lack of orientation in this space; little legibility that it serves adjacent Auditorium and/or Coliseum

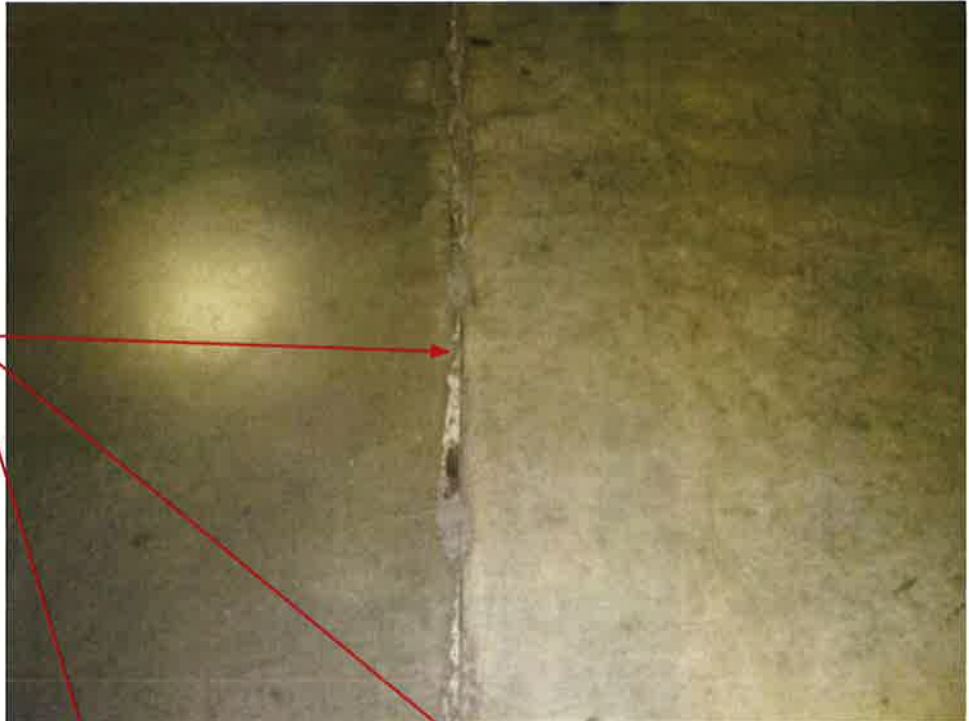
Pipe and drape for temporary event concessions

Some electric power on columns, but general shortage of power in this space



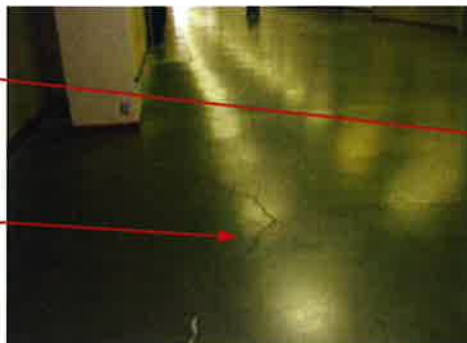
**COLISEUM  
CONCOURSE**

Slab control joints;  
widening as topping  
slab degrades



Hose bib; column  
cover has water  
damage, possible  
leak

Typical cracking in  
concourse topping  
slab, but there is  
still wearable life



**COLISEUM VOMITORY  
& CONCESSION  
STAND**

6' -3" width, too narrow

Potential queuing  
conflict between  
concession and  
vomitory



Lack of graphics



**NORTH CONCOURSE  
BETWEEN HERITAGE  
ROOM & NORTH  
EXHIBIT HALL**

Somewhat lighter  
ambiance than  
original facility to  
south

Lack of natural light

Confusing  
orientation

East/West  
circulation;  
importance of this  
intersection not  
clear



**VIEW INTO SOUTH  
EXHIBIT HALL FROM  
CONCOURSE**

Roll-Up door to  
South Exhibit Hall  
from North/South  
Circulation hallway



**WEST CONCOURSE  
ADJACENT TO  
AUDITORIUM**

Inadequate power  
and hard wiring for  
data

No phone, no  
plumbing (water  
and drain)

Only carpeted  
circulation  
concourse section  
in entire complex



Dedication plaque,  
original building  
completed 1968,  
located at Box Office



**BOX OFFICE TO AUDITORIUM**

Undifferentiated ceiling treatment

Edge of Auditorium

Potential of queuing at Box Office to block through circulation



Inadequate temporary display of event promotion information

Reflective; difficult to read

Box Office is in building interior; no direct access from outside



**LOWER LEVEL  
SERVICE ACCESSWAY**

New structural decking

Ad hoc storage

Un-excavated beyond

To Auditorium Stage  
10' x 10'-wide  
roll-up door

Truck delivery area  
for Auditorium and  
Coliseum

90 Degree turn to  
Coliseum

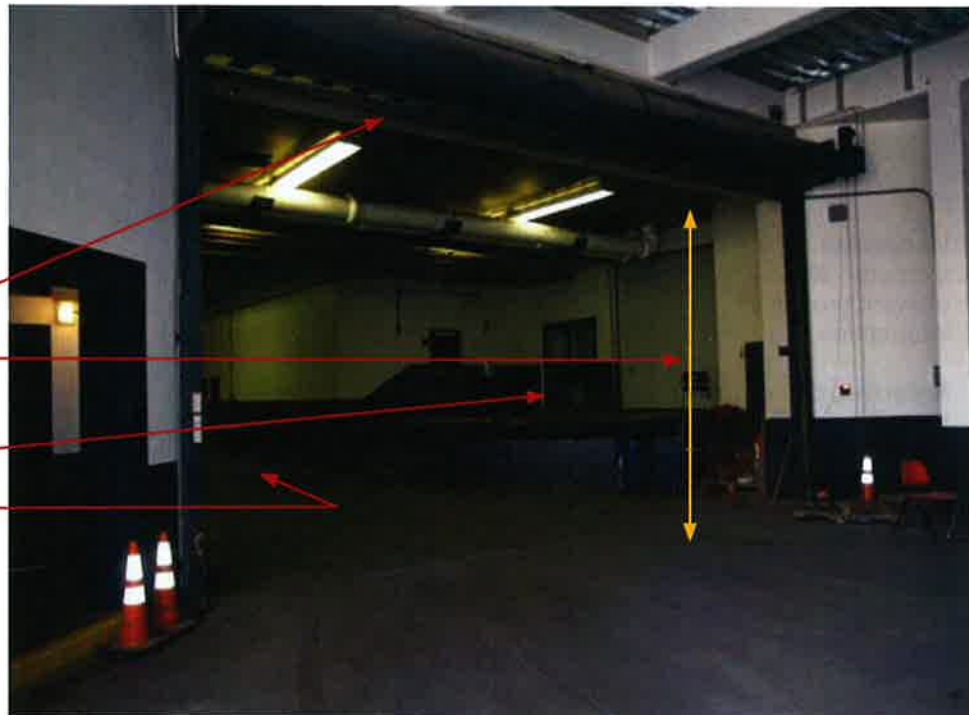


Roll-up door

14' vertical  
clearance

To Auditorium Stage

To Coliseum beyond



**TRUCK SERVICE TO COLISEUM FLOOR**

Single service access way only 12'-0" wide, to Coliseum @ north west corner

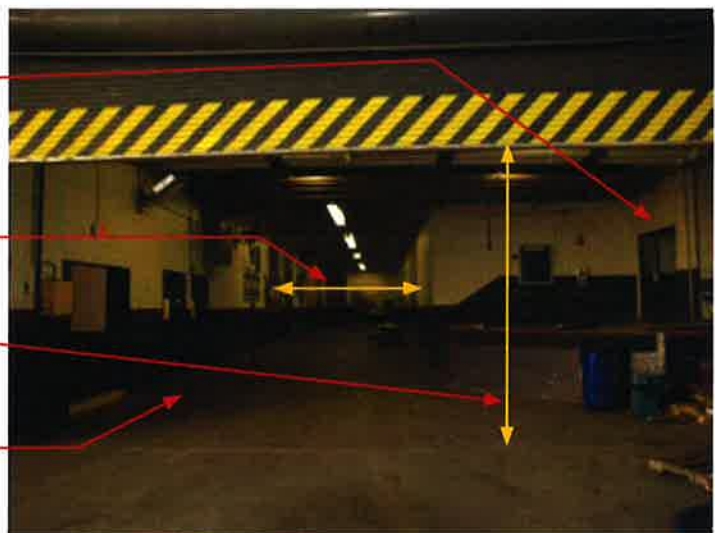


To Auditorium

19'-4" wide corridor

14'-0" vertical clearance

To Coliseum





**LOCKER AREA**

Locker Area under  
North seating area  
in Coliseum

Inadequate locker  
areas; not enough  
separation among  
locker areas, and  
what is there are  
too small and poorly  
arranged



**STORAGE**

Shared with  
Janitorial staff

Storage system  
does not take  
advantage of full  
vertical height



Back-of-house staff  
and storage area  
visible to public  
through doorway  
(roll-up door in open  
position)  
On North/South  
Circulation Hall



**STORAGE**

Regency Catering  
Kitchen

Cooler

Chair storage is  
taking up functional  
area in catering  
kitchen.



Regency Catering  
Kitchen

Ice machine

Inadequate  
plumbing; no hand  
washing facilities



**CONCESSION  
PREPARATION AREA,  
LOWER LEVEL**

Inadequate task  
lighting

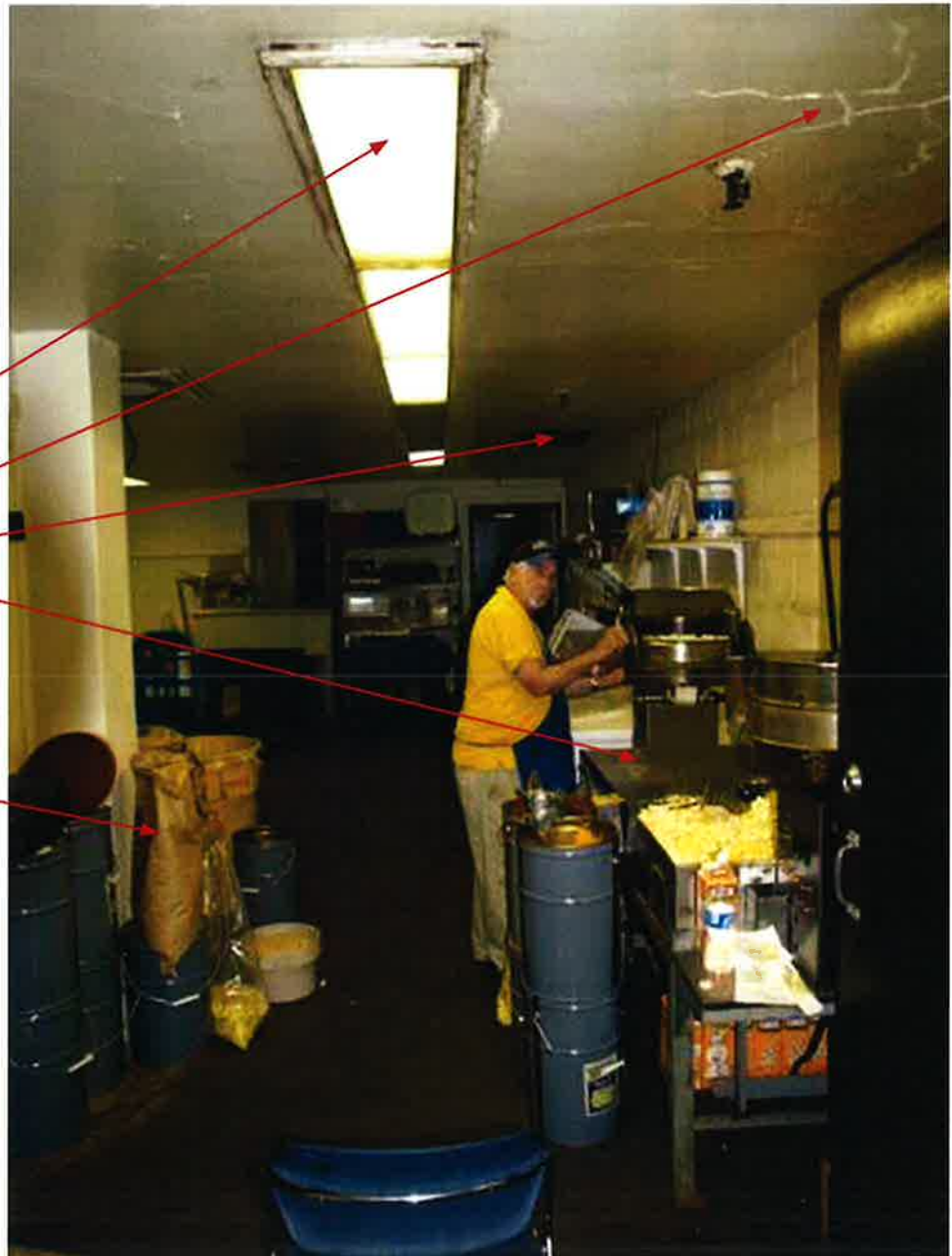
Ceiling damage

Inadequate exhaust

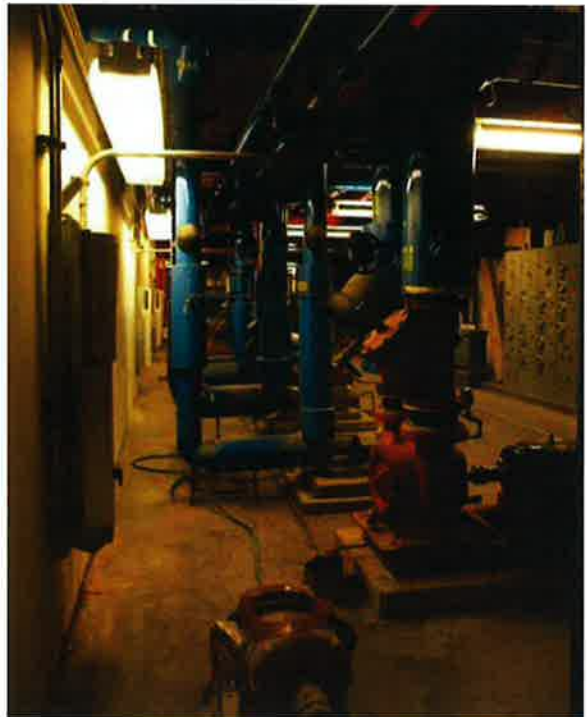
Insufficient  
preparation area

Lack of hand  
washing and  
cleanup sink

Lack of dedicated  
storage for food  
products, waste,  
etc.

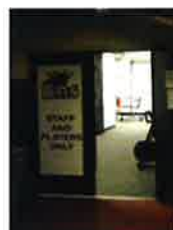


**MECHANICAL ROOMS**



**GRAPHICS & SIGNAGE**

Variety of font, scale and colors



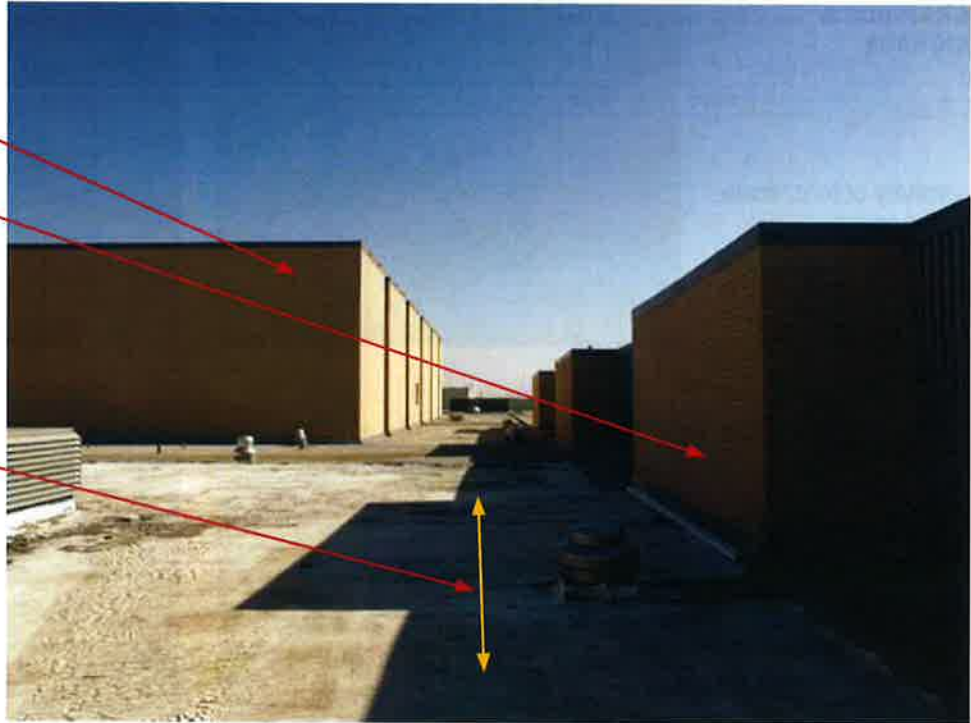
**ROOF**

Coliseum

Auditorium

Total roof area = ca.  
340,000 SF

North/South  
Circulation Hall



Grand Plaza

Cold tar pitch with  
roll-on reflective  
coating

Cold tar pitch

Built up roofing with  
cap sheet



**LOADING AREAS**

Regency Freight  
 Receiving Dock

Loading areas are  
 widely distributed  
 throughout site  
 rather than  
 consolidated



Entrance 7

Loading 6

Entrance 4

Regency Freight  
 Receiving Dock

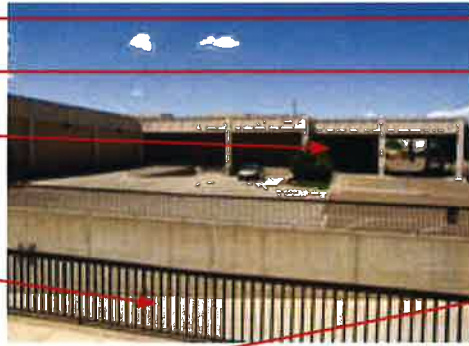
Subterranean ramp  
 to Auditorium &  
 Coliseum

Service area  
 visible near public  
 entrance

Service dock at NE  
 corner of building  
 near important  
 street intersection,  
 Loading 2 & 3

Loading 4

Loading 1





**EAST SIDE ENTRANCE  
#7 TO COLISEUM**

- Loading 6
- Entrance 7
- Attendee and service entrances are immediately adjacent to each other
- Dumpsters visible at public entrance
- Ramp for elevation change of about 4'-0"



Undistinguished architectural expression at entrance; relies on nondescript signage.



**EAST SIDE PARKING**

Building set back  
and surrounding  
parking  
lots create  
suburban effect



High water use turf  
grass



**ENTRANCE #8 TO  
COLISEUM AT  
SE CORNER OF  
COMPLEX**

No signage for  
Coliseum Box Office

Attempt to  
signify major  
entrance through  
architectural  
expression;  
identification still  
not clear

Elevation change  
approximately 4'-0"



Typical exterior  
entrance sign  
located in the  
landscape



**CENTENNIAL PARK  
AT CITY HALL-  
SOUTH END OF  
COMPLEX**

Space only  
occasionally used  
for programming



South end of  
Coliseum

Mainly a pass-  
through space, not  
well-utilized



**ENTRANCE #10 TO  
COLISEUM AT SOUTH  
END**

Other than sign,  
clues that this is  
entrance to 4,000+  
seat venue are  
lacking.

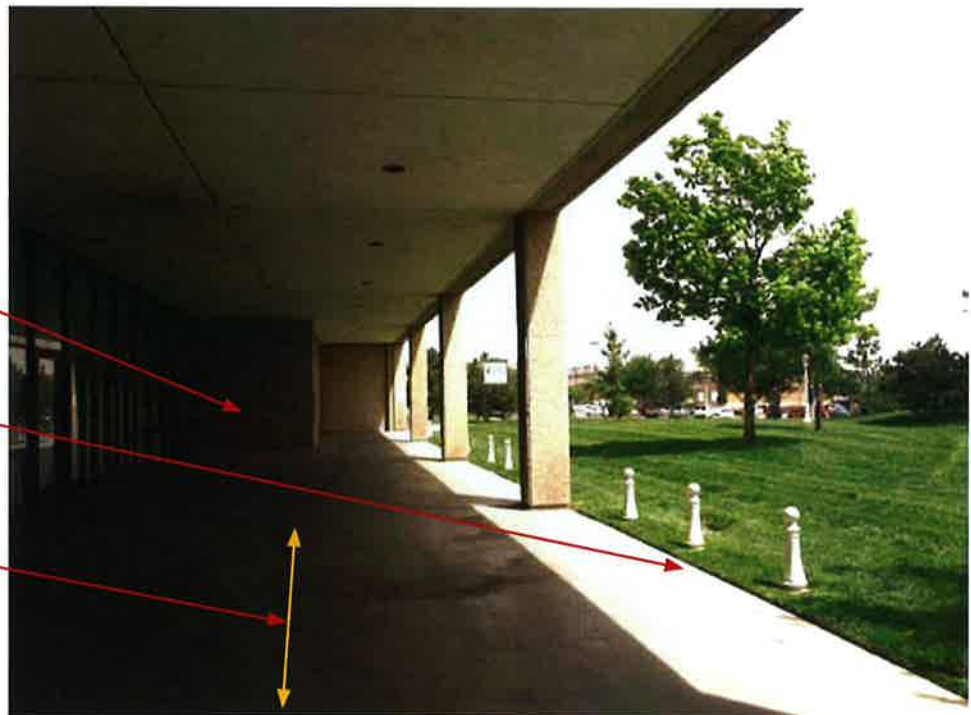
Entrance/Exit opens  
to Centennial Park



Dead exterior space;  
periodically used for  
service access

Bollards to prevent  
trucks driving in  
park and damaging  
turf

Loading 11 access



**ENTRANCE #11 TO  
GRAND PLAZA**

Entrance sign set  
back and not legible  
from street

Art program helps  
to relieve the visual  
monotony around  
the site.



**ENTRANCE #12 TO  
AUDITORIUM,  
WEST SIDE**

Main Entrance to  
Auditorium

Lack of sun and rain  
protection



**ENTRANCE #1 AT  
BUCHANAN STREET**

Canopy helps to identify entry and break-up sense of very long façade

Recessed, dark entry area to Box Office



Understate Public Entrance

Entry itself is dark and uninviting

Short term parking for Box Office



**ENTRANCE #2 AT  
SOUTH & NORTH  
EXHIBIT HALLS**

- Visitor's Center
- Loading Dock 2
- Pedestrian flow  
pinch point



**SERVICE ENTRANCE  
AT NORTH EXHIBIT  
HALL**

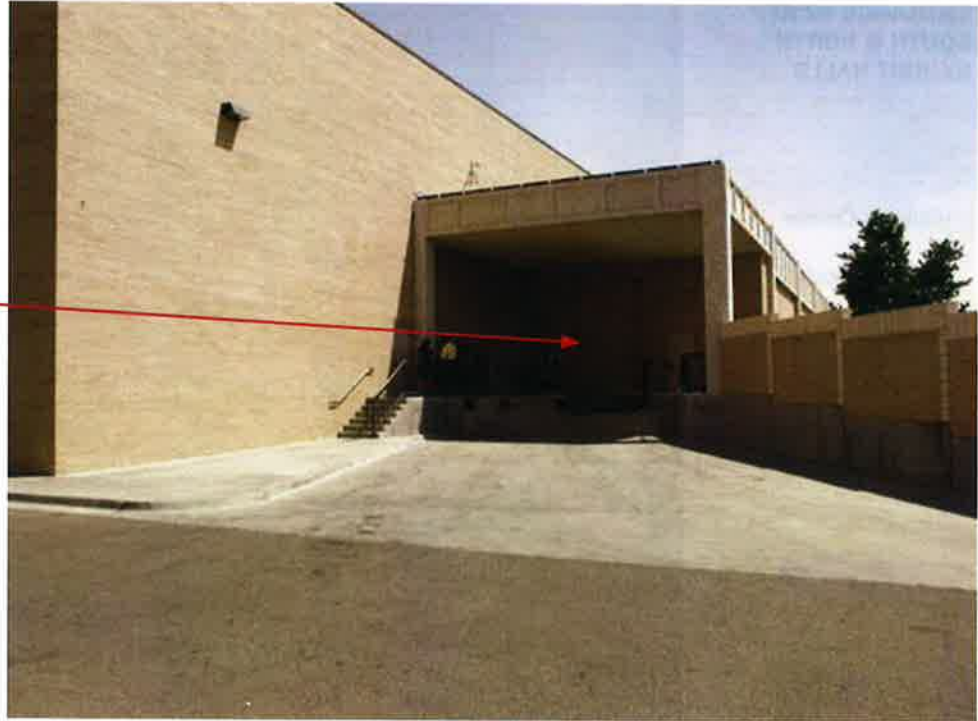
- Undersized loading  
entry; on same side  
of building that is  
used for public entry
- Door to North  
Exhibit Hall Catering  
Kitchen





**SERVICE ACCESS #3  
AT NORTH EXHIBIT  
HALL**

Truck service access and dock located at major corner of city street grid and facility is viewed as problematic.



Entrance 3

Lack of pedestrian buffer next to fast-moving traffic on 3rd



**ENTRANCE #3 AT  
NORTH END OF  
COMPLEX AT 3RD  
STREET**

Canopy helps to signify entry; lack of identification moving in this direction

Weak signage

Pedestrian/  
vehicular conflict



Recessed entry, no signage to reinforce wayfinding



**ENTRANCE #4 AT  
EAST SIDE OF  
COMPLEX**

Dark condition at  
public entry

14'-0" vertical  
clearance at drop-  
off/ pick-up area  
for Heritage and  
Regency Rooms

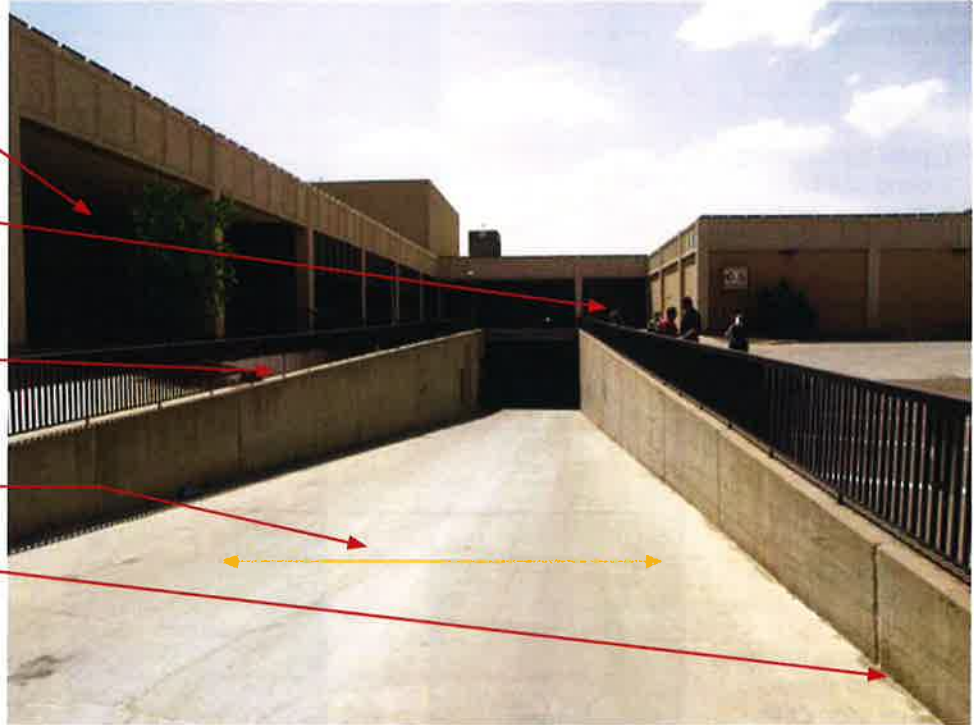


Entrance 4 in a sea  
of parking; lack of  
orientation to key  
destinations



**SERVICE ACCESS  
RAMP TO LOWER  
LEVEL**

- Administration Offices
- Entrance/Loading 5 above ramp opening, lack of safe public entrance
- Ramp blocks pedestrian flow at grade
- 25'-0" wide truck ramp
- No bumpers or curb at ramp edge



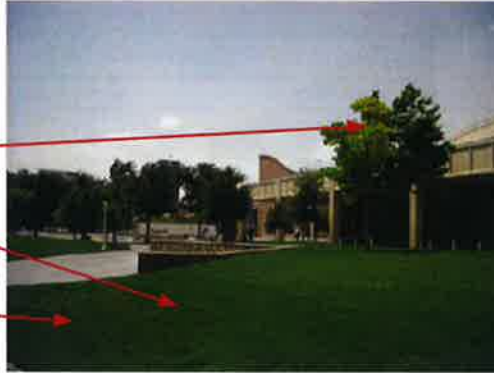
- Subterranean service ramp to Auditorium & Coliseum
- Administration Offices
- Electrical transformers and gas meters behind



**LANDSCAPE  
CONDITIONS**

Typical landscaping around complex:  
high water use turf  
and shade trees

Centennial Park



Parkway trees  
and turf buffer  
pedestrians from  
parking lot but not  
roadway.

Turf grass in narrow  
mounded strips  
can be difficult to  
maintain.



Composite lumber  
edging failing in  
many locations



Irrigation system  
exposed and needs  
mulch cover to  
conserve water

Composite lumber  
edging failing in  
many locations



**SITE AMENITIES/  
STREET FURNITURE**

No apparent city standard for site furnishings which are not consistent and typically in disrepair



Site lighting is not consistent throughout site

Few streetscape amenities at public entrances

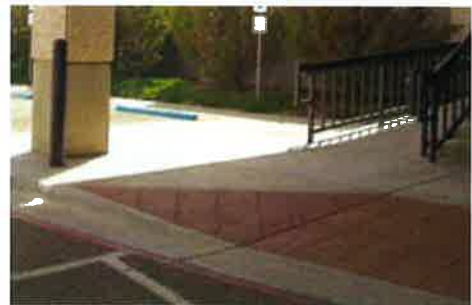


Variety of bollard types are used throughout the site.



**PAVING CONDITIONS**

Generally, concrete and asphalt paving are in good condition.



**PAVING CONDITIONS**

Multiple pavement types (sometimes highlighting entrances) are used inconsistently throughout the site







## Market Area Overview

### Introduction

This market area analysis reviews economic and demographic data that describe the overall condition of the local economy in Amarillo, Texas. The characteristics of the area economy and trends that indicate growth or decline provide indicators of the demand for the Amarillo Civic Center Complex (“ACCC”). HVS analyzed the following indicators: population, income, sales, work force characteristics, employment levels, major businesses, airport access, transportation, hotel supply, and tourism attractions.

### Market Area Definition

The market area for convention centers and arenas consists of the geographical region that offers transportation access, lodging, and other amenities to users of the ACCC. For the purposes of this study, HVS defined the market area as the Amarillo Metropolitan Statistical Area, which includes Potter, Carson, Armstrong, and Randall Counties. The following map shows the market area.

Figure 4-1 Map of Market Area



Located in the center of the Texas Panhandle, Amarillo, which was originally named Oneida, was once self-proclaimed as the “Helium Capital of the World” for having one of the country’s most productive helium fields. Amarillo is also known as the “Yellow Rose of Texas”. Amarillo is considered the regional economic center for the Texas Panhandle, as well as eastern New Mexico and the Oklahoma Panhandle. The meat packing industry is a major employer in Amarillo. About one-quarter of the country’s beef supply is processed in the area. Amarillo’s convenient location at the intersection of Interstate 27 and Interstate 40 provides the city with a significant amount of commercial highway traffic, positively affecting the area’s lodging industry.

Texas is situated in the southern United States and measures roughly 262,015 square miles. It is bordered by Louisiana and Arkansas to the east, the Gulf of Mexico to the southeast, Mexico to the south and southwest, New Mexico to the west, and Oklahoma to the north. Texas is the second largest state and is characterized predominantly by open plains. Interstate 35 bisects the state on a north/south axis, while Interstates 10 and 20 provide regional east/west access. The capital of Texas is Austin, located in the central part of the state. Other major cities include Dallas/Fort Worth (east), Houston (south), San Antonio (south), among many others that provide economic benefits. Although the weather varies somewhat among the state’s different regions, winters are mild and summers are warm. Precipitation is plentiful in areas, allowing the state to be the nation’s greatest cotton producer. Oil is an important element of Texas’ natural resource production. Manufactured goods include chemical and allied products, petroleum and coal products, food and kindred products, and transportation equipment.



**Economic &  
Demographic  
Review**



A primary source of economic and demographic statistics used in this analysis is the Complete Economic and Demographic Data Source published by Woods & Poole Economics, Inc. – a well-regarded forecasting service based in Washington, D.C. Using a database containing more than 900 variables for each county in the nation, Woods & Poole employs a sophisticated regional model to forecast economic and demographic trends. Historical statistics are based on census data and information published by the Bureau of Economic Analysis. Projections are formulated by Woods & Poole, and all dollar amounts have been adjusted for inflation, thus reflecting real change.

The following figure summarizes these statistics.

Figure 4-3, Economic and Demographic Data Summary,

	1990	2000	2009	2015	Average Annual Compounded Change		
					1990-00	2000-09	2009-15
<b>Resident Population (Thousands)</b>							
Amarillo, TX MSA	196.2	227.1	246.1	260.1	1.5	0.9	0.9
State of Texas	17,056.8	20,946.0	24,719.3	27,104.0	2.1	1.9	1.5
United States	249,622.8	282,171.9	307,050.4	325,421.9	1.2	0.9	1.0
<b>Per-Capita Personal Income*</b>							
Amarillo, TX MSA	22,645	26,561	29,930	32,611	1.6	1.3	1.4
State of Texas	23,458	30,694	34,386	36,865	2.7	1.3	1.2
United States	26,226	32,352	35,142	37,963	2.1	0.9	1.3
<b>W&amp;P Wealth Index</b>							
Amarillo, TX MSA	89.5	84.9	85.9	86.5	(0.5)	0.1	0.1
State of Texas	92.2	95.9	97.3	96.6	0.4	0.2	(0.1)
United States	100.0	100.0	100.0	100.0	0.0	(0.0)	0.0
<b>Food and Beverage Sales (Millions)*</b>							
Amarillo, TX MSA	237	303	347	364	2.5	1.5	0.8
State of Texas	16,883	25,003	31,717	35,039	4.0	2.7	1.7
United States	250,451	332,342	388,117	415,376	2.9	1.7	1.1
<b>Total Retail Sales (Millions)*</b>							
Amarillo, TX MSA	2,513	3,328	3,257	3,698	2.8	(0.2)	2.1
State of Texas	174,620	262,411	283,197	338,184	4.2	0.9	3.0
United States	2,545,947	3,516,734	3,544,629	4,093,326	3.3	0.1	2.4

\* Inflation Adjusted

Source: Woods & Poole Economics, Inc.



**Economic & Demographic Review (cont.)**

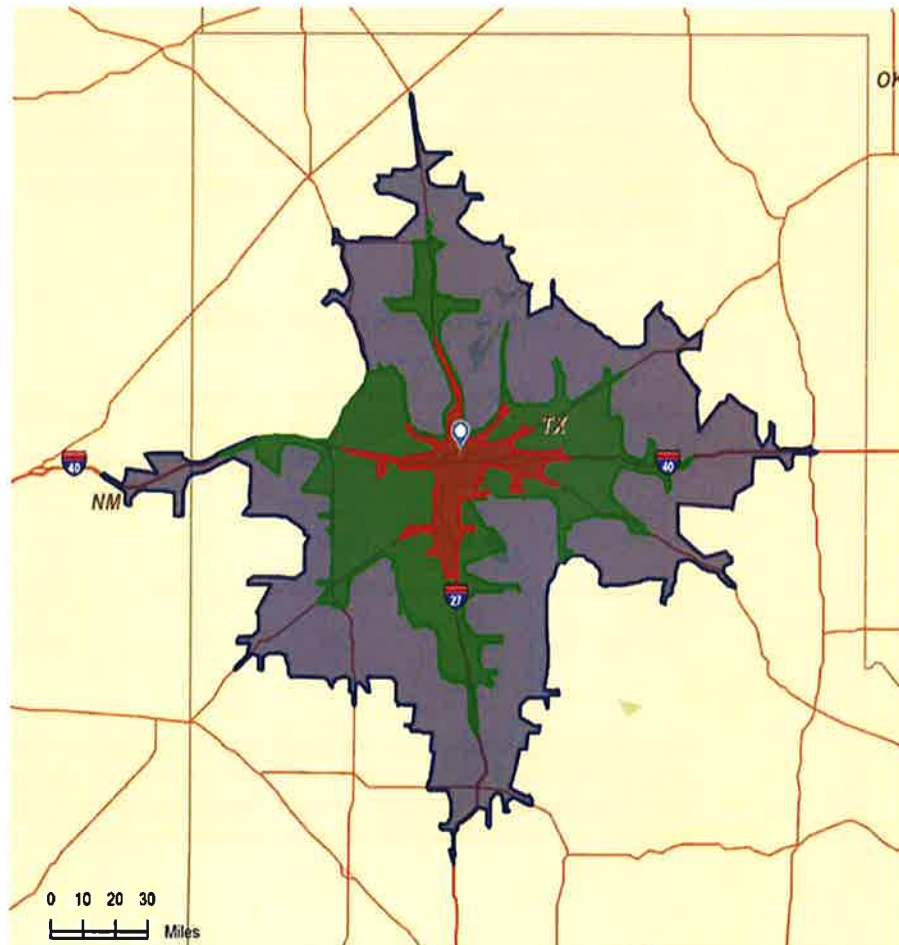
Historically, the County and Amarillo Metropolitan Statistical Area (“MSA”) have nearly met the nation in population growth, although growth projections slow for the MSA in coming years, and significantly stall in the County. Both per-capita personal income and the wealth index are lower in both the County and the Amarillo MSA as compared to state and national averages. These indices are projected to continue to grow in the future, above and beyond the State and the national averages. From 1990 to 2000, the County and MSA experienced relatively strong growth in food and beverage and retail sales compared to the State and Country, but dipped sharply from 2000 to 2010. Projections for these numbers continue to fall below the state and national averages through 2015.

**Drive-Time Radiuses Demographic Information**

To augment the demographics of the County and MSA presented above, HVS reviewed demographic trends within certain drive-time radiuses of the ACCC. An analysis of demographics within a drive-time radius often provide better insight into the persons residing in areas that would be potential markets for arena events, public consumer shows, banquets, and other local-based meetings and events.

HVS used data from Environmental Systems Research Institute (“ESRI”) to analyze demographics of populations within 30-minute, 60-minute, and 90-minute drive times.

Figure 4-3, 30,60 and 90-Minute Drive Time Radius Site Map



**Drive-Time  
Radiuses  
Demographic  
Information (cont.)**

Figure 4-4, Drive Time Radius Market Demographics

Drive-Time Range	Population (2010)	Percent Growth In Population (2010-2015)	Median Household Income (2010)	Percent Growth in Median Household Income (2010-2015)
30 Minutes (red)	224,401	0.69%	\$46,710	2.58%
60 Minutes (green)	278,932	0.65%	46,181	2.64%
90 Minutes (purple)	382,615	0.46%	44,949	2.78%
State of Texas	25,268,853	1.65%	51,960	2.54%
Country	311,212,863	0.76%	54,442	2.36%

Source: ESRI

The markets within all three drive-time radiuses have experienced population growth significantly below the State of Texas population growth, and substantially under the national average. Median household income level is below the state and national levels, but is growing at a faster rate, suggesting a strengthening economy and an increasing ability for the population to support the ACCC.

The success of an events facility lies in its ability to develop event programming that appeals to a broad cross-section of the marketplace. A market's age distribution can be a decisive factor in determining potential event demand, and provide insight into the types of events and programs that the market will support. A market with strong youth and teen populations suggests a stronger demand for family-oriented shows and higher participation rates in amateur sports programs. A market with a strong young adult population suggests increased demand for spectator sporting events, concerts and other entertainment. In general, a younger overall population base represents a positive sign for sports and entertainment facility demand.

Figure 4-5, Drive Time Radius Age Distribution

Age Range	30 Minute Drive-Time	60 Minute Drive Time	State of Texas	Country
0-19	29%	30%	30%	27%
20-34	22%	21%	22%	20%
35-44	13%	13%	14%	13%
45-54	13%	13%	14%	15%
55-64	10%	11%	10%	12%
Over 64	12%	12%	10%	13%

The 30 and 60-minute drive time-markets surrounding the ACCC include a population base that is consistent with the state of Texas and slightly younger than the US as a whole. A strong young adult population (ages 20-54) suggests a greater number of families with children and thus strong demand for events and programs at the ACCC.



**Workforce Characteristics**

The characteristics of an area's workforce provide an indication of the type and amount of transient visitation likely to be generated by local businesses. Sectors such as finance, insurance, and real estate (FIRE); wholesale trade; and services produce a considerable number of visitors who are not particularly rate sensitive. The government sector often generates transient room nights, but per-diem reimbursement allowances often limit the accommodations selection to budget and mid-priced lodging facilities. Contributions from manufacturing, construction, transportation, communications, and public utilities (TCPU) employers can also be important, depending on the company type.

The following table shows the Amarillo, TX MSA workforce distribution by business sector.

Figure 4-6, Historical and Projected Employment (000s)

Industry	1990		2000		2009		2015		Average Annual Compounded Change		
	Value	Percent of Total	Value	Percent of Total	Value	Percent of Total	Value	Percent of Total	1990-2000	2000-2009	2009-2015
Farm	2.0	1.8 %	2.2	1.5 %	2.1	1.3 %	2.0	1.2 %	0.9 %	(0.6) %	(0.2) %
Forestry, Fishing, Related Activities And Other	1.2	1.1	1.7	1.2	0.9	0.6	1.0	0.6	3.7	(6.8)	1.0
Mining	3.1	2.8	2.9	2.0	4.8	3.1	5.1	3.0	(0.7)	5.8	0.8
Utilities	1.0	0.9	0.8	0.5	0.7	0.5	0.7	0.4	(3.2)	(0.6)	0.3
Construction	6.1	5.5	9.5	6.6	9.2	6.0	10.3	6.7	4.6	(0.3)	1.8
Manufacturing	10.6	9.6	11.4	7.9	11.4	7.4	12.1	7.3	0.7	0.0	1.1
Total Trade	21.5	19.6	25.6	17.7	23.7	15.3	25.7	15.4	1.8	(0.9)	1.3
Wholesale Trade	6.5	5.9	7.1	4.9	5.7	3.7	5.9	3.6	0.8	(2.4)	0.7
Retail Trade	15.0	13.6	18.6	12.9	18.0	11.7	19.7	11.8	2.2	(0.3)	1.5
Transportation And Warehousing	4.6	4.2	4.6	3.2	4.7	3.1	4.9	3.0	(0.0)	0.4	0.7
Information	1.9	1.7	2.8	2.0	2.1	1.3	2.2	1.3	4.3	(3.4)	0.9
Finance And Insurance	5.1	4.7	8.4	5.8	10.8	7.0	11.6	6.9	5.0	2.8	1.1
Real Estate And Rental And Lease	3.0	2.7	4.8	3.3	5.8	3.7	6.4	3.9	4.9	2.0	1.8
Total Services	33.6	30.6	51.4	35.6	57.8	37.4	63.4	38.0	4.4	1.3	1.6
Professional And Technical Services	3.9	3.6	6.0	4.2	6.7	4.4	7.4	4.4	4.3	1.3	1.5
Management Of Companies And Enterprises	0.2	0.2	0.3	0.2	0.8	0.5	0.9	0.6	3.6	9.8	2.6
Administrative And Waste Services	3.0	2.8	5.5	3.8	6.2	4.0	7.5	4.5	6.1	1.3	3.3
Educational Services	0.6	0.6	1.0	0.7	1.7	1.1	1.9	1.2	4.8	5.8	1.9
Health Care And Social Assistance	9.5	8.7	15.6	10.8	17.9	11.6	19.6	11.7	5.0	1.6	1.5
Arts, Entertainment, And Recreation	1.7	1.5	2.4	1.7	2.3	1.5	2.5	1.5	3.8	(0.6)	1.2
Accommodation And Food Services	6.9	6.3	10.8	7.5	12.2	7.9	13.0	7.8	4.5	1.4	1.0
Other Services, Except Public Administration	7.6	6.9	9.8	6.8	9.9	6.4	10.6	6.4	2.5	0.2	1.1
Total Government	16.3	14.8	18.4	12.8	20.5	13.3	21.4	12.8	1.2	1.2	0.7
Federal Civilian Government	2.1	1.9	2.2	1.5	2.3	1.5	2.3	1.4	0.5	0.5	0.3
Federal Military	0.8	0.7	0.6	0.4	0.6	0.4	0.6	0.4	(2.0)	(0.5)	0.1
State And Local Government	13.5	12.3	15.6	10.8	17.7	11.4	18.5	11.1	1.5	1.4	0.8
TOTAL	109.9	100.0 %	144.5	100.0 %	154.5	100.0 %	166.8	100.0 %	2.8 %	0.7 %	1.3 %
MSA	109.9	—	144.5	—	154.5	—	166.8	—	2.8 %	0.7 %	1.3 %
U.S.	139,380.8	—	166,758.8	—	177,667.2	—	192,313.7	—	1.3	0.7	1.3

Source: Woods & Poole Economics, Inc.

While the trade segment of employment continues to slow, in both retail and wholesale trade, it provides for approximately 18 percent of employment in the MSA. The services sector has grown and is projected to continue growing. It currently accounts for 37 percent of employment. Total government also generates approximately 13 percent of total employment.



**Major Business & Industry**

Providing additional context for understanding the nature of the regional economy, the following table presents a list of the major employers in the market area.

Figure 4-7, Amarillo Major Employers

Type of Industry	Business	Estimated Number of Employees
<b>Manufacturing</b>		
	BWXT, Pantex	3,299
	Bell Helicopter Textron	1,200
	Owens Corning Fiberglass	225
	Crouse Hinds, Division of Cooper Industries	100
	ASARCO Inc	343
	Amarillo Gear Company	152
	Tech Spray, Inc	118
	Arden Corporation	108
	Weyerhaeuser Paper Company	101
<b>Food Processors and Distributors</b>		
	Tyson Foods	3,583
	Affiliated Foods	1,151
	McCarty- Hull	100
	Ben E. Keith	161
	Southwest Coca-Cola	120
<b>Business &amp; Financial Services</b>		
	Western National Insurance	1,300
	Hastings	777
	Anderson Merchandisers	580
	Corporate Systems Ltd.	499
	American Quarter Horse Association	306
	Atmos Energy	229
	Nationwide Insurance	462
	AT&T	174
	Valero Energy	116
	Core Data Resources	100

Source: Amarillo Economic Development Corporation

The Amarillo economy is composed of a diverse group of manufacturers, distribution companies, and central and back-office operations. A significant number of major companies across a broad range of business sectors indicate a strong and stable corporate presence as well as potential source of demand for ACCC spaces.



**Unemployment Statistics**

Unemployment statistics provide a measure of the health of the local economy and comparisons to state and national trends. The following table presents historical unemployment rates for the market area.

Figure 4-8, Unemployment Statistics

Year	County	MSA	State	Country
2000	2.4 %	2.4 %	2.8 %	4.0 %
2001	3.1	3.1	3.3	4.7
2002	4.4	4.4	3.9	5.8
2003	4.8	4.8	4.4	6.0
2004	4.8	4.8	4.6	5.5
2005	4.3	4.4	4.3	5.1
2006	3.7	3.7	3.7	4.6
2007	3.7	3.8	3.7	4.6
2008	4.2	4.3	4.4	5.8
2009	5.7	5.7	6.0	9.3
Recent Month - August				
2009	6.0	5.9	6.0	9.7
2010	6.6	6.6	6.6	9.6

Source: U.S. Census Bureau

The national unemployment rate in the U.S. fluctuated within a narrow range of between 4% and 6% in the decade spanning 1997 to 2007. The recession that began in late 2007 and the subsequent financial crisis in 2008 forced many businesses to downsize or cease operations. Over 3 million jobs were lost in 2008, and another 4.1 million were lost in 2009; as a result, the national unemployment rate reached 10.0% in the fourth quarter of 2009. However, beginning in the fourth quarter of 2009, the pace of job losses slowed dramatically and the national economy began to exhibit positive trends. Job growth resumed in January of 2010, and excluding the fluctuations related to the loss of temporary jobs associated with the 2010 Census collection of data, the pace of job growth improved steadily in the following months. Slow to moderate growth is anticipated over the balance of 2010. Forecasts for 2011 anticipate an accelerating pace of job growth throughout the year. Nevertheless, it is expected to take several years to regenerate the jobs that were lost during the recession, and most economists expect unemployment to remain somewhat heightened over the near term.

Like the rest of the country, the local population in and around Amarillo experience a spike in unemployment. In 2009, the local unemployment rate was 5.7 percent, consistent with State unemployment rates and significantly lower than the national rate.

**Airport Traffic**

Since airport access is an important consideration for event planners, airport passenger counts provide an indication of the ability of a market to support convention and trade show events. Trends showing changes in passenger counts also reflect local business activity and the overall economic health of the area.





**Airport Traffic  
(cont.)**

The Rick Husband International Airport became a public use airport in 1941. It is located six miles from downtown Amarillo. In 2008, the Rick Husband International Airport began a terminal addition and significant renovations which was completed in August 2011. Currently, the airport has three airlines - American, United, and Southwest Airlines - that offer a combined 50 arrivals and departures daily. Flights connect passengers to larger Texas airports, as well as the cities of Denver and Las Vegas.

The following table illustrates recent operating statistics for the primary airport facility serving the subject property's sub-market.

Figure 4-9, Airport Statistics

Year	Passengers Boarded	Percent Change*	Percent Change**
2003	384,521	—	—
2004	415,066	7.9 %	7.9 %
2005	444,886	7.2	7.6
2006	445,066	0.0	5.0
2007	457,960	2.9	4.5
2008	453,291	(1.0)	3.3
2009	406,630	(10.3)	0.9
2010	409,028	0.6	0.9

\*Percent change from the previous year

\*\*Compounded percent change from first year of data

Source: HVS

The Rick Husband International Airport experienced growth in the number of passengers boarded between 2003 through 2007. As is common across the country, passenger boarding declined in 2008 and 2009, but should rebound as the national economy recovers and with the completion of the renovations.

**Tourist Attractions** The market benefits from a variety of tourist and leisure attractions in the area. The peak season for tourism in this area is from May to September. During other times of the year, weekend demand comprises travelers passing through en route to other destinations, people visiting friends or relatives, and other similar weekend demand generators. Primary attractions in the area include the following:

- Palo Duro Canyon is located approximately 30 miles south of Amarillo and is the second largest canyon system in the country. The park has over 25,000 acres for hiking, biking, camping, and more.
- The Panhandle-Plains Historical Museum is the largest history museum in Texas and depicts the history of the Panhandle-Plains from 400 million years ago to the mid 20th century.
- The Wonderland Amusement Park has 25 rides and 32 attractions, including water rides and was named "2009 Park of The Year" by Amusement Today Magazine.
- The Amarillo Botanical Garden offers four acres of seasonal themed plantings.



**Tourist Attractions (cont.)**

- The American Quarter Horse Hall of Fame and Museum recently opened and showcases the colorful history and modern activities of the American Quarter Horse.
- The Texas Musical Drama is a family-friendly show held in an outdoor amphitheater near the Palo Duro Canyon each year. The show features over 60 actors, singers, and dancers who tell the stories, struggles, and triumphs of settlers of the Texas Panhandle in the 1800s.
- Amarillo Museum of Art has a collection of diverse treasures. The earlier collection focus was early American modernist paintings with works by Georgia O'Keeffe and John Marin. Other collections include works by European artists from 17th, 18th, and 19th centuries, photography works by Russell Lee, and a dramatically growing collection of Asian art.

American Quarter Horse Museum



**Lodging Supply**

A civic center’s ability to attract out-of-town groups depends greatly on the availability of adjacent or nearby hotel rooms within walking distance. Moreover, different events have different preferences with respect to the types of hotels that best meet the needs of their delegates and attendees. Most planners of professional conventions, conferences, and trade shows prefer large blocks of full-service hotel rooms in nationally branded upper-upscale hotels. Some consumer show and assembly event planners prefer less expensive, limited-service hotel options that offer guest amenities such as complimentary breakfast and free internet connections. The figure below shows the inventory of hotels within the area that may serve the ACCC.



**Lodging Supply  
(cont.)**

Figure 4-10, Lodging Supply

<b>Hotels By Number of Rooms</b>	<b>Number of Hotels</b>
0-49	14
50-99	28
100-149	19
150-199	2
More than 199	3
<b>Total</b>	<b>66</b>

Source: STR, HVS

There are 66 hotels in Amarillo; however, there are only five hotels with 150 rooms or more, thus limiting the capacity for larger convention events to house their attendees and/or exhibitors in a single location.

The quality of the hotels also indicates the market ability to support the ACCC. The figure below summarizes the lodging supply by service level.

Figure 4-11, Summary of Lodging Supply by Service Level

<b>2011 STR Chain Scale</b>	<b>Number of Hotels</b>	<b>% of Total Hotels</b>	<b>Number of Hotel Rooms</b>	<b>% of Total Hotel Room Count</b>
Economy	17	26%	1,343	24%
Midscale	12	18%	1,039	18%
Upper Midscale	11	17%	1,135	20%
Upscale	5	8%	456	8%
<u>Independent</u>	21	32%	1,653	29%
<b>Total</b>	<b>66</b>		<b>5,626</b>	

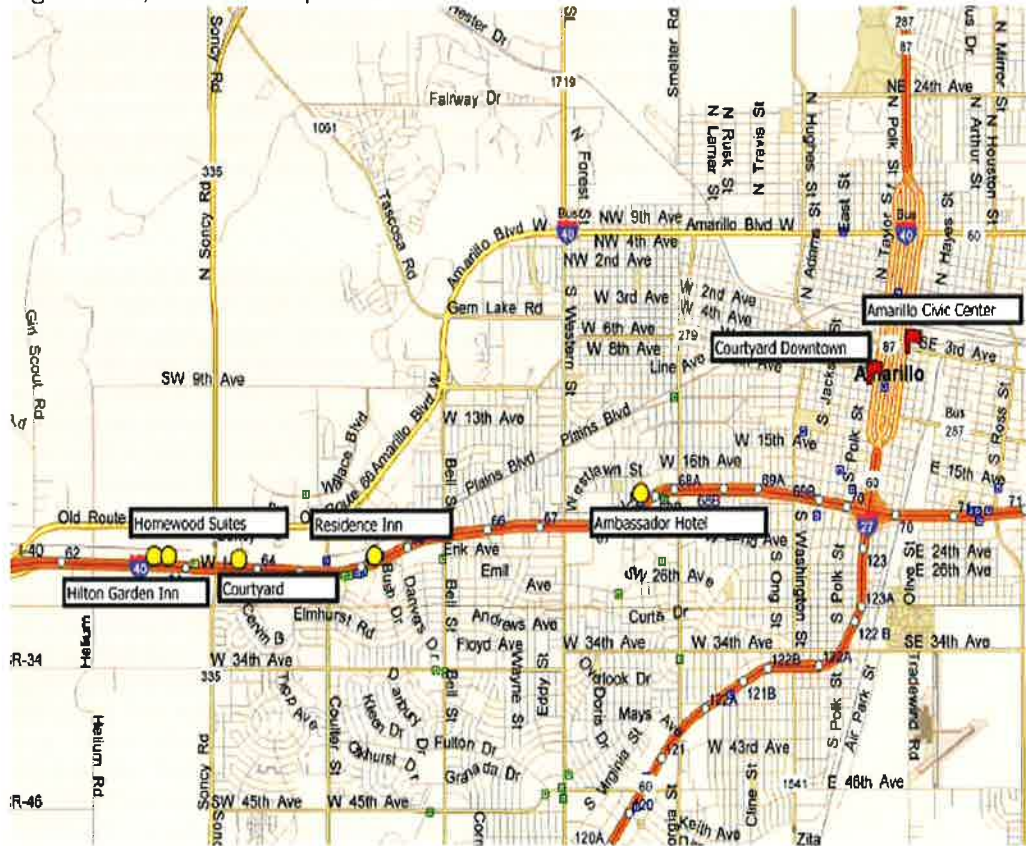
Source: STR

One-third of hotels in Amarillo are independent brands, including the 265-room Ambassador Hotel. There is a relatively even mix of economy, mid scale and upper mid scale hotels in Amarillo, with only five upscale properties and no upper-upscale or luxury properties. The following figure presents the location of five upscale properties and the Ambassador Hotel in relation to the ACCC.



**Lodging Supply  
(cont.)**

Figure 4-12, Location of Upscale Hotels



All of the upscale hotels and the Ambassador Hotel, with the exception of the new Courtyard Downtown, are located along Interstate 40 and are not proximate to downtown Amarillo nor the ACCC.

Just over 1,000 rooms have recently opened, are currently under construction, or are in the planning and development stages.

Figure 4-13, Lodging Supply Under Construction or in Planning

Proposed Property	Number of Rooms	Estimated Opening Date	Development Stage
Proposed Wyndham Convention Headquarters Hotel	300	September 1, 2013	Early Development
Courtyard Amarillo Downtown	107	January 1, 2011	Recently Opened
Staybridge Suites	96	May 1, 2012	Recently Opened
Candlewood Suites	96	April 1, 2012	Under Construction
Holiday Inn	153	July 1, 2011	Recently Opened
Holiday Inn Express & Suites	129	August 1, 2011	Under Construction
Comfort Inn & Suites	96	November 1, 2011	Under Construction
Fairfield Inn	81	April 1, 2012	Under Construction
<b>Totals/Averages</b>	<b>1,058</b>		



**Lodging Supply  
(cont.)**

The Courtyard by Marriott Amarillo Downtown (an upscale property) opened in January of 2011 with 107 rooms in the historic Fisk Building and is the first hotel in downtown Amarillo. The 11-story Fisk Medical and Professional Arts Building was built in 1928, and its renovation was the largest private investment in Amarillo's central business district in over 40 years. This type of upscale hotel development in downtown Amarillo assists in enhancing the attractiveness of Amarillo to event planners. In the early stages of development is a Wyndam Convention Center Hotel which would be proximate to the Amarillo Civic Center Complex.

**Conclusion**

The Amarillo market has experienced stable population growth, but this growth is expected to flatten in coming years. While median household income is below the State and National averages, it is, along with the wealth index, projected to increase at a higher rate than State and National averages. This growth indicates that the local population is going to continue to be a stable source of support for ACCC events. The continual growth in the services sector and existing presence of large companies, as well as moderately low unemployment numbers indicates a stable base of employment in the market and the likelihood that local businesses will continue to generate ACCC demand through space rentals for meetings, training and social events.

While the Amarillo area benefits from the wide array and unique tourist attractions, its current infrastructure does not satisfy the requirements of event planners today. The airport's terminal expansion and renovations will assist in attracting those events requiring air service from multiple locations. Since the airport currently serves only Texas's major airports, Denver and Las Vegas, access from other cities is problematic. The hotel market currently consists of largely small, economy, mid scale, or upper mid scale hotels on the major highways and routes outside of the downtown area of Amarillo. Retail, dining, and nightlife options within walking distance to the ACCC are also limited. Upscale hotel development in downtown Amarillo, such as the proposed convention center hotel, along with complementary retail and dining development, would greatly enhance the attractiveness of Amarillo to event planners. Ongoing redevelopment of downtown accompanying changes to the ACCC is crucial in creating a destination package that, in this competitive market, can compete for larger convention and trade show business.



## Industry Trends

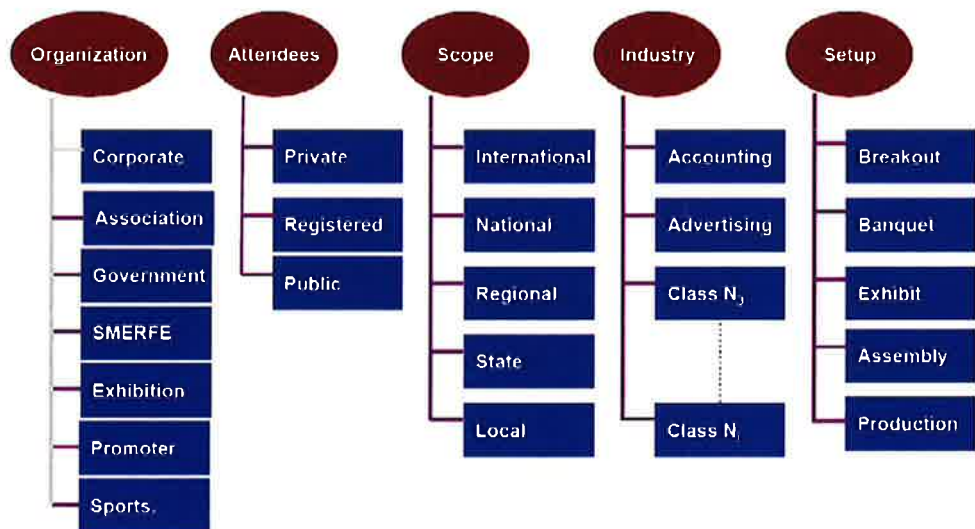
### Introduction

In the following section, HVS presents an analysis of the convention, tradeshow and meeting industry, including trends in the supply and demand of meeting and convention facilities, as well as trends in expenditures and meeting planner preferences. The purpose of this trends analysis is to provide background information necessary to assess the potential for civic center expansion in Amarillo. This section of the report also provides definitions of industry terms used throughout the remainder of this report.

### OASIS® Event Classification System

Convention centers measure their performance by tracking event activity, but the definition and classification of events lacks consistency throughout the industry. Each convention center or marketing organization has its own way of classifying and measuring event demand. HVS has developed a proprietary method of event classification called OASIS Event Classification Method® or OASIS®, which is a convenient acronym for five criteria of event categorization: Organization, Attendees, Scope, Industry, and Set-up. See the figure below.

Figure 4-14, OASIS Event Classification System



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**OASIS® Event  
Classification  
System (cont.)**

Following are definitions of the criteria in the OASIS Event Classification Method® and descriptions of the categories within each.

**ORGANIZATION**—the organization that sponsors or owns the event provides an important area of classification and can be described in seven mutually exclusive categories:

- **Corporations**—Corporations, or private business interests, are responsible for organizing the majority of events. The event organizers may be internal to the business or professional meeting planners.
- **Associations**—Associations are usually membership organizations centered on specific business types, professions or political purposes.
- **Government**—International, national, state or local government organizations sponsor events. This category is particularly important in markets with a large government office presence.
- **Exhibition Company**—Exhibiting organizations are companies or subsidiaries of companies for the purpose of owning and promoting exhibiting events, such as trade and consumer shows.
- **Event Promoter**—Event promoters are organizations that exist for the purpose of promoting concerts, entertainment and other types of live events that require production set-up.
- **Sports Enterprise**—Sports enterprises are companies or subsidiaries of companies that exist for the purpose of owning and promoting sporting events.
- **Social, Military, Educational, Religious, Fraternal and Ethnic (“SMERFE”)**—Although similar to associations, this category includes the types of organizations described in the title. SMERFE represents a distinct category because members of this category tend to be more price-sensitive and less profit-oriented than associations.

The organization criterion is most useful to marketing and sales organizations that rely on this information to make decisions on the allocation of staff and resources according to the type of organization sponsoring the event. Other industry participants, such as destination management companies and venue operators, also need to understand the type of organizations active in sponsoring events and value personal relationships with the event planners that represent them.

**ATTENDEES**—Event attendees represent four distinct categories that distinguish among the ways in which attendees gain access to events:

- **Private**—Attendees come to the event by invitation only and do not pay a registration or admission fee. Private attendees may be individually asked to attend, as to a wedding, or invited by virtue of belonging to a certain group, such as company employees or shareholders.
- **Registered**—Attendees do not necessarily need an invitation, but must pay an advance registration fee to attend the event. Registered attendees are often called delegates or qualified buyers and they usually attend an event for multiple days.
- **Public**—The event is open to the general public. Attendees may need to purchase a ticket for admission such as at a consumer show. Other civic events may be free of charge.
- **Combination**—Combination shows typically have an initial period of attendance by registered attendees only, and later by the public.

This category is particularly important to venue operators and industry analysts. Understanding the type of attendee is critical for assessing the impact on convention center operations and projecting the economic impact of events. The length of stay of attendees and their spending patterns varies considerably among the types of attendees.



**OASIS© Event Classification System (cont.)**

**SCOPE**—this category refers to the geographic origin of the attendees. Events are classified accordingly if a significant proportion of the attendees come from the indicated geographic region surrounding the convention center. Five categories capture all the potential geographic scopes and are self-explanatory:

- International
- National
- Regional
- State/Provincial
- Local

Understanding the origin of attendees is critical to event planners and in the estimation of the economic impact of events. Events that draw attendees from larger geographic regions tend to have higher new spending associated with the event. The allocation of marketing and sales resources may also break down according to the geographic scope of events.

**INDUSTRY**—in North America, HVS recommends relying on the North American Industry Classification System (“NAICS”) which replaced the previously used U.S. Standard Industrial Classification (“SIC”) system. NAICS was developed jointly by the U.S., Canada, and Mexico to provide new comparability in statistics about business activity across North America. Other economic regions and countries have similar industrial classification systems that are widely used and can be adopted for the purposes of classifying events by industry.

NAICS has hundreds of categories but these categories are organized hierarchically in five levels. All categories can be rolled up into twenty of the top levels in the hierarchy. However, not all top-level industry classifications are useful for event classification because little or no event activity is associated with them. Other top-level categories, such as Manufacturing, are too broad to provide meaningful information, and level two or three categories can form a useful breakdown of events.

The choice of industry classifications should result in a reasonable share of events falling into each category. According to the Tradeshow Week data book, the leading industries that are represented by conventions, tradeshow and exhibition include:

- Medical and Health Care
- Home Furnishings and Interior Design
- Sporting Goods and Recreation
- Apparel
- Building and Construction
- Landscape and Garden Supplies
- Computers and Computer Applications
- Education
- Gifts
- Associations





**OASIS® Event  
Classification  
System (cont.)**

Use of the NAICS codes allows for the orderly roll-up of industrial classifications across different events and venues, regardless of the categories or the hierarchical levels that different people may choose to use. Industrial classification information is useful for those planning to develop new events and for other analysts that need to understand how trends in economic health of the underlying industries affect the success of particular events and venues.

**Space Setup**—This final criterion provides for the categorization of events by set-up of the function spaces they utilize. Unlike all the other criteria, these categories are not mutually exclusive as events may use any combination of the five primary types of event set-up.

- **Breakout**—typically involves the use of meeting rooms, boardrooms or other multi-purposes spaces for meeting functions in a classroom or meeting setting. This set-up may involve some catering services such as coffee breaks or lunches.
- **Banquet**—includes the set-up for catered banquets events such as a wedding and may include some staging for presentations such as at a general session event.
- **Exhibit**—includes the set-up displays in exhibition halls or other multi-purpose space. Concession services and buffet lunches are often a component of this set-up.
- **Assembly**—includes set-up in theater style seating in plenary halls and fixed seat theaters or other multi-purposes spaces that are used primarily for assemblies and general sessions.
- **Production**—includes the set-up for concerts, entertainment, sporting events and other types of events that require significant staging, lighting, and other live-event related set-up.

**Event Types**

Application of the OASIS® system can provide precise definitions of commonly used event classifications. All commonly used terms for event types can be defined by a combination of three OASIS® categories: organization, attendees, and space set-up.

- **Conventions**—associations, government, and SMERFE organizations register attendees for multi-day events. Facility set up includes breakout, banquet and exhibit space set-up and may include plenary sessions. Typically, the primary purpose of a convention is information exchange.
- **Tradeshows**—provide a means for wholesalers and retailers to transact business with industry buyers. Like conventions, tradeshows offer a forum for exchanging industry ideas. In order to clearly differentiate conventions from tradeshows, HVS assumes that only corporations and enterprises can sponsor and produce tradeshows. Similar to conventions, tradeshows require registered attendees. While they also require exhibit space set-up, they only sometimes require banquet or breakout space set-up.
- **Combination Shows**—are either corporate or enterprise produced, with a part of the shows being a public event, and the rest of the show being a registered event. Always requiring exhibit set-up, they sometimes require plenary, banquet and/or breakout set-up for additional portions of their show.
- **Consumer Shows**—are public, ticketed events featuring the exhibitions of merchandise for sale or display. Only enterprises can produce consumer shows, as they provide a means of product distribution and advertising. They only require exhibit space set-up.
- **Conferences**—require a mix of banquet and breakout space set-up, but do not require any exhibit set-up. Conferences can be corporate, association, government or enterprise, but always require attendees to be registered.



**Event Types  
(cont.)**

- **Meetings**—only require breakout space set-up. Like conferences, they can be produced from any of the above named organization types, but unlike conferences, they are private events to which one must be invited.
- **Banquets**—only require a banquet set-up for food and beverage meal service. These events also can be produced by any organizational type, but are also private.
- **Assemblies**—usually involve a ceremony, a speech, or another similar activity that attracts a crowd of spectators. Produced only by SMERFE groups (social, military, educational, religious, fraternal and ethnic), they are always public events. Additionally, assemblies only require a plenary set-up.
- **Fairs**—usually involve an exhibit booth set-up for a public event in which a number of organizations or companies represent themselves and/or a product or service, with a similar theme or purpose uniting the event. Associations, governments or SMERFE groups may present a fair.
- **Civic Events**—is typically a local event, always produced by some form of governmental entity. These are public events that always only require a plenary set-up.
- **Entertainment**—usually a concert or some form of live entertainment, owned and organized by an event promoter for the public. Entertainment events only require a production set-up.
- **Sports**—require only a production set-up. Attendees to sporting events, which are always organized by sports enterprises, may be public, or registered. Some sporting events have both a registered and public aspect to the event over the span of a few days.

**Trends**

The purpose of this section is to describe the convention and meeting industry and analyze trends in the number of events, attendance, and the supply of meeting and exposition facilities.

**Supply Trends**

The convention center industry experienced significant year-over-growth in supply from 2000 through 2006. Since 2007, the rate of growth in supply has slowed, but remained positive. As the majority of convention and meeting facilities involve public funding, economic conditions affect the level of public investment in convention and meeting facilities that are intended to stimulate economic activity. As poor economic conditions continue to constrain public budgets nationwide, lack of available funding for convention and meeting facilities will continue to limit supply growth in the near future. As the economy improves, supply growth will likely remain low as convention venue projects have long lead times due to planning, financing and construction requirements.

A number of major convention centers will be undergoing expansions in the next few years, as described below.



**Supply Trends  
(cont.)**

Figure 4-15, Future Facility Expansions

<b>Year</b>	<b>Project</b>
2011	<b>Pennsylvania Convention Center Expansion</b> <ul style="list-style-type: none"> <li>o 239,000 sq ft. of exhibition space</li> <li>o 123,000 sq ft. of meeting space</li> <li>o 55,000 sq ft. of ballroom space</li> </ul>
2011	<b>Indiana Convention Center Expansion</b> <ul style="list-style-type: none"> <li>o 254,000 sq ft. of exhibition space</li> <li>o 63,000 sq ft. of meeting space</li> </ul>
2012	<b>Moscone Convention Center</b> <ul style="list-style-type: none"> <li>o \$70 million in facility improvements</li> </ul>
2012	<b>Dallas Convention Center</b> <ul style="list-style-type: none"> <li>o New 1,000-room headquarter hotel</li> </ul>
2013	<b>Anaheim Convention Center</b> <ul style="list-style-type: none"> <li>o Adding 100,000-sq ft outdoor plaza</li> </ul>
2013	<b>Cobo Convention Center</b> <ul style="list-style-type: none"> <li>o Modest expansion/facility remodeling</li> </ul>
2013	<b>Washington Convention Center</b> <ul style="list-style-type: none"> <li>o New 1,175-room headquarter hotel</li> </ul>
2013	<b>Music City Center (Nashville)</b> <ul style="list-style-type: none"> <li>o New 500,000+ sq ft center &amp; 800-room hotel</li> </ul>
TBD	<b>Miami Beach Convention Center</b> <ul style="list-style-type: none"> <li>o New ballroom and headquarter hotel</li> </ul>
TBD	<b>San Diego Convention Center</b> <ul style="list-style-type: none"> <li>o New 500-room hotel &amp; 350,000 sq ft of function space</li> </ul>
TBD	<b>Kansas City Convention Center</b> <ul style="list-style-type: none"> <li>o New 1,000-room headquarter hotel</li> </ul>
TBD	<b>Aurora, Colorado Gaylord</b> <ul style="list-style-type: none"> <li>o New 1,500-room hotel &amp; 400,000 sq ft of function space</li> </ul>

As evidenced in the above facility expansions, the type of supply growth has transformed in recent years to meet planners' needs. Meeting and breakout sessions have become more common during large conventions, thus increasing the need for additional meeting space and/or flexible function space. As the industry has matured, meeting planner expectations for quality have increased, including proximity of full-service hotels to event facilities. Five of the 11 facilities above plan to add hotel rooms as part of their expansions.

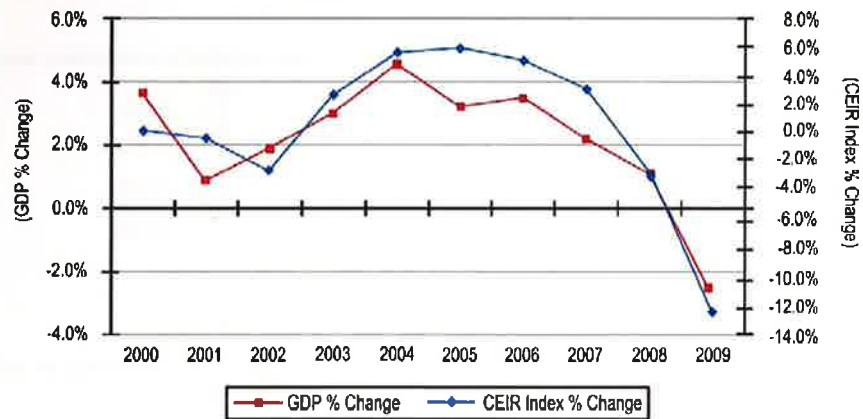


**Demand Trends**

The Center for Exhibition Industry Research (CEIR) has created an index of “total” demand in the convention and meeting industry and compared the demand index to the United States GDP. The following figure demonstrates how the combined or “Total” demand index shown in the above chart moves in step with the U.S. GDP.

Figure 4-16, Relationship Between GDP and Exhibition Demand

**CEIR Index Results Compared to U.S. GDP**

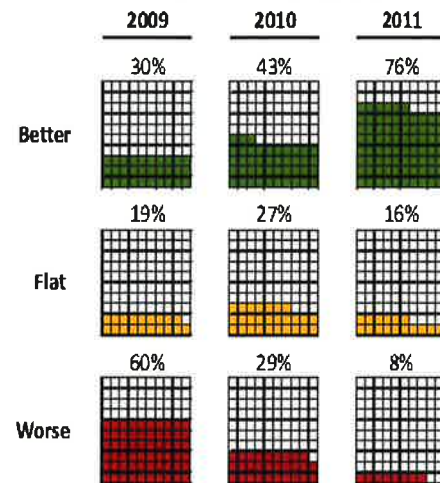


Source: Center for Exhibition Industry Research

The “total” demand index moves generally in step with the change in U.S. GDP. As limited funding mechanisms have slowed supply growth, the struggling budget situations of corporations, associations, and governmental entities decreased total demand for convention and meeting space in 2009.

Event planners are reporting a more optimistic outlook in coming years as the U.S. economy continues to recover. The following figure provides snapshot of how meeting planners had predicted that their business levels would change over the past three years.

Figure 4-17, Event Planner Outlook



Source: Meeting Planners International



**Demand Trends (cont.)**

As compared to predictions for 2010, meeting planners are more optimistic on the improvement in their meeting business for 2011.

The future trends in demand, according to data from Future Watch 2010 and 2011, show increased number of events and attendance, but decreases in meeting length and expenditures. The following table chart shows the average projected change for 2011 in these four demand indicators.

Figure 4-18, Demand Indicators

Dem and Indicator	2010 Predictions	2011 Predictions
Number of Meetings	↑ 2.8%	↑ 8.0%
Projected Attendance	↑ 4.5%	→ 2.0%
Average Meeting Length	→ -0.4%	→ 0.0%
Average Expenditure Per Meeting	→ -0.4%	↑ 5.0%

Source: Future Watch

In November of 2010, ExpoWeb conducted a survey of large convention and tradeshow producers on their top criteria for site selection.

Figure 4-19, Site Selection Criteria



Source: Future Watch

In addition to actual facility size, site selection, the survey indicates, is highly based on two important amenities - hotels and airports. This reaffirms the changing dynamic of the convention and meeting industry that is now focused on reducing costs for the hosting organization and its attendees as well as maximizing accessibility.



**Convention & Meeting Trends for the Future**

Over the past few decades, the meeting and convention industry has evolved dramatically from a budding industry to a more mature one that has become an important driver of the national economy. As an established industry, the rapid growth of the last four decades has been followed by a slowdown in supply growth in the late 2000s. As the economic recession continues to affect the level of demand and available budgets for conventions and meetings, the industry continues to evolve.

**Changes In Demand and Supply Transformation:** As discussed earlier, the maturity of the industry has sharply increased competitiveness in the industry. Nearby or attached quality hotel rooms, flexible meeting space, as well as price points at convention centers and hotels, and airport capacity and rates continue to drive site selection, and, therefore, dictate how supply has and will continue to change over time. Quality of convention facilities and hotels, in addition to size, price, and proximity, continue to be important factors in site selection.

**Travel Costs:** Organizations hosting and planning events, continue to work with tightened budgets, as do attendees. Recent increases in travel costs have decreased the desire to travel for some attendees and exhibitors. In the long run, expansions in the transportation system and continued innovations, as well as improved economic conditions, that reduce costs and increase the ease of and affordability, to travel are likely to support the growth of the meeting industry.

**Electronic Meetings:** In recent years, industry experts have speculated that improvements in telecommunications technology would supplant the need for face-to-face meetings. While data indicates that webinars or other electronic forms of meetings, in the end, have replaced some meetings and events, electronic meetings act as a demand generator for future meeting growth as it expands the networks and interactions of businesses and organizations.

**Mixed-Use Developments:** For many cities, states, areas and developers convention centers have become an opportunity to spawn a mixed-use attraction, an area often including hotels, retail, dining, sports venues, and entertainment options, in addition to a housing a convention center. Convention centers have become the center of their own “districts” offering almost everything a delegate, event organizer or exhibitor could want in one area. The growth of mixed-use developments, particularly after economic conditions have improved, will continue to change the meeting and convention industry as supply transforms.

**Spectator Arena Trends**

Over the past decade, innovations in arena design have spread from large urban arenas with major professional sports franchises to suburban and mid-sized metropolitan arenas. Following the design innovations in major league professional sports venues in the 1990’s, many mid-size facilities have created new revenue streams and added amenities that increase the value of the patron experience. New features include luxury suites, club seats, restaurants, VIP lounges, and more elaborate and convenient concessions services. Once rare in minor league venues, these features are now prevalent in new or retrofitted facilities, regardless of market or venue size.

The growth in popularity of minor league sports has led to the construction of several small- to mid-sized arenas as various markets seek to tap into the industry. As the cost of attending major league sporting events has continued to increase and other economic forces have strained the availability of disposable income, families are increasingly turning to minor league sports for a more affordable alternative. Mid-sized facilities that host minor league teams are designed with seating capacity and amenities that address the event demand in sub-markets and secondary population centers. They provide a more readily accessible and cost-effective alternative for entertainment and sporting activities.



**Spectator Arena Trends (cont.)**

Recent design of spectator sports arenas seeks to maximize revenue by diversifying capacity to host a variety of events and activities. Rather than focusing exclusively on spectator events, a new wave of arena design and utilization has emerged in which spectator arenas also accommodate community activities such as amateur sports, recreations activities and other community events. This combination of sports and entertainment with community activities not only improves financial viability, but also creates a stronger rationale for public sector participation in their development, as is common in other community center and recreational infrastructure.

Recently built venues also put a greater emphasis on exterior spaces and their connection to the surrounding urban environment. Entertainment plazas and pedestrian malls have replaced the sidewalks and parking lots that have traditionally surrounded arenas. Incorporation of a vibrant urban setting with residential, commercial, retail, dining and entertainment spaces around a venue has been an integral part of recent arena design trends.

**Concert Industry Trends**

Concerts and other family entertainment provide another important source of event demand for arenas. Concerts and entertainment events are typically booked through a third party promoter who pays a percentage of gate receipts to the venue as rent. Some venues may promote or co-promote events, but concert promoters drive the majority of events in the industry.

The North American concert industry is roughly a \$3.0 billion business annually. Concert promoters and talent buyers form agreements with artists and concert venues to book live music acts. Under most circumstances, a promoter offers the artist a guaranteed fee or a share of gross ticket revenues in exchange for the exclusive rights to book and promote an act on a certain date. The promoter also books a venue and pays a rental fee or offers a share of gross ticket revenues in exchange for use of a concert venue on a certain date. Hence, the promoter assumes the financial risk and must sell enough tickets at high enough prices to pay the artist, the venue, and make a profit.

The number of concert promoters in the US has consolidated significantly over the past decade, with Live Nation and AEG Live remaining as the two main national contenders. Both of these firms have expanded their businesses by vertically integrating into venue ownership and online ticket sales. Ownership of arenas, stadiums, theaters, and outdoor pavilions across the country allows these two firms to book the touring acts which they are promoting into venues which they own. Independent promoters remain in the market, but their numbers have dwindled. These independent promoters tend to book events in smaller venues and markets and would be a likely source of concert and other entertainment events at the ACCC.

The concert industry is seasonal. Approximately two-thirds of acts tour during the months of May through September, allowing them to book outdoor venues. If a show has success in a particular market, it may re-book during the winter at a smaller indoor venue to take advantage of this popularity. The proposed convention complex may have success in booking a handful of these shows; however, the venue will compete with casinos which have begun to take advantage of this trend. Casinos often offer promoters lucrative deals to book shows in their much smaller venues as a way to entice new patrons.



**Concert Industry Trends (cont.)**

Through much of the recent economic downturn, the concert industry seemed to be thriving. Big name acts were still able to sell tickets, ticket prices increased, and tour schedules were full. 2010, however, has brought a marked shift in an industry that had been able to resist recessionary pressures. North American touring shows have seen a significant drop in three key concert indicators.

- First, the combined gross of the top one hundred North American tours dropped by nearly \$200 million in the first and second quarter of 2010. This represents a 17 percent drop from the same period in 2009.
- Second, the number of tickets sold at these same tours fell to 15.9 million, a 12 percent decline from 2009.
- Average per show ticket sales declined by nine percent, despite a six percent drop in ticket prices as compared to 2009. Sluggish sales resulted in a number of cancelled performances by some of the industry's most popular performers.

Prior to the recent recession, the live music industry experienced tremendous growth. The proliferation of arenas and the renovation of historic theaters and concert halls provided an increasing supply of potential concert venues. The increasing supply of venues and strong consumer demand for live entertainment gave talent the upper hand in contract negotiations. Acts have been able to demand large guarantees from concert promoters, often as large as the maximum potential ticket sales revenue for an event. This leaves the promoter and the venue to share in concession, novelty, and other revenue. This dynamic helped to push ticket prices to record highs, as promoters attempted to maximize revenue in any way possible. Recent data on concert industry performance suggests that it has run into price resistance and declining consumer demand.

**Implications for Amarillo, TX**

As the meetings industry rebounds, meeting planners and attendees will continue to focus on reducing costs. As a geographic population center and economic hub in western Texas, Amarillo is well positioned to maintain its current event base and to attract new events. The following sections of this report study Amarillo's event demand potential in the meetings industry and the ACCC program and other infrastructure required to realize that potential.







## Comparable Venues

### Introduction

This analysis of comparable venues provides a basis for programming recommendation for the Amarillo Civic Center Complex (“ACCC”) as well as forecasts of event demand and financial operations. The analysis compares the function spaces and other amenities in each of the facilities along with other characteristics of the markets that are relevant to the success of the venue.

Amarillo, TX competes directly with other cities in west Texas and surrounding states for a share of the meetings market, sports, concerts, and entertainment events. Event planners and promoters select host cities for their events based on the overall package that a city may offer. Several factors determine a city’s overall strength and potential in the meetings market. These factors include the attributes of the convention facilities, lodging supply, the economic and demographic profile of the community, transportation access, tourism amenities, and overall destination appeal. This analysis will help in understanding the competitiveness of Amarillo, TX and the ACCC.

HVS analyzed the convention facilities and spectator arenas in two sets of cities.

- Medium to small cities in Texas with facilities that compete with the ACCC and are comparable in population size to Amarillo, and
- Medium to small cities throughout the U.S. which are comparable in population size to Amarillo and have both convention and arena venues.

HVS analyzed the cities and venues shown in the figure below.

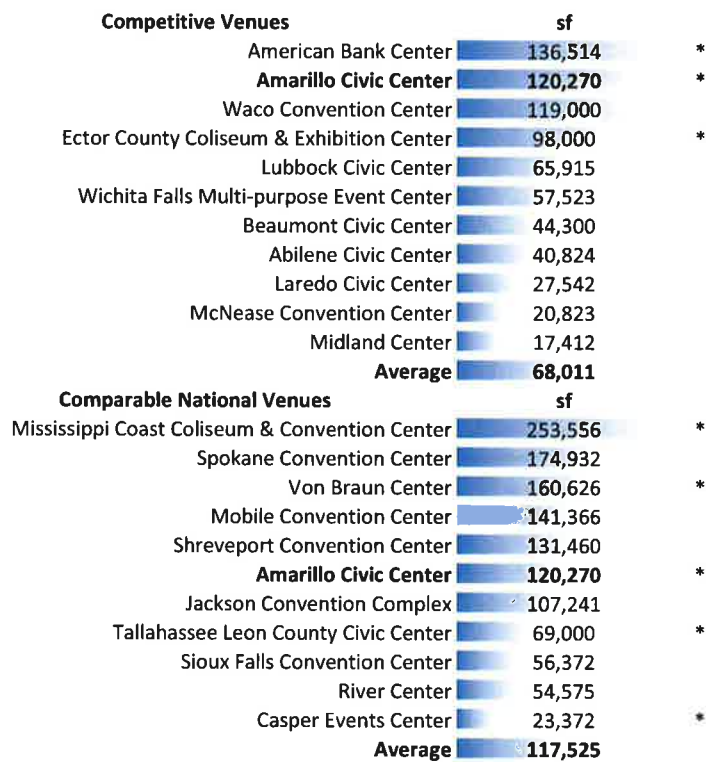
Figure 4-20, Comparable Cities and Venues

		Convention Venue	Spectator Arena
<b>Competitive Cities</b>			
Abilene	TX	Abilene Civic Center	Taylor County Expo
Corpus Christi	TX	American Bank Center	American Bank Center
Beaumont	TX	Beaumont Civic Center	Ford Arena
Odessa	TX	Ector County Coliseum & Exhibition Center	Ector County Coliseum
Laredo	TX	Laredo Civic Center	Laredo Energy Arena
Lubbock	TX	Lubbock Civic Center	United Spirit Arena
San Angelo	TX	McNease Convention Center	Foster Coliseum
Midland	TX	Midland Center	Chapparral Center
Waco	TX	Waco Convention Center	Ferrell Center
Wichita Falls	TX	Wichita Falls Multi-purpose Event Center	Kay Yeager Coliseum
<b>Comparable National Cities</b>			
Biloxi	MS	Mississippi Coast Coliseum & Convention Center	Mississippi Coast Coliseum
Casper	WY	Casper Events Center	Casper Events Center
Davenport	IA	River Center	I Wireless Arena
Huntsville	AL	Von Braun Center	Von Braun Center
Jackson	MS	Jackson Convention Complex	Mississippi Coliseum
Mobile	AL	Mobile Convention Center	Mitchell Center
Shreveport	LA	Shreveport Convention Center	Century Link Center
Sioux Falls	SD	Sioux Falls Convention Center	Sioux Falls Arena
Spokane	WA	Spokane Convention Center	Spokane Arena
Tallahassee	FL	Tallahassee Leon County Civic Center	Tallahassee Leon County Civic Center



**Convention Venues - Total Function Space Assessment** While convention centers in larger markets may have spaces dedicated solely to exhibits, banquets, and meetings, venues in smaller markets need to maintain flexible spaces which can accommodate a variety of uses. Depending on the needs of a particular event or when hosting simultaneous events, it is not uncommon for venues in smaller markets to use exhibit space for banquets and meetings or to set up smaller exhibitions in larger meeting and ballroom spaces. The total function space, therefore, gives a good indication of the flexibility of a particular venue and its capacity to host multiple events. The following figure presents the total function space, including all exhibit, ballroom, meeting, and arena floor space at the ACCC and each of the comparable venues noted above.

Figure 4-21, Total Function Space in Convention Venues



\* Arena floor space included in total function space

In comparison to its in-state competitors, the ACCC has an above average amount of total function space and ranks second to the American Bank Center in Corpus Christi. Unlike most of the competing venues, the total function space at the ACCC also includes the flat floor space of the main arena venue in the city. Arena floor space is also included in the total functions space in the American Bank Center and the Ector County Coliseum in Odessa. The recently completed \$17.5 million renovation at the Waco Convention Center brings its total function space, without an arena floor, to be approximately equal to that at the ACCC.

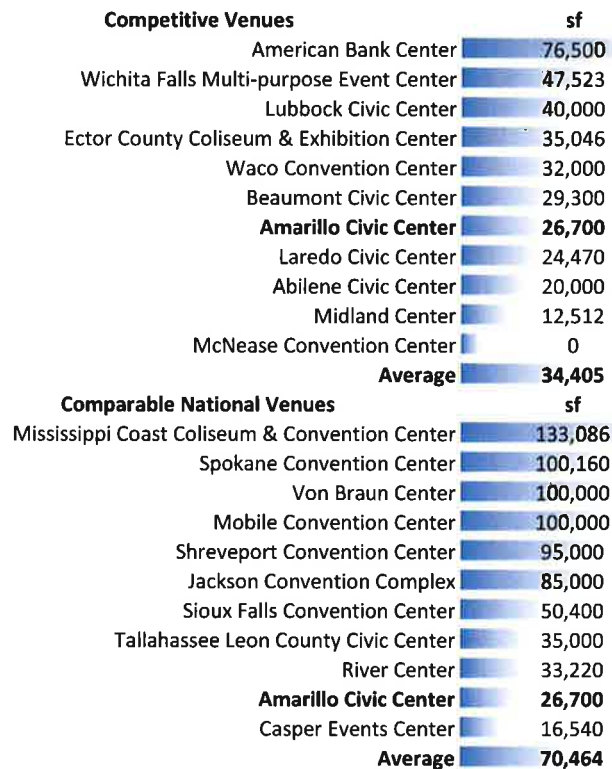
In comparison with the national comparable venues, the ACCC has an average amount of total function space. From this list, arena floor space is included in the function spaces Mississippi Coast Convention Center in Biloxi, MS, the Von Braun Center in Huntsville, AL, the Tallahassee Leon County Civic Center in Tallahassee, FL, and the Casper Events Center in Casper, WY.



**Exhibit Space Assessment**

Exhibition space is critical for several types of events such as conventions, tradeshow, and consumer shows. The amount and quality of exhibition space determines the size and types of events that the venue can accommodate. While total exhibit space is important, many events require that the space be contiguous rather than separated into different halls. The largest, contiguous exhibition space available at each of the selected comparable facilities provides an indication of the amount of contiguous space that is appropriate for Amarillo, TX.

Figure 4-22, Contiguous Exhibition Space in Comparable Venues



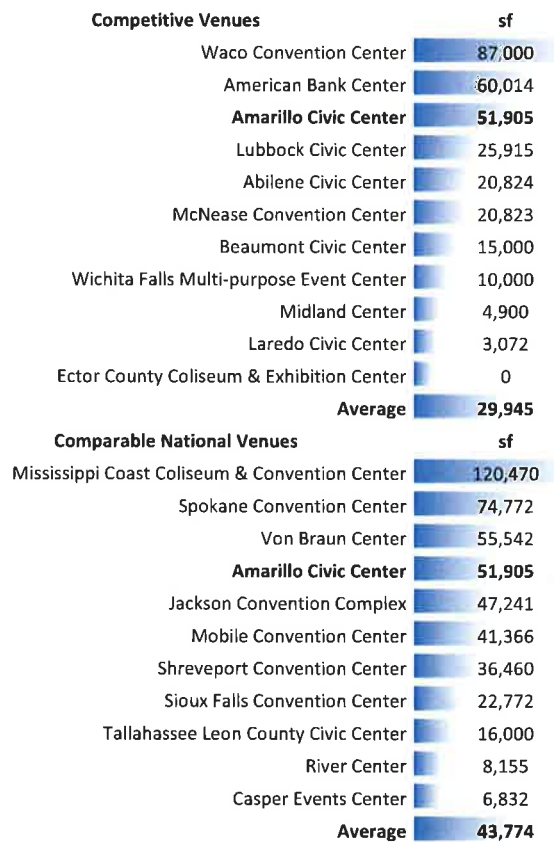
When comparing the largest single exhibit space available to a convention, trade show, or consumer show planner, the ACCC is below average as compared to its in state competitive set. The ACCC drops even further below the average when comparing the comparable national venues. Additionally, the largest exhibit hall at the ACCC, the 26,700 square foot South Exhibit Hall, is an older hall with low ceilings heights and several columns blocking the clear space. The newer, column-free North Exhibit Hall has 24,565 square feet of exhibit space. Although these halls are adjacent to one another, a dividing hallway precludes their use as contiguous space.



**Ballroom & Meeting Space Assessment**

Banquet space is important for convention centers as facility operators attempt to grow food service revenues at their facilities and event planners seek a higher level of service for their attendees. In addition to social events (such as weddings and fundraisers) that host banquets, several other types of events, such as conventions and tradeshow, typically require food services in a ballroom setting. General assemblies at conventions and tradeshow are often held in a ballroom with a theater or banquet set-up. Meeting rooms can accommodate sub-groups as they break out of larger general sessions at conventions and tradeshow. Additionally, these smaller rooms can accommodate self-contained meetings, training sessions, seminars, classes, and a variety of small meeting functions. Because of their flexibility, a facility's ballroom and meeting rooms are often its most frequently used function spaces. Consequently, the amount and flexibility of ballroom and meeting space can determine a venue's event size capacity and its ability to host simultaneous events. This is especially true for facilities in smaller markets which often cross utilize event spaces to accommodate demand. The figure below compares of available ballroom and meeting space in the comparable venues.

Figure 4-23, Ballroom and Meeting Space in Comparable Venues



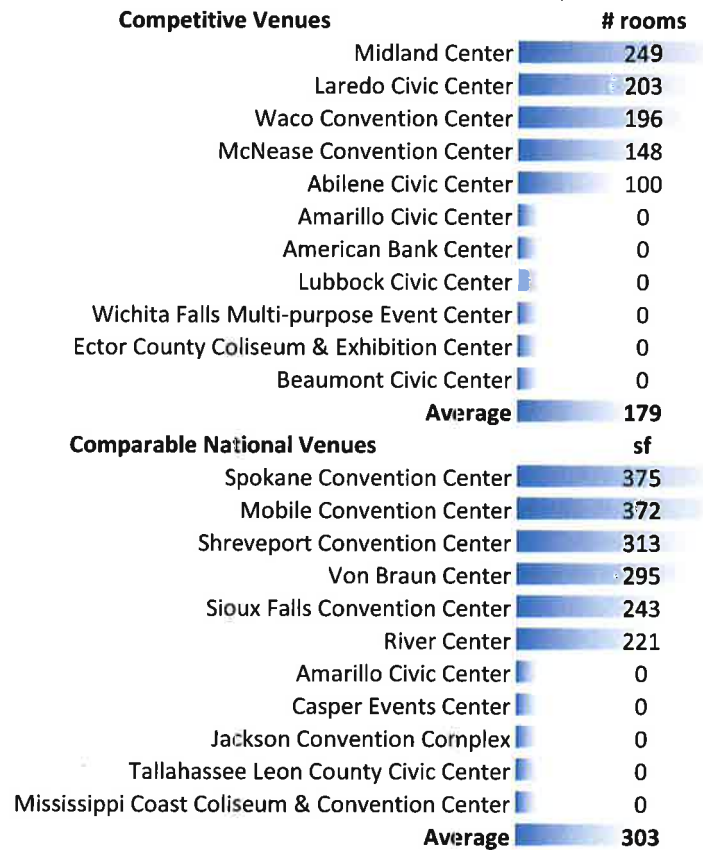
The ACCC has an above average amount of ballroom and meeting space as compared to both sets of comparable venues. Since meeting and ballroom space is generally proportionate to the amount of exhibit space, it is not surprising that those venues with the largest exhibit halls also have the most meeting and ballroom space. The renovated Waco Convention Center offers the greatest amount of flexible meeting and ballroom space in the competitive set.



**Adjacent  
Hotel Capacity  
Assessment**

The quality and proximity of hotel supply has increasingly become one of the most important selection factors for facility users in recent years. To attract out-of-town groups, an adequate supply of nearby hotel rooms should support the lodging needs of delegates, exhibitors, and other attendees. Proximity and connectivity are critical factors that event planners consider in evaluating overall hotel packages available in competing communities. Generally, the number of rooms offered at one or more hotels that are adjacent or connected to the convention center is the key point of comparison. Other factors that can be important are hotel brands, service levels, building ages, management, and available meeting and banquet spaces in these hotels. The following figure presents the number of hotel rooms at an adjacent or integrated hotel property.

Figure 4-24, Adjacent or Integrated Hotel Capacity



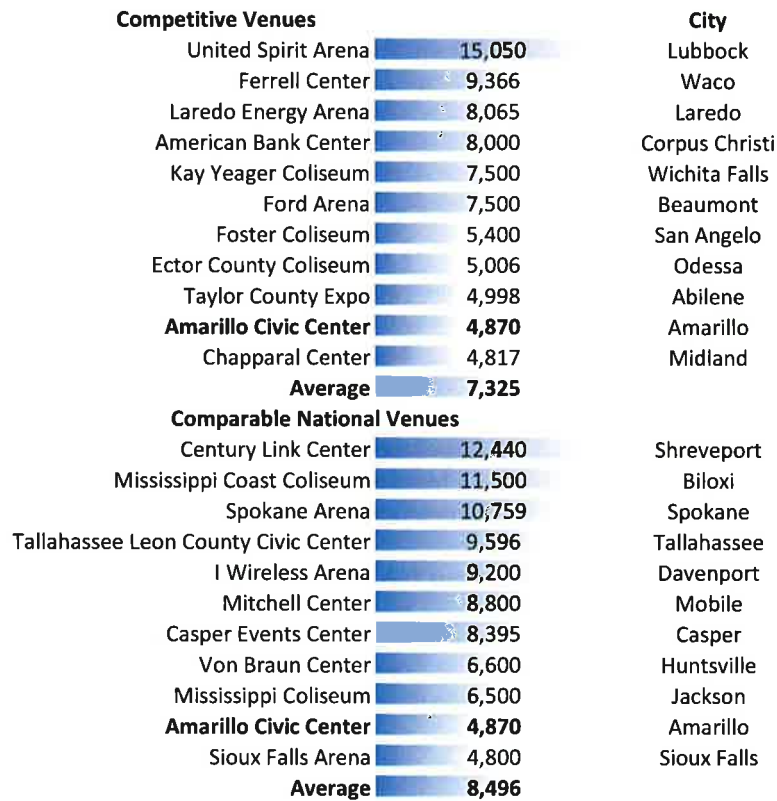
Like many of the comparable venues, the ACCC does not currently have an integrated or adjacent hotel property. For the competitive in-state set, adjacent hotels are relatively small properties averaging less than 200 rooms. Integrated hotel properties are more common and generally larger for the comparable national set with an average of just over 300 rooms.



**Arena Seating Assessment**

Each of the comparable cities presented in this section also has a spectator arena facility either integrated into the convention facility, as is the case in Amarillo, or as a stand-alone venue. While many factors are considered, the arena seating capacity is often the determining factor for event promoters when selecting a venue for their show. A comparison of fixed seating capacities provides an indication of the type of events that can be booked as well as the potential attendance. Sports team tenants also consider seating capacity when selecting a home venue, ideally matching potential attendance levels with seating capacity. The following figure presents the fixed arena seating capacity for the main arena venues in each of the comparable cities. For consistency, the figures below represent a hockey seating capacity and do not include floor seating.

Figure 4-25, Arena Fixed Seating Capacity



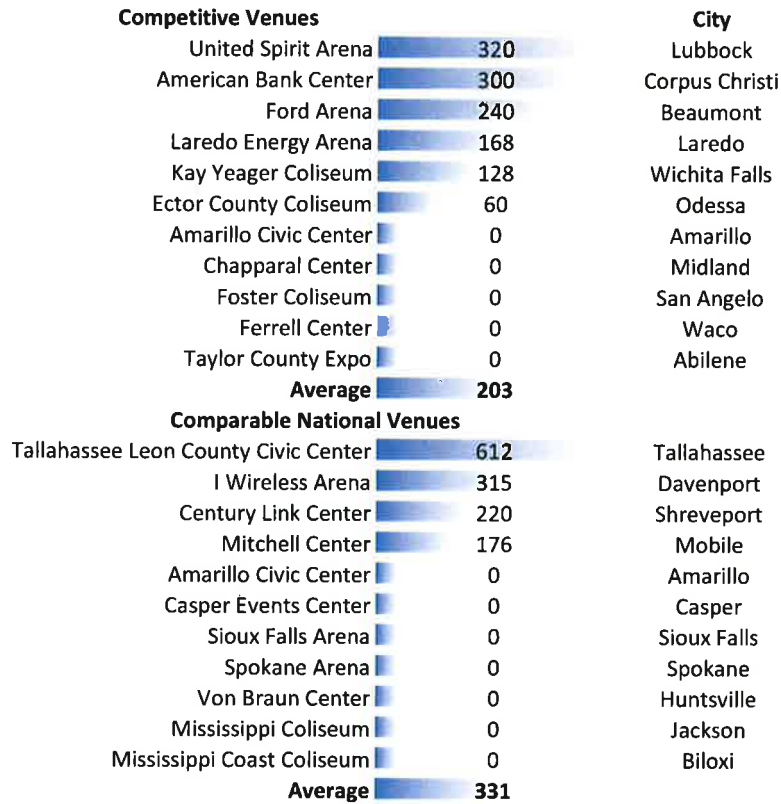
The seating capacity at the Cal Farley Coliseum (“Coliseum”) at the ACCC is well below the average of both comparable venue sets. Since opening the Coliseum in 1968, Amarillo has fallen behind several competing and comparable sized cities which have developed larger and more modern spectator arenas. Many of these newer arenas have also incorporated suites and other premium seating options as a significant source of revenue for tenant teams and the facility. The following figure presents the number of premium seats in each of the comparable arena venues.



**Arena Seating Assessment (cont.)**

The following figure presents the number of premium seats in each of the comparable arena venues.

Figure 4-26, Arena Premium Seat Capacity



Approximately half of the in-state competitive set has some form of premium seating available for lease with an average of just 200 seats. While fewer of the national comparable venues have premium seating, those that do, offer a greater number of premium seats, with an average of approximately 330 seats.

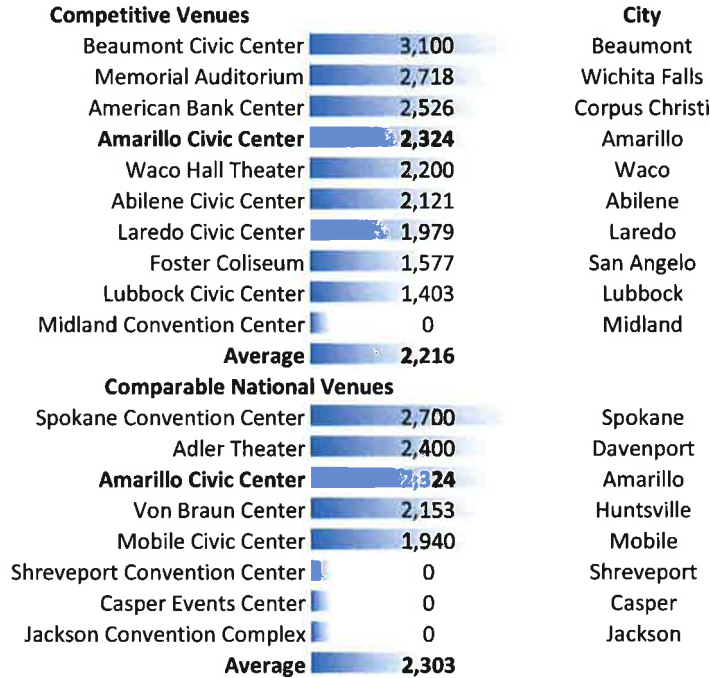




**Auditorium  
Seating  
Assessment**

Not all convention venues have an auditorium or theater. However, they are a highly desirable amenity and used often by convention and meeting planners as well as the local population. They are often the perfect space for a variety of uses, including large meetings, speeches, graduations, religious services, theater, and performing arts. The following figure compares the auditorium and theater seating of the comparable venues.

Figure 4-27, Auditorium/Theater Seating Capacity



As compared with those venues with an auditorium, the ACCC has a slightly above average number of auditorium seats.

The above analyses provided an overall summary of the gross space and seating capacities in each comparable city. The following section relates these capacities to the population base of each market, providing a better understanding of what facility programming is appropriate for the Amarillo market.



**Population & Income Comparisons**

Local area population data can provide evidence of a community’s overall economic size and ability to support public services and visitor amenities that are important for civic center users. Because most convention venues primarily target out-of-town users, local area population figures rarely have an indirect correlation with overall demand potential. However, population data can provide a basis for understanding a community’s ability to support and sustain a convention center, the surrounding neighborhood and market. Additionally, demand potential for certain types of events such as locally generated meetings, banquets, religious events, graduation ceremonies, and consumer shows can be linked to population.

For spectator arenas, however, there is a direct correlation between seating capacity and market population. Demand potential for sporting events, concerts, and other entertainment can be tied to the population base and the relative amount of disposable income available to support a facility’s programming. The following figure presents a comparison of metropolitan population and median household income for the comparable cities.

Figure 4-28, MSA Population and Median Household Income

	Competitive Venues	2010 Population	Median Household Income (2010 \$)
American Bank Center	Corpus Christi TX	418,376	43,187
Beaumont Civic Center	Beaumont TX	379,850	44,687
Lubbock Civic Center	Lubbock TX	280,414	43,075
<b>Amarillo Civic Center</b>	<b>Amarillo TX</b>	<b>248,785</b>	<b>45,071</b>
Laredo Civic Center	Laredo TX	246,729	37,281
Waco Convention Center	Waco TX	235,943	40,370
Abilene Civic Center	Abilene TX	160,601	39,818
Wichita Falls Multi-purpose Event Center	Wichita Falls TX	147,013	41,986
Ector County Coliseum & Exhibition Center	Odessa TX	137,427	44,138
Midland Center	Midland TX	135,431	51,922
McNease Convention Center	San Angelo TX	111,056	40,485
	<b>AVERAGE</b>	<b>227,420</b>	<b>42,911</b>
	<b>Comparable National Venues</b>		
Jackson Convention Complex	Jackson MS	544,374	46,276
Spokane Convention Center	Spokane WA	474,934	46,760
Von Braun Center	Huntsville AL	415,599	53,612
Mobile Convention Center	Mobile AL	414,958	41,022
Shreveport Convention Center	Shreveport LA	393,390	39,949
River Center	Davenport IA	380,912	48,120
Tallahassee Leon County Civic Center	Tallahassee FL	363,245	44,283
<b>Amarillo Civic Center</b>	<b>Amarillo TX</b>	<b>248,785</b>	<b>45,071</b>
Sioux Falls Convention Center	Sioux Falls SD	243,185	57,130
Mississippi Coast Coliseum & Convention Center	Biloxi MS	242,387	44,482
Casper Events Center	Casper WY	75,852	48,626
	<b>AVERAGE</b>	<b>345,238</b>	<b>46,848</b>

Source: Demographics Now

As compared to the in-state competitive set, Amarillo ranks above average in both market population and median household income, suggesting a relatively stronger market and greater ability to support convention and arena venues. As compared to the comparable national set, Amarillo has a below average population. However, unlike Amarillo and other cities in west Texas, which are several hundreds of miles from any major population center, many of the national comparables face competition from venues in nearby major metropolitan areas. As the population hub in the Texas Panhandle, Amarillo’s potential is similar to that of metropolitan areas with greater populations.



**Functional Elements versus Population Comparison**

The following figures relate the various components of the comparable venues to each city's metropolitan population. This analysis provides perspective into the appropriate programming for the ACCC as compared to the other cities and venues. For the purpose of this analysis, the functional elements for each of a city's venues are summed to calculate the total amount in a given market. Convention centers, civic centers, and arenas are considered. Agricultural-based exposition centers, such as the Amarillo National Center, are not included in this analysis.

Figure 4-29, Functional Elements versus Population - In-State Competitors

City	Metro Population	Distance to Amarillo (miles)	Venue	Arena / Coliseum Fixed Seating	Theater / Auditorium Fixed Seating	Total Function Space (SF)	Arena Seat per 1,000 Population	Theater Seat per 1,000 Population	SF of Function Space per 1,000 Pop
Amarillo	248,785		Amarillo Civic Center	4,870	2,324	120,270			
			Globe-News Center		1,237	1,750			
			<b>Total all Venues</b>	<b>4,870</b>	<b>3,561</b>	<b>122,020</b>	<b>19.6</b>	<b>14.3</b>	<b>490.5</b>
Lubbock	280,414	114	Lubbock Civic Center		1,403	65,915			
			City Bank Auditorium & Coliseum	7,244	2,821	20,000			
			United Spirit Arena	15,050		31,916			
<b>Total all Venues</b>	<b>22,294</b>	<b>4,224</b>	<b>117,831</b>	<b>79.5</b>	<b>15.1</b>	<b>420.2</b>			
Wichita Falls	147,013	211	Wichita Falls MPEC			57,523			
			Kay Yaeger Coliseum	7,500		28,800			
			Memorial Auditorium		2,718				
<b>Total all Venues</b>	<b>7,500</b>	<b>2,718</b>	<b>86,323</b>	<b>51.0</b>	<b>18.5</b>	<b>587.2</b>			
Midland	135,431	224	Midland Convention Center			17,412			
			Chapparral Center	4,817		16,000			
			<b>Total all Venues</b>	<b>4,817</b>		<b>33,412</b>	<b>35.6</b>		<b>246.7</b>
Abilene	160,601	227	Abilene Civic Center		2,121	33,400			
			Taylor County Expo Center	4,998		30,000			
			<b>Total all Venues</b>	<b>4,998</b>	<b>2,121</b>	<b>63,400</b>	<b>31.1</b>	<b>13.2</b>	<b>394.8</b>
Odessa	137,427	236	Ector County Coliseum & Exhibition	5,006		70,046			
			<b>Total all Venues</b>	<b>5,006</b>		<b>70,046</b>	<b>36.4</b>		<b>509.7</b>
San Angelo	111,056	272	McNease Convention Center			14,500			
			Foster Coliseum	5,400	1,577	36,000			
			<b>Total all Venues</b>	<b>5,400</b>	<b>1,577</b>	<b>50,500</b>	<b>48.6</b>	<b>14.2</b>	<b>454.7</b>
Waco	235,943	371	Waco Convention Center			75,400			
			Ferrell Center	9,366		16,500			
			Waco Hall Theater		2,200				
<b>Total all Venues</b>	<b>9,366</b>	<b>2,200</b>	<b>91,900</b>	<b>39.7</b>	<b>9.3</b>	<b>389.5</b>			
Laredo	246,729	551	Laredo Civic Center		1,979	24,470			
			Laredo Energy Arena	8,065		30,720			
			<b>Total all Venues</b>	<b>8,065</b>	<b>1,979</b>	<b>55,190</b>	<b>32.7</b>	<b>8.0</b>	<b>223.7</b>
Beaumont	379,850	572	Beaumont Civic Center	4,500	3,100	63,700			
			Ford Arena	7,500		117,695			
			<b>Total all Venues</b>	<b>12,000</b>	<b>3,100</b>	<b>181,395</b>	<b>31.6</b>	<b>8.2</b>	<b>477.5</b>
Corpus Christi	418,376	580	American Bank Center	8,000	2,526	153,015			
			<b>Total all Venues</b>	<b>8,000</b>	<b>2,526</b>	<b>153,015</b>	<b>19.1</b>	<b>6.0</b>	<b>365.7</b>
<b>Average*</b>							<b>40.5</b>	<b>11.6</b>	<b>407.0</b>

\* Averages do not include Amarillo



**Functional Elements versus Population Comparison (cont.)**

Figure 4-30, Functional Elements versus Population - National Competitors

City	Metro Population	Venue	Arena / Coliseum Fixed Seating	Theater / Auditorium Fixed Seating	Total Function Space (SF)	Arena Seat per 1,000 Population	Theater Seat per 1,000 Population	SF of Function Space per 1,000 Pop
Amarillo	248,785	Amarillo Civic Center	4,870	2,324	115,170	19.6	14.3	470.0
		Globe-News Center		1,237	1,750			
		<b>Total all Venues</b>	<b>4,870</b>	<b>3,561</b>	<b>116,920</b>			
Casper, WY	75,852	Casper Events Center	8,395		23,372	110.7		308.1
		<b>Total all Venues</b>	<b>8,395</b>		<b>23,372</b>			
Davenport, IA / Moline, IL	380,912	River Center / Adler Theater		2,400	54,575	24.2	6.3	224.7
		I Wireless Center	9,200		31,000			
		<b>Total all Venues</b>	<b>9,200</b>	<b>2,400</b>	<b>85,575</b>			
Shreveport, LA	393,390	Shreveport Convention Center			131,460	31.6		410.4
		Century Tel Center	12,440		30,000			
		<b>Total all Venues</b>	<b>12,440</b>		<b>161,460</b>			
Sioux Falls, SD	243,185	Sioux Falls Convention Center			131,460	19.7		632.7
		Sioux Falls Arena	4,800		22,400			
		<b>Total all Venues</b>	<b>4,800</b>		<b>153,860</b>			
Spokane, WA	474,852	Spokane Convention Center		2,700	174,932	22.7	5.7	431.6
		Spokane Arena	10,759		30,000			
		<b>Total all Venues</b>	<b>10,759</b>	<b>2,700</b>	<b>204,932</b>			
Huntsville, AL	415,599	Von Braun Center	5,006	2,153	160,626	12.0		386.5
		<b>Total all Venues</b>	<b>5,006</b>		<b>160,626</b>			
Mobile, AL	414,958	Mobile Convention Center			141,366	36.0	4.7	419.0
		The Mitchell Center	8,800		18,000			
		Mobile Civic Center	6,120	1,940	14,500			
		<b>Total all Venues</b>	<b>14,920</b>	<b>1,940</b>	<b>173,866</b>			
Jackson, MS	544,374	Jackson Convention Complex			107,241	11.9		243.7
		Mississippi Coliseum	6,500		25,449			
		<b>Total all Venues</b>	<b>6,500</b>		<b>132,690</b>			
Tallahassee, FL	363,245	Tallahassee Civic Center	9,596	1,979	69,000	26.4	5.4	190.0
		<b>Total all Venues</b>	<b>9,596</b>	<b>1,979</b>	<b>69,000</b>			
Biloxi, MS	242,387	MS Coast Convention Center			253,556	47.4		1148.3
		MS Coast Coliseum	11,500		24,780			
		<b>Total all Venues</b>	<b>11,500</b>		<b>278,336</b>			
<b>Average*</b>						<b>34.3</b>	<b>5.5</b>	<b>439.5</b>

\* Averages do not include Amarillo.



**Functional Elements versus Population Comparison (cont.)**

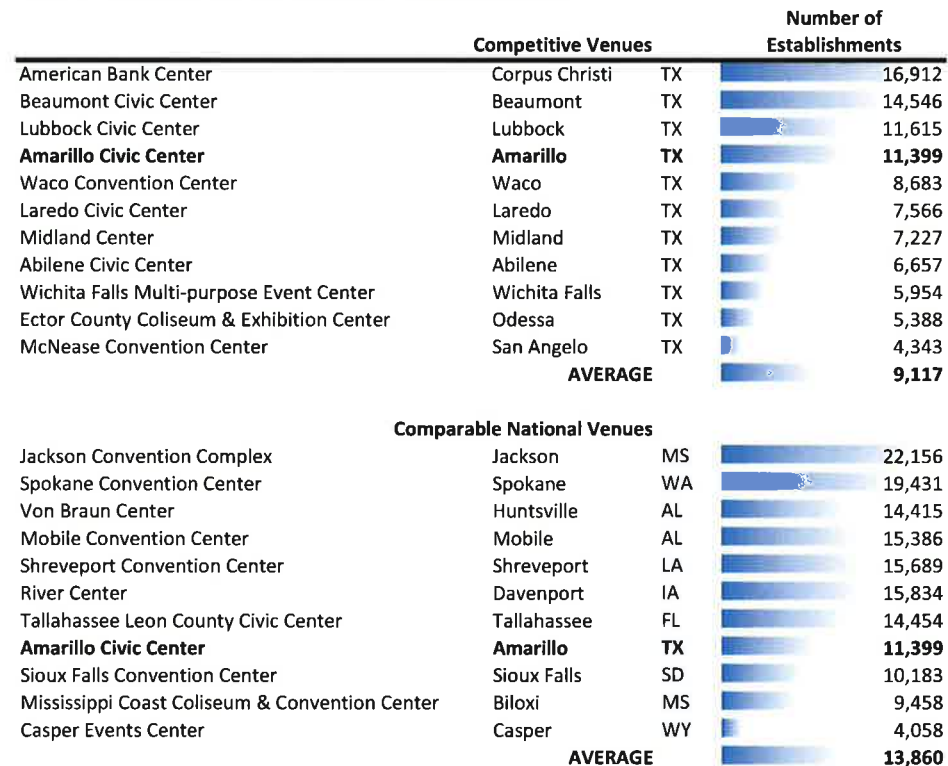
The above figures demonstrate that Amarillo has fewer arena seats, relative to its population, than any of its in-state competitors and the majority of the national comparables. The analysis shows that the Amarillo market could support an expanded arena venue with over 8,000 seats and still have an average number of arena seats for its population base. Conversely, Amarillo's auditorium and theater seating are above average as compared to its population, indicating that no new additions to the market are justified.

The analysis of exhibition, ballroom, and meeting space places Amarillo slightly above average for both sets of comparable cities. As noted previously, while the ACCC has an adequate amount of total space, the disjointed configuration of its exhibit spaces makes it inadequate for a number of events. Renovation of exhibit, banquet, and meeting spaces, therefore, should focus on modernization and reconfiguration of existing spaces to better suit the needs of today's meetings market.

**Corporate Comparison**

The density and breadth of a city's corporate base is a good indicator of potential in the meetings industry. A city's established presence in a particular industry makes it a more attractive destination for conventions, conferences, training, and other industry-specific events. A strong corporate presence also indicates a greater potential for premium seating sales as well as advertising and sponsorship opportunities. The following figures demonstrate how Amarillo compares with comparable cities in terms of the total number of business establishments.

Figure 4-31, Number of Business Establishments



Source: Demographics Now



**Corporate Comparison (cont.)**

Amarillo has a greater number of business establishments as compared to many of its in-state competitors, suggesting stronger support from local corporations for ACCC events and space rentals. Conversely, Amarillo ranks below average as compared to the national comparables.

**Air Service Capacity**

Transportation linkages, including airports, can play a critical role in the success of convention centers that target regional and national user groups. One of the best indicators of an airport's ability to enhance a convention center's draw is its service capacity, generally measured as total annual passenger volume, or traffic. An airport with relatively high annual passenger volumes generally is more convenient and has a wider draw than an airport with relatively low annual passenger volumes.

Figure 4-32, Air Service at Primary Airports in Competitive Set

	Competitive Venues		2009 Passengers
Lubbock Preston Smith International Airport	Lubbock	TX	1,113,819
Midland International Airport	Odessa	TX	838,540
Midland International Airport	Midland	TX	838,540
Corpus Christi International Airport	Corpus Christi	TX	733,628
<b>Amarillo International Airport</b>	<b>Amarillo</b>	<b>TX</b>	<b>406,630</b>
Laredo International Airport	Laredo	TX	207,172
Abilene Regional Airport	Abilene	TX	172,355
Waco Municipal Airport	Waco	TX	135,931
San Angelo Regional Airport - Mathis Field	San Angelo	TX	119,062
Southeast Texas Regional Airport	Beaumont	TX	100,000
Wichita Falls Municipal Airport	Wichita Falls	TX	44,673
	<b>AVERAGE</b>		<b>428,214</b>
	Comparable National Venues		
Spokane International Airport	Spokane	WA	3,055,081
Jackson-Evers International Airport	Jackson	MS	1,261,881
Huntsville International Airport	Huntsville	AL	1,171,147
Quad City International Airport	Davenport	IA	924,859
Gulfport-Biloxi International Airport	Biloxi	MS	800,742
Tallahassee Regional Airport	Tallahassee	FL	734,151
Sioux Falls Regional Airport	Sioux Falls	SD	677,164
Mobile Regional Airport	Mobile	AL	567,910
Shreveport Regional Airport	Shreveport	LA	511,730
<b>Amarillo International Airport</b>	<b>Amarillo</b>	<b>TX</b>	<b>406,630</b>
Natrona County International Airport	Casper	WY	90,241
	<b>AVERAGE</b>		<b>927,412</b>

Source: HVS

The number of passengers enplaned and deplaned at the Amarillo International Airport is about average as compared to the in state competitors. The majority of the cities, 6 out of the 10 comparables have less than half the passenger volume as Amarillo. Passenger volume in Amarillo is well below average as compared to the national comparable set. Amarillo's relative inaccessibility from locations outside of Texas may limit its ability to book regional and national events.





## Building Program Recommendations

### Introduction

HVS relied on a site inspection of the Amarillo Civic Center Complex (“ACCC”), in-depth user interviews, an analysis of the convention and arena programming in comparable cities, a thorough review of historical operations at the ACCC, other market research, and knowledge of standard industry practices to recommend a renovated civic center program for the ACCC. This facility program should serve as a guide for subsequent physical planning aimed at providing the desired renovated facility program elements.

### Current User & Lost Business Interviews

Currently, the ACCC is a valuable resource to the City of Amarillo, hosting variety of events including conventions and trade shows, the WRCA rodeo, consumer shows, local meetings and social events, sports, and entertainment events. The ACCC’s demand profile comprises a number of events which book the facility annually and other repeat customers. HVS developed a comprehensive user survey to identify the types and sizes of events currently held at the ACCC and to evaluate the ability of the ACCC to meet the needs of its current users. Current users of the ACCC were either personally interviewed or completed the survey form. Additionally, HVS interviewed representatives from organizations which did not select Amarillo as their event destination to understand their specific reasons for not selecting Amarillo. Respondents include representatives of following user groups:

- *National Conventions and Trade Shows*
- *State/Regional Conventions and Trade Shows*
- *Consumer Shows*
- *Local Meetings and Banquets*
- *Sports Tenants*
- *Sports Tournaments*
- *Entertainment Promoters*
- *WRCA Rodeo*

ACCC User and lost business interviews yield the following key findings:

- Existing events which use the entire civic center facility have reached capacity. Several event planners report that they could grow virtually every aspect of their events if the ACCC expands.
- Event planners cited Amarillo’s geographic location as its key strength. The city’s role as an industry hub makes it the preferred location of many event planners.
- The lack of a large, contiguous exhibit space has been the primary reason for the City’s loss of large national conventions and trade shows.
- Event planners are generally pleased with the North Exhibit Hall and Heritage Room. Several noted that the South Exhibit Hall is dated and difficult to fill with exhibitors.
- Event promoters using the Auditorium expressed that the configuration of the loading dock increases the labor costs associated with their event. Promoters who also book events in other competing facilities in Texas note that they do not face these same issues elsewhere, and therefore, have lower labor costs.





**Current User &  
Lost Business  
Interviews (cont.)**

- Event promoters using the Coliseum expressed that it is often difficult to book dates due to conflicts with event changeovers.
- Lack of adequate parking for both event attendees and exhibitor vehicles was noted as a problem, especially when the facility is hosting multiple events.
- Sports tenants would prefer a number of facility upgrades, including expanded seating capacity, premium seating, modern replay and ribbon boards, and other fan amenities typically found in newer facilities.
- Sports tournament which did not select Amarillo expressed similar concerns over the dated facility elements, including the playing surface and locker rooms.
- Several event planners noted inferior food service, including a lack of variety and overall quality of service. Concerns over the lack of flexibility to contract with vendors and lower food & beverage commissions were also noted.
- Meeting planners noted the lack of control over lighting and HVAC systems as a problem when hosting events at the facility.
- Many current event planners expressed that an adjacent hotel property would be a welcome feature, however, it is not a deciding factor.
- Planners not selecting Amarillo often note the lack of a proximate downtown hotel as the major reason for their decision.
- Several event planners noted the lack of retail and dining options within walking distance of the ACCC as a key weakness as compared to other competing facilities.

**Program  
Recommendations**

HVS program recommendations place the renovated ACCC in the position to serve its existing customer base, to accommodate local demand for meetings, banquets, and civic events, and to attract new state, regional, and national conventions and tradeshow. Functionality requirements revolve around the principal that the venue must host simultaneous events with different venue needs, such as consumer shows that use exhibition space and corporate meetings that use meeting and banquet space. Exhibit space should be large enough to accommodate national trade shows and conventions with flexible divisions that can also serve as meeting and banquet space. Back of house spaces, including the loading dock, locker rooms and storage areas should be able to serve multiple events without hindering the efficiency of another event's operation. The arena venue should accommodate the ACCC's tenant teams and have adequate seating capacity to attract small to medium-sized touring shows with modern tenant and fan amenities.

To address the functional, aesthetic, and system deficiencies that are present in the existing facility, HVS recommends a mix of new and renovated spaces such that the total facility program includes the following elements.

- Up to 100,000 square feet of total exhibit space with a 50,000 to 75,000 square foot contiguous, column-free exhibit hall and approximately 25,000 square feet of arena floor space.
- Flexible wall systems to allow a 25,000 square foot portion of the main exhibit hall to serve as banquet and meeting space in a variety of configurations.



**Program Recommendations (cont.)**

- A minimum of 50,000 square feet of flexible meeting and ballroom space,
- A 5,500 to 7,500-seat arena with 200 to 300 premium seats in various suite configurations
- A 2,300-seat auditorium theater

The following figure presents a comparison of the recommended versus existing function spaces at the Amarillo Civic Center Complex.

Figure 4-33, Existing Versus Proposed Function Spaces

Function Space	Existing ACCC Size (SF)	Configuration	Proposed Size (SF)	Configuration
Exhibit Space	68,456	2 Separate Halls, Arena Floor	Up to 100,000	Single Exhibit Hall, Arena Floor
Meeting/Ballroom Space	51,905	Heritage Room, Grand Plaza, Regency Room, Hospitality	Minimum 50,000	Heritage Room, Grand Plaza plus ballroom and meeting room blocks
Arena Seating	4,870	Single Concourse	5,500-7,500	Single or Double Concourse, 200-300 Premium Seats
Auditorium Seating	2,324		2,324	

**Exhibit Hall**

The exhibit hall would have minimal floor, ceiling and wall finishes would and serve as flexible multi-purpose space. It could host exhibitions, business events, as well as indoor sporting events such as volleyball, cheerleading, or martial arts tournaments. Flexible partitioning would allow a portion of the exhibit hall to support break out meetings and banquets from approximately 500 to 2,000 persons and assemblies of up to 3,000 persons. The full exhibit hall could support a 6,000-person banquet or an assembly of over 8,000 people. The floor would have a uniform grid of utility boxes for communications and power. Movable walls would be of high quality to provide good sound separation between halls. Ceiling heights should accommodate sporting events such as volleyball. Temporary staging capacity and light rigging points would be necessary to accommodate assemblies and various types of entertainment events.

The exhibit hall should be divisible into independently accessed halls of up to 25,000 square feet each. Loading docks should provide access to the service corridor which runs along the rear of the exhibit hall. Attendee access through pre-function areas should be separated from services access such that each of the subdivisions of the hall can be separately operating during simultaneous events. For example, one hall could be loaded and set up while an event is occurring in a neighboring hall.



**Civic Center  
 Ballroom &  
 Meeting Rooms**

Meeting and ballroom space is essential to provide breakout space for larger conference and convention events and to support stand-alone meetings and food and beverage functions. Many events require banquet space which is separate and distinct from a meeting room block. While site constraints and other design issues will affect the final layout of these functional spaces, HVS recommends that the Heritage Room remain as a multi-purpose banquet/meeting room space. Other flexible ballroom and meeting space would be required to further support exhibit hall events and other events. HVS recommends that the new meeting and ballroom space be located in flexible blocks in areas which are conveniently accessible for attendees and efficiently serviced by event staff.

**Arena/Coliseum**

Several factors determine the recommended seating capacity of the arena, including event promoter requirements, community needs, and the projected attendance levels for the primary tenants of the ACCC, the Amarillo Bulls and the Amarillo Venom. For all of these uses, it is important to suit the needs of the most popular events while maintaining an exciting and intimate atmosphere for those events which are less well attended.

The preference among facility managers and their minor league sports tenants is to have a sufficient number of seats to minimize the amount of unaccommodated demand for the more popular games, but not so many seats that the venue routinely appears to be half empty. A higher number of sellout games also provide an incentive to fans to purchase tickets in advance, either through season ticket packages or individual game purchases. Higher levels of season ticket sales help reduce variability in attendance and revenues, which can be important advantages for minor-league sports franchises.

The Coliseum currently has two sports tenants, the Amarillo Bulls of the North American Hockey League (“NAHL”) and the Amarillo Venom of the Lonestar Football League (“LSFL”). The Bulls franchise joined the NAHL in 2008 as the Albert Lea Thunder in Albert Lea, MN. The team was sold to Amarillo in May 2010, following the announcement that the Central Hockey League (“CHL”) Amarillo Gorillas would cease operations after 8 seasons in Amarillo. In their inaugural season in Amarillo, the Bulls averaged 1,737 attendees per game, well above the NAHL league average attendance of approximately 1,100 per game. With just a single season for the Bulls, a better indicator of potential hockey demand in Amarillo is the historical attendance of the CHL’s Amarillo Gorillas.

Figure 4-34, Historical Attendance Amarillo Gorillas

Year	CHL League	
	Amarillo Gorillas	Average
2002-03	3,696	4,401
2003-04	3,302	4,499
2004-05	3,016	4,478
2005-06	3,162	4,663
2006-07	2,892	4,388
2007-08	2,757	3,979
2008-09	2,035	3,808
2009-10	1,761	3,800
2010-11	na	3,784

Source: Central Hockey League

Note: League average are often inflated



**Arena/Coliseum  
(cont.)**

The Amarillo Venom began play in 2004 as the Amarillo Dusters of the Intense Football League, a small football league based in Texas. After a single season, the Duster joined Arena Football 2 (“af2”), a developmental league for the Arena Football League, until the league folded in 2009. At that time, the team decided to join the IFL rather than a new Arena Football 1 league. As a result, the team had to change their name and logo which were property of the Arena Football 1 league. The team joined the LSFL and became the Amarillo Venom in January 2010. Average attendance during this inaugural season was approximately 2,300. The following figure presents the historical attendance levels of the Amarillo Dusters. At the time of this writing, historical league attendance levels for the LSFL are not available.

Figure 4-35, Historical Attendance Amarillo Dusters

Year	Amarillo Dusters	af2 League
		Average
2005	3,925	4,887
2006	3,083	5,038
2007	3,039	4,695
2008	2,497	4,705
2009	2,230	4,641

Source: Arena Football League

Note: League average are often inflated

Support from the Amarillo community for its sports teams is evidenced by strong historical attendance levels. However, recent attendance has dwindled for both hockey and football tenants. Specific causes for the folding of the CHL Gorillas is not known, however, the inability to generate sufficient revenues to support team operations is often the case for teams abruptly ceasing operations. Since the 1990s, new arena design incorporates a number of revenue-generating elements not found in older arenas. Premium seating, private clubs, improved concessions points of sale, advertising, and sponsorship locations are examples of the key revenue elements that have become standard in new minor and junior league arenas. These new revenue streams are often shared between teams and venue as a part of team lease agreements, improving both the financial viability of the teams and the operating income of the venue. A newer venue also creates a more desirable experience for fans, leading to increased attendance levels and per capita spending. Given adequate venue improvement and quality team ownership, HVS feels that the Amarillo market is capable of supporting its two sports franchises with attendance levels approximating league averages. As is the goal of these recommendations, the proposed arena seating capacity would accommodate the most popular games, while not appearance cavernous for those games with average attendance.

The specific concert capacity for an arena with 5,500 to 7,500 fixed seats would be subject to the actual design of the facility. A typical arena design should yield around 7,000 to 9,000 seats in an end of stage configuration including seating on the arena floor. A venue with this seating capacity is ideally sized to attract both second tier touring acts and major acts as a convenient tour date between larger markets. The architects should consider methods of maximizing front-of-stage capacity to help broaden the array of concert events the facility can accommodate. This could be accomplished by placing more seating at one end of the arena. This type of configuration has the additional advantage of placing more seats in the corners of the arena, which savvy hockey fans know is the best seat location for hockey games because fans can see the entire ice surface at all times.

Premium seating is an increasingly important component of arenas of this size. HVS recommends that the facility include 200 to 300 premium seats in 12 to 20 suites of varying suite seat capacities. Un-leased “party” suites can be sold on a per event basis.



**Arena/Coliseum  
(cont.)**

A number of amenities and special privileges accompany the lease of a luxury suite. Facility design and marketing efforts will determine many of these arrangements. HVS assumes the proposed arena will provide at least the following equipment and services in each luxury suite:

- 12 to 20 fixed stadium-style seats,
- Additional portable seating and furniture, as needed,
- A high-definition, large screen television,
- Climate control,
- Utilities including water and electricity,
- Service bar,
- Cleaning and maintenance of suite and fixtures,
- Full-service catering,
- Two complimentary V.I.P. parking spaces,
- Access to a special lounge, club, or party room,
- High-speed internet and telephone connections, and
- First right of refusal to purchase tickets to playoff games and special events.

The design of the facility should ideally allow for additional suites if the actual market demand exceeds the demand indicated during initial programming and preconstruction sales.

HVS does not recommend that traditional club seats be included in the design of the facility. Instead, the facility itself should sell season ticket packages that include various amenities in addition to sports game tickets. These packages could include concert tickets, priority for purchasing tickets to other events, premium parking, access to a VIP lounge, in-seat waiter service, and other amenities. The advantage of these types of amenities is that they are not physically built into seats and therefore there is no set minimum or maximum number of such packages sold. The advantages that these season packages provide can be easily reserved for only those who purchase them, eliminating the problem of what to do with unsold club seat inventory.

In addition to the seating capacities and amenities in the arena bowl, HVS recommends the incorporation of the following elements into the arena design:

- Regulation sized hockey rink
- Concourse concessions with sufficient points of sale and adequate venting to support all types of food preparation,
- A VIP club
- Concourse restrooms, first aid station and security office,
- Team and visitor locker rooms,
- Additional locker rooms available for sports tournaments and theatrical productions,
- Catering kitchen sized to accommodate suites and club,
- Box office with walk-up ticket booth,
- Rigging grid with approximately 120,000 pounds of rigging capacity in ceiling



**Ancillary &  
Support Spaces**

In addition to the exhibit, arena, and meeting function spaces provided above, the gross floor area of the renovated ACCC would include the following elements:

- Lobby and Pre-function Areas – A well-appointed lobby and pre-function areas provide meeting planners areas for greeting and registration, social gatherings, and well-defined public access to the exhibit hall and meeting rooms. This space is also appropriate for stand-alone receptions, meals, and other community events.
- Circulation – Circulation space provides for the movement of attendees into and through the ACCC. These areas would include hallways, connecting walkways, and bridges as required. Depending on the concept plan, these areas could also include vertical circulation (stairwells, elevators, and escalators).
- Service access – Service corridors provide non-public access to the event hall and meeting rooms as well as connection to the facility’s loading docks, mechanical rooms, and storage.
- Drop-off zone – The ACCC should have a well-defined vehicular drop-off area and pedestrian access solely for the uses of event attendees.
- Loading areas – Service access that is separate from the drop-off zone, truck docks, and waste disposal areas necessary to support the ACCC.
- Kitchen – a main production kitchen could serve the needs of ballroom events or larger events which use a portion of the exhibit hall. The capacity of the kitchen should allow it to serve at least 2,000 persons, which would accommodate those events using a 25,000 square foot division of the exhibit hall.
- Storage – Adequate and convenient equipment storage is important to the efficient operation of the facility.
- Facility Operations – Spaces needed to support facility’s physical plant, including HVAC, plumbing, electrical and fire protection systems.
- Parking – the on-site capacity for parking should be determined in view of the amount of available off-site parking lots and decks that could service the ACCC. Accommodating the vehicles and trailers of event participants, exhibitors, attendees in a secure and convenient location is also important.





## Market Area Overview

### Introduction

HVS based event demand projections at the proposed Amarillo Civic Center Complex (“ACCC”) on the following research and analysis:

- The civic center program recommendations presented above,
- Historical ACCC demand data,
- User interviews,
- Industry data and trends reports,
- Key market and economic indicators outlined above,
- Comparable venue program and operating data,
- Existing state competitive venues,
- Interviews with government officials and other stakeholders, and
- Discussions with representatives from the current ACCC management and the Amarillo Convention and Visitors Council.

In developing the demand projections, HVS assumes that all civic center recommendations throughout this report are implemented. HVS assumes only minor improvements to the arena will be concurrent with the civic center improvements. Any expansion of arena seating capacity would take place at a time beyond the term of these projections. Projections assume that the proposed renovations open on October 1, 2014. HVS estimates that event demand would stabilize in the fourth year of operation—fiscal year 2017-18. Demand projections also assume highly qualified, professional sales and management teams for the proposed ACCC.

For the purpose of this analysis, event demand projections are limited to those which would take place in the renovated ACCC which includes the new exhibit hall, ballroom, meetings rooms, the Auditorium, and the Cal Farley Coliseum (“Coliseum”). HVS assumes that the performances and other events which take place at the Globe-News Center for the Performing Arts would remain consistent with historical demand levels.

### Historical Demand

The ACCC provided HVS with a list of events that occurred at the facility during fiscal years 2008-09 and 2009-10. The data set included event names, a description of the type of the event, start dates, and end dates, rooms utilized by date, and estimates of attendance. Based on this information, HVS reclassified event types into standard event categories to allow comparisons with other venues. The figure below summarizes the event and attendance history at the Amarillo Civic Center for the past two fiscal years.





**Historical Demand** Figure 4-36, Event and Attendance History  
(cont.)

	2008/09	2009/10
<b>Events</b>		
Conventions	3	6
Tradeshows	17	18
Consumer Shows	38	43
Meetings & Conferences	76	67
Banquets	128	118
Tenant Sports	42	45
WRCA Ranch Rodeo	1	1
Other Sports	6	8
Concerts & Entertainment	54	51
Assemblies	28	25
Other	32	44
<b>Total</b>	<b>425</b>	<b>426</b>
<b>Estimate of Average Attendance</b>		
Conventions	2,297	1,342
Tradeshows	1,741	2,010
Consumer Shows	2,386	2,471
Meetings & Conferences	248	206
Banquets	380	404
Tenant Sports	1,348	1,459
* WRCA Ranch Rodeo	14,595	14,878
Other Sports	2,517	954
Concerts & Entertainment	1,704	1,488
Assemblies	2,064	2,140
Other	401	658
<b>Estimate of Total Attendance</b>		
Conventions	6,890	8,054
Tradeshows	29,590	36,172
Consumer Shows	90,671	106,261
Meetings & Conferences	18,878	13,771
Banquets	48,646	47,724
Tenant Sports	56,625	65,633
* WRCA Ranch Rodeo	14,595	14,878
Other Sports	15,101	7,630
Concerts & Entertainment	92,025	75,898
Assemblies	57,788	53,508
Other	12,840	28,930
<b>Total</b>	<b>443,649</b>	<b>458,459</b>

\* WRCA Rodeo attendees only. WRCA Trade show attendees included in Tradeshows category.

The exhibit and meeting spaces at the ACCC currently hosts approximately 300 events each year including the conventions, trade shows, meetings, conferences, banquets, social events, and assemblies. The Coliseum and Auditorium host a variety of sporting events, graduations, concerts, theatrical productions, and other entertainment. In total, the ACCC hosts well over 400 events and 400,000 attendees each year. HVS analysis of historical attendance does not consider attendees related to in-house meetings and attendees at supplemental events directly related to other events (e.g. press conferences and concert VIP parties).



**Historical Demand (cont.)** Analysis of event demand and room utilization reveals that the ACCC regularly hosts multiple events throughout the year and that room utilization rates are consistently high. The following figure presents the use-days by room for the past two fiscal years. HVS use-days do not include the days dedicated to in-house meetings or planning meetings related to other events. Days dedicated to repair and maintenance or the installation and removal of ice in the Coliseum are also excluded.

Figure 4-37, Historical ACCC Use-Days by Room

Room	2008-09	2009-10
North Exhibit Hall	222	184
South Exhibit Hall	159	182
Heritage Room	191	203
Regency Room	155	191
Grand Plaza	151	147
Hospitality Room	111	98
Vip Room	57	75
Coliseum	230	188
Auditorium/Lobby	99	87

The two exhibit halls have an average occupancy rate of approximately 52 percent, which is well above the industry average and indicates that the ACCC cannot accommodate all events wishing to use the facility’s exhibit halls. The Heritage and Regency rooms are used regularly as exhibit halls to alleviate these conflicts; however, this practice limits the availability of these spaces for their intended meeting and banquet uses.

A number of annual events use the entire ACCC for multiple days and host well over 10,000 attendees from local, regional, and national base. These events are not only key economic drivers for Amarillo industry, they represent a major source of economic impact from visitor spending and overnight stays in local hotels. The following figure highlights the size and impact of these major annual events.

Figure 4-38, ACCC Major Annual Trade Show Events

Event	Average Attendance	Exhibit Space (square feet)	Occupied Days	Estimated Room Nights (1)
WRCA Rodeo/Trade Show	17,750	87,000	7	8,500
Farm & Ranch Show	15,000	175,000	6	5,000
Make-a-Wish Car Show	12,400	158,000	3	1,950

(1) Total estimated room nights based on tracked historical vendor room nights and an estimated number of room nights generated by show attendees.



**Historical Demand (cont.)**

Each of the above events uses the entire ACCC for several days, and each is at capacity. In addition to the exhibit space requirements noted above, each event also occupies a variety of support and meeting spaces necessary to produce the event. The WRCA Ranch Rodeo runs concurrent with a trade show requiring the Coliseum and every available space for meetings, catering, and other back-of house functions. These events are constrained by the physical limitations of the existing ACCC. As noted in the user interviews presented in earlier in this report, representatives from each of these events indicate that they could successfully grow all aspects of their events if the ACCC were to expand its exhibit and meeting facilities.

In order to accommodate the exhibit requirements for the above and other large exhibit events, the ACCC has had to rely on a number of measures. In addition to the North and South Exhibit halls, the Heritage and Regency Rooms are used for smaller exhibits and as overflow for larger events. Many larger trade shows and conventions use additional, make shift exhibit space, including the Coliseum concourses and the circulation spaces at the north end of the complex. As shown in the figure below, the average exhibit space needed for exhibiting events is well above the area of the facility' single largest exhibit hall.

Figure 4-39, Average Exhibit Requirements by Event Type (SF)

	<u>2008-09</u>	<u>2009-10</u>
<b>Type of Event</b>		
Conventions	12,575	46,788
Trade Shows	42,997	39,888
Consumer Shows	26,868	26,781

The figure above demonstrates that most trade shows and larger conventions, such as 2010's Order of the Eastern Star Grand Chapter Convention, require more exhibit space than can be accommodated by any single contiguous space within the ACCC. While the ACCC has successfully hosted many larger events by cobbling together exhibit spaces, for many events for which the ACCC must compete with other venues in the region, this solution is simply not attractive or acceptable. Lost business reports and interviews with lost clients confirm that this lack of a large, contiguous exhibit space severely hinders the marketability of the ACCC and has been a primary reason for losing several events to other cities.

**Lost Business**

HVS analyzed the lost business report prepared by the Amarillo Convention and Visitor Council ("ACVC"). An event becomes lost business if the ACVC loses a bid for an event or if an event planner had booked tentative dates in the ACCC, but ultimately decided to book the event in another city and venue. Events which face cancellation due to budgetary or other reasons are not included in this analysis. The ACVC records the number of lost events and the potential room nights associated with each event. The ACVC analysis covers events lost between October 2005 and April 2011. The figure below provides an annual summary of lost business by the year in which the events would have occurred



**Lost Business (cont.)**

Figure 4-40, ACCC Lost Events and Room Nights

Year	Number of Events	Total Attendance	Average Attendance	Total Room Nights	Average Room Nights
2006	5	1,475	295	883	177
2007	11	5,492	499	5,779	525
2008	22	16,179	735	18,523	842
2009	19	11,100	584	20,095	1,058
2010	16	11,840	740	20,855	1,303
2011	7	4,171	596	5,526	789
2012	8	5,650	706	8,025	1,003
2013 +	5	5,700	1,140	7,985	1,597
	<u>93</u>	<u>61,607</u>		<u>87,671</u>	

Source: Amarillo Convention and Visitors Council

The ACVC seeks to book events with regional, state, and national base of attendees. The following figure presents the geographic base of the lost business.

Figure 4-41, ACCC Lost Events by Geographic Base

Attendee Base	Number of Events	Total Attendance	Average Attendance	Total Room Nights	Average Room Nights
State	54	34,479	639	47,176	874
Regional	10	2,681	268	5,265	527
National	29	24,447	843	35,230	1,215
	<u>93</u>	<u>61,607</u>		<u>87,671</u>	

Source: Amarillo Convention & Visitor Council, Restated by HVS

Of the 93 events and nearly 88,000 room nights lost to other facilities, over half are from events planned by state associations and other events with a statewide attendee base. National events, which typically generate a greater number of room nights, also make up a significant percentage of lost business.

While the reasons for not selecting Amarillo can be multifaceted, HVS reviewed the detailed ACVC report and classified the primary reason for the lost business into six categories as detailed below.

- Facility – Facility reasons indicate that there was an insufficient amount of exhibit and/or meeting space, a lack of quality exhibit and/or meeting space, or unavailability of dates at the ACCC.
- Hotel - Hotel reasons indicates that the lack of an adjacent convention center hotel was the primary reason for not selecting Amarillo. This category can also indicate an insufficient number of committable hotel rooms, and an insufficient number of hotel rooms within walking distance to the ACCC.



**Lost Business (cont.)**

- Location – Location reasons indicate that Amarillo's location in the northwest portion of the State and its distance from major population centers make it less convenient and cost-effective for meeting attendees.
- Price/Budget – Price and budget reasons indicate that the costs associated with the event, including travel, lodging, and facility rental, were not as competitive as other competing locations.
- City – City reasons indicate that Amarillo lost out to another city with a better overall tourism package. Specific reasons may include the size of the city, a greater number of tourism options, concurrent complementary events, or simply the desire to host in a particular city.
- Other/Unspecified – Other, unspecified reasons indicate a better overall meeting package offered by another city without a primary reason identified.

The following figure presents the lost business classified into the above categories.

Figure 4-42, ACCC Lost Events by Primary Reason

<b>Reason</b>	<b>Number of Events</b>	<b>Total Attendance</b>	<b>Average Attendance</b>	<b>Total Room Nights</b>	<b>Average Room Nights</b>
Facility	12	9,075	756	10,642	887
Hotel	15	15,820	1,055	20,884	1,392
Location	14	10,621	759	16,481	1,177
Price/Budget	7	3,525	504	5,530	790
City-specific	13	2,750	212	5,428	418
Other/Unspecified	32	19,816	619	28,706	897
	<b>93</b>	<b>61,607</b>		<b>87,671</b>	

Source: Amarillo Convention & Visitor Council, Restated by HVS

The lack of a convention hotel and an insufficient number of proximate hotel rooms to the ACCC has been the single most often cited reason for not selecting Amarillo. As demonstrated in the comparable venue analysis presented earlier in this report, many competing venues, including those in Waco, Abilene, Midland, San Angelo, and Laredo, have hotel property within close proximity to the convention venue. As meeting planners and attendees get more accustomed to this feature in other cities, the importance of a convention hotel becomes even more crucial for Amarillo's success in booking events.

The next two most common reasons for not selecting Amarillo are its location and other city-specific factors. While it is impossible to change Amarillo's geographic location, improvements to the commercial area immediately surrounding the ACCC would improve the City's overall marketability as a destination and provide meeting attendees with a more attractive overall package in terms of dining, nightlife, and tourism options.

Around 12 percent of lost events and room nights specifically site the ACCC as the primary reason. Although cited less often, this reason is significant in that the ACVC would not compete for an event which the ACCC is clearly unable to accommodate. Several potential events are, therefore, not included in this analysis.



**Demand  
Projections**

HVS's analysis of historical ACCC demand, an analysis of comparable and competitive venues, and current user and lost business interviews suggest that the proposed expansion to the Civic Center should allow the venue to not only significantly expand utilization by its existing event base, but also attract a greater share of larger conventions, trade shows, and sports competitions. HVS's demand projections assume that the opening of the expanded Civic Center facility would be concurrent with the opening of an adjacent convention hotel. Collateral retail, dining, and entertainment development in the immediate vicinity of the ACCC is a crucial element to fully realizing the event demand potential of the complex. HVS assumes that these improvements would be ongoing throughout the event demand stabilization period.

The primary source of convention demand would remain the state and regional SMERF market. The expanded venue would allow the ACCC to compete for a broader base of events in this market and secure a greater number of all events. Although it is not a primary or consistent source of demand, the expanded facility would also increase bookings of national-based conventions. Similarly, the larger facility would allow for the expansion of its current regional-based trade shows and entice new shows which have not considered Amarillo due to facility constraints. A modest increase in state association conventions which rotate throughout the state of Texas would round out demand. The primary factors which hinder Amarillo's ability to book a greater number of statewide events are its relatively remote northern location in the state, the limited air service options into the city, and the large number of competing venues in Texas. However, the larger exhibit hall and improved meeting and banquet facilities would give Amarillo the chance to compete for a greater share of these events.

A secondary potential exists in amateur sporting events which would use the exhibit hall as a competition surface. The hall could accommodate a variety of indoor sports, including basketball, volleyball, wrestling, cheerleading, fencing, martial arts, and gymnastics. The presence of the Coliseum and its spectator seating also creates the opportunity to have a "championship venue" in the Coliseum with preliminary competitions taking place in the exhibit hall.

Demand for other event types would also benefit greatly from the expanded venue. With a larger, divisible exhibit hall, the ACCC would not have to rely on meeting and banquet space to handle overflow exhibit requirements. Freeing up these spaces for their intended uses would not only vastly improve the facility's ability host larger conventions, but also improve the facility's capacity to host multiple concurrent events, including meetings, conferences, and local stand-alone banquets. Similarly, less reliance on the Coliseum floor as overflow exhibit space would reduce changeover requirements and remove many of the event scheduling conflicts faced by concert and other event promoters.

HVS projects the following demand for the proposed ACCC. HVS based demand projections on the completion of the new exhibit hall in October 2014. Completion of the remaining improvements to the ACCC, including the reconfiguration of existing ACCC program areas into meeting and ballroom space, would take place in October 2016. HVS estimates that incremental event demand would ramp up following the completion of the new exhibit hall and stabilize by fiscal year 2018-19, two years after completion of all planned renovations.



**Demand Projections (cont.)**

Figure 4-43, ACCC Demand Projections

	2013/14	New Exhibit Hall Opens 2014/15	2015/16	Renovations Completed 2016/17	2017/18	2018/19
<b>Events</b>						
Conventions	5	7	8	9	10	10
Tradeshows	18	18	19	20	21	21
Consumer Shows	41	41	41	41	41	41
Meetings & Conferences	72	72	72	81	81	90
Banquets	123	92	92	104	104	115
Tenant Sports	44	44	44	44	44	44
WRCA Ranch Rodeo	1	1	1	1	1	1
Other Sports	7	13	14	14	15	15
Concerts & Entertainment	53	55	59	62	65	65
Assemblies	27	27	27	27	27	27
Other	38	38	38	38	38	38
<b>Total</b>	<b>429</b>	<b>407</b>	<b>413</b>	<b>440</b>	<b>446</b>	<b>467</b>
<b>Average Attendance</b>						
Conventions	1,500	1,600	1,600	1,600	1,600	1,600
Tradeshows	2,000	2,100	2,100	2,100	2,100	2,100
Consumer Shows	2,300	2,600	2,600	2,600	2,600	2,600
Meetings & Conferences	225	225	225	300	300	300
Banquets	400	400	400	500	500	500
Tenant Sports	1,400	1,400	1,400	1,400	1,400	1,400
WRCA Ranch Rodeo	14,750	14,750	14,750	14,750	14,750	14,750
Other Sports	1,500	1,500	1,500	1,500	1,500	1,500
Concerts & Entertainment	1,600	1,600	1,600	1,600	1,600	1,600
Assemblies	2,100	2,100	2,100	2,100	2,100	2,100
Other	525	525	525	525	525	525
<b>Total Attendance</b>						
Conventions	7,500	11,200	12,800	14,400	16,000	16,000
Tradeshows	36,000	37,485	39,690	41,895	44,100	44,100
Consumer Shows	94,300	105,300	105,300	105,300	105,300	105,300
Meetings & Conferences	16,200	16,200	16,200	24,300	24,300	27,000
Banquets	49,200	36,800	36,800	51,750	51,750	57,500
Tenant Sports	61,600	61,600	61,600	61,600	61,600	61,600
WRCA Ranch Rodeo	14,750	14,750	14,750	14,750	14,750	14,750
Other Sports	10,500	19,125	20,250	21,375	22,500	22,500
Concerts & Entertainment	84,800	88,400	93,600	98,800	104,000	104,000
Assemblies	56,700	56,700	56,700	56,700	56,700	56,700
Other	19,950	19,950	19,950	19,950	19,950	19,950
<b>Total</b>	<b>450,000</b>	<b>470,000</b>	<b>480,000</b>	<b>510,000</b>	<b>520,000</b>	<b>530,000</b>



**Demand Projections (cont.)**

A brief description of the event types and explanation of demand projections follows.

**Conventions**— Conventions are events that require a combination of exhibition, banquet, and meeting space. The exhibit hall could be divided and set up in various configurations to accommodate these events. Meeting and ballroom space is also used to accommodate the break out meetings and meals which are typically part of these multi-day events. Larger conventions which require additional meeting and ballroom space could use space within the proposed convention hotel. The source of conventions would be primarily state and regional based SMERF groups with some national groups booking as well. Government and other state associations that would rotate to Amarillo for their annual events are also included in this demand category.

**Tradeshows**— Tradeshows provide a means for wholesalers and retailers to transact business with industry buyers. As such, tradeshows are typically exhibit-oriented events in which products are displayed and demonstrated. Tradeshows require some meeting and meal space; however, these space requirements are much lower than that of conventions. The source of tradeshow demand would primarily be the expansion of existing shows produced by regional corporations and enterprises. HVS projects that trade shows would expand in both exhibit size and attendance. High quality exhibit space and reduced conflicts would also attract additional shows to the venue. For this analysis, the WRCA Tradeshow is also included in this category.

**Consumer Shows**—Consumer shows are ticketed, public events that would attract local and regional attendees such as home and garden shows, car shows, and gun shows. The exhibit hall would be the main exhibit space for vendors. Some meeting space would also be necessary for these events as support and back of house uses. Food and beverage services would be limited to concessions. As with tradeshows, the primary source of incremental consumer show demand would be the expansion of the size and attendance level at existing events.

**Meetings and Conferences**—Meetings and conferences are events that require breakout-meeting space but would not use banquet or exhibit space. Food service would be limited to coffee breaks, breakfasts, or luncheons that would be served in meeting rooms. Civic organizations, local corporations, state associations, religious groups, and government agencies would host meetings and conferences. Although the size of the meetings and conferences could range from 25 to 600 persons, most meetings and conferences would be small events that use a single meeting room. The exhibit hall could also handle larger meetings or several smaller simultaneous meetings. HVS projects that the improved meeting space and reduced conflicts would moderately increase overall demand for meetings and conferences. With the introduction of the convention hotel, some smaller corporate meetings would appropriately move to the hotel meeting space. Therefore, the average attendance for meeting and conferences at the ACCC would increase slightly.

**Banquets**—Banquets are stand-alone social events, luncheons, and other meals typically booked by local corporations, social and civic organizations, and private clients. The proposed ballroom would be the main banquet facility for the complex. The flexibility of the ballroom and pre-function space would allow for a variety of banquet sizes and multiple simultaneous events. Since the ballroom must also accommodate the needs of the venues convention clients, this flexibility is crucial to operate the facility with minimal scheduling conflicts. HVS recognizes that the introduction of the ballroom space at the proposed downtown convention hotel would garner some of the banquet events currently hosted by the ACCC. While the overall number of banquet events should decrease, the larger, high quality ballroom space proposed for the ACCC would attract a greater number of larger events resulting in a greater average attendance.





**Demand  
Projections  
(cont.)**

**Tenant Sports**— The ACCC currently has two tenant teams which use the Coliseum as their home venue, the Amarillo Bulls of the North American Hockey League (“NAHL”) and the Amarillo Venom of the Lonestar Football League (“LSFL”). Proposed renovations to the Coliseum include several improvements; however, the seating bowl and seating capacity would remain unchanged. While minor league sports leagues and tenants are often volatile, HVS assumes that the ACCC would continue to host, on average, two tenant teams. Event demand and attendance projections would remain consistent with recent historical levels.

**WRCA Ranch Rodeo**— The annual WRCA Ranch Rodeo is a multifaceted event which features several days of rodeo competition in the Coliseum as well as a trade show. For the purpose of this analysis, average attendance figures include those attending the WRCA Rodeo only. WRCA Tradeshow attendees are included with the tradeshow category. HVS projects that overall attendance would remain consistent with historical levels, however, the expanded exhibit space would allow the trade show portion of the event to feature larger exhibits and attract new exhibitors that the facility cannot currently accommodate.

**Other Sports**— Other sports currently include Roller Derby, cheerleading, tumbling competitions, martial arts, and boxing events. Given continued emphasis on marketing to sports events at all levels of competition and the addition of the proposed exhibit space as a venue for indoor playing surfaces, HVS assumes that ACCC would be able to book several additional sporting events each year. These events would be a mix of a variety of sports, potentially including volleyball, basketball, mat sports, badminton, table tennis, and fencing. Events could range from youth to adult to collegiate competitions. Many events would be multi-day, and potential exists for some sports events to use both the proposed exhibit hall and the Coliseum. For example, a basketball tournament could have up to eight courts in the exhibit hall for preliminary competitions with the Coliseum serving as the championship venue.

**Concerts and Entertainment**— While the Globe-News Center is the primary venue for performing arts, both the Coliseum and the Auditorium at the ACCC host a variety of concerts, live theater, family shows, and other entertainment events. The proposed improvements to the Auditorium back of house and marshaling areas would make the venue much more attractive and cost effective for event promoters. Coupled with fewer Coliseum scheduling conflicts, HVS projects that concert and entertainment demand would increase moderately.

**Assemblies**— Assemblies include religious ceremonies, lectures, large meetings, graduations, and other civic events which require a large seating capacity. The ACCC is currently the main venue for such events, and HVS assumes that the majority of graduations and other ceremonies which require a large amount of seating would appropriately remain in the Coliseum with smaller events utilizing the Auditorium. HVS projects that the number and nature of assemblies would remain consistent with historical levels.

**Other**— Other events include a variety of local-oriented facility rentals which include such events as exams, charity events, press conferences, radio/television satellite broadcasts, dance recitals, blood drives, and other civic uses are also placed in this other category. HVS projects that the demand for these other events would remain consistent with historical levels.



**Comparable Analysis**

While the primary indicator of demand is the ability to expand a venue’s established base of business, a good test for the reasonableness of these demand projections is an analysis of demand at competitive and comparable facilities and markets. Initial investigations into demand and attendance figures for the venues studied earlier in this report suggest that the ACCC is already outpacing its direct competitors in several event and attendance categories. Amarillo’s closest competitor, the Lubbock Civic Center and City Bank Auditorium and Coliseum, hosts approximately 260 events annually, as compared to over 400 events at the ACCC. The presence of the 15,000-seat United Spirit Arena in Lubbock decreases the Lubbock Civic Center’s ability to host certain sports and entertainment events, however, when considering only exhibit, banquet, and meeting events, the ACCC remains significantly ahead with 250 events compared to around 170 events in Lubbock. A similar situation exists when analyzing the national comparable venues presented in Section 4. On average, these venues host approximately 320 events annually, including around 240 exhibit, banquet, and meeting events.

In order to evaluate the demand projections for the proposed ACCC effectively, HVS expanded its comparable analysis to include a much broader selection of markets with venues of similar size to that proposed for Amarillo. The following figure compares the average of several years of recent historical demand for 12 venues with similar sized function spaces. These venues represent a wide range of markets with a mix of population size, economic breadth, and destination appeal. Because of the unique operating characteristics of exhibit and meeting facilities, no single facility or market can be considered a direct comparable to Amarillo and the ACCC. The averages from a large set of event data do provide evidence for the reasonableness of the projections for Amarillo. Details regarding the venues selected for this analysis are presented in Appendix 1. For comparison purposes, recent event data from the existing ACCC is also presented.

Figure 4-44, Comparable Venue Meeting Event Demand

	Existing Amarillo Civic Center	Proposed Amarillo Civic Center	Average of Comparable Venues
<b>Venue Program Areas (square feet)</b>			
Exhibit Hall(s)	51,256	Up to 100,000	84,400
Ballroom& Meeting Space	51,905	Min 50,000	42,900
<b>Total Function Space (1)</b>	<b>103,161</b>	<b>150,000</b>	<b>127,300</b>
<b>Event Demand</b>			
Conventions & Trade Shows	22	31	41
Consumer Shows	41	41	26
<b>Total Exhibit Events</b>	<b>63</b>	<b>72</b>	<b>67</b>
Banquets	123	115	61
Meetings & Conferences	72	90	146
<b>Total Attendance</b>			
Conventions & Trade Shows	43,500	60,100	69,500
Consumer Shows	94,300	105,300	180,300
<b>Total Exhibit Event Attendance</b>	<b>137,800</b>	<b>165,400</b>	<b>249,800</b>
Banquets	49,200	51,750	27,102
Meetings & Conferences	16,200	24,300	46,528

(1) Not all venues offer meeting and/or banquet space. Average total function space does equal the sum of the individual elements.



**Comparable  
Analysis (cont.)**

Taking historical performance and market factors into consideration, the demand projections for the proposed ACCC are consistent with event demand currently found in similar sized venues throughout the U.S. Specific conclusions include the following.

- Convention and trade show demand levels are reflective of the unique market characteristics as well as the differences in the Amarillo economy. The existing strength of the ACCC to penetrate the market is an important consideration. Facility improvements combined with continued marketing efforts by the ACVC and ACCC staffs should result in an expansion of existing demand to a level slightly lower than similar venues in larger, more diverse markets.
- The ACCC has had great success in hosting a variety of consumer shows. Several existing events include the Make-a-Wish Car Show, Business Connection,, and Gun and Knife Shows. Event demand for these mainly local-based events is well above the average demand for the comparable venues. While HVS projects that the number of events remains consistent with historical levels, larger and improved exhibit facilities should result in a modest increase in the number of exhibitors and attendees at these events.
- Demand for locally generated events, such as meetings and banquets, depend heavily on local market factors which are specific to each venue. These factors including local competition, population demographics, and the local market economy are important when comparing demand amongst different venues. The above average demand for banquets at the ACCC is likely a reflection of a lower level of local competition. While the number of banquets should decrease with the introduction of the proposed convention hotel, the larger ballroom capacity should result in a modest increase in the average size of these events at the ACCC.
- Throughout the last decade, other competing cities in Texas and the southwestern US have made significant investment into their meeting and convention assets. The proposed ACCC would establish Amarillo as a potential destination for a number of meetings and conventions that it is currently unable to host. As a destination, complementary downtown development, including a convention hotel, is essential for Amarillo to be successful in booking these events.

**Room Night  
Projections**

HVS calculated the potential generation of room nights by the proposed ACCC. These room nights represent new, induced demand into the Amarillo market as a direct result of the expansion and redevelopment of the ACCC. In order to calculate incremental room nights, HVS first estimated the room nights generated by existing ACCC operations. The following figures present the assumptions used to generate room night estimates, both before after the proposed expansion.



**Room Night Projections (cont.)** Figure 4-45, Assumptions for Pre-Expansion Room Nights

Type of Event	Length of Stay (nights)	Percent of Attendees Staying Overnight
Conventions	1.0	50%
Tradeshows	1.5	20%
Consumer Shows	1.0	10%
Meetings & Conferences	1.5	10%
Banquets	1.0	3%
Tenant Sports	1.0	3%
WRCA Ranch Rodeo	1.0	50%
Other Sports	1.0	3%
Concerts & Entertainment	1.0	3%
Assemblies	1.0	3%
Other	1.0	3%

Figure 4-46, Assumptions for Post Expansion Room Nights

Type of Event	Length of Stay (nights)	Percent of Attendees Staying Overnight
Conventions	2.0	70%
Tradeshows	1.5	25%
Consumer Shows	1.0	10%
Meetings & Conferences	1.5	15%
Banquets	1.0	3%
Tenant Sports	1.0	3%
WRCA Ranch Rodeo	1.0	50%
Other Sports	1.0	5%
Concerts & Entertainment	1.0	3%
Assemblies	1.0	3%
Other	1.0	3%

The introduction of the expanded ACCC would result in a greater number of citywide conventions and higher impact meetings and conferences in the Amarillo market. Larger conventions would bring a greater number of out-of-towners requiring lodging for extended periods. Meetings, conferences, and amateur sports competitions would similarly bring a greater percentage of attendees from outside the local market.



**Room Night Projections (cont.)** The following figure presents the resulting room night generation through 2018-19, the first year of stabilized demand.

Figure 4-47, Room Night Estimates

Type	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19
Conventions	3,800	15,700	17,900	20,200	22,400	22,400
Tradeshows	10,800	14,100	14,900	15,700	16,500	16,500
Consumer Shows	9,400	10,500	10,500	10,500	10,500	10,500
Meetings & Conferences	2,400	3,600	3,600	5,500	5,500	6,100
Banquets	1,500	1,100	1,100	1,600	1,600	1,700
Tenant Sports	1,800	1,800	1,800	1,800	1,800	1,800
WRCA Ranch Rodeo	7,400	7,400	7,400	7,400	7,400	7,400
Other Sports	300	1,000	1,000	1,100	1,100	1,100
Concerts & Entertainment	2,500	2,700	2,800	3,000	3,100	3,100
Assemblies	1,700	1,700	1,700	1,700	1,700	1,700
Other	600	600	600	600	600	600
<b>Total</b>	<b>42,200</b>	<b>60,200</b>	<b>63,300</b>	<b>69,100</b>	<b>72,200</b>	<b>72,900</b>

In a stabilized year, HVS estimates that the ACCC would generate approximately 72,900 room nights in the local area market, an increase of around 30,000 room nights from current levels. Some of these room nights would result from contract blocks with groups and others would result from individual hotel reservations.

Demand at most convention and civic centers is seasonal, with greater demand levels in the fall and winter months and fewer events during the summer. HVS analyzed the average monthly attendance levels at the ACCC for the past two fiscal years and applied these percentages to the room night projections to develop a monthly estimate of room nights.

Figure 4-48, Room Night Estimates by Month

Month	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19
January	3,682	5,252	5,522	6,028	6,299	6,360
February	3,721	5,308	5,582	6,093	6,366	6,428
March	4,373	6,239	6,560	7,161	7,482	7,555
April	3,472	4,953	5,208	5,685	5,940	5,997
May	5,810	8,288	8,715	9,513	9,940	10,036
June	1,824	2,602	2,736	2,986	3,120	3,151
July	1,610	2,296	2,414	2,636	2,754	2,780
August	1,450	2,068	2,175	2,374	2,481	2,505
September	1,740	2,483	2,610	2,850	2,977	3,006
October	3,785	5,400	5,678	6,198	6,476	6,539
November	4,676	6,671	7,015	7,657	8,001	8,078
December	6,057	8,641	9,086	9,919	10,363	10,464
<b>Total</b>	<b>42,200</b>	<b>60,200</b>	<b>63,300</b>	<b>69,100</b>	<b>72,200</b>	<b>72,900</b>

As is typical in the meetings industry, demand at the ACCC is seasonal, with the highest attendance levels peaking during December and May and reaching their lows during the summer months. While individual years would vary depending on a variety of factors, future attendance and room night distribution should follow existing patterns of demand.



## Operations Review

**Introduction** In this section, HVS analyzes the current ownership and management structure of the Amarillo Civic Center Complex (“ACCC”) as well as several key operating procedures and policies implemented by the City. This section also provides a discussion of current marketing and funding strategies, which may affect the facility’s performance level.

**Ownership** The City of Amarillo currently owns the ACCC. The City paid for the construction of the original convention center in 1968, the major renovations in 1978, 2003, and 2006 as well as certain furniture, fixtures, and equipment and capital improvements. Most civic and event centers in the United States are publicly owned. Municipal ownership is the most common ownership arrangement for these facilities. Many communities have established quasi-governmental or non-profit authorities to own their convention facilities on behalf of the local government. For example, the Metropolitan Entertainment & Convention Authority (“MECA”) owns the CenturyLink arena and convention center in Omaha, Nebraska. A small number of public facilities have county or state ownership.

Very few convention and civic centers are privately owned and those that are privately owned generally consist of relatively inexpensive buildings such as the Rock Financial Showplace in Novi, Michigan, which focuses almost exclusively on booking consumer shows. Other privately owned convention facilities are part of large integrated hotel developments, such as the Sands Expo in Las Vegas. Similarly, Gaylord resort properties offer several hundred thousand square feet of dedicated exhibit space and several hundred hotel guest rooms all within a single property. The primary benefit of the current ownership arrangement is that the City would maintain control:

- Future site development,
- Continued presence of a civic center complex,
- Maintenance and capital improvements to the facility, and
- Operating strategy for the civic center complex.

The primary risk associated with the current ownership arrangement concerns ongoing investments in the civic center complex. To remain competitive, the facility will likely require ongoing capital improvements. Moreover, the City bears the risks associated with financial operating losses at the facility.

**Management** The City of Amarillo currently manages the ACCC. The current leadership consists of a General Manager, Assistant General Manager, and Operations Manager. These positions correspond with the typical management arrangement for a convention center of this size. As is the case for many public assembly venues, the ACCC outsources food and beverage services to a third party concessions company. Unlike most convention centers, catering for meetings, banquets, and other events is open to all providers as selected by the event planner.

The primary benefit of the current management arrangement is that, with the exception of food service operations, the City maintains control of decisions related to the following points:

- Staffing levels and qualifications,
- Training and customer service requirements,
- Marketing priorities,



**Management (cont.)**

- Booking policies,
- Repair and maintenance schedules, and
- Capital improvements.

The primary risks associated with the current management arrangement include potential difficulties related to the following points:

Replacing expert management if key personnel leave,

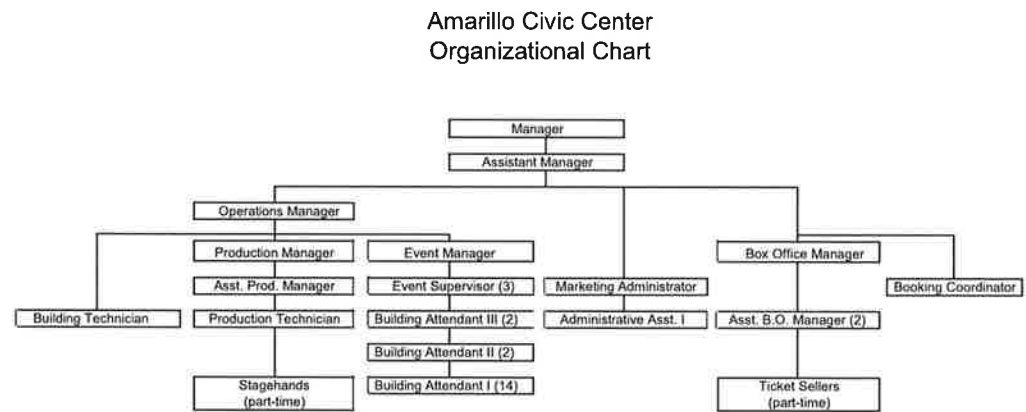
- Coordinating operations between the convention center and hotels,
- Financial operating risks associated with operating losses, and
- Inability to incentivize the sales team, due to public employee compensations rules

Outsourcing of the facility's concessions services likely results in the loss of potential revenue for the facility. However, it also represents a significant reduction in the need for food service staff and operating expenses related to food and beverage services. The ACCC's current open catering policy yields zero catering revenue to the venue. Contracting with a single, exclusive catering company or a handful of pre-approved vendors would allow the ACCC to collect a commission on all catering sales made in the facility, thus increasing food and beverage revenues significantly.

**Staffing**

The following organizational chart indicates the current staffing arrangement for the ACCC.

Figure 4-49, ACCC Staff Organization Chart



One of the key advantages of this type of staffing structure is its cost effectiveness. A relatively limited number of senior management positions help to reduce overall personnel and labor expenses. Moreover, the key food and beverage management positions are outsourced. The ACCC operates in manner that is common to other venues of its size in that it contracts out for many facility repair and maintenance functions rather than handle them with in-house personnel. Fewer full time positions are, therefore, offset by a larger budget for contracted services.



**Staffing (cont.)**

One of the key disadvantages of the staffing structure at the ACCC is the lack of emphasis on in-house sales and marketing. As will be detailed later in this section, the Amarillo Convention and Visitor Council (“ACVC”) is the primary sales and marketing organization for the ACCC. The ACVC has demonstrated success in attracting several new shows during the recent years, including the Order of the Eastern Star Grand Chapter Convention and Region 10 Catholic Youth Conference. These events are examples of high-impact events that require substantial room blocks at local hotels over multi-day periods. In addition to efforts led by a convention bureau, many mid-sized convention centers also have internal staff dedicated to working with the convention bureau. This staff can also focus on one or more of the following sales-related priorities: (i) selling event dates within a short-term booking window, (ii) targeting specialized demand segments that the convention bureau may not focus on, and (iii) selling especially difficult dates that are typically slow periods based on historical demand trends. A larger sales and marketing department on the ACCC staff would likely include additional specialized sales managers and administrators – with experience in the event planning industry – to target and work with event planners to bring their events to the venue.

**Reporting Policies**

Communication is critical between the city officials, day-to-day managers of the facility, and the public. It is common practice for facility managers to provide annual reports to officials in charge of guiding public policy decisions related to civic centers. Current management creates an annual budget for City review; however, this process does not report specific event data and resulting economic impacts on the area.

HVS recommends that an annual report prepared by facility management should include, at a minimum, a description of events and attendance at the ACCC well as a description of operating revenues and expenses associated with managing the venue. At least two years of historical annual data should be included in the annual report for comparison purposes. Based on our knowledge of industry standards, HVS suggests that the most common types of information typically available to a municipal owner of a civic or convention center include the following items:

- Aggregated data on historical events and attendance, organized by event type,
- Historical operating revenues and expenses associated with the venue, organized by year,
- Organizational chart depicting staffing structure for the venue,
- Strategic plan, expressing marketing strategies, future booking and operational goals, and an approach to achieve those goals,
- Annual estimates of room nights and the economic and fiscal impacts generated by the venue’s events, and
- An overview of positive impacts on the Amarillo community including data on charitable and community service events.

Facility managers typically collect most of this data, with the exception of room night and economic impact estimates which may require input from the ACVC records.

HVS recommends presenting summaries of all the preceding data points in an annual report document that can be distributed to city officials. Implementation of this annual comprehensive reporting process may enable the City to communicate better the overall success and importance of the ACCC to the public. In most communities, this is a collaborative process that helps to ensure continued public support of the meetings and convention industry and public investment in convention related assets and marketing organizations.





**Public Versus  
Private  
Management**

Most small to mid-size convention and civic center are owned and operated by the City or County government. With the exception of the American Bank Center in Corpus Christi, all of the competitive venues in Texas identified in previous sections of this report are public facilities operated as a City or County department. The most common alternative to this structure is to engage a private facility management company to operate the facility. Private management companies currently operate five of the national comparable facilities that HVS evaluated for this report. VenuWorks manages the River Center. Global Spectrum manages the Sioux Falls Convention Center. SMG manages the Mobile Convention Center, the Shreveport Convention Center, and the Jackson Convention complex.

There is no direct correlation between a facility's financial performance and public versus private management. Several privately managed venues similar in size to the ACCC have substantial annual operating deficits, much larger than that of the ACCC. Regardless of operator, none of the facilities studied for this report generated a positive net income in recent years. Operating deficits range from near break-even to over \$6 million and average \$1.5 million, slightly higher than the ACCC's current annual operating deficit. Based on our industry knowledge, the experience and talent level of specific personnel within a convention center's management team is more important than whether the management is a public agency or a private company.

The most appropriate reason to consider private management of a convention center is that the host city does not have the necessary experience, talent, or expertise available to manage the facility successfully. The current management team in place at the ACCC possesses substantial experience and skills in the field of facility management. A private management firm would not necessarily provide a team with as much, or more, industry experience than the current management team. A second time to consider engaging a private management firm is when a facility's costs have become excessive due to certain legal restrictions affecting public employees, especially compensation and benefits. After reviewing financial data from comparable facilities in other markets, HVS concluded that costs are not excessive at the ACCC.

There are also potential drawbacks and risks associated with using a private management firm to operate a convention center. The clearest financial drawback is that such an arrangement will incur a management fee in addition to all the operating costs associated with the facility. Management fees at public facilities comparable to the ACCC generally range between \$100,000 and \$300,000 annually. In cases when an existing public management staff is either nonprofessional or when expenses are irreversibly excessive, a change from public management to private management can improve the financial performance of a convention center substantially. In such cases, the management fees may be well worth the investment.

One potential risk associated with using a private management firm is that the City may not be able to monitor staff training and maintenance decisions as closely as it does now. In our user group interviews, several event planners specifically noted how well they thought the ACCC has been maintained and that the operations staff is both knowledgeable and helpful. Any negative comments regarding customer service were directly related to the food service provider. If the City decides to engage a private management firm, HVS strongly recommends the careful implementation of an evaluation process that focuses on both customer service satisfaction levels and facility maintenance procedures.



**Public Versus  
Private  
Management  
(cont.)**

Another important risk associated with using a private management firm is that the host municipality may not have much control over the selection of top positions at the convention center. The level of experience and talent a private management firm can bring to a public facility can vary substantially depending on whom the firm recruits for key positions, such as General Manager and Sales Director. Although the very best managers working for private management firms are among the world's best, each City must consider the likelihood of attracting this top tier of talent to its facility. HVS suggests that this talent risk would be significant for the ACCC, partially due to the market and facility. If the City decides to engage a private management firm, HVS strongly suggests that the City base the selection of such a firm on interviews with specific candidates for General Manager identified by the firms prior to engagement.

Under the current circumstances, HVS recommends keeping the current management structure and team in place at the ACCC. Rather than making major changes to the current staff or management structure, HVS suggests the City should consider minor adjustments to the current staff arrangement to place additional emphasis on event sales. Although the ACVC takes primary responsibility for selling and marketing the Civic Center beyond a 24-month booking window, there are still very important sales efforts that could either supplement the ACVC's role or focus on more aggressive event sales within the 24-month booking window.

**Sales & Marketing** The ACVC is the primary sales and marketing organization for the ACCC. The ACVC's most basic sales efforts involve educating event planners about Amarillo and the ACCC. These efforts include advertising campaigns, participation in tradeshow and conventions that target event planners, sales presentations and coordinating familiarization tours for event planners. The ACVC currently leads efforts in all of these areas.

If event planners are willing to consider Amarillo as a site for their events, then the ACVC also plays the role of event facilitator in two critical areas. Firstly, the ACVC matches event planners' facility requirements with the most suitable event space in the market (e.g. the ACCC). Secondly, the ACVC matches event planners' hotel requirements with the most suitable lodging properties in the community.

In the following discussion, HVS outlines in detail the functions, funding, leadership structure, staff organization, and convention center booking policies of the ACVC.

The primary mission of the ACVC is to market the City of Amarillo as a destination. As a part of this mission, the ACVC undertakes several related sales and marketing functions. These functions include general tourism marketing, along with targeted marketing to the convention and meetings industry and to sports, equine, and agricultural events. The ACVC's Film Commission also provides professional assistance to production companies that are interested in, or have chosen the Amarillo area for a film project.



**Sales & Marketing  
(cont.)**

One of the most important reasons for having a convention council is because representatives of the hotel industry wish to have a centralized organization that can serve as an entry point or information hub for visitors from all segments, including the group segment, business transient travelers, and leisure travelers. Therefore, it is common for hotels located in the same community to organize and agree to tax their revenues with the goal of funding such an organization. Using hotel tax revenue to pay for convention council funding is common. The principle behind this arrangement is typically an attempt to coordinate those who benefit from hotel taxes with those properties that pay them. In the case of convention and visitors bureau like the ACVC, the primary beneficiaries of the organization's efforts are generally hotels, and to a lesser extent restaurants, retail stores, visitor attractions, service providers, and car rental companies. For this reason, hotel taxes (and sometimes restaurant taxes and car rental taxes) are among the most common sources of funding for these organizations in the United States.

In Amarillo, local hotel occupancy tax ("HOT") revenues are the primary source of funding for the ACVC. The total hotel occupancy tax in Amarillo is currently 15 percent. Of this, six percent goes to the State of Texas. Seven percent goes to the City of Amarillo which is split between the ACCC and the ACVC. The remaining two percent goes to the Venue District. The ACVC annual budget, which is 100 percent funded by HOT revenues, is therefore dependent upon the actual HOT collections. Over the last five fiscal years, the ACVC's budget has ranged from \$1.6 million to around \$2 million. The 2010-11 ACVC budget was \$1.87 million. In 2011-12, however, increased HOT collections will yield an ACVC allotment of \$2.32 million, a 24 percent increase.

The ACVC's staff consists of nine full-time professional positions. A single manager serves as the Vice President of the ACVC. Under the Vice President's supervision, there are roughly four staff members dedicated to convention sales and service, two staff dedicated to tourism, and two positions dedicated to general administration and communication. This organizational structure is typical of most independent convention and visitor organizations around the country in that convention marketing is separate from tourism and destination marketing. For the purposes of this report, we are most interested in the convention-marketing role of the ACVC.

The ACVC's convention sales team consists of three full-time sales managers. The sales team's primary objective is to identify groups that will use the ACCC or other meeting facilities in Amarillo. Each sales manager focuses on a different demand segment. One sales manager focuses on SMERF, corporate, and agricultural meetings. Another sales manager handles agricultural and equine events as well as sports. The third, recently established, sales manager operates from a satellite office in Austin and focuses on the Texas state association demand segment.

The ACVC also has a convention services division. The Convention Services Director provides support services for large groups coming to Amarillo. These support services may include centralized housing services, coordinated transportation services, and destination packaging services.

HVS does not recommend any major changes to the ACVC staff at this time. The current staffing level and staff functions are consistent with other regional and state competitors. However, the potential future expansion or redevelopment of the ACCC should be coordinated with the creation of additional sales manager positions and an expansion of the convention services staff. Moreover, HVS recommends the shared support staff positions also expand to better serve all clients and maintain the two websites that the ACVC currently hosts.



**Sales & Marketing (cont.)** While the ACVC and the ACCC have no formal agreement, these organizations work together in booking events in a way that maximizes the benefit for the entire community. The ACVC has booking priority at the civic center for dates at least 24 months in the future and beyond. Any dates within the 24-month booking window are open to any potential user groups on a first-come, first-served basis. While many communities have a shorter, 18-month window, this is the most standard arrangement between convention centers and convention bureaus around the country. The primary intent of such a booking policy is to maximize the likelihood of attracting high-impact conventions, tradeshow, and conferences from out of town by giving them booking priority. Opening up the schedule inside the 24-month booking window, however, allows a facility to fill in empty dates with lower-impact events in an effort to maximize revenue for the facility and serve as a valuable resource to the community as a venue for charitable and other community events.

This booking policy has numerous exceptions. For instance, several large annual events, such as the Farm and Ranch Show, the WRCA Rodeo, and the Make-a-Wish Car Show are booked 5-6 years in advance. Certain resident companies have holds up to 3 years out. This practice has the potential to create confusion among ACVC sales staff. However, the historical consistency of events in Amarillo and presence of experienced staff members and good communication alleviates this concern.

Traditionally conventions and tradeshow are high-impact events while consumer shows are low-impact events. Because of Amarillo's location and role as a regional economic hub in the Texas Panhandle, certain consumer shows may have the potential to generate substantial economic impacts for the local economy. If they can demonstrate that their economic impacts exceed a certain threshold, then it makes sense for them to have some formal preferential treatment with respect to the booking policy. Therefore, HVS recommends implementing a system to objectively measure the new room night demand generated by consumer shows that includes both show exhibitors and show attendees. This system would not only justify booking certain consumer shows outside the 24-month window, it would also create some valuable and informative data for the previously mentioned annual reports





## Statement of Assumptions and Limiting Conditions

1. This report is to be used in whole and not in part.
2. No responsibility is assumed for matters of a legal nature.
3. We have not considered the presence of potentially hazardous materials on the proposed site, such as asbestos, urea formaldehyde foam insulation, PCBs, any form of toxic waste, polychlorinated biphenyls, pesticides, or lead-based paints.
4. We have made no survey of the property, and we assume no responsibility in connection with such matters. Sketches, photographs, maps, and other exhibits are included to assist the reader in visualizing the property. It is assumed that the use of the land and improvements is within the boundaries of the property described, and that there is no encroachment or trespass unless noted.
5. All information, estimates, and opinions obtained from parties not employed by HVS are assumed to be true and correct. We can assume no liability resulting from misinformation.
6. Unless noted, we assume that there are no encroachments, zoning violations, or building violations encumbering the subject property.
7. All mortgages, liens, encumbrances, leases, and servitudes have been disregarded unless specified otherwise.
8. We are not required to give testimony or attendance in court by reason of this analysis without previous arrangements, and only when our standard per diem fees and travel costs are paid prior to the appearance.
9. If the reader is making a fiduciary or individual investment decision and has any questions concerning the material presented in this report, it is recommended that the reader contact us.
10. We take no responsibility for any events or circumstances that take place subsequent to the date of our field inspection.
11. The quality of a convention/event center facility's on-site management and organization that market the facility have a direct effect on a center's economic viability. The forecasts presented in this analysis assume responsible ownership, competent management and effective marketing and sales. Any departure from this assumption may have a significant impact on the projected operating results.
12. It is agreed that our liability to the client is limited to the amount of the fee paid as liquidated damages. Our responsibility is limited to the client, and use of this report by third parties shall be solely at the risk of the client and/or third parties. The use of this report is also subject to the terms and conditions set forth in our engagement letter with the client.
13. This report was prepared by HVS Convention, Sports & Entertainment Facilities Consulting, a division of HVS Global Hospitality Services. All opinions, recommendations, and conclusions expressed during the course of this assignment are rendered by the staff of these two organizations, as employees, rather than as individuals.
14. This report is set forth as a market study of the proposed subject project; this is not an appraisal report.

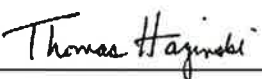




## Certification

The undersigned hereby certify that, to the best of our knowledge and belief:

1. that the statements of fact presented in this report are true and correct to the best of our knowledge and belief;
2. that the reported analyses, opinions, and conclusions are limited only by the reported assumptions and limiting conditions, and are our personal, impartial, and unbiased professional analyses, opinions, and conclusions;
3. that we have no (or the specified) present or prospective interest in the property that is the subject of this report and no (or the specified) personal interest with respect to the parties involved;
4. that we have no bias with respect to the property that is the subject of this report or to the parties involved with this assignment;
5. that our engagement in this assignment was not contingent upon developing or reporting predetermined results;
6. that this report sets forth all of the limiting conditions (imposed by the terms of this assignment) affecting the analyses, opinions, and conclusions presented herein;
7. that the fee paid for the preparation of this report is not contingent upon our conclusions, or the occurrence of a subsequent event directly related to the intended use of this report;
8. that Catherine Sarrett personally inspected the property described in this report; Thomas Hazinski participated in the analysis and reviewed the findings, but did not personally inspect the property;
9. that no one other than those listed above and the undersigned prepared the analyses, conclusions, and opinions concerning the real estate that are set forth in this market study; and
10. that our analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the Uniform Standards of Professional Appraisal Practice.

  
\_\_\_\_\_

Thomas Hazinski  
Managing Director

  
\_\_\_\_\_

Catherine Sarrett  
Project Manager









## Appendix A - Comparable Venues

### Competitive Venues

Competitive Venues include Spectator Arenas, Civic Centers and Convention facilities in medium to small cities in Texas which would compete with and are comparable to the Amarillo Civic Center. The following descriptions provide information on facility programming, ownership, management, and other amenities of the Competitive Venues in the nearby competitive cities and the comparable national cities.

### ABILENE, TEXAS

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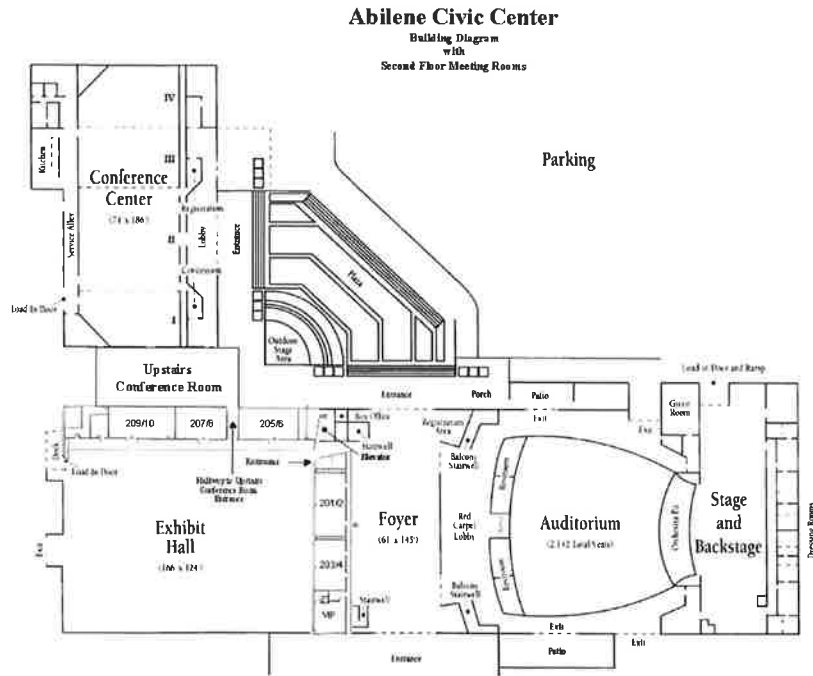
Abilene, Texas is home to the Abilene Civic Center and the Taylor County Expo Center. The Abilene Civic Center (“ACC”) features 40,824 square feet of total function space, including one 20,000 square foot exhibit hall and 11 meeting rooms totaling 20,824 square feet. The ACC is owned and operated by the City of Abilene.



The Taylor County Expo Center features a Coliseum with 30,000 square feet of arena/exhibit space. An additional outdoor pavilion includes a 1,200 square foot stage and seating for 1000. The Expo Center provides 5,000 free parking spaces.



## ABILENE CIVIC CENTER FLOOR PLANS





## **CORPUS CHRISTI, TEXAS**

The American Bank Center (“ABC”), formerly the Bayfront Plaza, is located in Corpus Christi, Texas and was renovated in 2004. The facility has 136,514 square feet of function space which include 76,500 square feet of exhibit space over two halls, 43,896 square



feet of ballroom space over 2 ballrooms that are both divisible into two sections, and 14 meeting rooms spanning 16,118 square feet. In addition, the Center has a 2,500-seat auditorium and a 10,000-seat arena. The ABC is owned by the City and operated by SMG. The Center is served by the Corpus Christi International Airport and has 2,200 on-site parking spots.

**AMERICAN BANK CENTER FLOOR PLANS**



## BEAUMONT, TEXAS

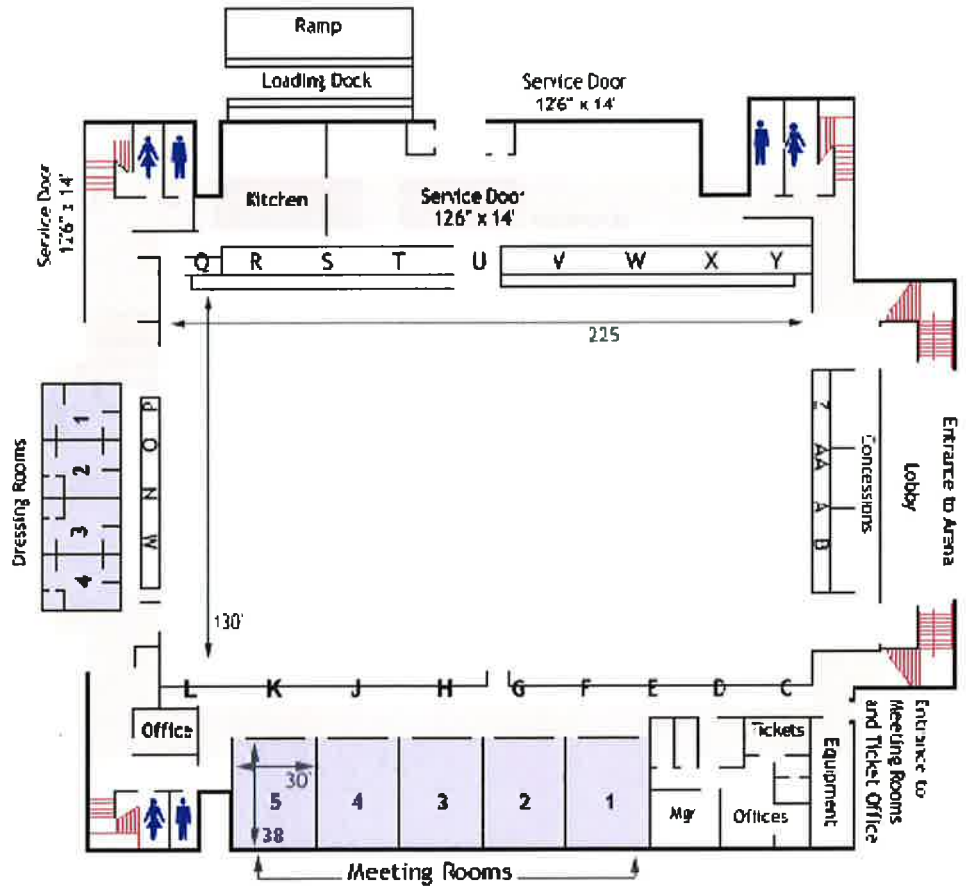
Beaumont, Texas is home to the Beaumont Civic Center and the Ford Arena.

The Beaumont Civic Center (“BCC”) offers 44,300 square feet of total function space. Of that total, 29,300 is exhibition space. The remaining 15,000 square feet are divided among six meeting spaces. The venue also offers 850 surface parking spots. The BCC is owned and operated by the City of Beaumont.



The Ford Arena has 9,737 seats, and is currently home to ice hockey, basketball, and indoor football teams.

### BEAUMONT CIVIC CENTER FLOOR PLANS





## ODESSA, TEXAS

Located in Odessa, Texas, the Ector County Coliseum & Exhibition Center (“ECCEC”) opened in 1954. It offers 70,046 square feet of exhibition space in three divisions. The ECCEC is owned and managed by Ector County.



### ECTOR COUNTY COLISEUM & EXHIBITION CENTER FLOOR PLANS





## LAREDO, TEXAS

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Located in Laredo, Texas are the Laredo Civic Center and the Laredo Energy Arena.

The Laredo Civic Center (“LCC”) offers 27,542 square feet of total function space, including one exhibition hall of 24,470 square feet and 3,072 square feet of meeting space in two divisions. The LCC is managed and operated by the City of Laredo.



The Laredo Energy Arena offers seating for between 8,076 and 9,622 guests, depending on event type. It also provides six spacious meeting rooms and 2,000 parking spaces.

## LAREDO CIVIC CENTER FLOOR PLANS

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[none available]





## LUBBOCK, TEXAS

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Lubbock, Texas is home to the Lubbock Civic Center and the United Spirit Arena.

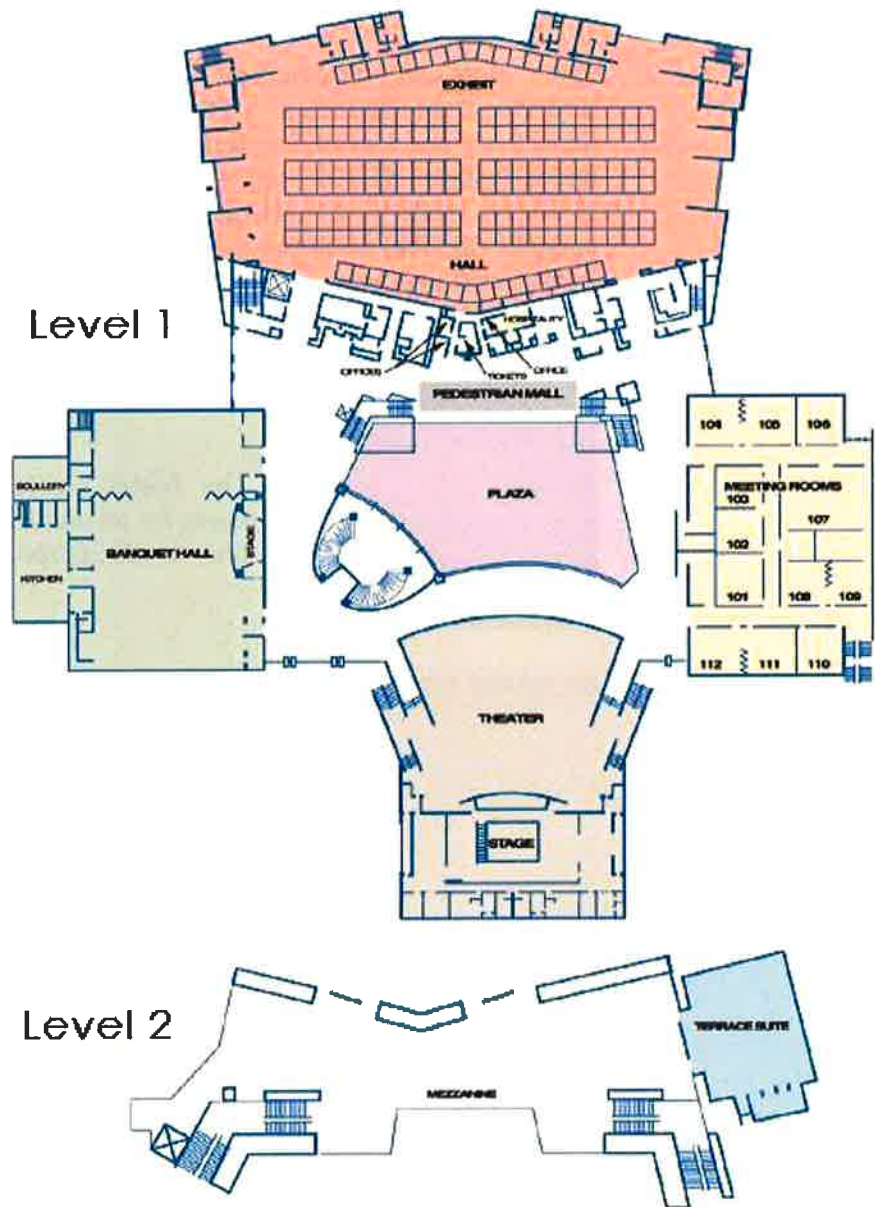
The Lubbock Civic Center (“LCC”) has a total of 65,915 square feet of function space. That total includes one exhibit hall of 40,000 square feet, 14,105 square feet of ballroom space in three divisions, and 11,810 square feet of meeting space in 13 divisions. The LCC is owned and operated by the City of Lubbock. Its nearest airport is Preston Smith International.



The United Spirit Arena offers 15,020 fixed seats, as well as two meeting rooms of 1,600 square feet each.



## LUBBOCK CIVIC CENTER FLOOR PLANS





**SAN ANGELO, TEXAS**

The McNease Convention Center and the Foster Coliseum are located in San Angelo, Texas.

The McNease Convention Center, which underwent an expansion in 2008, boasts a total 20,823 square feet of function space. Ballroom space totals 12,201 square feet in three divisions, while nine meeting rooms total 8,622 square feet. The McNease Convention Center is owned and operated by the City of San Angelo, and is served by the San Angelo Regional Airport.



The Foster Coliseum offers 4,898 fixed seats, with room for an additional 1,650 portable seats. The arena floor totals 20,000 square feet.

**MCNEASE CONVENTION CENTER FLOOR PLANS**



[none available]



## MIDLAND, TEXAS

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Midland, Texas is home to the Midland Convention Center and the Chaparral Center.

The Midland Convention Center ("MIDCC") is situated in Midland, Texas. The facility offers 12,512 square feet of exhibition space, a 17' X 60' stage, 200 parking spaces, and is adjacent to the 249- room Midland Hilton. Additionally, the facility has four meeting rooms that offer approximately 4,900 square feet of additional breakout-meeting space. These meeting rooms range in size between roughly 640 square feet and 2,100 square feet.

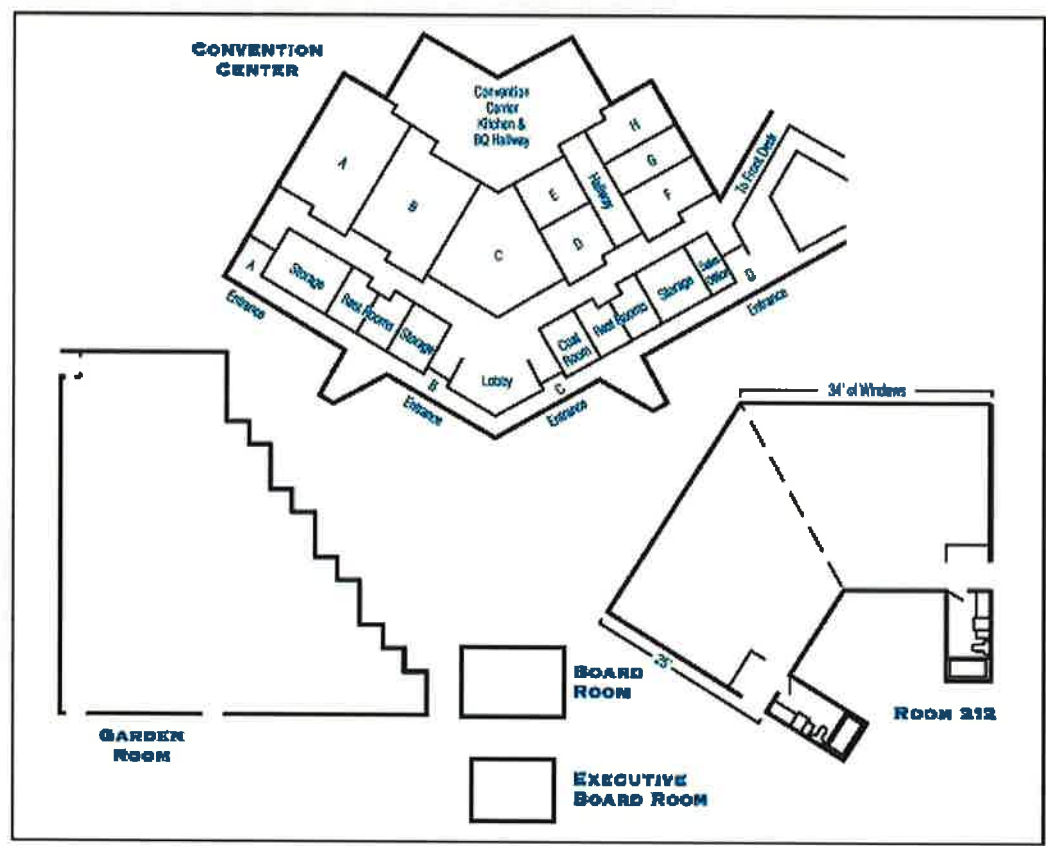


Located on the campus of Midland College, The Chaparral Center offers variable seating for up to 5,500 guests. Seating can be reconfigured to accommodate functions of various sizes.





### MIDLAND CONVENTION CENTER FLOOR PLANS



## WACO, TEXAS

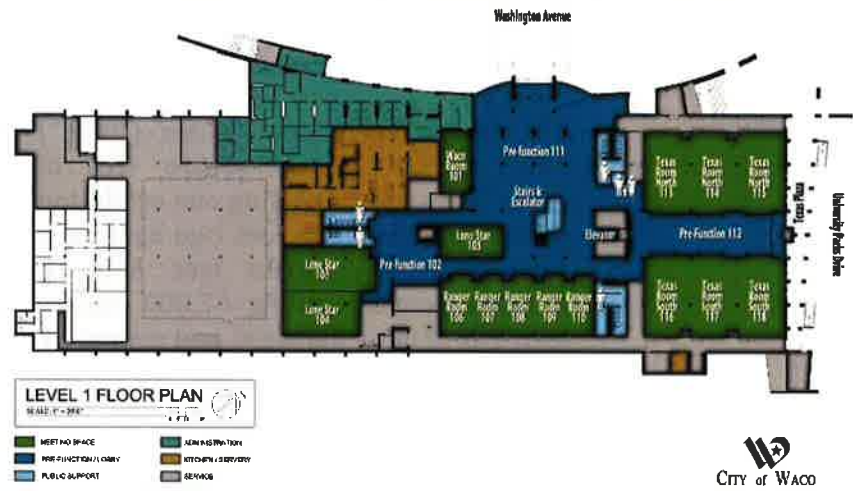
Located in Waco, Texas are the Waco Convention Center and the Ferrell Center.

The Waco Convention Center (“WCC”) offers 119,000 total square feet of exhibition space, including one exhibition hall of 32,000 square feet, two ballrooms totaling 30,000 square feet, and 18 meeting rooms totaling 57,000 square feet. The WCC is managed and owned by the City of Waco. It is served by the nearby Waco Regional Airport.



The Ferrell Center provides seating for 10,284 guests when hosting sporting events and seating for 12,000 guests at other events such as conventions, concerts, and convocations.

## WACO CONVENTION CENTER FLOOR PLANS

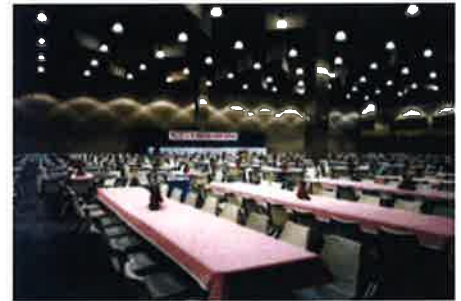




## WICHITA FALLS, TEXAS

Wichita Falls, Texas, is home to the Wichita Falls Multi-purpose Event Center and the Kay Yeager Coliseum.

The Wichita Falls Multi-purpose Event Center (“WFMPEC”), which opened in 1996 and was expanded in 2003, offers 57,523 square feet of event space. A total 47,523 square feet of exhibit space is divisible into six sections, and twelve meeting rooms comprise 10,000 square feet. The WFMPEC is owned and operated by Wichita County.

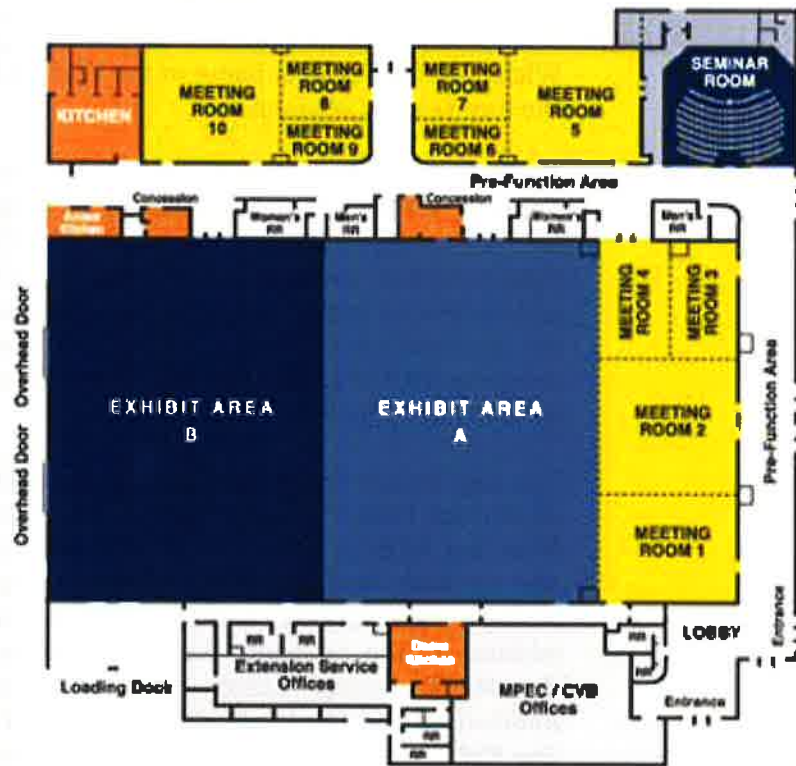


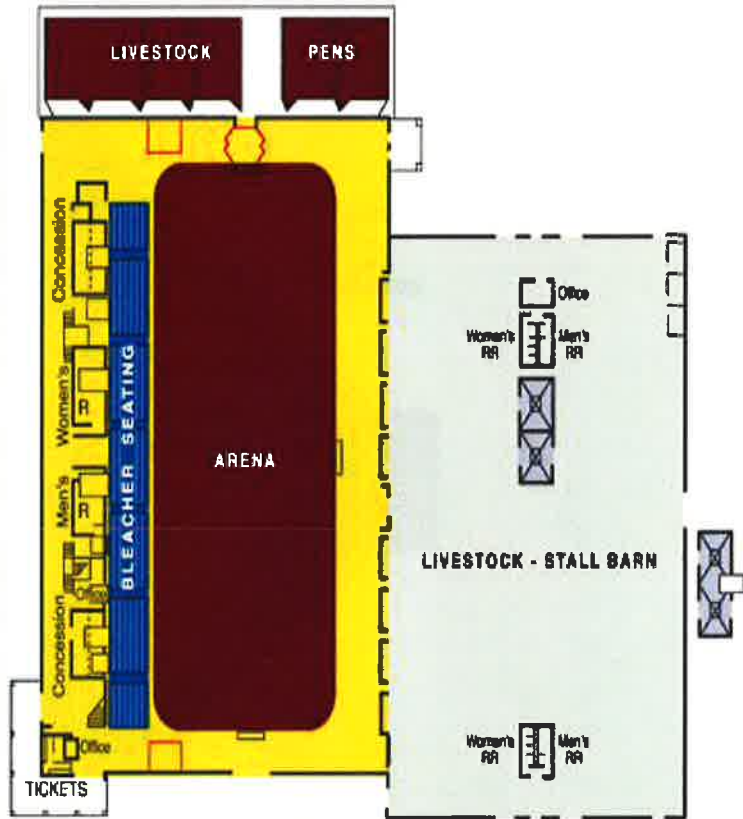
The Kay Yeager Coliseum (“KYC”) is located in Wichita Falls, TX near I-44 and 3.5 miles from the Wichita Falls airport. The KYC is one of four buildings that compose the Multipurpose Events Center (MPEC). In addition to the coliseum, the MPEC houses the MPEC Events Center, the Memorial Auditorium and the J.S. Bridwell AG Center. The KYC features a 30,000 square foot arena floor, offering permanent seating totaling 6,500 in addition to temporary seating for 3,500. The KYC is currently home to the Wichita Falls Wildcats, a member of the NAHL.



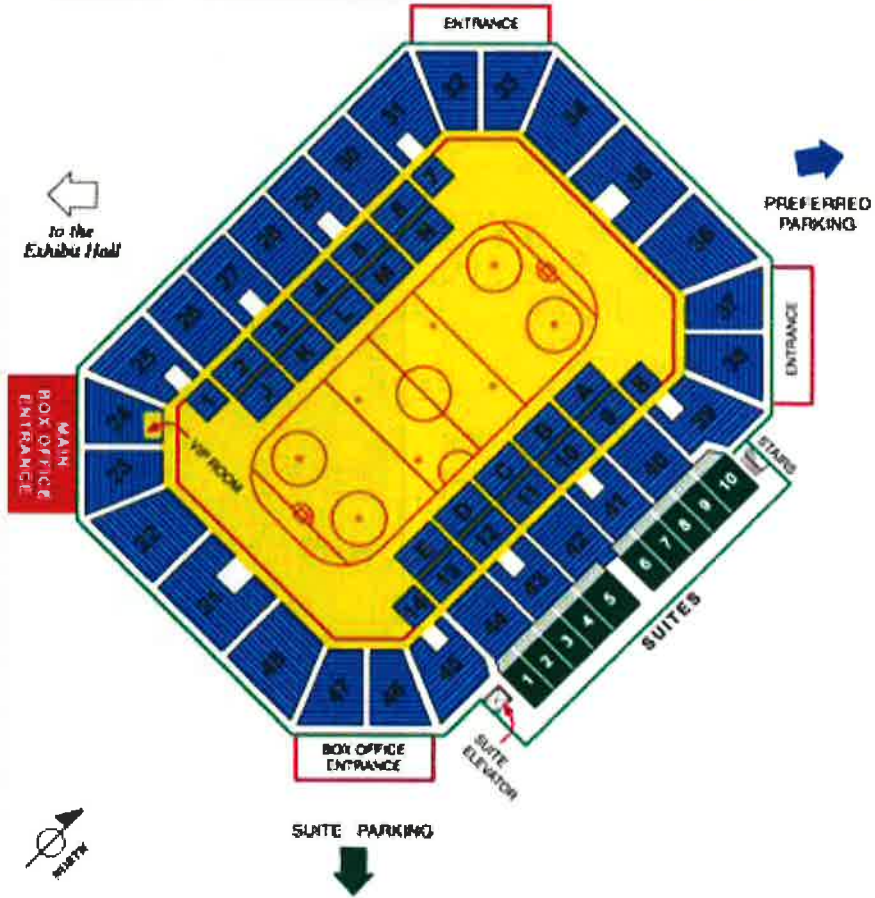


## WICHITA FALLS MULTI-PURPOSE EVENT CENTER FLOOR PLANS





### KAY YEAGER COLISEUM FLOOR PLANS





### **Competitive Regional Venues**

Comparable National Venues include Spectator Arenas, Civic Centers and Convention facilities in medium to small cities which are comparable to the Amarillo Civic Center. The following descriptions provide information on ownership, management, and operations of the Comparable National Venues.

### **BILOXI, MISSISSIPPI**

The Mississippi Coast Coliseum and Convention Center ("MCCCC") opened in 1962, and sits 10 miles from the Gulfport/Biloxi International Airport. With 253,556 square feet of function space, it offers both convention and arena venues. Exhibit space totals 133,086 square feet in four divisions. Ballroom space consists of eight divisions totaling 36,354 square feet, in addition to 29 meeting rooms that account for 84,116 square feet. The Coliseum can hold up to 15,000 guests for a full arena event, but it can also arrange seating for 3,000-4,000 guests in its theatre configuration.



## MISSISSIPPI COAST COLISEUM & CONVENTION CENTER FLOOR PLANS





## CASPER, WYOMING

The Casper Events Center (“CEC”) opened in 1982 in Casper, Wyoming and has 23,372 square feet of function space. The facility is owned and operated by the City and offers 3,600 adjacent parking spaces. The Center has a 16,540 square foot arena that can be used for exhibitions, a 3,820 square foot ballroom, and 4 meeting rooms totaling 3,012 square feet.



### CASPER EVENTS CENTER FLOOR PLANS

**Casper Events Center**  
Casper, Wyoming



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## QUAD CITIES, IOWA/ILLINOIS

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The Quad Cities are home to the River Center and the i wireless Center.

The River Center Convention Center ("RCCC") is located in downtown Davenport, Iowa, near the Mississippi River. The RCCC originally opened in 1983 and underwent an expansion in 2003 adding the Great Hall South and four meeting rooms, in addition to 2 square parks. The facility is roughly 17 minutes from the Quad City International Airport and is roughly 50 miles from the nearest Amtrak station in Galesburg. The 221-room Radisson Quad City Plaza is connected to the RCCC. The River Center Convention Center features two exhibit halls totaling 46,420 square feet of column-free exhibition space and 11 meeting rooms offering 8,155 square feet of meeting space. Additionally, the facility features the Adler Theatre and two large square parks for outdoor events.

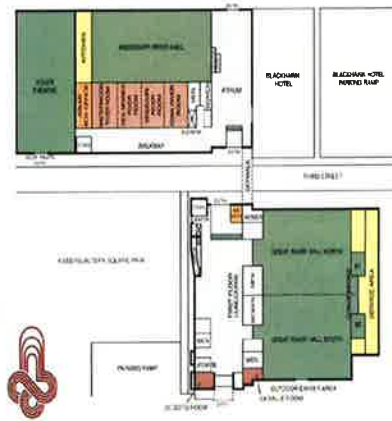


The i wireless Center is located in Moline, Illinois. It has 12,000 seats in an arena setup, and 3,000 in its theater configuration. The arena consists of 31,000 square feet of function space.

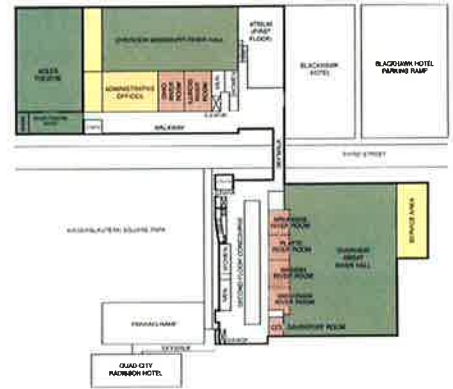


## RIVER CENTER FLOOR PLANS

**First Floor**



**Second Floor**







## HUNTSVILLE, ALABAMA

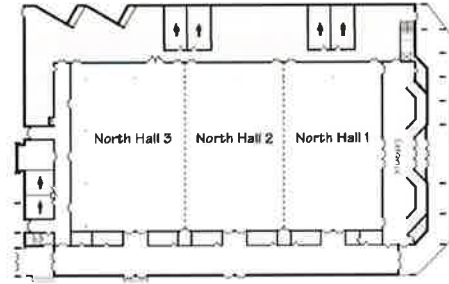
The Von Braun Center (“VBC”) opened in 1975 and is governed by a seven-member Board of Control appointed by the Mayor of Huntsville and the City Council. Located in northeast Alabama, the center is only a short drive from Huntsville International Airport. The center is set-up in three sections: North, South, and East. The South Hall has 81,900 square feet of



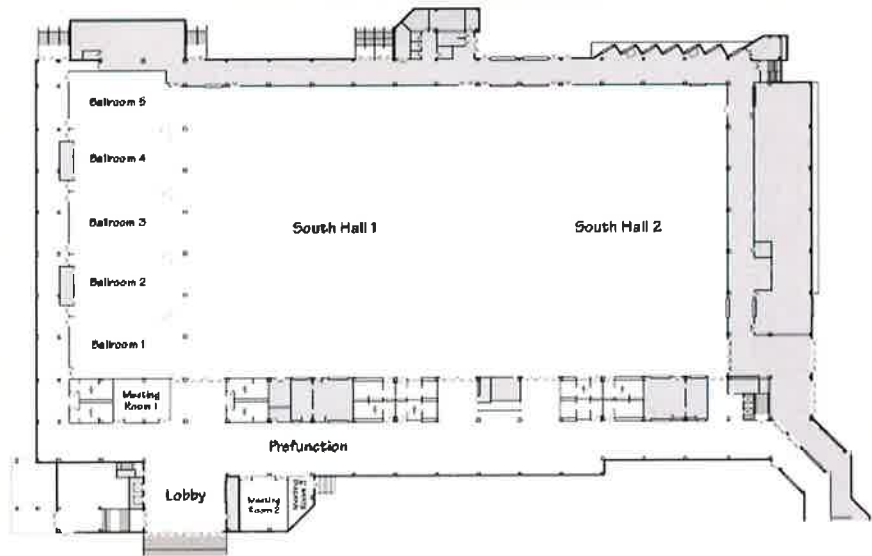
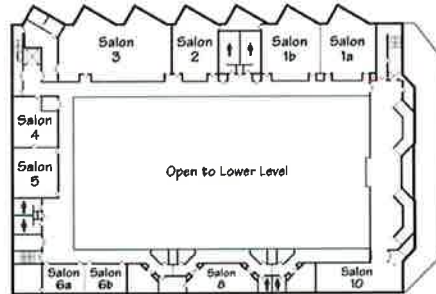
exhibition space, 16,650 square feet of ballroom space, and 2920 square feet of meeting space. The North Hall is the main meeting area with 11,972 square feet of meeting space on its second floor and 23,184 square feet of exhibit space on the first floor. The East Hall features 24,000 square feet of ballroom space. The VBC is a multi-purpose entertainment venue equipped to accommodate major concerts, Broadway performances, ballets, symphonies and a full range of sporting events. The 10,000 seat Arena, 2,153 seat Concert Hall and 502 seat Playhouse Theatre can also be used as meeting areas for conferences or seminars. The 295-room Embassy Suites has more than 7,000 square feet of additional meeting space and is connected via skybridge to Center.

## VON BRAUN CENTER FLOOR PLANS

**NORTH HALL - LEVEL 1**



**NORTH HALL - LEVEL 2**





**JACKSON, MISSISSIPPI**

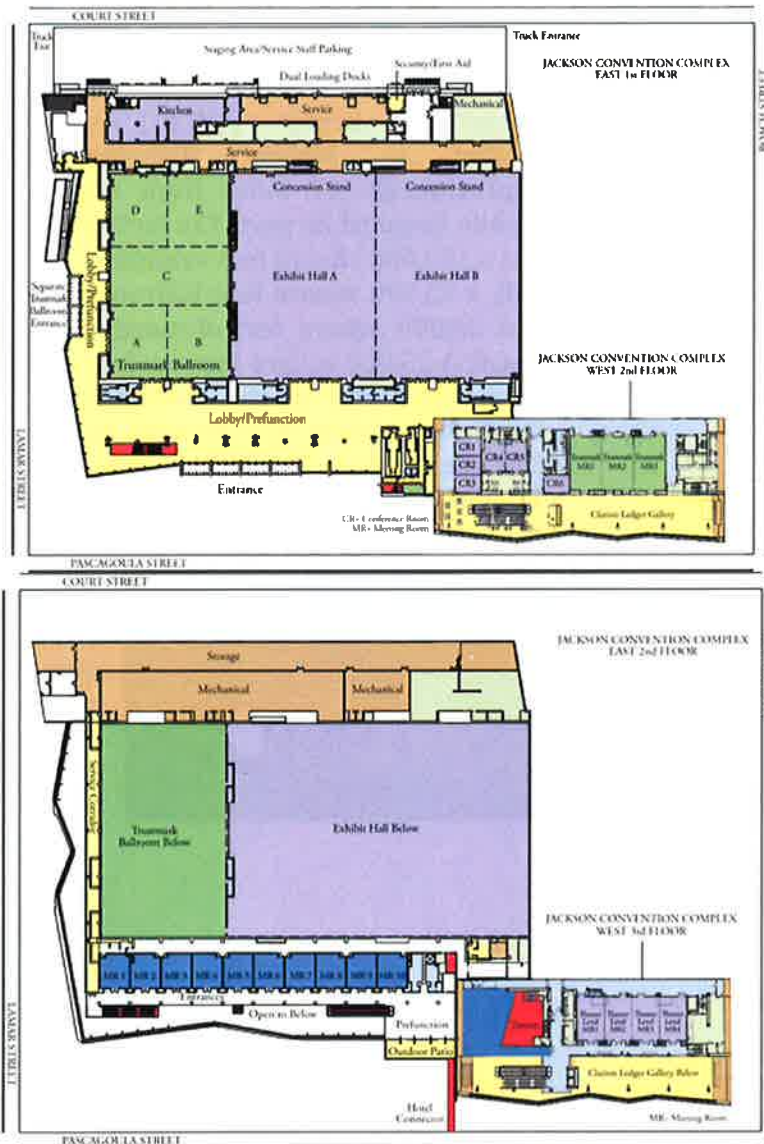
Jackson, Mississippi is home to both the Jackson Convention Complex and the Mississippi Coliseum.

The Jackson Convention Complex (“JCC”) is located in downtown Jackson, MS, featuring 330,000 square feet of total function space. The complex opened in January 2009, a merger between the existing Mississippi TelCom Center and the newly completed Capital City Convention Center. The facility features two large exhibit halls with a combined 60,000 square feet, 5 ballrooms totaling 25,000 square feet, 22,241 square feet in 22 meeting rooms, and additional lobby and pre-function space. The venue is operated by SMG.



The Mississippi Coliseum, which opened in 1962, sits on Mississippi State Fairgrounds. It offers variable seating for 6,500 and hosts a wide variety of events, including major conventions, basketball games, and rodeos.

## JACKSON CONVENTION COMPLEX FLOOR PLANS



## MOBILE, ALABAMA

Mobile, Alabama is home to the Mobile Convention Center and the Mobile Civic Center.

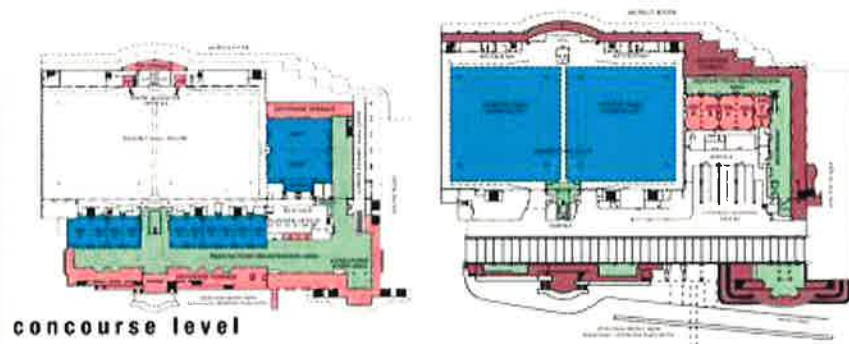
The Arthur Outlaw Mobile Convention Center (“MCC”) is located in Mobile, Alabama, approximately 17 miles from the Mobile Regional Airport. The facility has a 100,000 square foot exhibition hall, a 15,500 square foot ballroom, and 26,000 square feet of meeting space. A 25,000 square foot outdoor plaza has views of the river and downtown Mobile. It is attached to the Renaissance Riverview Plaza hotel with 372 guest rooms. The MCC is owned the City of Mobile and managed by SMG. A 1,550-space parking lot is attached the MCC via covered walkway, and there are an additional 286 spaces located below the facility.



The Mobile Civic Center lies in Mobile’s downtown historical district. The seven-story domed arena can host events for over 10,000 guests. The arena offers an additional 15 meeting rooms for a total of 80,000 square feet of exhibit space.



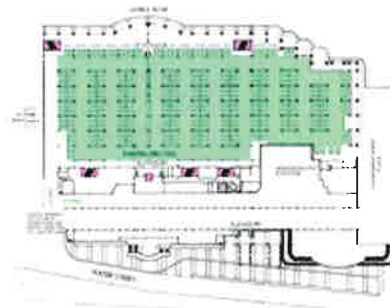
## MOBILE CONVENTION CENTER FLOOR PLANS



concourse level

exhibit hall level

### Parking Level





## SHREVEPORT, LOUISIANA

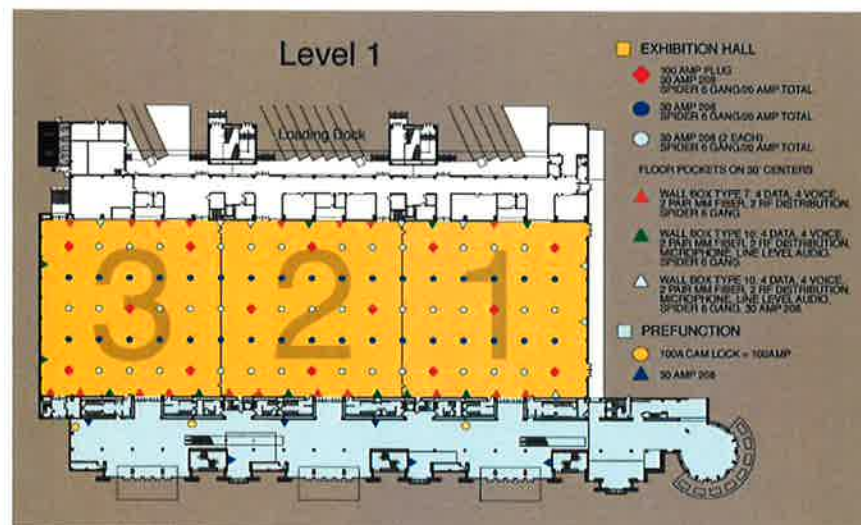
Both the Shreveport Convention Center and the Century Link Center are found in Shreveport, Louisiana.

The Shreveport Convention Center (“SCC”), located in downtown Shreveport, Louisiana, is the second largest convention center in Louisiana. The facility offers 95,000 square feet of exhibit space which can be divided into three exhibit halls, an 18,000 square foot ballroom, and 12 meeting rooms comprising 18,500 square feet. The facility connects, via a covered sky bridge, to the Hilton Shreveport, which has 313 guest rooms. The SCC is owned by the City of Shreveport and managed by SMG.



The Century Link Center (formerly the Century Tel Center) is located in Bossier City, Louisiana, near Shreveport. The arena frequently hosts basketball and ice hockey games, as well as other events.

## SHREVEPORT CONVENTION CENTER FLOOR PLANS



## SIoux FALLS, SOUTH DAKOTA

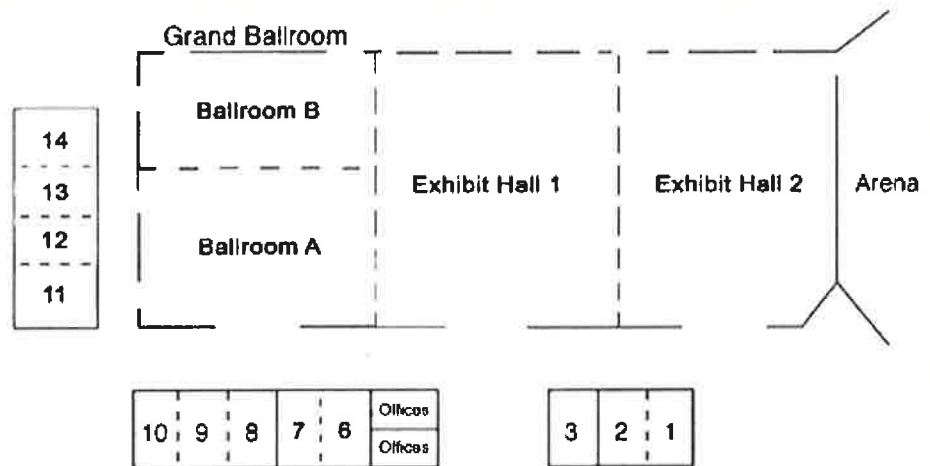


The Sioux Falls Convention Center is located in Sioux Falls, South Dakota. The facility connects with the Sioux Falls Arena, and sits across from the Sioux Falls Regional Airport. The Sheraton, with 243 guest rooms, connects by an enclosed walkway. Owned by the City of Sioux Falls, the Sioux Falls Convention Center is operated by Global Spectrum. The Sioux Falls Convention Center offers 33,600 square feet of exhibit space, a 16,800 square-foot ballroom, and a 4,320 square-foot ballroom. The facility also has ten meeting rooms totaling 5,972 square feet. Further, the facility offers 3,400 parking spaces.

The Sioux Falls Arena sits in Sioux Falls, South Dakota, adjacent to the Sioux Falls Stadium and Howard Wood Field, and across from the Sioux Falls Regional Airport. Attached to the Sioux Falls Arena are the Sioux Falls Convention Center and a Sheraton with 243 guest rooms. The Sheraton offers 33,600 square feet of exhibit space, a 16,800 square foot ballroom, a 2,600 square foot ballroom and roughly 12,000 square feet of meeting space. The Sioux Falls Arena offers 35,000 square feet of floor space.



### SIoux FALLS CONVENTION CENTER FLOOR PLANS







## SPOKANE, WASHINGTON

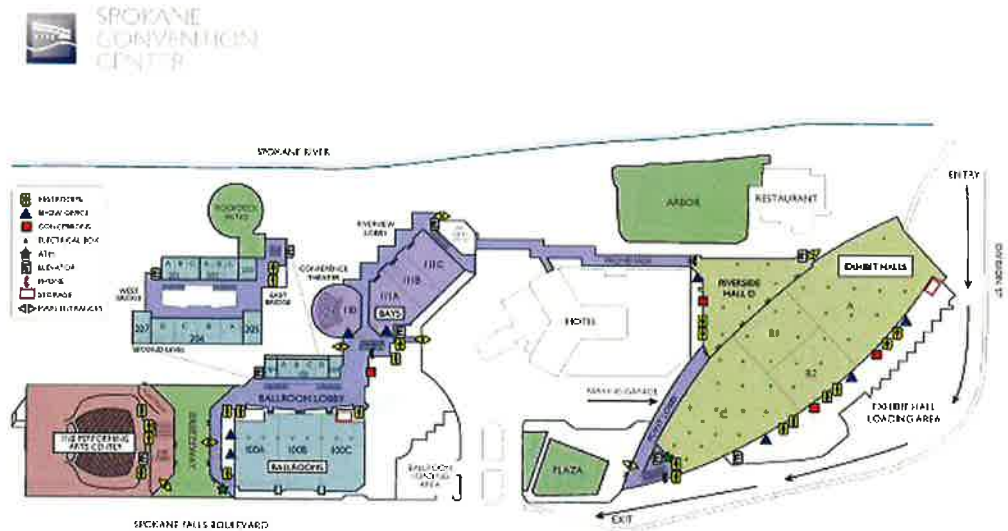
The Spokane Convention Center ("SCC") sits on the Spokane River, adjacent to the Riverfront Park in Spokane, Washington. The City of Spokane owns and operates the SCC. Adjacent to the SCC sits a Doubletree with 375 rooms. The facility underwent an expansion in 2006 that added 140,000 square feet of function space and the rest of the facility is undergoing current renovations. The SCC features an exhibit hall of 100,160 square feet, a 25,310 square foot ballroom, and a 13,730 square foot ballroom. It also offers 23 meeting rooms totaling 35,732 square feet. The adjacent performing arts center offers a 2,700 seat venue.



The Spokane Arena offers variable seating for almost 12,000 guests. Events hosted include hockey and basketball games, as well as concerts.



## SPOKANE CONVENTION CENTER FLOOR PLANS



314 WEST SPOKANE FALLS BOULEVARD SPOKANE, WASHINGTON 99201 PHONE: 509.279.7000 FAX: 509.279.7050 WWW.SPOKANECONVENTIONCENTER.COM

## TALLAHASSEE, FLORIDA

The Tallahassee Leon County Civic Center (“TLCCC”) is located in Tallahassee, Florida. The Civic Center offers a total of 69,000 square feet of function space. Of that total, 16,000 square feet is meeting space, while another 53,000 square feet in two divisions comprises the venue’s exhibit space. In addition, the TLCCC includes a 13,000 seat arena which hosts sporting events, graduations, and concerts.



### TALLAHASSEE LEON COUNTY CIVIC CENTER FLOOR PLANS





**Venues with Similar-Sized Exhibit Halls**

The following figure presents details on the convention venues used to compare event demand in Section 6 of this report. Each of the venues in the figure has an exhibit hall similar in size to that proposed for the expanded Amarillo Civic Center Complex.

**FIGURE A-1**

			<b>Total Function Space (SF)</b>	<b>Exhibit Hall Area (SF)</b>	<b>Ballroom Area (SF)</b>	<b>Meeting Room Area (SF)</b>
Albuquerque Convention Center	Albuquerque	NM	165,936	106,200	31,164	28,572
Buffalo Niagara Convention Center	Buffalo	NY	115,897	64,410	12,367	39,120
DCU Center	Worcester	0	102,836	81,320	15,068	6,448
Fresno Convention Center	Fresno	CA	123,738	67,000	13,129	11,609
Hot Springs Convention Center	Hot Springs	AR	119,000	103,000	16,000	-
Mid-America Center	Council Bluffs	IA	78,000	54,000	23,000	1,000
Ocean City Convention Center	Ocean City	MD	84,964	63,040	21,924	-
Ontario Convention Center	Ontario	CA	115,187	69,325	19,626	26,236
Peoria Civic Center	Peoria	IL	152,593	108,688	26,550	17,355
Pittsburgh Expo Mart	Pittsburgh	PA	124,744	106,000	-	18,744
Santa Clara Convention Center	Santa Clara	CA	118,664	90,000	28,664	-
Spokane Convention Center	Spokane	WA	174,932	100,160	39,040	35,732
	<b>AVERAGE</b>		<b>123,041</b>	<b>84,429</b>	<b>22,412</b>	<b>20,535</b>