



Cumberland County Civic Center Joint Task Force

Economic Analysis of Potential Renovation Options

Final Report

October 7, 2010



BRAILSFORD & DUNLAVEY

 The **Goldwater** Group

Preface

In January of 2010, the Board of Trustees of the Cumberland County Civic Center engaged Brailsford & Dunlavey and The Goldwater Group (“Consultants”) to conduct an economic analysis of potential renovation options for the Civic Center (“the Plan”). Led by and reporting to the Cumberland County Civic Center Joint Task Force (“Task Force”), the Consultants completed a scope of work that included updated primary market research, the development of operating strategies, and an economic analysis and business plan. This document represents the Consultant’s final report.

The findings of this report constitute the professional opinions of the Consultants based on the assumptions and conditions detailed throughout. The Consultants have conducted research using both primary and secondary sources which are deemed reliable, but whose accuracy the Consultants cannot guarantee. Due to variations in the national and global economic conditions, actual expenses and revenues may vary from projections, and these variations may be material.



CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE
Economic Analysis of Potential Renovation Options



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CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE
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1.0 Executive Summary

In January of 2010, the Board of Trustees of the Cumberland County Civic Center engaged Brailsford & Dunlavey and The Goldwater Group (“Consultants”) to conduct an economic analysis of potential renovation options for the Civic Center (“the Plan”). Led by and reporting to the Cumberland County Civic Center Joint Task Force (“Task Force”), the Consultants completed a scope of work that included updated primary market research, the development of operating strategies, and an economic analysis and business plan.

At the outset of the Plan, the Consultants conducted a kick-off meeting with the Task Force, interviewed the staff of the Portland Pirates (the facility’s “anchor tenant”), and met with the Civic Center operating and management team to identify objectives for the Plan and, more specifically, the future of the Civic Center. Based upon these meetings and discussions, the following were identified as the preferred outcomes for the project.

- **Maximize the event schedule:** As evidenced in the event analysis, it is important that any plan fundamentally protect the current event schedule and optimally expand the event schedule.
- **Improve the guest experience:** Visitor expectations have changed since the Civic Center opened and guests to all events should enjoy improved food and beverage options, expanded restrooms, enhanced circulation, and, where appropriate, options for a premium seating experience.
- **Create new revenue streams:** Considered improvement options should include, to the extent possible, new or enhanced revenue generating opportunities.
- **Extend the life of the building:** Considered improvement options should extend the life of the Civic Center as a public assembly facility.

Current Situation

The Plan’s findings included a number of positives regarding the Portland market, including the following.

- Portland is a strong market for entertainment and has remained consistent and reliable.
- The Civic Center is one of the most desirable stops in the New England market and is considered the “event center of Maine.”



- In addition to the strength of the market, the Civic Center is known as being well managed, with an effective and accommodating staff.
- A potential new facility in Bangor will not negatively affect the Civic Center due to the strength, convenience, and attractiveness of the Portland market.

At the same time and despite the market strengths, the Civic Center currently faces the risk of losing events, unless specific physical improvements are made.

- Operational inadequacies and limitations in the facility are becoming larger obstacles for event promoters as the needs of touring shows expand.
- Efficient and modern back-of-the-house amenities in newer venues in Manchester, NH and Lowell, MA are eroding the Civic Center's competitive position.
- The Pirates do not have the inventory of potential revenue spaces common to modern arenas, including premium seating and enhanced food and beverage operations.

Without the needed improvements to the Civic Center, the facility is likely to lose 10 annual events by 2016 and over \$450,000 in total net revenues. Through 2020, the facility is likely to lose an additional seven annual events and nearly \$2.7 million in total net revenues. Although the Portland market and the management of the Civic Center are strong, the physical deficiencies of the facility are increasingly too great to overcome.

Potential Operating and Improvement Scenarios

This Plan is focused on developing and analyzing specific improvements and operating strategies; identifying options and programs that respond to the objectives, market, and associated economics; and identifying the potential cost and revenue impacts of each. Following is a brief description of each of three identified scenarios and a summary of the potential financial performance of each.

Scenario A

- **Fundamentally protects the event schedule** with improvements to the tenant lockers, green rooms, and performer spaces; the expansion and improvement of the loading dock, staging areas, and production spaces; and the renovation and expansion of the ticketing and administration spaces.
- **Improves the guest experience** with the introduction of a hospitality area and kitchen, improved restrooms and expanded concession operations, and improved circulation.

- **Creates potential new revenue streams** with the expanded food and beverage operation, improved back-of-the-house event support spaces, and the introduction of additional advertising and building naming rights.

Scenario B

- Provides all of the improvements identified in Scenario A while also introducing premium seating.
- **Protects the event schedule** by providing a premium seating option that appeals to the Pirates.
- **Improves the guest experience** by providing a premium food and beverage area.
- **Creates additional new revenue streams** with the introduction of premium priced seating.
- **Extends the life of the building** with specific physical and operational improvements.

Scenario C

- Provides all of the improvements identified in Scenario A and Scenario B while also expanding the seating capacity.
- **Maximizes the event schedule** by providing an expanded seating inventory that may have a broader appeal in the marketplace.
- **Creates potential new revenue streams** with the possible attraction of additional events and the associated food and beverage sales.
- **Extends the life of the building** with specific physical and operational improvements.

| Improvement Category | Scenario A | Scenario B | Scenario C |
|--------------------------------|------------|------------|------------|
| Loge Box Seats | | ✓ | ✓ |
| Club Seats | | ✓ | ✓ |
| Hospitality / Kitchen | ✓ | ✓ | ✓ |
| Administration / Ticketing | ✓ | ✓ | ✓ |
| Advertising / Naming Rights | ✓ | ✓ | ✓ |
| Additional Seats | | | ✓ |
| Tenant Lockers / Support Space | ✓ | ✓ | ✓ |
| Production / Dock / Staging | ✓ | ✓ | ✓ |
| Concessions / Restrooms | ✓ | ✓ | ✓ |
| Press Area | ✓ | ✓ | ✓ |



Financial Performance

All three scenarios are projected to result in an increased positive net operating income for the Civic Center, in comparison to current operations. In year one, the net operating income for Scenario A is projected to be \$632,000 with a capital cost between \$24M and \$26M. The net operating income for Scenario B is projected to be \$1,618,000 with a capital cost between \$27M and \$29M. The net operating income for Scenario C is projected to be \$1,707,000 with a capital cost between \$32M and \$34M. The chart on the following page summarizes the estimated revenues and expenses for the building in year one and the projected capital costs.

Please note the following:

- The analysis includes no assumptions regarding the possible apportionment of net new revenues between the facility and the Pirates.
- The net new revenues apportioned to the facility in each scenario could potentially be used to offset a portion of the respective capital costs and support possible debt financing.
- The analysis should not be interpreted as a recommendation or determination of a funding strategy.
- All capital costs were budgeted without the benefit of a design concept or architectural drawings.



CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE 
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Summary of Projected Financial Performance: Year 1 (2012)

| | 2008-2009 Budget | Scenario A | Scenario B | Scenario C |
|-----------------------------|--------------------|---------------------|---------------------|---------------------|
| Revenues [1] | | | | |
| Event Income | \$447,000 | \$535,000 | \$558,000 | \$572,000 |
| Concessions Income | \$750,000 | \$1,120,000 | \$1,179,000 | \$1,246,000 |
| Hospitality Income | \$0 | \$195,000 | \$201,000 | \$208,000 |
| Merchandise Income | \$0 | \$19,000 | \$24,000 | \$28,000 |
| Advertising Income | \$177,100 | \$265,000 | \$265,000 | \$265,000 |
| Naming Rights | \$0 | \$200,000 | \$200,000 | \$200,000 |
| Other Income | \$69,663 | \$0 | \$0 | \$0 |
| Luxury Suites | \$0 | \$0 | \$248,000 | \$248,000 |
| Club Seats | \$0 | \$0 | \$648,000 | \$648,000 |
| Premium Seating F&B | \$0 | \$0 | \$109,000 | \$109,000 |
| Total Revenues | \$1,444,000 | \$2,334,000 | \$3,432,000 | \$3,524,000 |
| Expenses | | | | |
| Salaries & Benefits | \$595,000 | \$694,000 | \$757,000 | \$757,000 |
| Utilities | \$432,000 | \$527,000 | \$550,000 | \$550,000 |
| Repairs & Maintenance | \$96,000 | \$112,000 | \$117,000 | \$117,000 |
| Materials & Supplies | \$28,000 | \$33,000 | \$34,000 | \$34,000 |
| Insurance | \$90,000 | \$105,000 | \$115,000 | \$117,000 |
| Advertising | \$60,000 | \$70,000 | \$70,000 | \$70,000 |
| General & Administrative | \$54,000 | \$63,000 | \$63,000 | \$64,000 |
| Contract Services | \$53,000 | \$59,000 | \$65,000 | \$65,000 |
| Other | \$35,000 | \$39,000 | \$43,000 | \$43,000 |
| Total Expenses | \$1,443,000 | \$1,702,000 | \$1,814,000 | \$1,817,000 |
| Net Operating Income | \$1,000 | \$632,000 | \$1,618,000 | \$1,707,000 |
| Capital Costs | | \$24,000,000 | \$27,000,000 | \$32,000,000 |
| | | to | to | to |
| | | \$26,000,000 | \$29,000,000 | \$34,000,000 |

[1] The analysis includes no assumptions regarding the possible apportionment of net new revenues between the facility and the Pirates. The net new revenues apportioned to the facility in each scenario could potentially be used to offset a portion of the respective capital costs and support possible debt financing.

Summary of Projected Financial Performance: 2016

Included below is a comparison of the Civic Center's projected financial performance in the year 2016 without improvements, to the three improvement scenarios. As previously noted, without the improvements the facility is likely to lose ten annual events and is projected to lose over \$252,000 in the year 2016. Scenarios A, B, and C are projected to result in a positive net operating income, of \$688,000, \$1,795,000, and \$1,893,000 respectively.

| | No Improvements | Scenario A | Scenario B | Scenario C |
|-----------------------------|--------------------|--------------------|--------------------|--------------------|
| YEAR | 2016 | 2016 | 2016 | 2016 |
| Revenues | | | | |
| Event Income | \$502,000 | \$603,000 | \$629,000 | \$646,000 |
| Concessions Income | \$790,000 | \$1,261,000 | \$1,328,000 | \$1,403,000 |
| Hospitality Income | NA | \$219,000 | \$227,000 | \$234,000 |
| Merchandise Income | NA | \$22,000 | \$27,000 | \$31,000 |
| Advertising Income | \$114,000 | \$299,000 | \$299,000 | \$299,000 |
| Naming Rights | NA | \$200,000 | \$200,000 | \$200,000 |
| Other Income | \$266,000 | \$0 | \$0 | \$0 |
| Luxury Suites | NA | \$0 | \$275,000 | \$275,000 |
| Club Seats | NA | \$0 | \$729,000 | \$729,000 |
| Premium Seating F&B | NA | \$0 | \$123,000 | \$123,000 |
| Total Revenues | \$1,672,000 | \$2,604,000 | \$3,837,000 | \$3,940,000 |
| Expenses | | | | |
| Salaries & Benefits | \$775,000 | \$782,000 | \$853,000 | \$853,000 |
| Utilities | \$503,000 | \$593,000 | \$619,000 | \$619,000 |
| Repairs & Maintenance | \$145,000 | \$126,000 | \$132,000 | \$132,000 |
| Materials & Supplies | \$43,000 | \$37,000 | \$38,000 | \$38,000 |
| Insurance | \$109,000 | \$118,000 | \$129,000 | \$132,000 |
| Advertising | \$72,000 | \$79,000 | \$79,000 | \$79,000 |
| General & Administrative | \$62,000 | \$71,000 | \$71,000 | \$73,000 |
| Contract Services | \$73,000 | \$66,000 | \$73,000 | \$73,000 |
| Other | \$142,000 | \$44,000 | \$48,000 | \$48,000 |
| Total Expenses | \$1,924,000 | \$1,916,000 | \$2,042,000 | \$2,047,000 |
| Net Operating Income | (\$252,000) | \$688,000 | \$1,795,000 | \$1,893,000 |

Next Steps

In consideration of the findings and analyses included in this Plan, the following are recommended next steps for the Cumberland County Civic Center Trustees to consider completing in the next six to nine months.

- Commit to advancing Scenario B.
- Scenario B responds to each of the project objectives by protecting and maximizing the event schedule, including Pirates hockey games; improving the guest experience with premium spaces, hospitality areas, and improved concessions and restrooms; and generating new revenues through ancillary revenues, advertising, and new events, while not requiring the significant structural expense associated with significantly expanding the seating capacity. As supported by the market analysis, the strategy puts less of a focus on luxury suites and multiple lounge areas while ensuring proper back-of-the-house improvements are made and that guest services, including food and beverage, and restrooms, are enhanced.
- As the project moves into pre-development, there will be the opportunity to refine and adjust the program within the framework of the program and the economic analysis in this Plan.

Project Scope

- Select and engage an appropriate architectural and/or engineering design service professional to implement a design study that illustrates and tests the physical feasibility of Scenario B. The design study will provide the basis for cost estimation, the refinement of revenue and operating cost projections, and the development of a sources and uses statement.
- Manage the design exercise to ensure that the project objectives and considered improvements are incorporated and that the schemes have the ability to generate the projected financial performance.
- Select and engage an experienced construction or estimating firm to develop accurate cost estimates and likely construction and phasing schedules.
- Investigate and identify the most appropriate delivery method for the improvements. Methods could vary from a traditional design-bid-build delivery to a design/build approach.

Project Implementation

- Negotiate lease terms with the Pirates to determine the revenue apportionment between the facility and the tenant.



- Consider and investigate options and benefits for possible out-sourcing of recommended revenue-generating opportunities including naming rights, concessions, and hospitality/catering.
- Determine the appropriate level of public funding to commit to the project. Possible funding mechanisms may include grants and debt from the state, county, and federal governments. Other potential revenue sources may be considered to support funding, including ticket surcharges, parking fees, and food service vendor equity. All funding commitments must provide sources to fund capital outlays and operating costs.
- Develop a comprehensive project implementation schedule inclusive of pre-development, funding, public approvals, design, and construction.



2.0 Comparable Market Analysis

2.1 Introduction

The comparable market analysis is designed to measure the demographic and economic environment of the Portland market and evaluate the market's ability to support an events center. Key to this exercise is identifying comparable markets and creating a context for the evaluation of the Portland market position. The analysis includes several market characteristics and multiple metrics, including the following.

- Market Population and Characteristics
- Market Wealth
- Market Spending Behaviors
- Market Economic Activity
- Market Facility Inventories
- Market Premium Seating

The entire comparable market analysis is attached in Exhibit A.

2.2 Methodology

The Consultants completed a series of related exercises to gain an understanding of the demographic and economic environment of the Portland market. The initial step in the analysis was to define the extent of the Portland market. Portland is located within a recognized Metropolitan Statistical Area ("MSA"), which is the common definition of market areas as defined by the federal government's Office of Management and Budget. For the purpose of this exercise, common demographic and economic indicator data were collected for the Portland MSA, as well as the potential comparable MSAs and are the basis by which comparable markets were identified.

Comparable markets were identified as those that most closely resemble Portland in population, total retail sales, and effective buying income (EBI) or “disposable income.” These categories provide an appropriate metric to measure the common indicators of market size, market wealth, and market economic activity. In addition, all of the comparable markets were filtered to identify only those that have a recently constructed or renovated arena with a primary sports tenant. With one exception, each comparable market also supports a Minor League Baseball franchise. The following eight MSAs were identified as most comparable to the Portland market.

| Market | Arena | Total Population | Total Retail Sales (\$000) | Total EBI (\$000) |
|---------------------|---------------------------------------|------------------|----------------------------|---------------------|
| Boise, ID | Qwest Arena | 595,000 | \$12,035,032 | \$11,496,703 |
| Des Moines, IA | Wells Fargo Arena | 547,900 | \$8,596,700 | \$12,133,079 |
| Harrisburg, PA | Giant Center | 529,800 | \$9,102,312 | \$11,571,138 |
| Manchester, NH | Verizon Wireless Arena | 406,600 | \$9,753,731 | \$10,289,715 |
| Scranton, PA | Wachovia Arena | 549,800 | \$10,028,125 | \$9,960,918 |
| Toledo, OH | Lucas County Arena | 651,300 | \$8,916,809 | \$12,610,659 |
| Wichita, KS | Intrust Bank Arena | 597,400 | \$9,103,263 | \$11,289,781 |
| Youngstown, OH | Covelli Centre | 582,600 | \$7,976,452 | \$9,953,719 |
| | | 557,550 | \$9,439,053 | \$11,163,214 |
| Portland, ME | Cumberland County Civic Center | 517,000 | \$10,008,443 | \$11,394,541 |

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

Figure 2.2.1: Comparable Market Analysis

2.3 Market Population and Characteristics

Portland has a modest population in comparison to the selected markets. The market population is approximately eight percent smaller than the comparable average. With 517,000 residents, the Portland market ranks seventh among the eight comparable markets.

Portland also has an aging population, with thirty percent of the total population between the ages of 45 and 64. Furthermore, the market ranks first among the comparable set in the percentage of population between the ages of 45 and 54 and between the ages of 55 and 64. Figure 2.3.1 illustrates the stratified population for the comparable set.

| Market | Total Population | 0-17 | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ | % of Market Age 18-34 | Target Population |
|---------------------------|------------------|--------------|-------------|--------------|--------------|--------------|--------------|--------------|-----------------------|-------------------|
| Boise, ID | 595,000 | 27.0% | 9.1% | 15.5% | 14.5% | 13.5% | 10.1% | 10.3% | 24.7% | 146,706 |
| Des Moines, IA | 547,900 | 25.5% | 8.8% | 14.2% | 15.0% | 14.5% | 10.7% | 11.3% | 23.0% | 126,220 |
| Harrisburg, PA | 529,800 | 21.9% | 9.3% | 12.1% | 14.0% | 15.7% | 12.5% | 14.5% | 21.4% | 113,354 |
| Manchester, NH | 406,600 | 24.1% | 8.5% | 11.5% | 15.9% | 16.7% | 11.9% | 11.4% | 20.1% | 81,656 |
| Scranton, PA | 549,800 | 20.1% | 9.5% | 11.4% | 13.3% | 14.8% | 12.6% | 18.4% | 20.9% | 114,649 |
| Toledo, OH | 651,300 | 24.0% | 11.2% | 12.8% | 13.0% | 14.7% | 11.4% | 13.0% | 24.0% | 156,273 |
| Wichita, KS | 597,400 | 26.9% | 9.4% | 13.2% | 13.5% | 14.7% | 10.4% | 12.0% | 22.6% | 134,991 |
| Youngstown, OH | 582,600 | 21.6% | 9.9% | 11.3% | 12.2% | 15.1% | 12.6% | 17.3% | 21.2% | 123,498 |
| Comparable Average | 557,550 | 23.9% | 9.5% | 12.8% | 13.9% | 15.0% | 11.5% | 13.5% | 22.2% | 124,668 |
| Portland, ME | 517,000 | 21.6% | 8.6% | 10.7% | 14.9% | 16.9% | 13.1% | 14.2% | 19.3% | 99,942 |

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

Figure 2.3.1: Stratified Population and Target Market

As suggested by its aging population, Portland has a modestly sized “target market” as traditionally defined. The traditional target market, the population between the ages of 18 and 34, represents the portion of the population most likely to patronize a public assembly facility. Nineteen percent of the population in the Portland market fits the target demographic, ranking lowest among the comparable set.

Portland has a relatively low number of total households. Within the comparable set, Portland ranks eighth in total households, exceeding only the Manchester market. With 213,400 households, Portland lags the comparable average of 220,713. The chart below shows a comparison of the total number of households and the household size in each market.

| Market | Total Households | Household Size |
|---------------------|------------------|----------------|
| Boise, ID | 220,100 | 2.65 |
| Des Moines, IA | 219,500 | 2.44 |
| Harrisburg, PA | 214,300 | 2.37 |
| Manchester, NH | 154,800 | 2.57 |
| Scranton, PA | 228,200 | 2.31 |
| Toledo, OH | 263,000 | 2.40 |
| Wichita, KS | 233,200 | 2.52 |
| Youngstown, OH | 232,600 | 2.40 |
| Comparable Average | 220,713 | 2.46 |
| Portland, ME | 213,400 | 2.36 |

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

Figure 2.3.2: Total Households and Household Size

With a modest population and low number of households, the Portland market has a small average household size compared to the set. Only Manchester has a smaller average household size than Portland. In addition, the average household size of 2.36 in Portland is smaller than the comparable average of 2.46. Portland's modest population, limited target market, small number of households, and small household size are a function of the markets aging population.

The total population in the Portland market is projected to grow modestly through 2013. The Portland population will maintain the rank of eighth among the comparable set and continue to exceed only the Manchester market. The figure below highlights the population and household projections for each comparable market.

The projected population growth rate of three percent for the Portland market is consistent with the comparable average. Only Boise, Des Moines, and Manchester are projected to grow at a rate faster than Portland through 2013. In addition, four of the comparable markets are projected to lose population over the same period.

| Market | Total Population | 2013 Population | % Change | Total Households | 2013 Households | % Change |
|--------------------|---------------------|--------------------|-------------|---------------------|--------------------|-------------|
| Boise, ID | 595,000 | 680,100 | 14.3% | 220,100 | 253,300 | 15.1% |
| Des Moines, IA | 547,900 | 590,500 | 7.8% | 219,500 | 239,100 | 8.9% |
| Harrisburg, PA | 529,800 | 542,600 | 2.4% | 214,300 | 222,000 | 3.6% |
| Manchester, NH | 406,600 | 421,200 | 3.6% | 154,800 | 160,800 | 3.8% |
| Scranton, PA | 549,800 | 543,000 | -1.2% | 228,200 | 228,600 | 0.2% |
| Toledo, OH | 651,300 | 644,000 | -1.1% | 263,000 | 264,200 | 0.5% |
| Wichita, KS | 597,400 | 613,400 | 2.7% | 233,200 | 241,100 | 3.4% |
| Youngstown, OH | 582,600 | 567,900 | -2.5% | 232,600 | 229,600 | -1.3% |
| Comparable Average | 557,550 | 575,338 | 3.3% | 220,713 | 229,838 | 4.3% |
| Portland, ME | 517,000 | 532,600 | 3.0% | 213,400 | 223,200 | 4.6% |

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

Figure 2.3.3: Population and Household Projections



2.4 Market Wealth

In comparison to the comparable set, Portland can be considered a wealthy market. The Portland market is slightly higher in total, average, and median effective buying income (“EBI”) or earnings after taxes than the comparable average, ranking fifth. Only Des Moines and Manchester exceed Portland in per capita EBI. Figure 2.4.1 includes a comparison of EBI data.

| Market | Total EBI (\$000) | Average Household EBI | Median Household EBI | Per Capita EBI |
|---------------------|----------------------|--------------------------|-------------------------|-----------------|
| Boise, ID | \$11,496,703 | \$52,223 | \$42,261 | \$19,322 |
| Des Moines, IA | \$12,133,079 | \$55,272 | \$44,470 | \$22,147 |
| Harrisburg, PA | \$11,571,138 | \$53,995 | \$43,203 | \$21,841 |
| Manchester, NH | \$10,289,715 | \$66,450 | \$53,678 | \$25,304 |
| Scranton, PA | \$9,960,918 | \$43,658 | \$34,608 | \$18,117 |
| Toledo, OH | \$12,610,659 | \$47,950 | \$38,198 | \$19,362 |
| Wichita, KS | \$11,289,781 | \$48,403 | \$40,638 | \$18,898 |
| Youngstown, OH | \$9,953,719 | \$42,797 | \$34,668 | \$17,086 |
| Comparable Average | \$11,163,214 | \$51,344 | \$41,466 | \$20,260 |
| Portland, ME | \$11,394,541 | \$53,404 | \$42,468 | \$22,036 |

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

Figure 2.4.1: Market Wealth Analysis

Portland also has a comparably high concentration of households in the higher income brackets. Approximately forty percent of market households have an EBI of more than \$50,000. Only the Des Moines, Harrisburg, and Manchester markets have a higher percentage of households that fall within the highest income brackets. The higher income households are consistent with the aging population and reflective of the population in its prime earning years. The following chart illustrates the percentage of households stratified by income bracket.

| Market | Households by EBI | | | | |
|---------------------------|-------------------|----------------------|----------------------|----------------------|-------------|
| | \$0 to \$14,999 | \$15,000 to \$24,999 | \$25,000 to \$49,999 | \$50,000 to \$99,999 | \$100,000+ |
| Boise, ID | 10.3% | 12.8% | 37.9% | 32.5% | 6.4% |
| Des Moines, IA | 10.0% | 11.6% | 35.7% | 34.8% | 7.9% |
| Harrisburg, PA | 10.9% | 12.4% | 35.7% | 33.2% | 7.8% |
| Manchester, NH | 8.4% | 9.3% | 28.5% | 39.2% | 14.6% |
| Scranton, PA | 18.1% | 16.6% | 35.4% | 25.0% | 4.8% |
| Toledo, OH | 15.4% | 15.2% | 34.7% | 28.8% | 5.9% |
| Wichita, KS | 12.7% | 14.0% | 37.5% | 30.5% | 5.4% |
| Youngstown, OH | 16.6% | 17.4% | 36.9% | 25.1% | 4.1% |
| Comparable Average | 13.1% | 13.9% | 35.5% | 30.7% | 6.8% |
| Portland, ME | 11.6% | 12.4% | 36.1% | 32.5% | 7.3% |

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

Figure 2.4.2: Stratified Wealth Analysis

Total EBI in the Portland market is projected to increase by nearly \$2 billion by 2013. The resulting growth rate exceeds the comparable average by two percentage points. However, over the same period, the market will maintain its rank among the comparable market set.

The average household EBI in the Portland market is projected to grow significantly through the year 2013. It is expected to lag only the Manchester market in total growth rate over the same period. Although Portland will maintain its rank of fourth among the comparable markets, it will exceed the comparable average in average household EBI. The chart below lists the wealth projections for each market.

| Market | Total EBI (\$000) | 2013 Total EBI (\$000) | % Change | Average Household EBI | 2013 Average Household EBI | % Change |
|---------------------------|----------------------|---------------------------|--------------|--------------------------|-------------------------------|--------------|
| Boise, ID | \$11,496,703 | \$14,686,099 | 27.7% | \$52,223 | \$57,980 | 11.0% |
| Des Moines, IA | \$12,133,079 | \$14,673,486 | 20.9% | \$55,272 | \$61,358 | 11.0% |
| Harrisburg, PA | \$11,571,138 | \$13,427,615 | 16.0% | \$53,995 | \$60,486 | 12.0% |
| Manchester, NH | \$10,289,715 | \$12,133,055 | 17.9% | \$66,450 | \$75,453 | 13.5% |
| Scranton, PA | \$9,960,918 | \$11,103,821 | 11.5% | \$43,658 | \$48,581 | 11.3% |
| Toledo, OH | \$12,610,659 | \$13,756,263 | 9.1% | \$47,950 | \$52,071 | 8.6% |
| Wichita, KS | \$11,289,781 | \$12,542,876 | 11.1% | \$48,403 | \$52,013 | 7.5% |
| Youngstown, OH | \$9,953,719 | \$10,617,603 | 6.7% | \$42,797 | \$46,250 | 8.1% |
| Comparable Average | \$11,163,214 | \$12,867,602 | 15.1% | \$51,344 | \$56,774 | 10.4% |
| Portland, ME | \$11,394,541 | \$13,353,148 | 17.2% | \$53,404 | \$59,818 | 12.0% |

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

Figure 2.4.3: Market Wealth Projections

2.5 Market Spending Behaviors

Total discretionary spending and entertainment spending in the Portland market is consistent with the comparable set. Portland's total expenditures are slightly lower than the comparable average, ranking fifth within the set. Accordingly, consumer spending on entertainment is slightly lower than the comparable average. The following chart indicates the consumer spending for all comparable markets.

| Market | Total Expenditures (\$000) | Entertainment Expenditures (\$000) | Entertainment as % of Total Expenditures |
|---------------------------|----------------------------|------------------------------------|--|
| Boise, ID | \$11,280,893 | \$145,321 | 1.29% |
| Des Moines, IA | \$11,225,334 | \$124,735 | 1.11% |
| Harrisburg, PA | \$10,707,830 | \$115,033 | 1.07% |
| Manchester, NH | \$9,128,913 | \$121,414 | 1.33% |
| Scranton, PA | \$10,589,067 | \$106,822 | 1.01% |
| Toledo, OH | \$12,245,204 | \$123,077 | 1.01% |
| Wichita, KS | \$11,041,180 | \$109,371 | 0.99% |
| Youngstown, OH | \$10,260,427 | \$90,110 | 0.88% |
| Comparable Average | \$10,809,856 | \$116,985 | 1.08% |
| Portland, ME | \$10,755,943 | \$115,547 | 1.07% |

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

Figure 2.5.1: Consumer Spending Analysis

2.6 Market Economic Activity

The Portland market ranks favorably against the comparable set across all common economic indicators, including total retail sales and the total number of business establishments. Portland exceeds the comparable average in total retail sales and ranks third behind Boise and Scranton.

Portland's total retail sales are expected to remain strong through 2013 and will continue to exceed the comparable average. Over the same period, the rate of growth in retail sales is projected to increase significantly. By 2013, only three markets will experience a higher rate of growth than Portland. Figure 2.6.1 illustrates the retail sales projections for each market.

| Market | Retail Sales (\$000) | Establishments | 2013 Retail Sales (\$000) | % Change |
|---------------------------|----------------------|----------------|---------------------------|--------------|
| Boise, ID | \$12,035,032 | 18,347 | \$16,104,867 | 33.8% |
| Des Moines, IA | \$8,596,700 | 15,196 | \$9,200,573 | 7.0% |
| Harrisburg, PA | \$9,102,312 | 13,700 | \$9,715,302 | 6.7% |
| Manchester, NH | \$9,753,731 | 11,164 | \$11,665,417 | 19.6% |
| Scranton, PA | \$10,028,125 | 13,888 | \$11,670,986 | 16.4% |
| Toledo, OH | \$8,916,809 | 15,716 | \$8,566,940 | -3.9% |
| Wichita, KS | \$9,103,263 | 14,997 | \$10,226,657 | 12.3% |
| Youngstown, OH | \$7,976,452 | 13,807 | \$8,201,758 | 2.8% |
| Comparable Average | \$9,439,053 | 14,602 | \$10,669,063 | 11.8% |
| Portland, ME | \$10,008,443 | 18,068 | \$11,419,159 | 14.1% |

Sources: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

Figure 2.6.1: Retail Sales Projections

The Portland market has a comparatively large number of business establishments. With over 18,000 businesses, Portland exceeds the average by more than 3,400 businesses and ranks below only Boise in total number of establishments. It must be noted that a comparably higher portion of the Portland businesses has fewer than 50 employees. The distribution of businesses by employees is most similar to that of Boise. Following is a chart that illustrates the number of business establishments by employments for the market set.

| Market | Total Establishments | Establishments by Employment | | | | | |
|---------------------|----------------------|------------------------------|------------|------------|-----------|-----------|----------|
| | | 1-49 | 50-99 | 100-249 | 250-499 | 500-999 | 1,000 + |
| Boise, ID | 18,347 | 17,586 | 440 | 233 | 62 | 18 | 8 |
| Des Moines, IA | 15,196 | 14,174 | 559 | 331 | 82 | 28 | 22 |
| Harrisburg, PA | 13,700 | 12,776 | 494 | 295 | 75 | 42 | 18 |
| Manchester, NH | 11,164 | 10,488 | 378 | 230 | 45 | 16 | 7 |
| Scranton, PA | 13,888 | 13,012 | 443 | 307 | 88 | 26 | 12 |
| Toledo, OH | 15,716 | 14,710 | 552 | 327 | 83 | 29 | 15 |
| Wichita, KS | 14,997 | 14,091 | 517 | 286 | 76 | 19 | 8 |
| Youngstown, OH | 13,807 | 13,050 | 440 | 241 | 56 | 11 | 9 |
| Comparable Average | 14,602 | 13,736 | 478 | 281 | 71 | 24 | 12 |
| Portland, ME | 18,068 | 17,354 | 393 | 243 | 54 | 17 | 7 |

Source: United States Census Bureau - 2007 County Business Patterns (NAICS)

Figure 2.6.2: Business Establishments by Employment

2.7 Premium Seating Share Analysis

The Consultants conducted a systematic and comprehensive review of sports facilities in each comparable market as well as Portland. The review identified and inventoried total premium seats in every professional and collegiate ballpark, arena, and stadium in the respective markets. A summary of the premium seating inventory is included below, and the full analysis is included in Exhibit A.

| Market | Arena | | Ballpark | | Stadium | | Total | | Total Premium Seats |
|---------------------|----------|------------|-----------|------------|----------|------------|-----------|------------|---------------------|
| | Suites | Club Seats | Suites | Club Seats | Suites | Club Seats | Suites | Club Seats | |
| Boise, ID | 39 | 1,000 | 0 | 0 | 35 | 916 | 74 | 1,916 | 3,100 |
| Des Moines | 36 | 600 | 44 | 4,000 | 0 | 0 | 80 | 4,600 | 5,880 |
| Harrisburg, PA | 40 | 688 | 21 | 766 | 0 | 0 | 61 | 1,454 | 2,430 |
| Manchester, NH | 34 | 600 | 36 | 0 | 0 | 0 | 70 | 600 | 1,720 |
| Scranton, PA | 32 | 624 | 18 | 0 | 0 | 0 | 50 | 624 | 1,424 |
| Toledo, OH | 20 | 750 | 28 | 600 | 44 | 300 | 92 | 1,650 | 3,122 |
| Wichita, KS | 22 | 300 | 8 | 800 | 0 | 0 | 30 | 1,100 | 1,580 |
| Youngstown, OH | 26 | 520 | 0 | 0 | 26 | 0 | 52 | 520 | 1,352 |
| Comparable Average | 31 | 635 | 19 | 771 | 13 | 152 | 64 | 1,558 | 2,576 |
| Portland, ME | 0 | 0 | 17 | 0 | 0 | 0 | 17 | 0 | 272 |

Sources: Revenues from Sports Venues College & Pro Editions 2009 and facility websites

Figure 2.7.1: Premium Seating Inventory

For these same markets, business establishment data were collected. Using the number of businesses and number of premium seats, a share analysis ratio was created that represents the number of premium seats per business. The resulting ratios were used to comparatively evaluate the capacity of the Portland market to absorb additional, or “net new”, premium seats. This type of quantitative analysis provides a market context that is useful in establishing the potential for additional premium seats. As applied in this Plan, the analysis is used only as a tool to generally verify the market for premium seating inventories identified in previous studies.

With 272 premium seats and 707 businesses with over 50 employees, the Portland market has a share ratio of 0.38 premium seats per business. The Portland share ratio is the lowest among the comparable set and indicates a capacity for additional premium seats. Ratios range from 1.6 in the Scranton market to 5.9 in the Des Moines market. To evaluate the comparable market ratios more accurately, these markets were not considered in the analysis and the averages were adjusted. The following chart illustrates the aggregate premium seating analysis.

| Market | # of Premium Seats | Businesses with over 50 Employees | Premium Seats per Business |
|------------------------------|--------------------|-----------------------------------|----------------------------|
| Boise, ID | 3,100 | 753 | 4.1 |
| Des Moines, IA | 5,880 | 1,000 | 5.9 |
| Harrisburg, PA | 2,430 | 906 | 2.7 |
| Manchester, NH | 1,720 | 669 | 2.6 |
| Scranton, PA | 1,424 | 864 | 1.6 |
| Toledo, OH | 3,122 | 991 | 3.2 |
| Wichita, KS | 1,580 | 898 | 1.8 |
| Youngstown, OH | 1,352 | 748 | 1.8 |
| Comparable Average | 2,217 | 828 | 2.7 [1] |
| Portland, ME- Current | 272 | 707 | 0.38 |
| Portland, ME - Potential | 1,896 | 707 | 2.7 |
| Net New Premium Seats | 1,624 | | |

Sources: Revenues from Sports Venues College Edition 2009 and league/team websites

[1] Adjusted Average

Figure 2.7.2: Premium Seating Share Analysis

The comparable set ratio, which was calculated at 2.7, was applied to the number of businesses in Portland to identify the potential capacity for additional premium seats. Based on the comparable set ratio, the Portland business market has the potential capacity to support 1,896 total premium seats, or an additional 1,624 premium seats. This analysis alone is not intended to suggest that a renovated facility should have 1,624 premium seats; instead, it verifies that capacity does exist and that other comparable markets are supporting more premium seats than are currently supplied in Portland.

A similar suite share ratio was also calculated for each market to provide a basis for considering what portion of the premium seating capacity might be driven by the demand for luxury suites. Similar to the aggregate premium seating analysis, the resulting ratios were used to evaluate the Portland market’s capacity to absorb additional luxury suites.

With 17 luxury suites and 707 large businesses, the Portland market has a share ratio of 41.6, which is the highest in the set. Ratios among the comparable markets ranged from 7.0 in Toledo to 29.9 in Wichita. To ensure validity, neither was considered in the analysis. The remaining comparable markets have a share ratio of 13.1, which is over 28 points lower than Portland’s ratio. The applied comparable set ratio indicates that the Portland market has the potential to support 54 total suites, or an additional 37 suites.

| Market | Total Suites | Businesses with over 50 Employees | Businesses per Suite |
|---------------------------------|--------------|-----------------------------------|----------------------|
| Boise, ID | 74 | 753 | 10.2 |
| Des Moines, IA | 80 | 1,000 | 12.5 |
| Harrisburg, PA | 61 | 906 | 14.9 |
| Manchester, NH | 70 | 669 | 9.6 |
| Scranton, PA | 50 | 864 | 17.3 |
| Toledo, OH | 142 | 991 | 7.0 |
| Wichita, KS | 30 | 898 | 29.9 |
| Youngstown, OH | 52 | 748 | 14.4 |
| Comparable Average | 65 | 823 | 13.1 [1] |
| Portland, ME - Current | 17 | 707 | 41.6 |
| Portland, ME - Potential | 54 | 707 | 13.1 |
| Net New Luxury Suites | 37 | | |

Source: United States Census Bureau - 2007 County Business Patterns (NAICS)

[1] Adjusted Average

Figure 2.7.3: Premium Suite Share Analysis

For the purposes of this Plan, the identified capacity for additional suites is also considered the capacity for new loge seats, which are described in detail in Section 5.0.

3.0 Competitive Market Analysis

3.1 Introduction

The competitive market analysis is designed to further measure and evaluate the Portland market with a focus on the regional competitive conditions. A review of demographic and economic indicator data in areas defined by drive times was completed to support the analysis. Data was collected for the Portland market as well as markets with competing public assembly facilities throughout New England. The competitive market analysis considers multiple demographic metrics, including the following.

- Market Population
- Market Households
- Market Wealth
- Market Spending Behaviors
- 2014 Demographic Projections

3.2 Methodology

The Consultants utilized data provided by Environmental Systems Research Institute (“ESRI”) to complete the drive time analysis. ESRI combines geographical information system (“GIS”) technology with extensive demographic, consumer, and business information to generate a detailed statistical profile of specific areas. The drive time areas were defined and data collected for 30-minute, 45-minute, and 60-minute drive time areas from Portland and each of the competing markets.

While all public assembly facilities of various sizes throughout New England compete for events, only the regional facilities that directly compete with the Civic Center were analyzed. For the purpose of this exercise, the identified competing regional markets include Augusta, ME, Bangor, ME, Lewiston, ME, Lowell, MA, and Manchester, NH. The event centers located in these markets include the Augusta Civic Center, Bangor Civic Center, Androscoggin Bank Colisee, Tsongas Arena, and Verizon Wireless Area, respectively. Bangor, ME was also included to consider the possibility of a new arena.

The map below includes the drive time areas for the Bangor, Augusta, Lewiston, Portland, Manchester, and Lowell markets (from top right to bottom left). The red lines represent a 30-minute drive time, green lines a 45-minute drive time, and blue lines a 60-minute drive time. The following pages include maps for the individual markets and the entire analysis is included in Exhibit B.

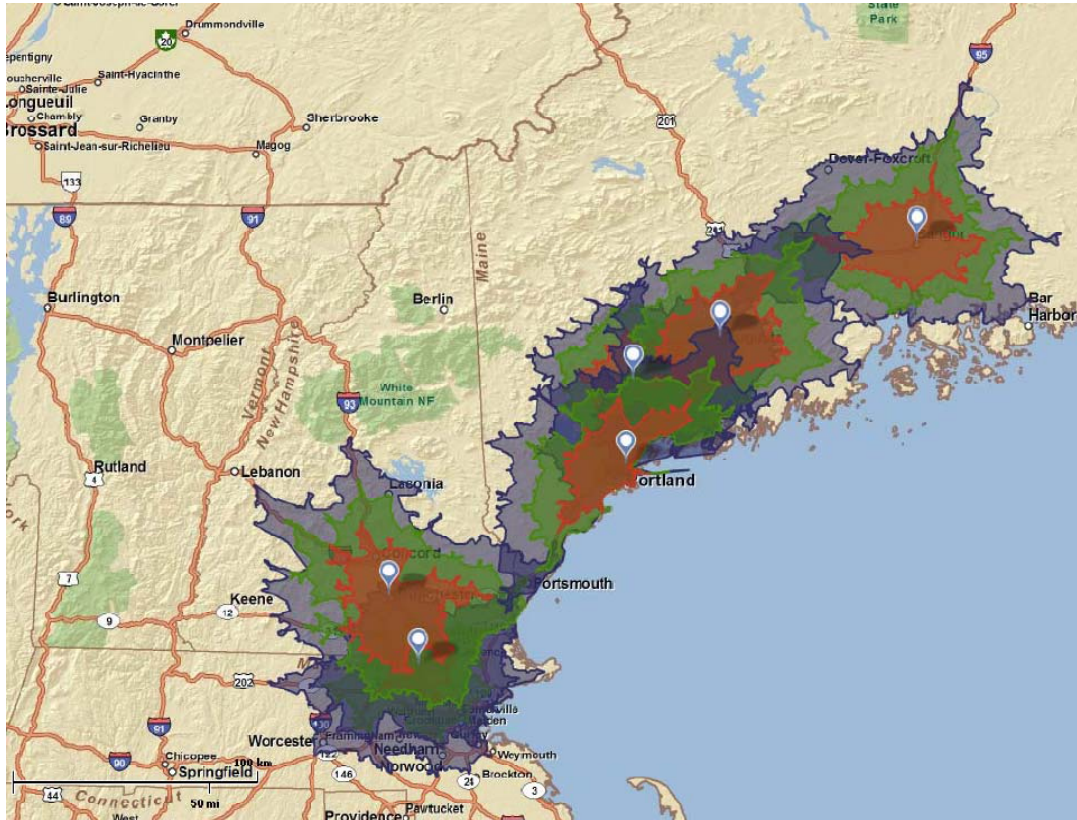


Figure 3.2.1: Regional Markets Drive Time Area Map

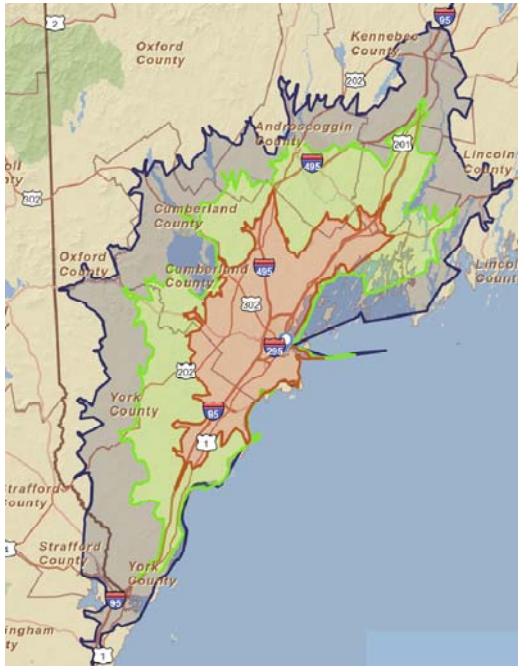


Figure 3.2.2: Portland Drive Time Area Map

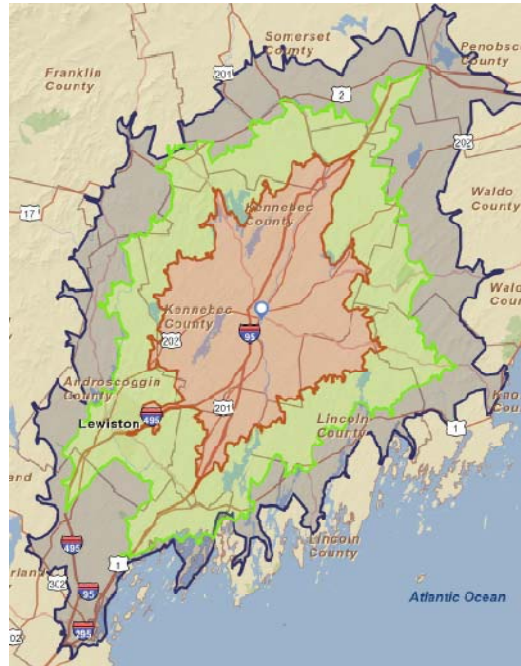


Figure 3.2.3: Augusta Drive Time Area Map

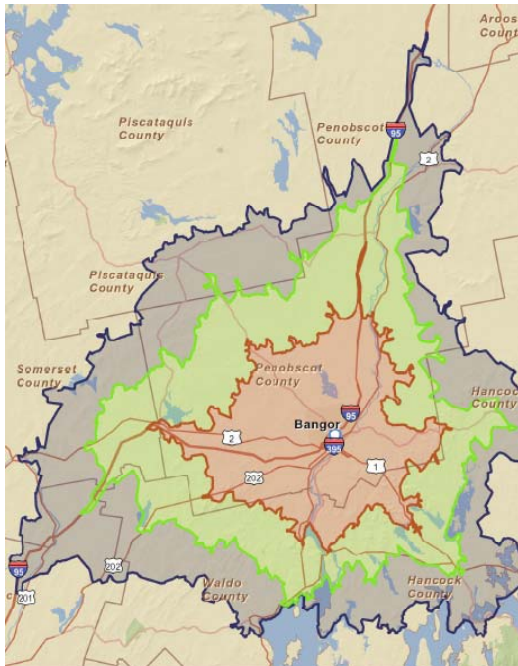


Figure 3.2.4: Bangor Drive Time Area Map

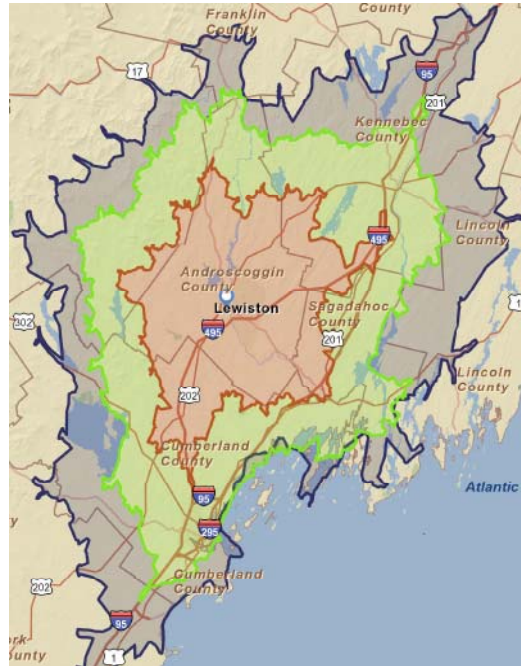


Figure 3.2.5: Lewiston Drive Time Area Map



CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options



Figure 3.2.6: Lowell Drive Time Area Map

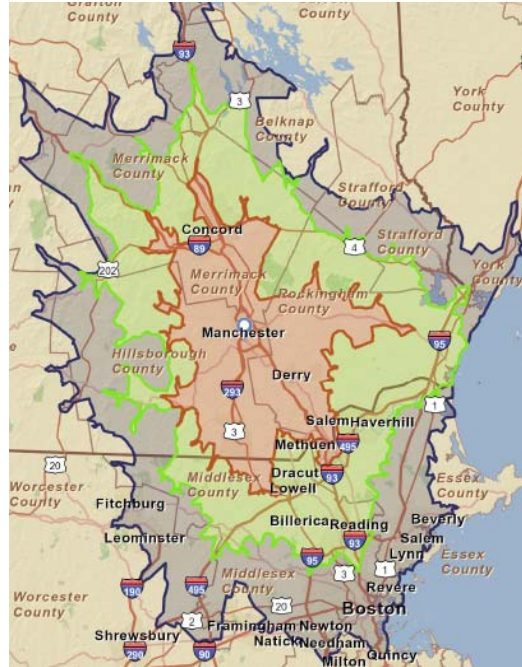


Figure 3.2.7: Manchester Drive Time Area Map

3.3 Market Population and Characteristics

Based on the drive time population analysis, the competitive markets can be segmented into two distinct groups according to population. Lowell, MA and Manchester, NH have significantly larger populations than the three similarly sized Maine markets. The drive time data is summarized below in Figure 3.3.1.

| Market | 2009 Total Population | | | 2014 Total Population | | |
|---------------------|-----------------------|-----------|-----------|-----------------------|-----------|-----------|
| | 30 Minute | 45 Minute | 60 Minute | 30 Minute | 45 Minute | 60 Minute |
| Augusta, ME | 123,178 | 304,250 | 564,839 | 125,304 | 309,165 | 573,799 |
| Bangor, ME | 113,437 | 160,220 | 249,500 | 115,562 | 163,180 | 253,439 |
| Lewiston, ME | 134,031 | 431,302 | 624,943 | 136,493 | 439,344 | 637,677 |
| Lowell, MA | 1,705,095 | 4,268,292 | 5,501,983 | 1,718,639 | 4,305,494 | 5,558,860 |
| Manchester, NH | 632,923 | 1,541,506 | 3,876,722 | 645,578 | 1,570,504 | 3,925,213 |
| Competitive Average | 541,733 | 1,341,114 | 2,163,597 | 548,315 | 1,357,537 | 2,189,798 |
| Portland, ME | 295,047 | 478,781 | 727,456 | 300,609 | 489,195 | 745,030 |

Source: Environmental Systems Resource Institution (ESRI)

Figure 3.3.1: Drive Time Area Population and Projections

Compared to the other three Maine markets, Portland has a considerably larger population within the shortest drive time areas. In the 30-minute drive time, Portland's population exceeds each of these markets by 2.4 times, on average. In the longer drive time areas, Portland remains the largest Maine market. At the same time, Augusta and Lewiston gain market size as the market geographies overlap.



Compared to the other Maine markets, Portland has significantly more households within a 30-minute area. In the shortest drive time area, Portland has between 2.24 and 2.65 more households than Augusta, Bangor, and Lewiston. Like the population analysis, in the 60-minute drive time the Augusta and Lewiston markets increase significantly as the geographies overlap. As could be predicted, the number of Portland households is significantly lower than that of Lowell and Manchester.

| Market | 2009 Total Households | | | 2014 Total Households | | |
|---------------------|-----------------------|-----------|-----------|-----------------------|-----------|-----------|
| | 30 Minute | 45 Minute | 60 Minute | 30 Minute | 45 Minute | 60 Minute |
| Augusta, ME | 51,889 | 127,154 | 239,048 | 53,360 | 130,612 | 245,318 |
| Bangor, ME | 46,735 | 66,044 | 103,269 | 48,132 | 68,033 | 106,150 |
| Lewiston, ME | 55,246 | 181,796 | 260,906 | 56,818 | 186,908 | 268,683 |
| Lowell, MA | 647,989 | 1,653,042 | 2,115,381 | 654,875 | 1,671,772 | 2,143,109 |
| Manchester, NH | 236,912 | 569,001 | 1,502,787 | 243,370 | 581,577 | 1,525,973 |
| Competitive Average | 207,754 | 519,407 | 844,278 | 211,311 | 527,780 | 857,847 |
| Portland, ME | 123,850 | 199,546 | 304,444 | 127,160 | 205,563 | 314,315 |

Source: Environmental Systems Resource Institution (ESRI)

Figure 3.3.2: Drive Time Area Households and Projections

3.4 Market Wealth

Among the competing Maine markets, Portland has a comparably smaller percentage of households in the lower income brackets. In the shortest drive time area, the Portland market is more than four percentage points lower than all three Maine markets. However, the competing markets of Lowell and Manchester are more than five percentage points lower than Portland in the 30-minute drive time area. The percentage of Portland households with annual income in the lowest income brackets is consistent with the comparable average across all three drive time areas.

| Market | 2009: Under \$24,999 | | | 2009: \$25,000-\$49,999 | | |
|---------------------|----------------------|--------------|--------------|-------------------------|--------------|--------------|
| | 30 Minute | 45 Minute | 60 Minute | 30 Minute | 45 Minute | 60 Minute |
| Augusta, ME | 26.4% | 25.8% | 24.3% | 29.5% | 29.5% | 28.2% |
| Bangor, ME | 27.3% | 27.6% | 29.1% | 28.7% | 29.8% | 30.4% |
| Lewiston, ME | 24.0% | 22.5% | 22.4% | 28.9% | 27.0% | 27.0% |
| Lowell, MA | 13.2% | 16.1% | 15.8% | 15.4% | 17.6% | 17.6% |
| Manchester, NH | 14.4% | 13.9% | 16.1% | 19.1% | 17.7% | 18.1% |
| Competitive Average | 21.1% | 21.2% | 21.5% | 24.3% | 24.3% | 24.3% |
| Portland, ME | 19.6% | 20.4% | 20.3% | 24.2% | 25.4% | 25.7% |

Source: Environmental Systems Resource Institution (ESRI)

Figure 3.4.1: Drive Time Area Income Distribution

Portland has the highest concentration of households in the higher income brackets among all the studied markets. The percentage of Portland households with incomes between \$50,000 and \$99,999 is consistently higher than the competing average across all three drive time areas. Portland ranks first among the market set in each drive time area. Following is a chart that shows the distribution of wealth in the higher income brackets among the market set.

| Market | 2009: \$50,000-\$99,999 | | | 2009: \$100,000 + | | |
|---------------------|-------------------------|-----------|-----------|-------------------|-----------|-----------|
| | 30 Minute | 45 Minute | 60 Minute | 30 Minute | 45 Minute | 60 Minute |
| Augusta, ME | 34.9% | 35.2% | 36.1% | 9.2% | 9.5% | 11.3% |
| Bangor, ME | 33.2% | 32.6% | 31.5% | 10.8% | 9.9% | 8.9% |
| Lewiston, ME | 37.3% | 37.7% | 37.9% | 9.8% | 12.8% | 12.8% |
| Lowell, MA | 32.0% | 32.1% | 33.0% | 39.3% | 34.2% | 33.6% |
| Manchester, NH | 38.2% | 36.3% | 33.4% | 28.3% | 32.2% | 32.4% |
| Competitive Average | 35.1% | 34.8% | 34.4% | 19.5% | 19.7% | 19.8% |
| Portland, ME | 39.6% | 39.1% | 39.2% | 16.7% | 15.0% | 14.8% |

Source: Environmental Systems Resource Institution (ESRI)

Figure 3.4.2: Drive Time Area Income Distribution

Only the Lowell and Manchester markets have a higher percentage of households with annual incomes that exceed \$100,000. In the shortest drive time area, the Portland market is more than five percentage points higher than all three Maine markets. Portland also exceeds these markets in the 45-, and 60-minute drive time areas, and ranks third among the competitive market set.

The concentration of Portland wealth in the lowest income brackets, or less than \$50,000, is expected to decline through 2014. In addition, it is projected to decline across all three drive time areas. Portland is expected to maintain its rank of third among the competing markets in this category through 2014. Figure 3.4.3 highlights the households' wealth projections within the lower income brackets.

| Market | 2014: Under \$24,999 | | | 2014: \$25,000-\$49,999 | | |
|----------------------------|----------------------|--------------|--------------|-------------------------|--------------|--------------|
| | 30 Minute | 45 Minute | 60 Minute | 30 Minute | 45 Minute | 60 Minute |
| Augusta, ME | 25.2% | 24.6% | 23.1% | 30.0% | 29.8% | 28.0% |
| Bangor, ME | 25.7% | 26.0% | 27.5% | 29.4% | 31.0% | 31.7% |
| Lewiston, ME | 22.8% | 21.3% | 21.4% | 29.2% | 26.3% | 26.1% |
| Lowell, MA | 12.1% | 14.9% | 14.5% | 14.7% | 16.8% | 16.9% |
| Manchester, NH | 13.4% | 12.9% | 14.8% | 18.6% | 17.1% | 17.3% |
| Competitive Average | 19.8% | 19.9% | 20.3% | 24.4% | 24.2% | 24.0% |
| Portland, ME | 18.7% | 19.5% | 19.4% | 21.9% | 23.7% | 24.3% |

Source: Environmental Systems Resource Institution (ESRI)

Figure 3.4.3: Drive Time Area Income Distribution Projections

By 2014, the concentration of wealth in Portland in the higher income brackets is expected to grow in all three drive time areas. Much like the current situation, Portland is projected to exceed all the competitive markets in the \$50,000 to \$99,999 bracket. In addition, Portland will maintain its rank of third among the comparable set in the highest income bracket. The chart below illustrates household wealth projections in the highest income brackets.

| Market | 2014: \$50,000-\$99,999 | | | 2014: \$100,000 + | | |
|----------------------------|-------------------------|--------------|--------------|-------------------|--------------|--------------|
| | 30 Minute | 45 Minute | 60 Minute | 30 Minute | 45 Minute | 60 Minute |
| Augusta, ME | 35.4% | 36.0% | 37.3% | 9.3% | 9.6% | 11.5% |
| Bangor, ME | 33.9% | 33.0% | 31.8% | 10.9% | 10.0% | 9.0% |
| Lewiston, ME | 38.1% | 39.4% | 39.5% | 9.9% | 13.0% | 13.0% |
| Lowell, MA | 31.5% | 32.6% | 33.3% | 41.7% | 35.8% | 35.2% |
| Manchester, NH | 38.7% | 36.4% | 33.8% | 29.2% | 33.7% | 33.9% |
| Competitive Average | 35.5% | 35.5% | 35.1% | 20.2% | 20.4% | 20.5% |
| Portland, ME | 42.3% | 41.4% | 41.4% | 17.0% | 15.3% | 15.1% |

Source: Environmental Systems Resource Institution (ESRI)

Figure 3.4.4: Drive Time Area Income Distribution Projections

4.0 Event Market Analysis

4.1 Introduction

The Consultants conducted a series of interviews with event promoters, agents, production personnel, and touring show producers familiar with the Portland market to collect professional opinions and insights regarding the entertainment industry, emerging trends, the Portland market, and the Civic Center's competitive position. Interviewees were also asked to identify potential improvements, features, and/or amenities that would increase the Civic Center's functionality and maximize its marketability for events. All of the interviewees currently bring events to or previously have worked with the Civic Center.

The Consultants also conducted interviews with the managers of several regional public assembly facilities to identify the variety of competitive venues, their level of usage, and respective scheduling strategies. In addition, the Consultants reviewed the competitive context to inform the interview process. For each regional facility, the Consultants collected schedule information, building program data, seating inventories, and event capabilities to identify potential market niches not fulfilled by the current supply of facilities.

4.2 Methodology

The Consultants developed specific interview guides for the entertainment providers and the facility managers and conducted primary interviews via telephone and electronic mail. Supplementary secondary research was conducted on the respective facility websites via the Internet and using professional industry sources. Copies of the interview guides and the competitive context are attached in Exhibit B.

4.3 Competitive Context Review

In the greater Maine, Massachusetts, and New Hampshire region, there are a significant number of public assembly facilities that compete for events, including concerts, family entertainment events, sporting events, conventions and trade shows. Figure 4.3.1 below lists the inventory of primary regional public assembly facilities with capacities and approximate drive times from the City of Portland.

| Location | Drive Time [1] | Facilities | Capacity |
|-----------------|------------------|----------------------------------|----------------------|
| Portland, ME | - | Cumberland County Civic Center | 6,700 - 8,400 |
| | | Portland Exposition Center | 3,500 |
| | | Merrill Auditorium | 1,900 |
| Lewiston, ME | 45 mins. | Androscoggin Bank Colisee | 3,800 - 4,700 |
| Augusta, ME | 1 hr. | Augusta Civic Center | 5,353 - 8,000 |
| Durham, NH | 1 hr. | Whittemore Center Arena | 6,500 - 7,500 |
| Manchester, NH | 1 hr., 30 mins. | Verizon Wireless Arena | 8,600 - 10,000 |
| Lowell, MA | 1 hr., 35 mins. | Tsongas Center | 6,500 - 7,800 |
| Boston, MA | 1 hr., 45 mins. | TD Garden | 17,500 - 19,000 |
| | | Agganis Arena | 6,150 - 8,000 |
| | | Matthews Arena | 5,400 - 6,300 |
| Bangor, ME | 2 hrs. | Bangor Civic Center & Auditorium | 5,200 - 6,000 |
| | | <i>New Bangor Arena [2]</i> | <i>5,400 - 7,400</i> |
| Orono, ME | 2 hrs., 10 mins. | Alfond Arena | 5,641 - 5,712 |
| Worcester, MA | 2 hrs., 10 mins. | DCU Center | 14,800 |
| Mansfield, MA | 2 hrs., 15 mins. | Comcast Center | 19,900 |
| Amherst, MA | 3 hrs. | Mullins Center | 10,500 |
| Springfield, MA | 3 hrs. | MassMutal Center | 3,856 - 7,743 |

[1] Approximate drive time from Portland, ME

[2] Planned arena

Sources: Facility websites and interviews with building managers

Figure 4.3.1: Regional Public Assembly Facilities

The average seating capacity among the venues is approximately 8,200 seats, which includes fixed and floor seating. Five facilities have capacities that exceed 10,000. Of the five facilities, three offer premium-seating options including luxury suites and club seats.

4.4 Building Manager Interview Findings

Interviewees indicated that, while all entertainment venues in the greater New England area compete for events, there are five primary competitors of the Civic Center. The venues are the Augusta Civic Center in Augusta, ME, Bangor Civic Center & Auditorium in Bangor, ME, Androscoggin Bank Colisee in Lewiston, ME, Verizon Wireless Arena in Manchester, NH, and Tsongas Center in Lowell, MA. The competitors have smaller seating capacities with an average of 6,595 seats and only Manchester offers premium seating. Among the three, the facilities in Augusta, Manchester, and Bangor were considered the primary proximate competitors, including a potential new facility in Bangor.

Augusta Civic Center

The Augusta Civic Center was built in 1973 and features a main arena, 23 meeting rooms, and two ballrooms. The 6,500-seat public assembly facility has retractable seating and no premium seating options. The Civic Center does not have a professional sports tenant or an ice sheet. However, the University of Maine at Augusta utilizes several meeting rooms for classroom space.

With over 120 events per year, the Civic Center's primary use is for conventions, tradeshows, and conferences. Several state and other public entities frequently use the Civic Center for meetings and conferences. The main arena hosts a limited number (five) of music concerts annually.

Civic Center rental rates for non-profit organizations range from \$1,200 to \$1,350 per day with an additional fee of 12% of gross gate receipts. Rental rates charged to for-profit organizations range from \$1,300 to \$1,550 with 13% of total ticket sales. The Civic Center collects 4.5% of ticket revenues for music concerts, with a not-to-exceed total of \$4,000, and imposes a service charge of \$1.50 per ticket.

Unlike the competition, catering is a significant revenue generator for the Civic Center. Catering operations were upgraded in 2003 with the installation of a full-service kitchen at a cost of \$4 million. Building management indicated that in 2009 catering represented approximately 54% of the total operating revenues for that year.



Bangor Auditorium

Bangor Auditorium is a part of a larger complex, Bass Park, which also includes a Civic Center and the State Fairgrounds. Built in the 1950's, the entire complex is owned and operated by the State of Maine. With seating for up to 6,000, the Bangor Auditorium features a mixture of fixed chair back seats and retractable bleacher seating on both sides of the event floor. Like the Augusta Civic Center, the venue does not have an ice sheet.

The civic center portion of the complex is primarily used for flat floor events. Its usage ranges between 75 to 100 event days per year. With 22,000 square feet of available floor space, it hosts conferences, banquets, and trade shows including the Bangor Boating and Marine Show and the Bangor Home Show.

The auditorium hosts music concerts, high school graduation ceremonies and notable family shows including the Harlem Globetrotters, Sesame Street Live, and Anah Temple Shrine Circus. There are approximately 35 to 45 events per year hosted in the Auditorium. The functionality of the building program allows events to occur simultaneously and allows larger events to occupy both the Civic Center space and the Auditorium. Rental rates include a fixed fee and 10% of total ticket sales.

Unlike the Augusta Civic Center, the Bangor complex does not have a full-service kitchen. Instead, all catering services are outsourced and a warming kitchen is utilized on event days. According to management, a full kitchen would better service the facility.

The Bangor Arena Implementation Committee is currently planning a new multi-purpose event center and a renovation of the existing auditorium. The project is expected to have two phases. Phase I would include the construction of a new 5,400-fixed seat arena and the second phase would include a renovation to the auditorium. The arena would have a maximum capacity of 7,400 and feature nine luxury suites and club seating options. Although it is not expected to have a professional sports tenant, the proposed facility would include an ice sheet. Regional building managers felt that a state-of-the-art arena in Bangor might offer some competition with Portland's venue for events initially, but not over the long term.

Verizon Wireless Arena

Built in 2001, the Verizon Wireless Arena is the newest of the competing entertainment venues. The arena has a capacity of 8,600 for ice hockey and a maximum capacity of approximately 10,000 for music concerts. It also features premium-seating options,

including 34 luxury suites and 600 club seats. Luxury suites are priced at \$50,000 per year over a five-to-10 year lease term. Club seats cost \$1,600 per year.

Verizon Wireless Arena is home to the Manchester Monarchs of the American Hockey League AHL. Privately managed by SMG, the arena also attracts a variety of entertainment events. It hosts music concerts, trade shows, and family shows including Disney on Ice, Stars on Ice, and the Harlem Globetrotters. Inclusive of Monarchs home games, Verizon Wireless Arena usage ranges between 120 to 156 event days per year.

4.5 Entertainment Provider Interview Findings

Interviewees defined Portland as a strong market for entertainment and, in particular, for music concerts and touring shows. They noted that Portland's event market has been consistent and reliable for the past several years and is expected to remain that way for the near future.

The Civic Center was identified as the "event center of Maine." Located on the northern edge of the national touring routes, it was described as one of the most desirable stops in the New England market. However, interviewees voiced concern over the Civic Center's lack of performer amenities and back-of-the-house spaces routinely available in new or recently renovated buildings.

All interviewees indicated that the Civic Center is well managed, a key to its viability and standing in the industry. They noted that the management team and staff are helpful and effective in accommodating the needs of their events. While interviewees highlighted the physical and operational inadequacies and limitations of the building, they stressed that the ongoing viability for booking events at the Civic Center can be attributed to the strength of the Portland event market and the venue management team.

Some touring show producers expressed interest in the potential to increase the capacity of the Civic Center. They indicated that an expansion of 1,000 to 2,000 seats could enhance the venue, and, as a result, benefit their events. At the same time, they stressed that an increase in seating capacity would not be a necessity for their events and that back-of-the-house improvements were more critical. One concert promoter suggested that a much larger increase, up to 15,000 seats, would better accommodate the promoter's music concerts.

Interviewees were asked to comment on the proposed arena in Bangor and how it might affect their decisions to bring events to the Civic Center and potentially influence regional competition. Touring show producers indicated that a new Bangor arena would not affect



their decisions to bring events to the Civic Center, primarily due to the strength, convenience and attractiveness of the Portland market.

Promoters, producers, and entertainment providers identified several investment and improvement opportunities for the Civic Center to maintain its competitive position as an entertainment venue. Interviewees believe that operational and potential revenue generating improvements are critical to the Civic Center's viability to host events. Following is a list of their suggested improvements.

- Increased size of the loading dock to improve load-in and load-out time
- Larger size and inventory of dressing rooms and related spaces
- Additional parking options for trucks and tour buses
- Additional storage areas for marshalling and staging equipment
- Wider concourses to reduce congestion at concession stands and restrooms
- More and modernized concession stands and restrooms
- Upgraded merchandise stands with additional points of sale and locations
- Improved ticketing



5.0 Operating Scenarios

5.1 Introduction

At the outset of this planning effort, the Consultants conducted a kick-off meeting with the Task Force, interviewed the Pirates staff, and met with the Civic Center operating and management team to identify objectives for the Plan and, more specifically, the future of the Civic Center. Based upon these meetings and discussions, the following were identified as the preferred outcomes for the project.

- **Maximize the event schedule:** As evidenced in the event analysis, it is important that any plan fundamentally protect the current event schedule and optimally expand the event schedule.
- **Improve the guest experience:** Visitor expectations have changed since the Civic Center opened and guests to all events should enjoy improved food and beverage options, expanded restrooms, enhanced circulation, and, where appropriate, options for a premium seating experience.
- **Create new revenue streams:** Considered improvement options should include, to the extent possible, new or enhanced revenue generating opportunities.
- **Extend the life of the building:** Considered improvement options should include, to the extent possible, the life of the Civic Center as a public assembly facility.

5.2 Methodology

This Plan is focused on developing and analyzing specific improvements and operating strategies; identifying options and programs that respond to the objectives, market, and associated economics; and identifying the potential cost and revenue impacts of each. The Consultants identified a range of potential improvement categories and associated characteristics for inclusion in the development of potential operating scenarios. Each category was informed by the objectives of the Plan and the several market analyses included in this report. The categories include improvements identified by previous studies as well as additional options or approaches to categories that were informed by the market analysis. Following is a summary of the potential improvement categories.

- **Loge Boxes:** Loge boxes are rising in popularity as a premium seating option and provide a price point and level of privacy between that of a luxury suite and a club seat. Loge boxes are semi-private seating configurations defined by low walls or rails. They typically include fixed or movable seating, a small refrigerator, drink rail, and access to a hospitality area. While locations vary, it is common for loge boxes to be located in “endzones” or “sidelines.” The images below illustrate common loge box configurations. ***Loge boxes will introduce a new revenue stream and provide a premium guest experience.***



- **Club Seats:** Club seats are wide, padded fixed seats located in the seating bowl. Common seating bowl locations for club seats are along the sidelines. Club seats typically have access to hospitality areas and / or in-seat service. ***Club seats will introduce a new revenue stream and provide a premium guest experience.***
- **Hospitality Area and Kitchen:** A new hospitality area will provide a lounge space for premium seat holders and a lounge area for other events. The space could be accessible before and after events and available on a rental basis for meetings and receptions. The hospitality area would be configured much like a restaurant and bar and will require a kitchen to support the increased level of food service. The kitchen will also provide for catering during other events. ***The hospitality area will introduce a new revenue stream, potential new events, and improve the guest experience.***
- **Administration and Ticketing:** Improvements to these areas would expand the ticketing operation, introduce new ticketing systems, increase the number of box office windows and queuing areas, and provide for additional administrative office and support space. ***The investment would improve the guest experience and enhance management’s ability to coordinate event activities.***
- **Advertising and Naming Rights:** Potential improvements would include the addition of electronic advertising boards to expand inventory, possible naming or sponsorship opportunities throughout the interior of the building, and a new marquee with advertising inventory. Pending endorsement of the Board of the

Civic Center, the category also includes the opportunity to market and sell naming rights to the facility and possibly interior spaces. ***This investment would generate new revenues.***

- **Additional Seats:** As has been studied in the past and as defined by program guidelines established in 1997, this category assumes the addition of fixed seats to the seating inventory. ***This investment has the potential to attract additional events and generate additional revenue.***
- **Tenant Lockers and Support Space:** Potential improvements include the renovation and expansion of the Pirates locker rooms, the addition of green rooms and performer spaces, and an expansion of storage space. ***The investment will appeal to the Pirates and promoters and work to protect the event schedule.***
- **Production, Dock, and Staging:** Renovations in these areas would address current loading dock deficiencies, increase the staging areas, and improve ice making and maintenance facilities. ***The investment will appeal to the Pirates and promoters and work to protect the event schedule.***
- **Concessions and Restrooms:** These potential improvements are included in the same category because any improvements to the concession operation will require a leveraged improvement of the restroom facilities. To accommodate these renovations, the concourse will likely require an expansion. Improvements would include additional restroom fixtures and a refined mix of fixtures, additional points of sale, expanded menu offerings, and the possible introduction of portables. ***The improvements will improve the guest experience, work to protect the event schedule, and generate new revenues.***
- **Press Area:** Improvements would include a modest expansion to the existing press area, the addition of press support areas, additional areas for scoreboard operator(s), and technology renovations. ***The improvements have the potential to improve the guest experience with the event presentation and to support the events provided by the Pirates.***



5.3 Operating Scenarios

In consideration of the project objectives, the market analysis included in this Plan, and the described improvement categories, the Consultants identified three potential operating scenarios and associated improvement programs. The scenarios serve as the basis for the following financial and economic analysis section. Following is a brief description of each scenario and a summary.

Scenario A

- **Fundamentally protects the event schedule** with improvements to the tenant lockers, green rooms, and performer spaces; the expansion and improvement of the loading dock, staging areas, and production spaces; and the renovation and expansion of the ticketing and administration spaces.
- **Improves the guest experience** with the introduction of a hospitality area and kitchen, improved restrooms and expanded concession operations, and improved circulation.
- **Creates potential new revenue streams** with the expanded food and beverage operation, improved back-of-the-house event support spaces, and the introduction of additional advertising and building naming rights.

Scenario B

- Provides all of the improvements identified in Scenario A while also introducing premium seating.
- **Protects the event schedule** by providing a premium seating option that appeals to the Pirates.
- **Improves the guest experience** by providing a premium food and beverage area.
- **Creates additional new revenue streams** with the introduction of premium priced seating.

Scenario C

- Provides all of the improvements identified in Scenario A and Scenario B while also expanding the seating capacity.
- **Maximizes the event schedule** by providing an expanded seating inventory that may have a broader appeal in the marketplace.
- **Creates potential new revenue streams** with the possible attraction of additional events and the associated food and beverage sales.



| Improvement Category | Scenario A | Scenario B | Scenario C |
|--------------------------------|------------|------------|------------|
| Loge Box Seats | | ✓ | ✓ |
| Club Seats | | ✓ | ✓ |
| Hospitality / Kitchen | ✓ | ✓ | ✓ |
| Administration / Ticketing | ✓ | ✓ | ✓ |
| Advertising / Naming Rights | ✓ | ✓ | ✓ |
| Additional Seats | | | ✓ |
| Tenant Lockers / Support Space | ✓ | ✓ | ✓ |
| Production / Dock / Staging | ✓ | ✓ | ✓ |
| Concessions / Restrooms | ✓ | ✓ | ✓ |
| Press Area | ✓ | ✓ | ✓ |

Figure 5.3.1: Operating Scenarios

5.4 Additional Operating Considerations

Concessions and Catering

Each operating strategy assumes that the Civic Center's food and beverage service operations will be outsourced. With the operations outsourced, the facility catering capabilities can be expanded through a higher quality and expanded menu of food and beverage offerings.

Ticketing Systems

The program for each scenario includes the implementation of advanced ticketing systems. A new ticketing system will strengthen the efficiency of ticketing and box office operations. It is assumed that with more efficient operations, circulation will improve on event days, in particular at the entrance points to the Civic Center. As a result, the overall guest experience at the arena will be enhanced.

Building Management

A subject the Consultants investigated was the possibility of replacing the Civic Center's current self-operation with a public assembly private management company. Private management firms, such as industry leaders SMG and Global Spectrum, provide services such as venue management and operations, event booking, food and beverage, marketing and ticketing throughout the country. Both SMG and Global Spectrum have a major



presence in the New England region in competing buildings with the Civic Center (SMG at Verizon Wireless Arena in Manchester and Global Spectrum at the Tsongas Center in Lowell and Mullins Center in Amherst). Given this competitive reality and the highly favorable standing the current staff enjoys among event users within the industry, the Consultants recommend that the Civic Center continue as a self-operated venue.

Restaurant and Retail Spaces

The Consultants were asked to consider the viability of creating and operating a restaurant and a merchandise retail store to which the public could have daily access on event and non-event days. The Consultants determined that there were no business and operational models that could justify either initiative at this time. This report does identify, however, a potentially attractive revenue-generating opportunity through an expanded hospitality business in which expanded, well-appointed space with accompanying catering services could be introduced, as arenas around the country have done successfully. Additionally, the hospitality area could be located within the building in an area that with the proper market demands could be easily converted to a restaurant.

Rather than attempting a highly risky walk-in retail store venture, the Consultants recommend upgrading the merchandise locations in the Civic Center's box office lobby that could feature displays of primary tenant/event/venue-related apparel and products which could be open to the public during normal box office hours at minimal additional operating expense.

Rebranding and Marketing

With the potential renovation of the Civic Center, there will be a unique opportunity for marketing the venue to key constituent audiences including the sports and entertainment event industry, prospective sponsors, local and regional ticket buyers, and potential business and civic targets for the new hospitality services. In conjunction with any renovation that is undertaken, the Consultants recommend that appropriate financial resources and creative focus be assigned to develop and execute a multi-faceted marketing campaign that can serve to re-brand and re-position the Civic Center highlighting new and improved facilities and services.



5.5 Case Studies Review

The Consultants identified three renovation projects of similar size and scope to a potential Civic Center renovation. The case studies summarize the investments and improvements, project costs, the impact on the facility, and the potential impacts on the properties surrounding the facility. The case studies focused on the following event centers.

- Allen County War Memorial Coliseum, Fort Wayne, IN (“Coliseum”)
- Dunkin’ Donuts Center, Providence, RI (“The Dunk”)
- Peoria Civic Center, Peoria, IL (“PCC”)

Allen County War Memorial Coliseum

Allen County War Memorial Coliseum is located outside of downtown Fort Wayne, IN. Built in 1952, the 13,000-capacity facility is home to three professional sports franchises, including the Fort Wayne Komets of the International Hockey League, and a local university. The Coliseum is managed by Allen County and, in addition to supporting its tenants, it hosts music concerts, touring shows, family shows, conferences, and meetings.

The Coliseum renovations were completed in 2001 at a cost of \$32,000,000. The roof of the arena was raised to accommodate the addition of 24 luxury suites, 322 club seats, and an increase of 2,400 seats within the seating bowl. Other renovations included.

- ADA accessibility enhancements throughout the concourse and seating areas
- Installation of a new sound system
- Expansion of the existing concession stands with additional points of sale
- Upgrade of the building’s mechanical/electrical/plumbing systems

The renovations created potential net new revenue opportunities for the building, through additional concession stand revenues, increased gate receipts, and premium-seating revenues. Building management indicated that the additional seating capacity allowed the arena to host larger music concerts.

The potential economic impact on the surrounding neighborhood appears to be limited. Much of the adjacent property consists of surface parking lots and an abandoned minor league ballpark complex that were not affected by the renovations. However, Coliseum management indicated that an increase in events at the arena led to the development of a 151-room hotel nearby.



Dunkin' Donuts Center

Built in 1972, the Dunkin' Donuts Center is located in downtown Providence, RI and is adjacent to the Rhode Island Convention Center. The 13,000-seat capacity facility is home to the Providence Bruins of the American Hockey League and Providence College basketball programs. Managed by a private operator, the facility is also an active events center and hosts music concerts, dirt shows, touring shows, family shows, conferences, and trade shows.

The State of Rhode Island purchased the arena from the City of Providence in 2005 for \$20,000,000 and began a three-year, \$60,000,000 renovation project. The stated goal of the renovation was to enhance events, patron experience, and quality of life in Providence. The extensive renovation plan included.

- Construction of an ADA accessible entrance
- Introduction of 20 luxury suites and two party suites
- Replacement of aging seats
- Installation of a new scoreboard and additional signage
- Upgrade of food service kitchens, restaurant, and bar areas
- Relocation of the box office and ticketing services
- Addition and expansion of concession stands and restrooms
- Upgrade of tenant locker rooms and dressing rooms
- Expansion of the lobby and concourses
- Construction of a new pedestrian bridge to the convention center
- Upgrade of the building's mechanical, electrical, plumbing, fire, and life safety systems

Renovation of The Dunk created potential net new revenue opportunities through concession stand revenues, restaurant and bar revenues, and luxury suite rentals. The pedestrian connection to the convention center provided better synergies between the two facilities. The venue now has the ability to host NCAA Division I basketball tournament games as it meets the tournament's requirements.

The arena renovation project appears to have generated a certain level of ancillary real estate development activity. According to an article in the Providence Journal dated March of 2009, in anticipation of the project the inventory of Providence hotel rooms increased by approximately 30%. Included were a new 274-room hotel and an addition of 200 rooms to an existing hotel.

Peoria Civic Center

Located in downtown Peoria, IL, the Civic Center is home to the Peoria Rivermen of the American Hockey League. The 28-year-old facility has a maximum seating capacity of 10,400 and does not offer premium-seating options. The PCC is a privately operated facility, and hosts a variety of events including music concerts, family shows, conventions, and conferences.

The combined renovation cost of the exhibit hall and arena exceeded \$55,000,000. The renovations were completed in 2007 and included an expansion of the exhibit hall, ballroom, and pre-function spaces. The arena received the following investments and improvements.

- Addition and expansion of concession stands and food court
- Upgrade and expansion of administrative offices, ticket booths, and box office
- Upgrade and addition of new restrooms
- Expansion and improvement of the loading dock with 12 covered bays

The renovations created potential net new revenue opportunities for the building, through additional concession stand revenues and new food court revenues. Similar to the Coliseum renovation project, the potential economic impact to the surrounding area appears minimal. According to a Travel Daily News International article dated December 2008, a \$102,000,000 private development project was proposed but stalled due to lack of support. The project would have included a new 200-room hotel, parking garage, retail space, and a walkway to the Civic Center.

6.0 Financial Analysis

6.1 Introduction

The financial analysis portion of the Plan quantifies the revenues generated by the operating strategies and is intended to measure the capacity of those revenue streams to support operating requirements and potential debt service obligations. The analysis applies the findings of the market analysis to estimate likely revenue streams and the associated operating costs for the scenarios described in Section 5.0.

6.2 Methodology and Notes

Key to this exercise is the comprehensive financial model developed by the Consultants. This tool allows for a thorough understanding of all the financial implications associated with the facility investment by integrating capital budgets, pro formas, revenue calculations, event schedules, outline programs, and operating expense calculations into a single model. Any changes to the project or operating strategies can be analyzed on a specific and project-wide basis while maintaining internal balance of the financial model.

The revenue and operating cost assumptions in this model are based on a combination of factors including: the Civic Center's historical financial performance, analyses performed in this report, industry standards, and the Team's industry expertise. Utilizing the Civic Center's historical cost data, a baseline scenario was established to evaluate the net economic impact of the potential renovation options on the building's financial performance. A more detailed description of the specific assumptions is included in the following text. Full versions of the financial model are provided in Exhibit D.

While every attempt was made to develop economic and financial models that are as comprehensive as possible, the scope of this Plan converges on a number of topics and decision points that require additional study and cannot be addressed in detail in an economic analysis. It is nonetheless important to outline the specific areas that are not addressed in this Plan and acknowledge the importance of these topics as the project moves into implementation. Following is a summary of the key considerations.



- All projected capital costs represent order of magnitude budgets created based on anticipated square footage improvements and costs per square foot. All budgets were created without the benefit of specific design and engineering studies and the participation of a professional estimator. All capital costs should be treated as budgets and not as construction estimates until architectural designs are available to complete accurate take-offs and construction estimates.
- All scenarios will potentially require some level of conformance with ADA requirements and possibly life safety code requirements. The cost and program impacts cannot be quantified without more detailed design work but must be acknowledged as factors that can impact project budgets and seating programs. All subsequent design solutions and budgeting activities must consider the need for ADA compliance, ensure that any net seating additions consider the potential loss of seats to meet ADA requirements, and that all estimates include the associated costs.
- While this Plan includes a financial analysis, it is limited to the financial operations of the facility and does not consider a potential funding plan, nor the terms of a long-term lease with the Pirates or other tenants. While all identified net new revenues can be considered potential sources for offsetting or supporting capital costs, decisions regarding the commitment of the new revenues should be made within the context of a larger funding plan. As the project progresses towards implementation, a specific funding plan can consider potential debt and equity sources not supported by the building operations, including but not limited to ticket surcharges, parking fees, concessionaire equity, tenant contributions, and other potential city or county funding support. In addition, various operating agreements, including tenant leases (addressing, among other things, terms for the control and sharing of various revenue and expense line items) and concessionaire agreements must be negotiated.
- None of the models include assumptions regarding the potential disruption of Civic Center operations during the renovation period. As architects and builders are engaged during the predevelopment process, the specific phasing and timing of the construction work can be addressed specifically and accurately. Efforts should and can be made to minimize service disruptions and accommodate, to the extent possible, the Civic Center's event schedule. The potential disruption of the Civic Center operations during the renovation period could have financial implications.
- The entirety of this analysis does not assume the future business terms between the Civic Center and the Pirates or any other sports tenant. All net revenue calculations quantify the new revenues generated by a specific improvement and do not include assumptions regarding the potential apportionment of those revenues with the Pirates. It must also be acknowledged that while assumptions



were not made regarding the potential sharing of revenues, it is likely that some portion of the net new revenues will be apportioned between the Civic Center and the Pirates. Following is a summary of the net new revenue streams generated in each scenario that are most often shared and recent revenue apportionment standards established by recent minor league hockey leases.

- Naming Rights: Ranges from 0% to 100% to the building, but typically the building collects 100% of the proceeds. The revenues are typically controlled by the entity marketing and entering into the naming rights agreement and that entity is typically the building owner.
- Premium Seats: Ranges from 0% to 50% to the building, but typically the tenant collects 100% of the revenue or the building collects the premium on the ticket price. Another typical structure provides tenant control of revenues generated during tenant events and building control of revenues generated during all other events.
- Food and Beverage: The tenant may receive a negotiated portion of the venue's net revenues from concession sales derived from the tenant's events. If the venue operates its own concessions, it generally collects 100% of the net revenues for events. If the venue engages a concessionaire for concessions operations, a venue's typical apportionment of net revenues can range from 30% to 45%. Revenue apportionment between the venue and the tenant for hospitality and/or catering during the tenant's events is often separately negotiated from the concessions deal.

6.3 Capital Cost Assumptions

Based upon a thorough review of the existing Civic Center and the previously completed renovation schemes, the Consultants developed an outline improvement program for all potential improvements. The program is not based on a single specific design, but does include spaces that the other studies have verified as fitting within the building. The square footage program provides the basis for developing hard cost budgets based upon a construction cost per square foot metric. All budgets include the hard and soft costs of construction. Soft costs include, but are not limited to, architectural and engineering fees, project management fees, legal fees, permitting fees, testing and inspections, insurance, owner's contingency, and accounting fees. Soft costs vary by project, but may range from 25% to 35% of the projects hard costs. A summary of the capital costs for all categories of potential improvements is included on the following page.



| | Improved Area | Cost / SF (2011 \$) | Hard Costs | Soft Costs [1] | Total Budget |
|--------------------------------|---------------|---------------------|---------------------|--------------------|---------------------|
| Loge Box Seats | 2,880 | \$325 | \$936,000 | \$281,000 | \$1,217,000 |
| Club Seats | 4,200 | \$325 | \$1,365,000 | \$410,000 | \$1,775,000 |
| Hospitality / Kitchen | 9,960 | \$325 | \$3,237,000 | \$971,000 | \$4,208,000 |
| Administration / Ticketing | 3,360 | \$325 | \$1,092,000 | \$328,000 | \$1,420,000 |
| Advertising / Naming Rights | NA | NA | \$800,000 | \$240,000 | \$1,040,000 |
| Additional Seats | 8,400 | \$460 | \$3,864,000 | \$1,159,000 | \$5,023,000 |
| Tenant Lockers / Support Space | 8,400 | \$325 | \$2,730,000 | \$819,000 | \$3,549,000 |
| Production / Dock / Staging | 22,200 | \$325 | \$7,215,000 | \$2,165,000 | \$9,380,000 |
| Concessions / Restrooms | 10,080 | \$325 | \$3,276,000 | \$983,000 | \$4,259,000 |
| Press Area | 1,800 | \$325 | \$585,000 | \$176,000 | \$761,000 |
| Totals | 71,280 | | \$25,100,000 | \$7,532,000 | \$32,632,000 |

[1] Soft costs are estimated at 30% of hard costs.

Figure 6.3.1: Capital Costs

6.4 Revenue Assumptions

Event Income, Event Schedule, and Attendance

The Consultants developed a series of event-specific assumptions including projected event schedules, event income, and average attendance to calculate the total income generated by an event. The event types include Pirates hockey games, ice shows, rock concerts, tradeshow, family events, high school and college events, and other events. Figure 6.4.1 outlines the event-specific assumptions included in the financial model.

| Event Type | Income per Event | # of Events by Scenario | | | Average Attendance by Scenario | | |
|------------------------|------------------|-------------------------|----|----|--------------------------------|-------|-------|
| | | A | B | C | A | B | C |
| Ice Shows | \$3,500 | 13 | 13 | 13 | 4,500 | 4,500 | 4,500 |
| Rock Concerts | \$5,200 | 16 | 20 | 22 | 5,625 | 5,625 | 6,000 |
| Non-Rock Concerts | \$6,200 | 4 | 4 | 4 | 5,625 | 5,625 | 6,000 |
| Pirates Hockey | \$2,500 | 40 | 40 | 40 | 4,700 | 4,700 | 4,700 |
| Tradeshows/Conventions | \$2,000 | 24 | 24 | 24 | 1,406 | 1,406 | 1,406 |
| High School/College | \$2,600 | 21 | 21 | 21 | 1,125 | 1,125 | 1,125 |
| Family Events | \$2,500 | 20 | 20 | 20 | 3,375 | 3,375 | 3,375 |
| Wrestling/Other | \$1,000 | 9 | 10 | 13 | 2,250 | 2,250 | 2,400 |

Figure 6.4.1: Event Assumptions

Event income calculations include all revenues generated by the event, excluding concessions and merchandise, and generally represent the rental agreement for the event. Assumptions for event income range from \$1,000 for wrestling events to over \$6,000 for non-rock concerts.

The annual event schedule varies by scenario. Based upon the current 142-event schedule, Scenario A is assumed to generate five additional events per year. With the renovations addressed in Scenario B, it is assumed that the Civic Center will have the ability to host up to 10 additional events annually and up to 15 additional events per year in Scenario C. New events are projected to include rock concerts, non-rock concerts, and other events.

It must be noted that while the Pirates are assumed to play a 40-game home season, the potential exists for the league to shorten the home season to 36 games. The models also do not assume a second sports tenant, which could be a future possibility as emerging indoor sports leagues develop the following and popularity necessary to prove to be economically viable alternatives to other touring shows.

All attendance includes a “no show factor” to differentiate between paid attendance and turnstile attendance. For all scenarios, there is a “no show factor” of 5% for all non-tenant events and 15% for Pirates hockey games.

Concessions and Merchandise

Concession sales are calculated for each event type with a unique per capita spending assumption. Price point assumptions range from \$3.90 to \$6.30. Ice shows, concerts, and family events have the highest per capitas, while high school sporting events have the lowest. In each scenario the concessions cost is set at 60%. Merchandise sales are also calculated for each event type with a unique per capita spending assumption. Per capita assumptions range from \$0.25 to \$1.00 with a merchandise cost of 75%. All concession and merchandise calculations are based upon turnstile attendance calculations and include the “no show factor”.

Premium Seating

Premium seating programs are included in both Scenarios B and C and include 120 loge seats and 500 club seats. The loge seats are priced at \$2,500 per seat annually with a 3% annual increase. Of the lease revenue, 15% is committed to specific loge box expenses and per capita concessions are set at \$20.00. An occupancy percentage of 90% is included in the financial model.



The club seats are priced at \$1,500 per year and are assumed to be 90% occupied in the average year. Per capita concessions are assumed to be \$12.00 and 10% of the revenues are committed to club seat expenses. Lease terms include a one-year commitment with a 3% renewal rate.

Seating Capacity

Total fixed seating capacity includes all the seats located within the seating bowl in a hockey configuration. Scenario's A and B provide a total fixed seating capacity consistent with the Civic Center's current hockey capacity of 6,700. In Scenario C, the fixed seating capacity is 7,700, which is a net increase of 1,000 seats.

From a programming perspective, the fixed seating capacity in Scenario B is conservative. Of the 620 new premium seats, 500 are assumed to be club seats that are one for one replacements of the current seating bowl chairs. The 120 loge seats could be situated along the sidelines at the concourse or, in avoiding the displacement of current fixed seating, could be located at a new premium level on the garage side of the Civic Center and at the top of the seating bowl.

In Scenario C, the facility is assumed to require significant structural improvements to accommodate an expanded seating bowl, the construction of fixed seats in the corners of the seating bowl, or the addition of a balcony. Considering the potential ADA impacts on the seating inventory, the clearest path to a significant increase in seating capacity requires the structural upgrades documented in several previous planning studies.

Hospitality Space

The hospitality space is assumed to have a capacity of 250 during Civic Center events and 400 for receptions and other rental events. The model assumes a \$20.00 per cap for the space with the building collecting 25% of the proceeds.

Naming Rights and Advertising

The renovation of the Civic Center presents several net new sponsorship and naming opportunities. The included financial model assumes \$250,000 in annual revenues from advertising and sponsorships and an additional \$200,000 per year from a 10-year facility naming rights agreement.



6.5 Operating Expense Assumptions

Personnel and Non-Personnel Expenses

A premium, or improvement factor, was applied to the Civic Center's personnel expenses to reflect the increase in costs associated with the renovation options. The model assumes a 10% improvement factor for Scenario A and a 20% improvement factor for Scenarios B and C.

The Consultants also applied improvement factors to each of the Civic Center's non-personnel costs to quantify the additional costs to operate a renovated building. The non-personnel expenses include utilities, repairs and maintenance, insurance, and contract services among other costs. Improvement factors for Scenario's A and B are between 5% and 10% and between 15% and 22.5% for Scenario C.

6.6 Financial Performance

With an understanding of the potential improvements, projected capital costs, facility revenues, and operating expenses, the economics of the Civic Center renovation scenarios can be evaluated. All three scenarios are projected to perform with a positive net operating income. In year one, the net operating income for Scenario A is projected to be \$632,000 with a capital cost between \$24M and \$26M. The net operating income for Scenario B is projected to be \$1,618,000 with a capital cost between \$27M and \$29M. The net operating income for Scenario C is projected to be \$1,707,000 with a capital cost between \$32M and \$34M. The chart on the following page summarizes the estimated revenues and expenses for the building in year one - 2012 - and the projected capital costs.

It must be noted again that the analysis includes no assumptions regarding the possible apportionment of net new revenues between the facility and the Pirates.

Projected Financial Performance Summary: Year 1 (2012)

| | 2008-2009 Budget | Scenario A | Scenario B | Scenario C |
|-----------------------------|--------------------|---------------------|---------------------|---------------------|
| Revenues [1] | | | | |
| Event Income | \$447,000 | \$535,000 | \$558,000 | \$572,000 |
| Concessions Income | \$750,000 | \$1,120,000 | \$1,179,000 | \$1,246,000 |
| Hospitality Income | \$0 | \$195,000 | \$201,000 | \$208,000 |
| Merchandise Income | \$0 | \$19,000 | \$24,000 | \$28,000 |
| Advertising Income | \$177,100 | \$265,000 | \$265,000 | \$265,000 |
| Naming Rights | \$0 | \$200,000 | \$200,000 | \$200,000 |
| Other Income | \$69,663 | \$0 | \$0 | \$0 |
| Luxury Suites | \$0 | \$0 | \$248,000 | \$248,000 |
| Club Seats | \$0 | \$0 | \$648,000 | \$648,000 |
| Premium Seating F&B | \$0 | \$0 | \$109,000 | \$109,000 |
| Total Revenues | \$1,444,000 | \$2,334,000 | \$3,432,000 | \$3,524,000 |
| Expenses | | | | |
| Salaries & Benefits | \$595,000 | \$694,000 | \$757,000 | \$757,000 |
| Utilities | \$432,000 | \$527,000 | \$550,000 | \$550,000 |
| Repairs & Maintenance | \$96,000 | \$112,000 | \$117,000 | \$117,000 |
| Materials & Supplies | \$28,000 | \$33,000 | \$34,000 | \$34,000 |
| Insurance | \$90,000 | \$105,000 | \$115,000 | \$117,000 |
| Advertising | \$60,000 | \$70,000 | \$70,000 | \$70,000 |
| General & Administrative | \$54,000 | \$63,000 | \$63,000 | \$64,000 |
| Contract Services | \$53,000 | \$59,000 | \$65,000 | \$65,000 |
| Other | \$35,000 | \$39,000 | \$43,000 | \$43,000 |
| Total Expenses | \$1,443,000 | \$1,702,000 | \$1,814,000 | \$1,817,000 |
| Net Operating Income | \$1,000 | \$632,000 | \$1,618,000 | \$1,707,000 |
| Capital Costs | | \$24,000,000 | \$27,000,000 | \$32,000,000 |
| | | to | to | to |
| | | \$26,000,000 | \$29,000,000 | \$34,000,000 |

[1] The analysis includes no assumptions regarding the possible apportionment of net new revenues between the facility and the Pirates. The net new revenues apportioned to the facility in each scenario could potentially be used to offset a portion of the respective capital costs and support possible debt financing.

Figure 6.6.1: Financial Performance Comparison

7.0 Next Steps

In consideration of the findings and analyses included in this Plan, the following are recommended next steps for the Cumberland County Civic Center Trustees to consider completing in the next six to nine months.

- Commit to advancing Scenario B.
- Scenario B responds to each of the project objectives by protecting and maximizing the event schedule, including Pirates hockey games; improving the guest experience with premium spaces, hospitality areas, and improved concessions and restrooms; and generating new revenues through ancillary revenues, advertising, and new events, while not requiring the significant structural expense associated with significantly expanding the seating capacity. As supported by the market analysis, the strategy puts less of a focus on luxury suites and multiple lounge areas while ensuring proper back-of-the-house improvements are made and that guest services, including food and beverage and restrooms, are enhanced.
- As the project moves into pre-development, there will be the opportunity to refine and adjust the program within the framework of the program and the economic analysis in this Plan.

Project Scope

- Select and engage an appropriate architectural and/or engineering design service professional to implement a design study that illustrates and tests the physical feasibility of Scenario B. The design study will provide the basis for cost estimation, the refinement of revenue and operating cost projections, and the development of a sources and uses statement.
- Manage the design exercise to ensure that the project objectives and considered improvements are incorporated and that the schemes have the ability to generate the projected financial performance.
- Select and engage an experienced construction or estimating firm to develop accurate cost estimates and likely construction and phasing schedules.
- Investigate and identify the most appropriate delivery method for the improvements. Methods could vary from a traditional design-bid-build delivery to a design/build approach.



Project Implementation

- Negotiate lease terms with the Pirates to determine the revenue apportionment between the facility and the tenant.
- Consider and investigate options and benefits for possible out-sourcing of recommended revenue-generating opportunities including naming rights, concessions, and hospitality/catering.
- Determine the appropriate level of public funding to commit to the project. Possible funding mechanisms may include grants and debt from the state, county, and federal governments. Other potential revenue sources may be considered to support funding, including ticket surcharges, parking fees, and food service vendor equity. All funding commitments must provide sources to fund capital outlays and operating costs.
- Develop a comprehensive project implementation schedule inclusive of pre-development, funding, public approvals, design, and construction.



A. Comparable Market Analysis

 CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE
Economic Analysis of Potential Renovation Options

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Comparable Market Identification

| Market [1] | Total Population [2] | Market | Total Retail Sales [3] | Market | Total EBI [4] |
|----------------------|----------------------|----------------------|------------------------|----------------------|---------------------|
| Toledo, OH | 651,300 | Grand Rapids, MI | \$13,380,948 | Fresno, CA | \$14,198,130 |
| Syracuse, NY | 649,100 | Fresno, CA | \$12,907,001 | Akron, OH | \$14,121,905 |
| Charleston, SC | 617,900 | Baton Rouge, LA | \$12,583,486 | Columbia, SC | \$14,108,532 |
| Greenville, SC | 614,000 | Cape Coral, FL | \$12,568,173 | Greensboro, NC | \$13,109,963 |
| Colorado Springs, CO | 608,500 | Little Rock, AR | \$12,470,688 | Little Rock, AR | \$13,087,430 |
| Cape Coral, FL | 608,200 | Dayton, OH | \$12,458,842 | Springfield, MA | \$12,898,395 |
| Wichita, KS | 597,400 | Boise, ID | \$12,035,032 | Colorado Springs, CO | \$12,828,658 |
| Boise, ID | 595,000 | Bakersfield, CA | \$11,986,855 | Madison, WI | \$12,785,568 |
| Youngstown, OH | 582,600 | New Haven, CT | \$11,963,072 | Toledo, OH | \$12,610,659 |
| Lakeland, FL | 579,900 | Poughkeepsie, NY | \$11,755,404 | Charleston, SC | \$12,401,213 |
| Scranton, PA | 549,800 | Tulsa, OK | \$11,558,084 | Syracuse, NY | \$12,783,749 |
| Madison, WI | 549,100 | Madison, WI | \$11,457,879 | Des Moines, IA | \$12,133,079 |
| Palm Bay, FL | 548,500 | Greenville, SC | \$10,582,036 | Bakersfield, CA | \$12,034,135 |
| Des Moines, IA | 547,900 | Jackson, MS | \$10,461,512 | Palm Bay, FL | \$11,917,873 |
| Jackson, MS | 533,700 | Syracuse, NY | \$10,445,058 | Stockton, CA | \$11,881,045 |
| Augusta, GA | 529,900 | Columbia, SC | \$10,189,451 | Santa Rosa, CA | \$11,753,533 |
| Harrisburg, PA | 529,800 | Springfield, MA | \$10,176,115 | Harrisburg, PA | \$11,571,138 |
| Modesto, CA | 528,500 | Scranton, PA | \$10,028,125 | Boise, ID | \$11,496,703 |
| Portland, ME | 517,000 | Portland, ME | \$10,008,443 | Portland, ME | \$11,394,541 |
| Ogden, UT | 513,400 | McAllen, TX | \$9,958,699 | Wichita, KS | \$11,289,781 |
| Deltona, FL | 509,800 | Akron, OH | \$9,864,953 | Greenville, SC | \$11,280,656 |
| Chattanooga, TN | 502,300 | Colorado Springs, CO | \$9,820,475 | Lakeland, FL | \$10,729,468 |
| Lancaster, PA | 500,100 | Manchester, NH | \$9,753,731 | Manchester, NH | \$10,289,715 |
| Provo-Orem, UT | 495,900 | Reno-Sparks, NV | \$9,686,535 | Deltona, FL | \$10,076,358 |
| Santa Rosa, CA | 476,500 | Deltona, FL | \$9,556,320 | Naples, FL | \$10,032,020 |
| Durham, NC | 474,200 | Palm Bay, FL | \$9,548,914 | Scranton, PA | \$9,960,918 |
| Winston, NC | 466,400 | Port St. Lucie, FL | \$9,258,637 | Lancaster, PA | \$9,956,788 |
| Lansing, MI | 454,100 | Wichita, KS | \$9,103,263 | Youngstown, OH | \$9,953,719 |
| Spokane, WA | 453,400 | Harrisburg, PA | \$9,102,312 | Durham, NC | \$9,884,361 |
| Pensacola, FL | 449,100 | Stockton, CA | \$9,078,692 | Reno-Sparks, NV | \$9,780,906 |
| Lexington, KY | 444,500 | Lexington, KY | \$8,941,629 | Chattanooga, TN | \$9,696,869 |
| Flint, MI | 441,900 | El Paso, TX | \$8,921,170 | El Paso, TX | \$9,655,905 |
| Fayetteville, AR | 440,000 | Toledo, OH | \$8,916,809 | Port St. Lucie, FL | \$9,609,501 |
| Visalia, CA | 434,200 | Santa Rosa, CA | \$8,850,913 | Jackson, MS | \$9,584,389 |
| York-Hanover, PA | 426,000 | Des Moines, IA | \$8,596,700 | Trenton, NJ | \$9,528,438 |
| Vallejo, CA | 421,700 | Spokane, WA | \$8,555,030 | Augusta, GA | \$9,505,854 |
| Salinas, CA | 420,200 | Lakeland, FL | \$8,438,591 | Lexington, KY | \$9,429,863 |
| Corpus Christi, TX | 417,900 | Pensacola, FL | \$8,403,203 | Ogden, UT | \$9,344,921 |
| Springfield, MO | 417,800 | Naples, FL | \$8,380,487 | Santa Barbara, CA | \$9,273,645 |
| Santa Barbara, CA | 413,800 | Fayetteville, AR | \$8,291,415 | Winston, NC | \$9,226,241 |
| Port St. Lucie, FL | 412,800 | Ashville, NC | \$8,284,179 | Lansing, MI | \$8,975,774 |
| Fort Wayne, IN | 412,900 | Lancaster, PA | \$8,111,789 | Modesto, CA | \$8,846,150 |
| Reno-Sparks, NV | 412,100 | Chattanooga, TN | \$8,021,643 | Pensacola, FL | \$8,820,661 |
| Canton, OH | 409,900 | Youngstown, OH | \$7,976,452 | Anchorage, AK | \$8,796,893 |
| Reading, PA | 407,800 | Winston, NC | \$7,972,822 | York-Hanover, PA | \$8,780,370 |
| Manchester, NH | 406,600 | Springfield, MO | \$7,963,082 | Vallejo, CA | \$8,773,980 |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

[2] Market size indicator

[3] Economic activity indicator (1,000 of dollars)

[4] Market wealth indicator - EBI (Effective Buying Income) defined as "disposable" of "after-tax" income (1,000 of dollars)

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Comparable Market Set

| Market [1] | Total Population [2] | Total Retail Sales [3] | Total EBI [4] |
|---------------------------|----------------------|------------------------|---------------------|
| Boise, ID | 595,000 | \$12,035,032 | \$11,496,703 |
| Des Moines, IA | 547,900 | \$8,596,700 | \$12,133,079 |
| Harrisburg, PA | 529,800 | \$9,102,312 | \$11,571,138 |
| Manchester, NH | 406,600 | \$9,753,731 | \$10,289,715 |
| Scranton, PA | 549,800 | \$10,028,125 | \$9,960,918 |
| Toledo, OH | 651,300 | \$8,916,809 | \$12,610,659 |
| Wichita, KS | 597,400 | \$9,103,263 | \$11,289,781 |
| Youngstown, OH | 582,600 | \$7,976,452 | \$9,953,719 |
| Comparable Average | 557,550 | \$9,439,053 | \$11,163,214 |
| Portland, ME | 517,000 | \$10,008,443 | \$11,394,541 |
| Comparable Rank | 8th | 3rd | 5th |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

[2] Market size indicator

[3] Economic activity indicator (1,000 of dollars)

[4] Market wealth indicator - EBI (Effective Buying Income) defined as "disposable" of "after-tax" income (1,000 of dollars)

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Arena Review

| Market [1] | Tenant | League | Arena [2] | Opened | Hockey Capacity | Maximum Capacity | Luxury Suites | Club Seats |
|---------------------|--------------------------------|------------|---------------------------------------|-------------|-----------------|------------------|---------------|------------|
| Boise, ID | Idaho Steelheads | ECHL | Owest Arena | 1997 | 5,300 | 6,800 | 39 | 1,000 |
| Des Moines, IA | Iowa Energy | NBA DL | Wells Fargo Arena | 2005 | 15,200 | 17,000 | 36 | 600 |
| Harrisburg, PA | Hershey Bears | AHL | Giant Center | 2002 | 10,500 | 12,500 | 40 | 688 |
| Manchester, NH | Manchester Monarchs | AHL | Verizon Wireless Arena | 2001 | 10,100 | 11,770 | 34 | 600 |
| Scranton, PA | Wilkes-Barre/Scranton Penguins | AHL | Wachovia Arena | 1999 | 8,400 | 10,000 | 32 | 624 |
| Toledo, OH | Toledo Walleye | ECHL | Huntington Center | 2009 | 7,400 | 8,000 | 20 | 750 |
| Wichita, KS | Wichita Thunder | CHL | Intrust Bank Arena | 2010 | 15,000 | 17,500 | 22 | 300 |
| Youngstown, OH | Youngstown Phantoms | USHL | Covelli Centre | 2005 | 5,700 | 5,900 | 26 | 520 |
| Comparable Average | | | | 2004 | 9,700 | 11,200 | 31 | 635 |
| Portland, ME | Portland Pirates | AHL | Cumberland County Civic Center | 1977 | 6,700 | 8,400 | 0 | 0 |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

[2] Arena located within MSA of comparable market

Sources: Revenues from Sports Venues College Edition 2009 and league/team websites

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Market Size

| Market [1] | Total Population [2] | Total Households | Household Size |
|---------------------------|----------------------|------------------|----------------|
| Boise, ID | 595,000 | 220,100 | 2.65 |
| Des Moines, IA | 547,900 | 219,500 | 2.44 |
| Harrisburg, PA | 529,800 | 214,300 | 2.37 |
| Manchester, NH | 406,600 | 154,800 | 2.57 |
| Scranton, PA | 549,800 | 228,200 | 2.31 |
| Toledo, OH | 651,300 | 263,000 | 2.40 |
| Wichita, KS | 597,400 | 233,200 | 2.52 |
| Youngstown, OH | 582,600 | 232,600 | 2.40 |
| Comparable Average | 557,550 | 220,713 | 2.46 |
| Portland, ME | 517,000 | 213,400 | 2.36 |
| Comparable Rank | 8th | 8th | 8th |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

[2] Market size indicator

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Target Market Analysis

| Market [1] | Total Population | 0-17 | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ | % of Market Age 18-34 | Target Population |
|---------------------------|------------------|--------------|-------------|--------------|--------------|--------------|--------------|--------------|-----------------------|-------------------|
| Boise, ID | 595,000 | 27.0% | 9.1% | 15.5% | 14.5% | 13.5% | 10.1% | 10.3% | 24.7% | 146,706 |
| Des Moines, IA | 547,900 | 25.5% | 8.8% | 14.2% | 15.0% | 14.5% | 10.7% | 11.3% | 23.0% | 126,220 |
| Harrisburg, PA | 529,800 | 21.9% | 9.3% | 12.1% | 14.0% | 15.7% | 12.5% | 14.5% | 21.4% | 113,354 |
| Manchester, NH | 406,600 | 24.1% | 8.5% | 11.5% | 15.9% | 16.7% | 11.9% | 11.4% | 20.1% | 81,656 |
| Scranton, PA | 549,800 | 20.1% | 9.5% | 11.4% | 13.3% | 14.8% | 12.6% | 18.4% | 20.9% | 114,649 |
| Toledo, OH | 651,300 | 24.0% | 11.2% | 12.8% | 13.0% | 14.7% | 11.4% | 13.0% | 24.0% | 156,273 |
| Wichita, KS | 597,400 | 26.9% | 9.4% | 13.2% | 13.5% | 14.7% | 10.4% | 12.0% | 22.6% | 134,991 |
| Youngstown, OH | 582,600 | 21.6% | 9.9% | 11.3% | 12.2% | 15.1% | 12.6% | 17.3% | 21.2% | 123,498 |
| Comparable Average | 557,550 | 23.9% | 9.5% | 12.8% | 13.9% | 15.0% | 11.5% | 13.5% | 22.2% | 124,668 |
| Portland, ME | 517,000 | 21.6% | 8.6% | 10.7% | 14.9% | 16.9% | 13.1% | 14.2% | 19.3% | 99,942 |
| Comparable Rank | 8th | 7th | 8th | 9th | 3rd | 1st | 1st | 4th | 9th | 8th |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Market Wealth

| Market [1] | Total EBI [2] | Average Household EBI | Median Household EBI | Per Capita EBI |
|---------------------------|---------------------|-----------------------|----------------------|-----------------|
| Boise, ID | \$11,496,703 | \$52,223 | \$42,261 | \$19,322 |
| Des Moines, IA | \$12,133,079 | \$55,272 | \$44,470 | \$22,147 |
| Harrisburg, PA | \$11,571,138 | \$53,995 | \$43,203 | \$21,841 |
| Manchester, NH | \$10,289,715 | \$66,450 | \$53,678 | \$25,304 |
| Scranton, PA | \$9,960,918 | \$43,658 | \$34,608 | \$18,117 |
| Toledo, OH | \$12,610,659 | \$47,950 | \$38,198 | \$19,362 |
| Wichita, KS | \$11,289,781 | \$48,403 | \$40,638 | \$18,898 |
| Youngstown, OH | \$9,953,719 | \$42,797 | \$34,668 | \$17,086 |
| Comparable Average | \$11,163,214 | \$51,344 | \$41,466 | \$20,260 |
| Portland, ME | \$11,394,541 | \$53,404 | \$42,468 | \$22,036 |
| Comparable Rank | 5th | 4th | 4th | 3rd |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

[2] Market wealth indicator - EBI (Effective Buying Income) defined as "disposable" of "after-tax" income (1,000 of dollars)

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Market Wealth Analysis

| Market [1] | Total Households | Average Household EBI | Median Household EBI | Households by EBI | | | | |
|---------------------------|------------------|-----------------------|----------------------|-------------------|----------------------|----------------------|----------------------|-------------|
| | | | | \$0 to \$14,999 | \$15,000 to \$24,999 | \$25,000 to \$49,999 | \$50,000 to \$99,999 | \$100,000+ |
| Boise, ID | 220,100 | \$52,223 | \$42,261 | 10.3% | 12.8% | 37.9% | 32.5% | 6.4% |
| Des Moines, IA | 219,500 | \$55,272 | \$44,470 | 10.0% | 11.6% | 35.7% | 34.8% | 7.9% |
| Harrisburg, PA | 214,300 | \$53,995 | \$43,203 | 10.9% | 12.4% | 35.7% | 33.2% | 7.8% |
| Manchester, NH | 154,800 | \$66,450 | \$53,678 | 8.4% | 9.3% | 28.5% | 39.2% | 14.6% |
| Scranton, PA | 228,200 | \$43,658 | \$34,608 | 18.1% | 16.6% | 35.4% | 25.0% | 4.8% |
| Toledo, OH | 263,000 | \$47,950 | \$38,198 | 15.4% | 15.2% | 34.7% | 28.8% | 5.9% |
| Wichita, KS | 233,200 | \$48,403 | \$40,638 | 12.7% | 14.0% | 37.5% | 30.5% | 5.4% |
| Youngstown, OH | 232,600 | \$42,797 | \$34,668 | 16.6% | 17.4% | 36.9% | 25.1% | 4.1% |
| Comparable Average | 220,713 | \$51,344 | \$41,466 | 13.1% | 13.9% | 35.5% | 30.7% | 6.8% |
| Portland, ME | 213,400 | \$53,404 | \$42,468 | 11.6% | 12.4% | 36.1% | 32.5% | 7.3% |
| Comparable Rank | 8th | 4th | 4th | 5th | 6th | 4th | 4th | 4th |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

[2] Market wealth indicator - EBI (Effective Buying Income) defined as "disposable" of "after-tax" income (1,000 of dollars)

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Consumer Spending Analysis

| Market [1] | Total Expenditures [2] | Entertainment Expenditures [3] | Entertainment Expenditures as % of Total |
|--------------------|------------------------|--------------------------------|--|
| Boise, ID | \$11,280,893 | \$145,321 | 1.29% |
| Des Moines, IA | \$11,225,334 | \$124,735 | 1.11% |
| Harrisburg, PA | \$10,707,830 | \$115,033 | 1.07% |
| Manchester, NH | \$9,128,913 | \$121,414 | 1.33% |
| Scranton, PA | \$10,589,067 | \$106,822 | 1.01% |
| Toledo, OH | \$12,245,204 | \$123,077 | 1.01% |
| Wichita, KS | \$11,041,180 | \$109,371 | 0.99% |
| Youngstown, OH | \$10,260,427 | \$90,110 | 0.88% |
| Comparable Average | \$10,809,856 | \$116,985 | 1.08% |
| Portland, ME | \$10,755,943 | \$115,547 | 1.07% |
| Comparable Rank | 5th | 5th | 4th |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

[2] Total expenditures in \$000

[3] Entertainment expenditures in \$000

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Business Establishments

| Market [1] | Total Establishments | Establishments by Employment | | | | | |
|---------------------------|----------------------|------------------------------|------------|------------|------------|------------|------------|
| | | 1-49 | 50-99 | 100-249 | 250-499 | 500-999 | 1,000 + |
| Boise, ID | 18,347 | 17,586 | 440 | 233 | 62 | 18 | 8 |
| Des Moines, IA | 15,196 | 14,174 | 559 | 331 | 82 | 28 | 22 |
| Harrisburg, PA | 13,700 | 12,776 | 494 | 295 | 75 | 42 | 18 |
| Manchester, NH | 11,164 | 10,488 | 378 | 230 | 45 | 16 | 7 |
| Scranton, PA | 13,888 | 13,012 | 443 | 307 | 88 | 26 | 12 |
| Toledo, OH | 15,716 | 14,710 | 552 | 327 | 83 | 29 | 15 |
| Wichita, KS | 14,997 | 14,091 | 517 | 286 | 76 | 19 | 8 |
| Youngstown, OH | 13,807 | 13,050 | 440 | 241 | 56 | 11 | 9 |
| Comparable Average | 14,602 | 13,736 | 478 | 281 | 71 | 24 | 12 |
| Portland, ME | 18,068 | 17,354 | 393 | 243 | 54 | 17 | 7 |
| Comprable Rank | 2nd | 2nd | 8th | 6th | 8th | 7th | 8th |

[1] Designated Market Area (DMA) defined by "Broadcast Market"

Source: United States Census Bureau - 2007 County Business Patterns (NAICS)

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Population and Household Projections

| Market [1] | Total Population | 2013 Population | % Change | Total Households | 2013 Households | % Change |
|---------------------------|------------------|-----------------|-------------|------------------|-----------------|-------------|
| Boise, ID | 595,000 | 680,100 | 14.3% | 220,100 | 253,300 | 15.1% |
| Des Moines, IA | 547,900 | 590,500 | 7.8% | 219,500 | 239,100 | 8.9% |
| Harrisburg, PA | 529,800 | 542,600 | 2.4% | 214,300 | 222,000 | 3.6% |
| Manchester, NH | 406,600 | 421,200 | 3.6% | 154,800 | 160,800 | 3.8% |
| Scranton, PA | 549,800 | 543,000 | -1.2% | 228,200 | 228,600 | 0.2% |
| Toledo, OH | 651,300 | 644,000 | -1.1% | 263,000 | 264,200 | 0.5% |
| Wichita, KS | 597,400 | 613,400 | 2.7% | 233,200 | 241,100 | 3.4% |
| Youngstown, OH | 582,600 | 567,900 | -2.5% | 232,600 | 229,600 | -1.3% |
| Comparable Average | 557,550 | 575,338 | 3.3% | 220,713 | 229,838 | 4.3% |
| Portland, ME | 517,000 | 532,600 | 3.0% | 213,400 | 223,200 | 4.6% |
| Comparable Rank | 8th | 8th | 4th | 8th | 7th | 3rd |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Retail Sales Projections

| Market [1] | Retail Sales [2] | Establishments | 2013 Retail Sales [3] | % Change |
|---------------------------|---------------------|----------------|-----------------------|--------------|
| Boise, ID | \$12,035,032 | 18,347 | \$16,104,867 | 33.8% |
| Des Moines, IA | \$8,596,700 | 15,196 | \$9,200,573 | 7.0% |
| Harrisburg, PA | \$9,102,312 | 13,700 | \$9,715,302 | 6.7% |
| Manchester, NH | \$9,753,731 | 11,164 | \$11,665,417 | 19.6% |
| Scranton, PA | \$10,028,125 | 13,888 | \$11,670,986 | 16.4% |
| Toledo, OH | \$8,916,809 | 15,716 | \$8,566,940 | -3.9% |
| Wichita, KS | \$9,103,263 | 14,997 | \$10,226,657 | 12.3% |
| Youngstown, OH | \$7,976,452 | 13,807 | \$8,201,758 | 2.8% |
| Comparable Average | \$9,439,053 | 14,602 | \$10,669,063 | 11.8% |
| Portland, ME | \$10,008,443 | 18,068 | \$11,419,159 | 14.1% |
| Comparable Rank | 3rd | 2nd | 4th | 4th |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

[2] Retail sales in \$000

[3] Retail sales projections in \$000

Sources: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition & United States Census Bureau 2007 County Business Patterns (NAICS)

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Market Wealth Projections

| Market [1] | Total EBI [2] | 2013 Total EBI | % Change | Average Household EBI | 2013 Average Household EBI | % Change |
|---------------------------|---------------------|---------------------|--------------|-----------------------|----------------------------|--------------|
| Boise, ID | \$11,496,703 | \$14,686,099 | 27.7% | \$52,223 | \$57,980 | 11.0% |
| Des Moines, IA | \$12,133,079 | \$14,673,486 | 20.9% | \$55,272 | \$61,358 | 11.0% |
| Harrisburg, PA | \$11,571,138 | \$13,427,615 | 16.0% | \$53,995 | \$60,486 | 12.0% |
| Manchester, NH | \$10,289,715 | \$12,133,055 | 17.9% | \$66,450 | \$75,453 | 13.5% |
| Scranton, PA | \$9,960,918 | \$11,103,821 | 11.5% | \$43,658 | \$48,581 | 11.3% |
| Toledo, OH | \$12,610,659 | \$13,756,263 | 9.1% | \$47,950 | \$52,071 | 8.6% |
| Wichita, KS | \$11,289,781 | \$12,542,876 | 11.1% | \$48,403 | \$52,013 | 7.5% |
| Youngstown, OH | \$9,953,719 | \$10,617,603 | 6.7% | \$42,797 | \$46,250 | 8.1% |
| Comparable Average | \$11,163,214 | \$12,867,602 | 15.1% | \$51,344 | \$56,774 | 10.4% |
| Portland, ME | \$11,394,541 | \$13,353,148 | 17.2% | \$53,404 | \$59,818 | 12.0% |
| Comparable Rank | 5th | 5th | 4th | 4th | 4th | 2nd |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

[2] Market wealth indicator - EBI (Effective Buying Income) defined as "disposable" of "after-tax" income (1,000 of dollars)

Source: Trade Dimensions International, Inc. - Demographics USA 2008 - County Edition

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Public Assembly Facility Inventory

| Market [1] | Facilities | Opened | Capacity | Owner | Tenant(s) |
|----------------|--------------------------------|--------|----------|--|--|
| Boise, ID | Qwest Arena | 1997 | 5,000 | State of Idaho | Idaho Steelheads (ECHL), Idaho Stampede (NBA-DL) |
| | Bronco Stadium | 1970 | 32,000 | Boise State University | Boise State University |
| | Memorial Stadium | 1988 | 4,500 | NA | Boise Hawks (A Baseball) |
| Des Moines, IA | Wells Fargo Arena | 2005 | 15,200 | Polk County | Iowa Energy (NBA DL) |
| | Principal Park | 1992 | 10,500 | City of Des Moines | Iowa Cubs (AAA Baseball) |
| Harrisburg, PA | Giant Center | 2002 | 10,500 | Dauphin County | Hershey Bears (AHL) |
| | New Metro Bank Park [2] | 2010 | 6,000 | City of Harrisburg | Harrisburg Senators (AA Baseball) |
| Manchester, NH | Verizon Wireless Arena | 2001 | 10,000 | City of Manchester | Manchester Monarchs (AHL) |
| | Merchantsauto.com Stadium | 2005 | 7,700 | City of Manchester | New Hampshire Fisher Cats (AA Baseball) |
| Scranton, PA | Wachovia Arena | 1999 | 8,300 | Lucerne County Convention Center Authority | Wilkes-Barre/Scranton Penguins (AHL) |
| | PNC Field | 1989 | 10,800 | Lackawanna County | Scranton Yankees (AAA Baseball) |
| Toledo, OH | Huntington Center | 2009 | 8,000 | Lucas County | Toledo Walleye (ECHL) |
| | Fifth Third Field | 2002 | 8,900 | Lucas County | Toledo Mud Hens (AAA Baseball) |
| | Glass Bowl | 1937 | 26,000 | University of Toledo | University of Toledo |
| Wichita, KS | Intrust Bank Arena | 2010 | 15,000 | Sedgwick County | Wichita Thunder (CHL) |
| | Lawrence-Dumont Stadium | 1934 | 6,111 | City of Wichita | Wichita wingnuts (AA Baseball) |
| Youngstown, OH | Covelli Center | 2005 | 5,700 | City of Youngstown | Youngstown Steelhounds (CHL) |
| | Arnold Stambaugh Stadium | 1982 | 17,000 | Youngstown State University | Youngstown State University |
| Portland, ME | Cumberland County Civic Center | 1977 | 6,700 | Cumberland County | Portland Pirates (AHL) |
| | Portland Exposition Center | 1920 | 3,500 | City of Portland | Maine Red Claws (NBA DL) |
| | Hadlock Field | 1933 | 7,368 | City of Portland | Portland Sea Dogs (AA Baseball) |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

[2] The new Metro Bank Park is planned to open in April 2010.

Sources: Revenues from Sports Venues College & Pro Editions 2009 and facility websites

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Premium Seating Inventory

| Market [1] | Facilities | Arena | | Ballpark | | Stadium | | Total | | Total Premium Seats [2] |
|----------------|--------------------------------|-----------|--------------|-----------|--------------|-----------|------------|-----------|--------------|-------------------------|
| | | Suites | Club Seats | Suites | Club Seats | Suites | Club Seats | Suites | Club Seats | |
| Boise, ID | Qwest Arena | 39 | 1,000 | | | | | | | |
| | Bronco Stadium | | | | | 35 | 916 | | | |
| | Memorial Stadium | | | 0 | 0 | | | | | |
| | | <u>39</u> | <u>1,000</u> | <u>0</u> | <u>0</u> | <u>35</u> | <u>916</u> | <u>74</u> | <u>1,916</u> | <u>3,100</u> |
| Des Moines, IA | Wells Fargo Arena | 36 | 600 | | | | | | | |
| | Principal Park | | | 44 | 4,000 | | | | | |
| | | | | 44 | 4,000 | 0 | 0 | | | |
| | | <u>36</u> | <u>600</u> | <u>44</u> | <u>4,000</u> | <u>0</u> | <u>0</u> | <u>80</u> | <u>4,600</u> | <u>5,880</u> |
| Harrisburg, PA | Giant Center | 40 | 688 | | | | | | | |
| | New Metro Bank Park [3] | | | 21 | 766 | | | | | |
| | | | | 21 | 766 | 0 | 0 | | | |
| | | <u>40</u> | <u>688</u> | <u>21</u> | <u>766</u> | <u>0</u> | <u>0</u> | <u>61</u> | <u>1,454</u> | <u>2,430</u> |
| Manchester, NH | Verizon Wireless Arena | 34 | 600 | | | | | | | |
| | Merchantsauto.com Stadium | | | 36 | 0 | | | | | |
| | | | | 36 | 0 | 0 | 0 | | | |
| | | <u>34</u> | <u>600</u> | <u>36</u> | <u>0</u> | <u>0</u> | <u>0</u> | <u>70</u> | <u>600</u> | <u>1,720</u> |
| Scranton, PA | Wachovia Arena | 32 | 624 | | | | | | | |
| | PNC Field | | | 18 | 0 | | | | | |
| | | | | 18 | 0 | 0 | 0 | | | |
| | | <u>32</u> | <u>624</u> | <u>18</u> | <u>0</u> | <u>0</u> | <u>0</u> | <u>50</u> | <u>624</u> | <u>1,424</u> |
| Toledo, OH | Huntington Center | 20 | 750 | | | | | | | |
| | Fifth Third Field | | | 28 | 600 | | | | | |
| | Glass Bowl | | | | | 44 | 300 | | | |
| | | <u>20</u> | <u>750</u> | <u>28</u> | <u>600</u> | <u>44</u> | <u>300</u> | <u>92</u> | <u>1,650</u> | <u>3,122</u> |
| Wichita, KS | Intrust Bank Arena [4] | 22 | 300 | | | | | | | |
| | Lawrence-Dumont Stadium | | | 8 | 800 | | | | | |
| | | | | 8 | 800 | 0 | 0 | | | |
| | | <u>22</u> | <u>300</u> | <u>8</u> | <u>800</u> | <u>0</u> | <u>0</u> | <u>30</u> | <u>1,100</u> | <u>1,580</u> |
| Youngstown, OH | Covelli Center | 26 | 520 | | | | | | | |
| | Arnold Stambaugh Stadium | | | | | 26 | 0 | | | |
| | | | | 0 | 0 | 26 | 0 | | | |
| | | <u>26</u> | <u>520</u> | <u>0</u> | <u>0</u> | <u>26</u> | <u>0</u> | <u>52</u> | <u>520</u> | <u>1,352</u> |
| | Comparable Average | 31 | 635 | 19 | 771 | 13 | 152 | 64 | 1,558 | 2,576 |
| Portland, ME | Cumberland County Civic Center | 0 | 0 | | | | | | | |
| | Portland Exposition Center | 0 | 0 | | | | | | | |
| | Hadlock Field | | | 17 | 0 | | | | | |
| | | | <u>0</u> | <u>0</u> | <u>17</u> | <u>0</u> | <u>0</u> | <u>0</u> | <u>17</u> | <u>0</u> |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

[2] Average of 16 fixed seats per luxury suite

[3] The new Metro Bank Park is planned to open in April 2010.

[4] Intrust Bank Arena also features 40 loge boxes that are not included in the premium seating analysis.

Sources: Revenues from Sports Venues College & Pro Editions 2009 and facility websites

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Premium Seating Price Points

| Market [1] | Facilities | Luxury Suites | | | | Club Seats | | | |
|----------------|--------------------------------|---------------|-------------|----------|--------------|-----------------|-------------|---------|-------------|
| | | # of Suites | Price Range | | Term Length | # of Club Seats | Price Range | | Term Length |
| | | | Low | High | | | Low | High | |
| Boise, ID | Owest Arena | 38 | \$17,000 | \$40,000 | 1 to 5 Yrs. | 1,000 | \$800 | \$1,000 | 1 to 3 Yrs. |
| | Bronco Stadium | 35 | \$42,000 | \$48,000 | 1 Yr | 916 | \$2,200 | \$2,200 | 1 Yr |
| | Memorial Stadium | 0 | - | - | - | 0 | - | - | - |
| Des Moines, IA | Wells Fargo Arena | 36 | \$40,500 | \$60,500 | NA | 600 | \$1,400 | \$1,800 | 1 Yr. |
| | Principal Park | 44 | \$18,000 | \$20,000 | 1 to 3 Yrs. | 4,000 | \$400 | \$400 | 1 Yr. |
| Harrisburg, PA | Giant Center | 40 | \$40,000 | \$55,000 | NA | 688 | \$590 | \$590 | NA |
| | New Metro Bank Park [2] | 21 | \$25,000 | \$35,000 | 3 to 7 Yrs. | 766 | \$500 | \$750 | 1 to 3 Yrs. |
| Manchester, NH | Verizon Wireless Arena | 34 | \$49,500 | \$49,500 | 5 to 10 Yrs. | 600 | \$1,600 | \$1,600 | 1 Yr. |
| | Merchantsauto.com Stadium | 36 | \$17,500 | \$17,500 | 1 to 5 Yrs. | 0 | - | - | - |
| Scranton, PA | Wachovia Arena | 32 | \$35,000 | \$37,500 | 3 to 5 Yrs. | 624 | \$1,000 | \$1,500 | 1 to 5 Yrs. |
| | PNC Field | 18 | \$17,500 | \$17,500 | 10 Yrs. | 0 | - | - | - |
| Toledo, OH | Huntington Center | 20 | NA | NA | NA | 750 | \$1,300 | \$1,300 | 1 Yr. |
| | Fifth Third Field | 28 | \$26,500 | \$28,000 | 5 to 7 Yrs. | 600 | \$648 | \$648 | 1 Yr |
| | Glass Bowl | 44 | NA | NA | NA | 300 | NA | NA | NA |
| Wichita, KS | Intrust Bank Arena [3] | 22 | \$37,500 | \$43,500 | 1 Yr. | 300 | \$1,100 | \$1,100 | 1 Yr. |
| | Lawrence-Dumont Stadium | 8 | \$10,000 | \$10,000 | 3 Yrs. | 800 | \$460 | \$460 | 1 Yr. |
| Youngstown, OH | Covelli Center | 26 | \$25,000 | \$55,000 | 3 to 7 Yrs. | 520 | \$1,400 | \$1,400 | 2 to 5 Yrs. |
| | Arnold Stambaugh Stadium | 26 | \$15,000 | \$15,000 | 3 Yrs. | 0 | - | - | - |
| Portland, ME | Cumberland County Civic Center | 0 | - | - | - | 0 | - | - | - |
| | Portland Exposition Center | 0 | - | - | - | 0 | - | - | - |
| | Hadlock Field | 17 | \$9,000 | \$18,500 | 5 Yrs. | 0 | - | - | - |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

[2] The new Metro Bank Park is planned to open in April 2010.

[3] Intrust Bank Arena also features 40 loge boxes that are not included in the premium seating analysis.

Sources: Revenues from Sports Venues College & Pro Editions 2009 and facility websites

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Premium Seating Share Analysis

| Market [1] | Total | | Business Establishments with 50 - 99 Employees | | | Business Establishments with 100 - 249 Employees | | | Business Establishments with 250 - 499 Employees | | | Business Establishments with over 500 Employees | | |
|--------------------|---------------|------------|--|-----------|---------------|--|-----------|---------------|--|-----------|---------------|---|-----------|---------------|
| | Luxury Suites | Club Seats | Total | Per Suite | Per Club Seat | Total | Per Suite | Per Club Seat | Total | Per Suite | Per Club Seat | Total | Per Suite | Per Club Seat |
| Boise, ID | 74 | 1,916 | 440 | 5.9 | 0.2 | 233 | 3.1 | 0.1 | 62 | 0.8 | 0.0 | 18 | 0.2 | 0.0 |
| Des Moines, IA | 80 | 4,600 | 559 | 7.0 | 0.1 | 331 | 4.1 | 0.1 | 82 | 1.0 | 0.0 | 28 | 0.4 | 0.0 |
| Harrisburg, PA | 61 | 1,454 | 494 | 8.1 | 0.3 | 295 | 4.8 | 0.2 | 75 | 1.2 | 0.1 | 42 | 0.7 | 0.0 |
| Manchester, NH | 70 | 600 | 378 | 5.4 | 0.6 | 230 | 3.3 | 0.4 | 45 | 0.6 | 0.1 | 16 | 0.2 | 0.0 |
| Scranton, PA | 50 | 624 | 443 | 8.9 | 0.7 | 307 | 6.1 | 0.5 | 88 | 1.8 | 0.1 | 26 | 0.5 | 0.0 |
| Toledo, OH | 142 | 2,274 | 552 | 3.9 | 0.2 | 327 | 2.3 | 0.1 | 83 | 0.6 | 0.0 | 29 | 0.2 | 0.0 |
| Wichita, KS | 30 | 1,100 | 517 | 17.2 | 0.5 | 286 | 9.5 | 0.3 | 76 | 2.5 | 0.1 | 19 | 0.6 | 0.0 |
| Youngstown, OH | 52 | 520 | 440 | 8.5 | 0.8 | 241 | 4.6 | 0.5 | 56 | 1.1 | 0.1 | 11 | 0.2 | 0.0 |
| Comparable Average | 70 | 1,636 | 478 | 8.1 | 0.4 | 281 | 4.8 | 0.3 | 71 | 1.2 | 0.1 | 24 | 0.4 | 0.0 |
| Portland, ME | 17 | 0 | 393 | 23.1 | - | 243 | 14.3 | - | 54 | 3.2 | - | 17 | 1.0 | - |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

Source: United States Census Bureau - 2007 County Business Patterns (NAICS)

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Premium Seating Share Analysis

| Market [1] | # of Premium Seats | Businesses with over 50 Employees | Premium Seats per Business | |
|------------------------------|--------------------|-----------------------------------|----------------------------|-----|
| Boise, ID | 3,100 | 753 | 4.1 | |
| Des Moines, IA | 5,880 | 1,000 | 5.9 | |
| Harrisburg, PA | 2,430 | 906 | 2.7 | |
| Manchester, NH | 1,720 | 669 | 2.6 | |
| Scranton, PA | 1,424 | 864 | 1.6 | |
| Toledo, OH | 3,122 | 991 | 3.2 | |
| Wichita, KS | 1,580 | 898 | 1.8 | |
| Youngstown, OH | 1,352 | 748 | 1.8 | |
| Comparable Average | 2,217 | 828 | 2.7 | [2] |
| Portland, ME- Current | 272 | 707 | 0.38 | |
| Portland, ME - Potential | 1,896 | 707 | 2.7 | |
| Net New Premium Seats | 1,624 | | | |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

[2] Adjusted Average

Source: United States Census Bureau - 2007 County Business Patterns (NAICS)

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Comparable Market Analysis

Luxury Suite Share Analysis

| Market [1] | Total Luxury Suites | Businesses with over 50 Employees | Businesses per Luxury Suite | |
|------------------------------|---------------------|-----------------------------------|-----------------------------|------------|
| Boise, ID | 74 | 753 | 10.2 | |
| Des Moines, IA | 80 | 1,000 | 12.5 | |
| Harrisburg, PA | 61 | 906 | 14.9 | |
| Manchester, NH | 70 | 669 | 9.6 | |
| Scranton, PA | 50 | 864 | 17.3 | |
| Toledo, OH | 142 | 991 | 7.0 | |
| Wichita, KS | 30 | 898 | 29.9 | |
| Youngstown, OH | 52 | 748 | 14.4 | |
| Comparable Average | 65 | 823 | 13.1 | [2] |
| Portland, ME - Current | 17 | 707 | 41.6 | |
| Portland, ME - Potential | 54 | 707 | 13.1 | |
| Net New Luxury Suites | 37 | | | |

[1] United States Census Bureau Metropolitan Statistical Area (MSA)

[2] Adjusted Average

Source: United States Census Bureau - 2007 County Business Patterns (NAICS)

B. Competitive Market Analysis

 CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE
Economic Analysis of Potential Renovation Options

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Competitive Market Analysis

Total Population by Drive Times

| Market [1] | 2009 Total Population | | | 2014 Total Population | | | Change Over 5 Years | | | % Annual Change | | |
|---------------------|-----------------------|----------------|----------------|-----------------------|----------------|----------------|---------------------|----------------|----------------|-----------------|----------------|----------------|
| | 30 Minute Area | 45 Minute Area | 60 Minute Area | 30 Minute Area | 45 Minute Area | 60 Minute Area | 30 Minute Area | 45 Minute Area | 60 Minute Area | 30 Minute Area | 45 Minute Area | 60 Minute Area |
| Augusta, ME | 123,178 | 304,250 | 564,839 | 125,304 | 309,165 | 573,799 | 2,126 | 4,915 | 8,960 | 0.34% | 0.32% | 0.32% |
| Bangor, ME | 113,437 | 160,220 | 249,500 | 115,562 | 163,180 | 253,439 | 2,125 | 2,960 | 3,939 | 0.37% | 0.37% | 0.31% |
| Lewiston, ME | 134,031 | 431,302 | 624,943 | 136,493 | 439,344 | 637,677 | 2,462 | 8,042 | 12,734 | 0.36% | 0.37% | 0.40% |
| Lowell, MA | 1,705,095 | 4,268,292 | 5,501,983 | 1,718,639 | 4,305,494 | 5,558,860 | 13,544 | 37,202 | 56,877 | 0.16% | 0.17% | 0.21% |
| Manchester, NH | 632,923 | 1,541,506 | 3,876,722 | 645,578 | 1,570,504 | 3,925,213 | 12,655 | 28,998 | 48,491 | 0.40% | 0.37% | 0.25% |
| Competitive Average | 541,733 | 1,341,114 | 2,163,597 | 548,315 | 1,357,537 | 2,189,798 | 6,582 | 16,423 | 26,200 | 0.33% | 0.32% | 0.30% |
| Portland, ME | 295,047 | 478,781 | 727,456 | 300,609 | 489,195 | 745,030 | 5,562 | 10,414 | 17,574 | 0.37% | 0.43% | 0.48% |
| Competitive Rank | 3rd | 3rd | 3rd | 3rd | 3rd | 3rd | 3rd | 3rd | 3rd | 2nd | 1st | 1st |

[1] Markets with regional competing events centers.

Source: Environmental Systems Resource Institution (ESRI)

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Competitive Market Analysis

Total Households by Drive Times

| Market [1] | 2009 Total Households | | | 2014 Total Households | | | % Change Over 5 Years | | |
|---------------------|-----------------------|----------------|----------------|-----------------------|----------------|----------------|-----------------------|----------------|----------------|
| | 30 Minute Area | 45 Minute Area | 60 Minute Area | 30 Minute Area | 45 Minute Area | 60 Minute Area | 30 Minute Area | 45 Minute Area | 60 Minute Area |
| Augusta, ME | 51,889 | 127,154 | 239,048 | 53,360 | 130,612 | 245,318 | 2.83% | 2.72% | 2.62% |
| Bangor, ME | 46,735 | 66,044 | 103,269 | 48,132 | 68,033 | 106,150 | 2.99% | 3.01% | 2.79% |
| Lewiston, ME | 55,246 | 181,796 | 260,906 | 56,818 | 186,908 | 268,683 | 2.85% | 2.81% | 2.98% |
| Lowell, MA | 647,989 | 1,653,042 | 2,115,381 | 654,875 | 1,671,772 | 2,143,109 | 1.06% | 1.13% | 1.31% |
| Manchester, NH | 236,912 | 569,001 | 1,502,787 | 243,370 | 581,577 | 1,525,973 | 2.73% | 2.21% | 1.54% |
| Competitive Average | 207,754 | 519,407 | 844,278 | 211,311 | 527,780 | 857,847 | 2.49% | 2.38% | 2.25% |
| Portland, ME | 123,850 | 199,546 | 304,444 | 127,160 | 205,563 | 314,315 | 2.67% | 3.02% | 3.24% |
| Competitive Rank | 3rd | 3rd | 3rd | 3rd | 3rd | 3rd | 5th | 1st | 1st |

[1] Markets with regional competing events centers.

Source: Environmental Systems Resource Institution (ESRI)

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Competitive Market Analysis

Target Markets by Drive Times

| Market [1] | 2009 | | | 2014 | | | % Change Over 5 Years | | |
|---------------------|------------------------------|----------------|----------------|------------------------------|----------------|----------------|-----------------------|----------------|----------------|
| | Target Market: Age 20-34 [2] | | | Target Market: Age 20-34 [2] | | | | | |
| | 30 Minute Area | 45 Minute Area | 60 Minute Area | 30 Minute Area | 45 Minute Area | 60 Minute Area | 30 Minute Area | 45 Minute Area | 60 Minute Area |
| Augusta, ME | 21,803 | 55,374 | 103,930 | 23,056 | 58,123 | 109,596 | 5.7% | 5.0% | 5.5% |
| Bangor, ME | 24,276 | 32,204 | 48,154 | 24,730 | 32,799 | 48,914 | 1.9% | 1.8% | 1.6% |
| Lewiston, ME | 24,126 | 81,516 | 114,990 | 25,115 | 86,990 | 123,072 | 4.1% | 6.7% | 7.0% |
| Lowell, MA | 322,263 | 883,536 | 1,089,393 | 343,728 | 942,903 | 1,167,361 | 6.7% | 6.7% | 7.2% |
| Manchester, NH | 117,724 | 272,847 | 817,988 | 128,470 | 299,966 | 867,472 | 9.1% | 9.9% | 6.0% |
| Competitive Average | 102,038 | 265,095 | 434,891 | 109,020 | 284,156 | 463,283 | 5.5% | 6.0% | 5.5% |
| Portland, ME | 57,239 | 88,574 | 133,852 | 62,827 | 95,882 | 144,536 | 9.8% | 8.3% | 8.0% |
| Competitive Rank | 3rd | 3rd | 3rd | 3rd | 3rd | 3rd | 1st | 2nd | 1st |

[1] Markets with regional competing events centers.

[2] Target market represents the portion of the population most likely to patronize a sports and events center.

Source: Environmental Systems Resource Institution (ESRI)

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Competitive Market Analysis

Target Markets as Percent of Total Population by Drive Times

| Market [1] | 2009 | | | 2014 | | | % Change Over 5 Years | | |
|---------------------|------------------------------|----------------|----------------|------------------------------|----------------|----------------|-----------------------|----------------|----------------|
| | Target Market: Age 20-34 [2] | | | Target Market: Age 20-34 [2] | | | | | |
| | 30 Minute Area | 45 Minute Area | 60 Minute Area | 30 Minute Area | 45 Minute Area | 60 Minute Area | 30 Minute Area | 45 Minute Area | 60 Minute Area |
| Augusta, ME | 17.7% | 18.2% | 18.4% | 18.4% | 18.8% | 19.1% | 0.7% | 0.6% | 0.7% |
| Bangor, ME | 21.4% | 20.1% | 19.3% | 21.4% | 20.1% | 19.3% | 0.0% | 0.0% | 0.0% |
| Lewiston, ME | 18.0% | 18.9% | 18.4% | 18.4% | 19.8% | 19.3% | 0.4% | 0.9% | 0.9% |
| Lowell, MA | 18.9% | 20.7% | 19.8% | 20.0% | 21.9% | 21.0% | 1.1% | 1.2% | 1.2% |
| Manchester, NH | 18.6% | 17.7% | 21.1% | 19.9% | 19.1% | 22.1% | 1.3% | 1.4% | 1.0% |
| Competitive Average | 18.9% | 19.1% | 19.4% | 19.6% | 19.9% | 20.2% | 0.7% | 0.8% | 0.8% |
| Portland, ME | 19.4% | 18.5% | 18.4% | 20.9% | 19.6% | 19.4% | 1.5% | 1.1% | 1.0% |
| Competitive Rank | 2nd | 4th | 4th | 2nd | 4th | 3rd | 1st | 3rd | 2nd |

[1] Markets with regional competing events centers.

[2] Target market represents the portion of the population most likely to patronize a sports and events center.

Source: Environmental Systems Resource Institution (ESRI)

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Competitive Market Analysis

Total Household Income by Drive Times

| Market [1] | 2009 Under \$24,999 | | | 2009 \$25,000-\$49,999 | | | 2009 \$50,000-\$99,999 | | | 2009 \$100,000 + | | |
|---------------------|------------------------|-----------|-----------|---------------------------|-----------|-----------|---------------------------|-----------|-----------|---------------------|-----------|-----------|
| | 30 Minute | 45 Minute | 60 Minute | 30 Minute | 45 Minute | 60 Minute | 30 Minute | 45 Minute | 60 Minute | 30 Minute | 45 Minute | 60 Minute |
| | Area | Area | Area | Area | Area | Area | Area | Area | Area | Area | Area | Area |
| Augusta, ME | 26.4% | 25.8% | 24.3% | 29.5% | 29.5% | 28.2% | 34.9% | 35.2% | 36.1% | 9.2% | 9.5% | 11.3% |
| Bangor, ME | 27.3% | 27.6% | 29.1% | 28.7% | 29.8% | 30.4% | 33.2% | 32.6% | 31.5% | 10.8% | 9.9% | 8.9% |
| Lewiston, ME | 24.0% | 22.5% | 22.4% | 28.9% | 27.0% | 27.0% | 37.3% | 37.7% | 37.9% | 9.8% | 12.8% | 12.8% |
| Lowell, MA | 13.2% | 16.1% | 15.8% | 15.4% | 17.6% | 17.6% | 32.0% | 32.1% | 33.0% | 39.3% | 34.2% | 33.6% |
| Manchester, NH | 14.4% | 13.9% | 16.1% | 19.1% | 17.7% | 18.1% | 38.2% | 36.3% | 33.4% | 28.3% | 32.2% | 32.4% |
| Competitive Average | 21.1% | 21.2% | 21.5% | 24.3% | 24.3% | 24.3% | 35.1% | 34.8% | 34.4% | 19.5% | 19.7% | 19.8% |
| Portland, ME | 19.6% | 20.4% | 20.3% | 24.2% | 25.4% | 25.7% | 39.6% | 39.1% | 39.2% | 16.7% | 15.0% | 14.8% |
| Competitive Rank | 4th | 4th | 4th | 4th | 4th | 4th | 1st | 1st | 1st | 3rd | 3rd | 3rd |

[1] Markets with regional competing events centers.

Source: Environmental Systems Resource Institution (ESRI)

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Competitive Market Analysis

Projected Total Household Income by Drive Times

| Market [1] | 2014 Under \$24,999 | | | 2014 \$25,000-\$49,999 | | | 2014 \$50,000-\$99,999 | | | 2014 \$100,000 + | | |
|---------------------|------------------------|-----------|-----------|---------------------------|-----------|-----------|---------------------------|-----------|-----------|---------------------|-----------|-----------|
| | 30 Minute | 45 Minute | 60 Minute | 30 Minute | 45 Minute | 60 Minute | 30 Minute | 45 Minute | 60 Minute | 30 Minute | 45 Minute | 60 Minute |
| | Area | Area | Area | Area | Area | Area | Area | Area | Area | Area | Area | Area |
| Augusta, ME | 25.2% | 24.6% | 23.1% | 30.0% | 29.8% | 28.0% | 35.4% | 36.0% | 37.3% | 9.3% | 9.6% | 11.5% |
| Bangor, ME | 25.7% | 26.0% | 27.5% | 29.4% | 31.0% | 31.7% | 33.9% | 33.0% | 31.8% | 10.9% | 10.0% | 9.0% |
| Lewiston, ME | 22.8% | 21.3% | 21.4% | 29.2% | 26.3% | 26.1% | 38.1% | 39.4% | 39.5% | 9.9% | 13.0% | 13.0% |
| Lowell, MA | 12.1% | 14.9% | 14.5% | 14.7% | 16.8% | 16.9% | 31.5% | 32.6% | 33.3% | 41.7% | 35.8% | 35.2% |
| Manchester, NH | 13.4% | 12.9% | 14.8% | 18.6% | 17.1% | 17.3% | 38.7% | 36.4% | 33.8% | 29.2% | 33.7% | 33.9% |
| Competitive Average | 19.8% | 19.9% | 20.3% | 24.4% | 24.2% | 24.0% | 35.5% | 35.5% | 35.1% | 20.2% | 20.4% | 20.5% |
| Portland, ME | 18.7% | 19.5% | 19.4% | 21.9% | 23.7% | 24.3% | 42.3% | 41.4% | 41.4% | 17.0% | 15.3% | 15.1% |
| Competitive Rank | 4th | 4th | 4th | 4th | 4th | 4th | 1st | 1st | 1st | 3rd | 3rd | 3rd |

[1] Markets with regional competing events centers.

Source: Environmental Systems Resource Institution (ESRI)

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Competitive Market Analysis

Median Household Income by Drive Times

| Market [1] | 2009 Median Household Income | | | 2014 Median Household Income | | | % Change Over 5 Years | | |
|---------------------|------------------------------|----------------|----------------|------------------------------|----------------|----------------|-----------------------|----------------|----------------|
| | 30 Minute Area | 45 Minute Area | 60 Minute Area | 30 Minute Area | 45 Minute Area | 60 Minute Area | 30 Minute Area | 45 Minute Area | 60 Minute Area |
| Augusta, ME | \$44,492 | \$45,235 | \$47,415 | \$47,006 | \$47,429 | \$49,176 | 5.65% | 4.85% | 3.71% |
| Bangor, ME | \$44,803 | \$43,693 | \$41,857 | \$47,159 | \$46,397 | \$45,314 | 5.26% | 6.19% | 8.26% |
| Lewiston, ME | \$47,358 | \$50,397 | \$50,462 | \$48,818 | \$51,697 | \$51,831 | 3.08% | 2.58% | 2.71% |
| Lowell, MA | \$81,166 | \$73,242 | \$73,159 | \$85,112 | \$76,855 | \$76,714 | 4.86% | 4.93% | 4.86% |
| Manchester, NH | \$69,368 | \$73,167 | \$71,218 | \$73,488 | \$76,924 | \$75,413 | 5.94% | 5.13% | 5.89% |
| Competitive Average | \$57,437 | \$57,147 | \$56,822 | \$60,317 | \$59,860 | \$59,690 | 4.96% | 4.74% | 5.09% |
| Portland, ME | \$55,695 | \$53,647 | \$53,463 | \$58,921 | \$55,961 | \$55,407 | 5.79% | 4.31% | 3.64% |
| Competitive Rank | 3rd | 3rd | 3rd | 3rd | 3rd | 3rd | 2nd | 5th | 5th |

[1] Markets with regional competing events centers.

Source: Environmental Systems Resource Institution (ESRI)

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Competitive Market Analysis

Entertainment Spending by Drive Times

| Market [1] | 2009 Total Entertainment Spending | | | 2009 Entertainment Spending Per Household | | | 2009 Entertainment Spending Per Capita | | |
|---------------------|-----------------------------------|-----------------|-----------------|---|----------------|----------------|--|----------------|----------------|
| | 30 Minute Area | 45 Minute Area | 60 Minute Area | 30 Minute Area | 45 Minute Area | 60 Minute Area | 30 Minute Area | 45 Minute Area | 60 Minute Area |
| Augusta, ME | \$129,125,512 | \$322,837,502 | \$658,535,915 | \$2,488 | \$2,539 | \$2,755 | \$1,048 | \$1,061 | \$1,166 |
| Bangor, ME | \$119,499,022 | \$166,156,318 | \$251,230,376 | \$2,557 | \$2,516 | \$2,433 | \$1,053 | \$1,037 | \$1,007 |
| Lewiston, ME | \$145,076,750 | \$525,778,337 | \$749,223,080 | \$2,626 | \$2,892 | \$2,872 | \$1,082 | \$1,219 | \$1,199 |
| Lowell, MA | \$3,154,707,618 | \$7,242,672,168 | \$9,123,997,570 | \$4,868 | \$4,381 | \$4,313 | \$1,850 | \$1,697 | \$1,658 |
| Manchester, NH | \$915,991,750 | \$2,358,537,011 | \$6,426,313,285 | \$3,866 | \$4,145 | \$4,276 | \$1,447 | \$1,530 | \$1,658 |
| Competitive Average | \$892,880,130 | \$2,123,196,267 | \$3,441,860,045 | \$3,281 | \$3,295 | \$3,330 | \$1,296 | \$1,309 | \$1,338 |
| Portland, ME | \$396,839,181 | \$615,083,793 | \$933,169,256 | \$3,204 | \$3,082 | \$3,065 | \$1,345 | \$1,285 | \$1,283 |
| Competitive Rank | 3rd | 3rd | 3rd | 3rd | 3rd | 3rd | 3rd | 3rd | 3rd |

[1] Markets with regional competing events centers.

Source: Environmental Systems Resource Institution (ESRI)

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Competitive Market Analysis

Regional Public Assembly Facilities - Overview

| Location | Drive Time [1] | Facilities | Facility Type | Owner(s) | Management | Primary Tenant(s) | Opened | Capacity | Luxury Suites | Club Seats |
|-----------------|------------------|---|----------------------------|---|--|---|--------------------|---------------------------------------|-----------------|-----------------|
| Portland, ME | - | Cumberland County Civic Center | Civic Center | Cumberland County | Cumberland County | Portland Pirates (AHL) | 1977 | 6,700 - 8,400 | 0 | 0 |
| | | Portland Exposition Center | Expo Center | City of Portland | City of Portland | Maine Red Claws (NBA DL) | 1920 | 3,500 | 0 | 0 |
| | | Merrill Auditorium | Auditorium | City of Portland | City of Portland | None | 1911 | 1,900 | 0 | 0 |
| Lewiston, ME | 45 mins. | Androscoggin Bank Colisee | Arena | Firland Management, LLC | Firland Management, LLC | Lewiston Maineiacs (QMJHL) | 1959 | 3,800 - 4,700 | 0 | 0 |
| Augusta, ME | 1 hr. | Augusta Civic Center | Civic Center | City of Augusta | City of Augusta | None | 1973 | 5,353 - 8,000 | 0 | 0 |
| Durham, NH | 1 hr. | Whittemore Center Arena | Arena | University of New Hampshire | University of New Hampshire | University of New Hampshire | 1995 | 6,500 - 7,500 | 0 | 0 |
| Manchester, NH | 1 hr., 30 mins. | Verizon Wireless Arena | Arena | City of Manchester | SMG | Manchester Monarchs (AHL); Manchester Wolves (af2) | 2001 | 8,600 - 10,000 | 34 | 600 |
| Lowell, MA | 1 hr., 35 mins. | Tsongas Center at UMASS Lowell | Arena | City of Lowell / University of Massachusetts Lowell | Global Spectrum | <i>Former: Lowell Devils (AHL);</i> University of Massachusetts Lowell | 1998 | 6,500 - 7,800 | 0 | 0 |
| Boston, MA | 1 hr., 45 mins. | TD Garden | Arena | Delaware North Companies, Inc. | Delaware North Companies, Inc. | Boston Celtics (NBA); Boston Bruins (NHL); Boston Blazers (NLL) | 1995 | 17,500 - 19,000 | 104 | 1,900 |
| | | Agganis Arena Matthews Arena | Arena Arena | Boston University Northeastern University | Boston University Northeastern university | Boston University Northeastern University | 2005 1910 | 6,150 - 8,000 5,400 - 6,300 | 28 | NA |
| Bangor, ME | 2 hrs. | Bangor Civic Center & Auditorium <i>New Bangor Arena</i> | Auditorium <i>Arena</i> | State of Maine <i>TBD</i> | State of Maine <i>TBD</i> | None <i>TBD</i> | 1955 <i>TBD</i> | 3,200 - 5,200 <i>5,400 - 7,400</i> | 0 <i>TBD</i> | 0 <i>TBD</i> |
| Orono, ME | 2 hrs., 10 mins. | Alfond Arena | Arena | University of Maine | University of Maine | University of Maine | 1977 | 5,641 - 5,712 | 13 | 0 |
| Worcester, MA | 2 hrs., 10 mins. | DCU Center | Arena | City of Worcester | SMG | Worcester Sharks (AHL) | 1982 | 14,800 | 2 | 0 |
| Mansfield, MA | 2 hrs., 15 mins. | Comcast Center | Amphitheater | Live Nation | Live Nation | None | 1986 | 19,900 | 0 | 0 |
| Amherst, MA | 3 hrs. | Mullins Center | Arena | University of Massachusetts Amherst | Global Spectrum | University of Massachusetts Amherst | 1993 | 10,500 | 0 | 0 |
| Springfield, MA | 3 hrs. | MassMutal Center | Civic Center | State of Massachusetts | Global Spectrum | Springfield Falcons (AHL); Springfield Armor (NBA DL) | 1972 | 3,856 - 7,743 | 0 | 234 |

[1] Approximate drive time from Portland, ME

Sources: Facility websites and interviews with building managers

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Competitive Market Analysis

Competing Arenas Events Review

| Location | Facility | Events Per Year | Event Days Per Year [4] | Event Types | Rental Rates | Naming Rights |
|----------------|----------------------------------|-----------------|-------------------------|--|--|---------------|
| Portland, ME | Cumberland County Civic Center | NA | 130 - 150 | Cumberland County Civic Center hosts music concerts, tradeshows, conventions, family shows, high school sporting events, and professional sporting events. | NA | None |
| Augusta, ME | Augusta Civic Center | 100 - 120 | NA | The Augusta Civic Center hosts concerts, tradeshows, conventions, banquets, corporate meetings, family shows, high school basketball tournaments and summer camps, and high school graduation. | At the Civic Center, event rentals rates are between \$1,200 - \$1,550 per day plus 12% - 13% of total ticket sales. Event rental rates for non-profit organizations in \$1,350 per day. | None |
| Bangor, ME | Bangor Civic Center & Auditorium | NA | 133 - 165 | Bangor Civic Center & Auditorium hosts conventions, trade shows, banquets and meetings. The Civic Center hosts only flat floor events and does not host sporting events. | Typical event rental rates include a fixed fee and 10% of total ticket sales. | None |
| | New Bangor Arena | 170 - 230 [1] | NA | The new Bangor Arena would host meetings, banquets, high school basketball tournaments, music concerts, tradeshows, conventions, family shows, high school graduations, and sporting events. | NA | TBD |
| Lewiston, ME | Androscoggin Bank Colisee | 80 - 110 | NA | Androscoggin Bank Colisee hosts music concerts, tradeshows, conventions, family shows, youth hockey games, high school hockey games, and college hockey games. The majority of events are high school and sporting events. | Ice time is rented for \$225 per hour. Event rentals rates are \$7,000 per event plus 10% of total ticket sales and change over fees. | NA |
| Lowell, MA | Tsongas Center at UMASS Lowell | NA | 108 - 120 [2] | Tsongas Center at UMASS Lowell hosts music concerts, tradeshows, family shows, conferences, and college hockey games. The majority of events are college hockey games. | NA | None |
| Manchester, NH | Verizon Wireless Arena | NA | 120 - 156[3] | Verizon Wireless Arena hosts music concerts, tradeshows, family shows, and professional sporting events. | NA | \$11,000,000 |

[1] Based on information provided by feasibility study for the new arena

[2] Includes Devils (former tenant) and UMASS Lowell sporting events

[3] Includes Monarchs and Wolves sporting events

[4] Event days include stage/equipment setup and tear down days

Sources: Facility websites and interviews with building managers

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE
Economic Analysis of Potential Renovation Options

Agent / Producer / Promoter Interview Guide

1. How would you characterize the Portland market for entertainment?
 - a. How do you see the market trending?
2. What types of entertainment shows are fairing the best?
3. What buildings compete for your and others' events within the market?
4. What, if any, are the challenges associated with producing shows in the Civic Center?
5. What features of the Civic Center support the efficient production of shows?
6. *If not bringing events to the Civic Center, "Why do you not bring events to the Civic Center?"*
7. How could a newly renovated Civic Center distinguish itself in the market and attract events?
8. What seating capacity would make the Civic Center the most marketable?
9. What amenities/features do you believe are imperative for attracting entertainment events?
10. What additional amenities/features would you like to see in a newly renovated Civic Center?
11. Considering the appropriate seating capacity and preferred features just described, how many events could the facility realistically anticipate hosting?
 - a. What types of events would be included?
12. Describe the regional route for touring shows.
 - a. How many stops will a touring show make in the market?
 - b. What, if any, restrictions or barriers exist?
13. How might a new arena in Bangor impact the Civic Center event schedule?
14. What has been the history of your events at the Civic Center?
15. What month(s)/time of year do you prefer to come to the market?

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE
Economic Analysis of Potential Renovation Options

Facility Manager Interview Guide

1. Who manages the facility? Public or Private?
2. What tenants does the facility have?
3. How many events does the facility host per year?
4. Can you provide me with a full year event schedule?
5. How many non-sporting events does the building host per year?
6. What is the average attendance for non-sporting events this year?
7. What notable concerts and events are planned for this year?
8. Who gets to use the building? Do tenants dominate the schedule?
9. What are the rental rates to use the facility?
10. Does the facility take a percentage of ticket sales?
11. Could you describe the concert, family show, and sporting events markets?
12. What is your primary market for:
 - Sporting events?
 - Concerts?
 - Family shows?
 - Religious events?
 - Trade shows?
 - Dirt shows?
 - Conferences / conventions / meetings – if applicable, what types?
13. Where are people coming from that go to these events?
14. How far do people travel to get to events? (20 miles? 40 miles?)
15. Who promotes the events for the facility? Can I contact them?
16. What facilities or markets are you competing against?
17. What are the limitations of the facility? (Is it the facility? Is it the location? Is it accessibility? Is it competition? Is it affordability?)



Portland, ME

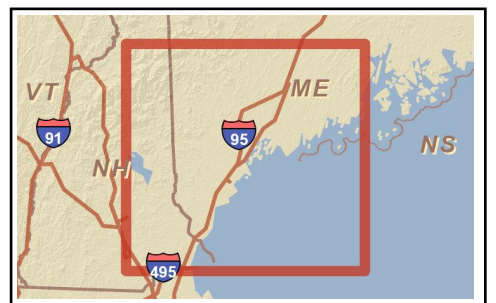
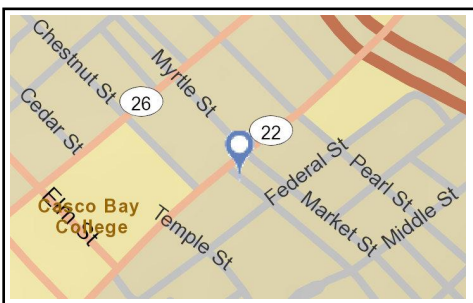
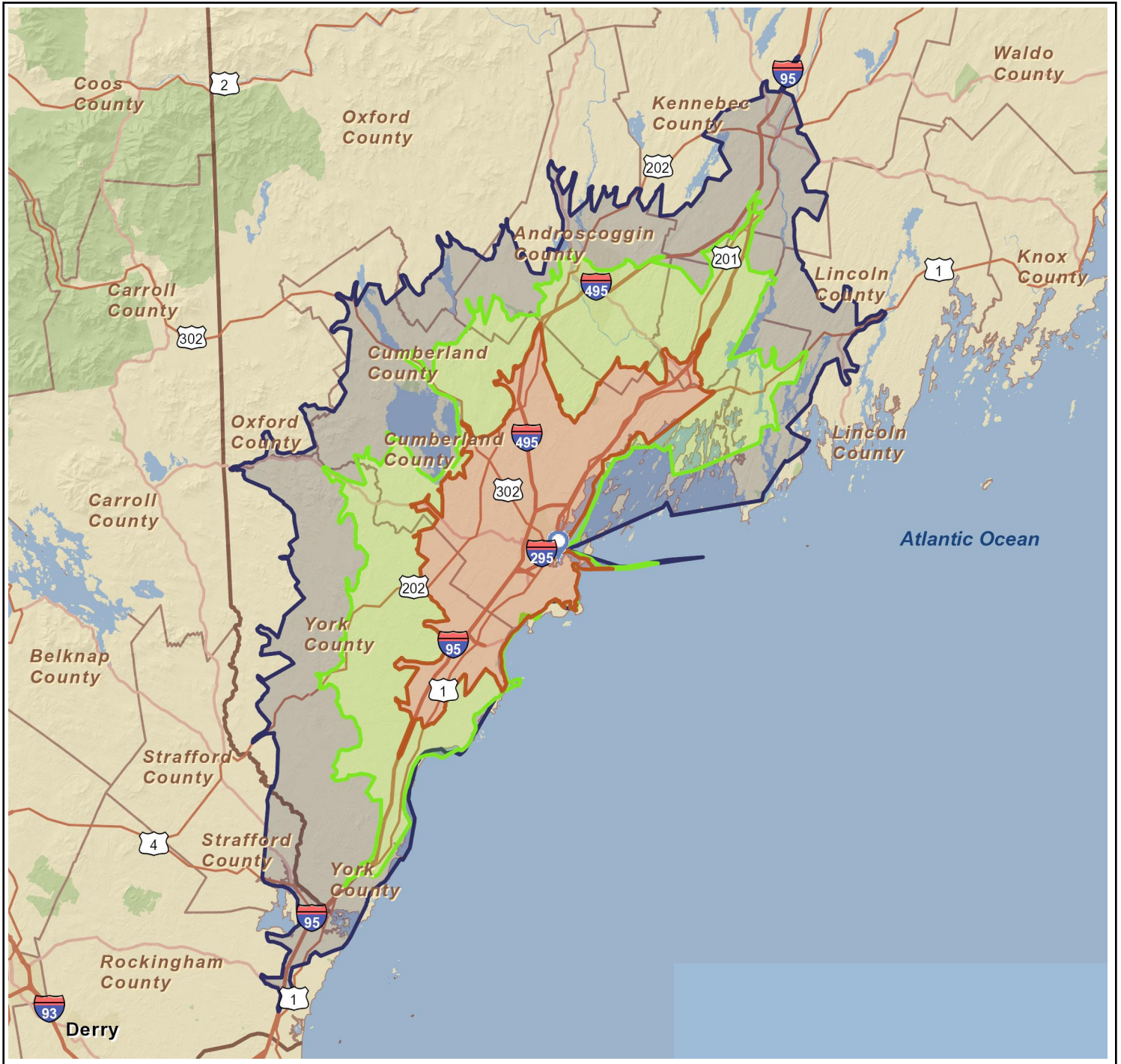
Portland, Maine

Latitude: 43.65915

Longitude: -70.25665

Site Type: Drive Time

Drive Time 30, 45, 60 Minutes





Market Profile

Portland, ME

Site Type: Drive Tim
 Latitude: 43.65915
 Longitude: -70.25665

Portland, ME

Portland, ME

Portland, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



| | | | |
|-------------------------|---------|---------|---------|
| 2000 Total Population | 279,009 | 450,059 | 679,112 |
| 2000 Group Quarters | 8,726 | 13,600 | 17,027 |
| 2009 Total Population | 295,047 | 478,781 | 727,456 |
| 2014 Total Population | 300,609 | 489,195 | 745,030 |
| 2009 - 2014 Annual Rate | 0.37% | 0.43% | 0.48% |



| | | | |
|-----------------------------|---------|---------|---------|
| 2000 Households | 114,953 | 183,591 | 278,201 |
| 2000 Average Household Size | 2.35 | 2.38 | 2.38 |
| 2009 Households | 123,850 | 199,546 | 304,444 |
| 2009 Average Household Size | 2.30 | 2.32 | 2.33 |
| 2014 Households | 127,160 | 205,563 | 314,315 |
| 2014 Average Household Size | 2.28 | 2.31 | 2.31 |
| 2009 - 2014 Annual Rate | 0.53% | 0.60% | 0.64% |
| 2000 Families | 70,513 | 116,207 | 177,182 |
| 2000 Average Family Size | 2.95 | 2.94 | 2.93 |
| 2009 Families | 74,245 | 123,690 | 190,094 |
| 2009 Average Family Size | 2.86 | 2.85 | 2.84 |
| 2014 Families | 75,356 | 126,070 | 194,283 |
| 2014 Average Family Size | 2.83 | 2.82 | 2.81 |
| 2009 - 2014 Annual Rate | 0.30% | 0.38% | 0.44% |



| | | | |
|-------------------------------|---------|---------|---------|
| 2000 Housing Units | 123,149 | 204,119 | 318,253 |
| Owner Occupied Housing Units | 58.9% | 58.6% | 58.0% |
| Renter Occupied Housing Units | 34.5% | 31.3% | 29.5% |
| Vacant Housing Units | 6.7% | 10.1% | 12.6% |
| 2009 Housing Units | 133,519 | 223,775 | 351,190 |
| Owner Occupied Housing Units | 58.3% | 58.2% | 57.7% |
| Renter Occupied Housing Units | 34.4% | 31.0% | 29.0% |
| Vacant Housing Units | 7.2% | 10.8% | 13.3% |
| 2014 Housing Units | 137,252 | 230,904 | 363,234 |
| Owner Occupied Housing Units | 57.6% | 57.5% | 56.9% |
| Renter Occupied Housing Units | 35.0% | 31.6% | 29.6% |
| Vacant Housing Units | 7.4% | 11.0% | 13.5% |

Median Household Income

| | | | |
|------|----------|----------|----------|
| 2000 | \$43,084 | \$41,942 | \$42,075 |
| 2009 | \$55,695 | \$53,647 | \$53,463 |
| 2014 | \$58,921 | \$55,961 | \$55,407 |

Median Home Value

| | | | |
|------|-----------|-----------|-----------|
| 2000 | \$126,407 | \$119,505 | \$116,026 |
| 2009 | \$218,121 | \$206,673 | \$200,664 |
| 2014 | \$275,188 | \$260,322 | \$250,570 |

Per Capita Income

| | | | |
|------|----------|----------|----------|
| 2000 | \$23,166 | \$22,220 | \$22,102 |
| 2009 | \$29,684 | \$28,141 | \$27,887 |
| 2014 | \$30,616 | \$29,026 | \$28,790 |

Median Age

| | | | |
|------|------|------|------|
| 2000 | 37.4 | 37.5 | 37.8 |
| 2009 | 40.0 | 40.3 | 40.7 |
| 2014 | 40.2 | 40.9 | 41.3 |

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by total population. Detail may not sum to totals due to rounding.

[Source: ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile

Portland, ME

Site Type: Drive Tim
 Latitude: 43.65915
 Longitude: -70.25665

Portland, ME

Portland, ME

Portland, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Households by Income

| Household Income Base | 115,013 | 183,937 | 278,425 |
|--------------------------|----------|----------|----------|
| < \$15,000 | 14.4% | 14.8% | 14.6% |
| \$15,000 - \$24,999 | 12.6% | 13.1% | 12.9% |
| \$25,000 - \$34,999 | 12.9% | 13.2% | 13.3% |
| \$35,000 - \$49,999 | 17.3% | 17.8% | 18.1% |
| \$50,000 - \$74,999 | 21.5% | 21.5% | 21.7% |
| \$75,000 - \$99,999 | 10.6% | 10.2% | 10.0% |
| \$100,000 - \$149,999 | 6.7% | 6.1% | 6.0% |
| \$150,000 - \$199,999 | 1.8% | 1.6% | 1.5% |
| \$200,000 + | 2.2% | 1.9% | 1.8% |
| Average Household Income | \$55,512 | \$53,681 | \$53,206 |

2009 Households by Income

| Household Income Base | 123,850 | 199,546 | 304,444 |
|--------------------------|----------|----------|----------|
| < \$15,000 | 10.6% | 10.9% | 10.8% |
| \$15,000 - \$24,999 | 9.0% | 9.5% | 9.5% |
| \$25,000 - \$34,999 | 10.4% | 10.5% | 10.6% |
| \$35,000 - \$49,999 | 13.8% | 14.9% | 15.1% |
| \$50,000 - \$74,999 | 21.6% | 22.0% | 22.7% |
| \$75,000 - \$99,999 | 18.0% | 17.1% | 16.5% |
| \$100,000 - \$149,999 | 10.2% | 9.4% | 9.4% |
| \$150,000 - \$199,999 | 3.4% | 2.9% | 2.8% |
| \$200,000 + | 3.1% | 2.7% | 2.6% |
| Average Household Income | \$69,738 | \$66,615 | \$65,878 |

2014 Households by Income

| Household Income Base | 127,160 | 205,563 | 314,315 |
|--------------------------|----------|----------|----------|
| < \$15,000 | 10.4% | 10.7% | 10.6% |
| \$15,000 - \$24,999 | 8.3% | 8.8% | 8.8% |
| \$25,000 - \$34,999 | 9.0% | 9.1% | 9.3% |
| \$35,000 - \$49,999 | 12.9% | 14.6% | 15.0% |
| \$50,000 - \$74,999 | 24.0% | 24.0% | 24.3% |
| \$75,000 - \$99,999 | 18.3% | 17.4% | 17.1% |
| \$100,000 - \$149,999 | 10.5% | 9.7% | 9.7% |
| \$150,000 - \$199,999 | 3.4% | 2.9% | 2.8% |
| \$200,000 + | 3.1% | 2.7% | 2.6% |
| Average Household Income | \$71,299 | \$68,080 | \$67,413 |

2000 Owner Occupied Housing Units by Value

| Total | 72,308 | 119,831 | 184,485 |
|-----------------------|-----------|-----------|-----------|
| < \$50,000 | 4.2% | 6.0% | 7.3% |
| \$50,000 - \$99,999 | 23.3% | 29.0% | 31.4% |
| \$100,000 - \$149,999 | 39.1% | 34.4% | 31.9% |
| \$150,000 - \$199,999 | 16.7% | 15.0% | 14.3% |
| \$200,000 - \$299,999 | 10.7% | 9.9% | 9.4% |
| \$300,000 - \$499,999 | 4.7% | 4.2% | 4.2% |
| \$500,000 - \$999,999 | 1.2% | 1.3% | 1.3% |
| \$1,000,000+ | 0.2% | 0.2% | 0.3% |
| Average Home Value | \$151,771 | \$145,452 | \$143,097 |

2000 Specified Renter Occ. Housing Units by Contract Rent

| Total | 42,307 | 63,248 | 92,681 |
|----------------|--------|--------|--------|
| With Cash Rent | 96.8% | 95.7% | 95.2% |
| No Cash Rent | 3.2% | 4.3% | 4.8% |
| Median Rent | \$540 | \$499 | \$501 |
| Average Rent | \$538 | \$502 | \$506 |

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest, dividends, net rents, pensions, SSI and welfare payments, child support and alimony. Specified Renter Occupied Housing Units exclude houses on 10+ acres. Average Rent excludes units paying no cash rent.

[Source: ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile Portland, ME

Site Type: Drive Tim
Latitude: 43.65915
Longitude: -70.25665

Portland, ME

Portland, ME

Portland, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Population by Age

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|--------------|-----------------------|-----------------------|-----------------------|
| Total | 279,009 | 450,059 | 679,112 |
| Age 0 - 4 | 5.8% | 5.9% | 5.8% |
| Age 5 - 9 | 6.6% | 6.7% | 6.6% |
| Age 10 - 14 | 6.8% | 7.0% | 7.0% |
| Age 15 - 19 | 6.4% | 6.6% | 6.5% |
| Age 20 - 24 | 5.9% | 5.8% | 5.6% |
| Age 25 - 34 | 14.3% | 13.7% | 13.6% |
| Age 35 - 44 | 17.4% | 17.2% | 17.2% |
| Age 45 - 54 | 14.7% | 14.7% | 14.8% |
| Age 55 - 64 | 8.5% | 8.8% | 9.1% |
| Age 65 - 74 | 6.6% | 6.8% | 7.0% |
| Age 75 - 84 | 5.0% | 4.9% | 4.9% |
| Age 85+ | 1.9% | 1.9% | 1.8% |
| Age 18+ | 76.9% | 76.4% | 76.5% |

2009 Population by Age

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|--------------|-----------------------|-----------------------|-----------------------|
| Total | 295,047 | 478,781 | 727,456 |
| Age 0 - 4 | 5.6% | 5.7% | 5.7% |
| Age 5 - 9 | 5.6% | 5.8% | 5.7% |
| Age 10 - 14 | 5.9% | 6.1% | 6.0% |
| Age 15 - 19 | 7.0% | 6.9% | 6.7% |
| Age 20 - 24 | 7.1% | 6.7% | 6.5% |
| Age 25 - 34 | 12.3% | 11.8% | 11.9% |
| Age 35 - 44 | 14.0% | 13.9% | 13.9% |
| Age 45 - 54 | 16.2% | 16.3% | 16.4% |
| Age 55 - 64 | 12.3% | 12.7% | 12.9% |
| Age 65 - 74 | 6.6% | 6.9% | 7.1% |
| Age 75 - 84 | 4.9% | 4.8% | 4.8% |
| Age 85+ | 2.5% | 2.4% | 2.3% |
| Age 18+ | 78.7% | 78.4% | 78.6% |

2014 Population by Age

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|--------------|-----------------------|-----------------------|-----------------------|
| Total | 300,609 | 489,195 | 745,030 |
| Age 0 - 4 | 5.5% | 5.5% | 5.5% |
| Age 5 - 9 | 5.6% | 5.7% | 5.7% |
| Age 10 - 14 | 5.8% | 6.0% | 6.0% |
| Age 15 - 19 | 6.4% | 6.3% | 6.1% |
| Age 20 - 24 | 7.1% | 6.7% | 6.4% |
| Age 25 - 34 | 13.8% | 12.9% | 13.0% |
| Age 35 - 44 | 12.1% | 12.1% | 12.2% |
| Age 45 - 54 | 14.9% | 15.0% | 15.1% |
| Age 55 - 64 | 13.4% | 14.0% | 14.1% |
| Age 65 - 74 | 8.4% | 8.8% | 9.0% |
| Age 75 - 84 | 4.6% | 4.6% | 4.7% |
| Age 85+ | 2.5% | 2.4% | 2.3% |
| Age 18+ | 79.4% | 79.1% | 79.3% |

2000 Population by Sex

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|---------|-----------------------|-----------------------|-----------------------|
| Males | 48.1% | 48.3% | 48.5% |
| Females | 51.9% | 51.7% | 51.5% |

2009 Population by Sex

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|---------|-----------------------|-----------------------|-----------------------|
| Males | 48.3% | 48.5% | 48.7% |
| Females | 51.7% | 51.5% | 51.3% |

2014 Population by Sex

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|---------|-----------------------|-----------------------|-----------------------|
| Males | 48.5% | 48.6% | 48.7% |
| Females | 51.5% | 51.4% | 51.3% |

Source: ESRI forecasts for 2009 and 2014.; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Portland, ME

Site Type: Drive Tim
 Latitude: 43.65915
 Longitude: -70.25665

Portland, ME

Portland, ME

Portland, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|---------|---------|
| Total | 279,009 | 450,059 | 679,112 |
| White Alone | 95.8% | 96.2% | 96.4% |
| Black Alone | 1.0% | 0.9% | 0.8% |
| American Indian Alone | 0.3% | 0.3% | 0.3% |
| Asian or Pacific Islander Alone | 1.5% | 1.2% | 1.1% |
| Some Other Race Alone | 0.3% | 0.3% | 0.3% |
| Two or More Races | 1.1% | 1.1% | 1.1% |
| Hispanic Origin | 0.9% | 0.9% | 0.9% |
| Diversity Index | 9.9 | 9.1 | 8.7 |

2009 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|---------|---------|
| Total | 295,047 | 478,781 | 727,456 |
| White Alone | 94.6% | 95.2% | 95.4% |
| Black Alone | 1.3% | 1.2% | 1.0% |
| American Indian Alone | 0.3% | 0.3% | 0.3% |
| Asian or Pacific Islander Alone | 2.1% | 1.7% | 1.7% |
| Some Other Race Alone | 0.5% | 0.4% | 0.4% |
| Two or More Races | 1.2% | 1.2% | 1.2% |
| Hispanic Origin | 1.4% | 1.4% | 1.4% |
| Diversity Index | 12.9 | 11.8 | 11.3 |

2014 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|---------|---------|
| Total | 300,609 | 489,195 | 745,030 |
| White Alone | 93.8% | 94.6% | 94.8% |
| Black Alone | 1.5% | 1.3% | 1.2% |
| American Indian Alone | 0.3% | 0.3% | 0.3% |
| Asian or Pacific Islander Alone | 2.6% | 2.1% | 2.1% |
| Some Other Race Alone | 0.6% | 0.5% | 0.5% |
| Two or More Races | 1.2% | 1.2% | 1.2% |
| Hispanic Origin | 1.8% | 1.8% | 1.7% |
| Diversity Index | 15.0 | 13.7 | 13.1 |



2000 Population 3+ by School Enrollment

| | | | |
|-------------------------------|---------|---------|---------|
| Total | 269,494 | 434,791 | 655,766 |
| Enrolled in Nursery/Preschool | 1.7% | 1.6% | 1.6% |
| Enrolled in Kindergarten | 1.3% | 1.3% | 1.3% |
| Enrolled in Grade 1-8 | 11.6% | 11.7% | 11.7% |
| Enrolled in Grade 9-12 | 5.7% | 5.7% | 5.7% |
| Enrolled in College | 5.2% | 5.0% | 4.6% |
| Enrolled in Grad/Prof School | 1.2% | 1.1% | 1.0% |
| Not Enrolled in School | 73.4% | 73.6% | 74.1% |

2009 Population 25+ by Educational Attainment

| | | | |
|------------------------------|---------|---------|---------|
| Total | 202,816 | 329,628 | 505,181 |
| Less than 9th Grade | 3.1% | 3.7% | 3.7% |
| 9th - 12th Grade, No Diploma | 5.3% | 6.1% | 6.2% |
| High School Graduate | 28.7% | 31.3% | 32.4% |
| Some College, No Degree | 17.8% | 18.0% | 18.2% |
| Associate Degree | 9.6% | 9.3% | 9.1% |
| Bachelor's Degree | 23.2% | 20.7% | 20.0% |
| Graduate/Professional Degree | 12.2% | 10.8% | 10.3% |

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: [ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile

Portland, ME

Site Type: Drive Tim
 Latitude: 43.65915
 Longitude: -70.25665

Portland, ME

Portland, ME

Portland, ME

Drive Time: 30 Minutes

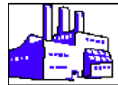
Drive Time: 45 Minutes

Drive Time: 60 Minutes



2009 Population 15+ by Marital Status

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|---------------|-----------------------|-----------------------|-----------------------|
| Total | 244,473 | 395,029 | 601,041 |
| Never Married | 28.2% | 26.7% | 26.1% |
| Married | 53.2% | 54.6% | 55.1% |
| Widowed | 6.3% | 6.2% | 6.3% |
| Divorced | 12.2% | 12.4% | 12.5% |



2000 Population 16+ by Employment Status

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|---------------------|-----------------------|-----------------------|-----------------------|
| Total | 221,480 | 356,426 | 537,550 |
| In Labor Force | 69.1% | 68.6% | 68.4% |
| Civilian Employed | 66.2% | 65.3% | 65.2% |
| Civilian Unemployed | 2.5% | 2.7% | 2.6% |
| In Armed Forces | 0.4% | 0.7% | 0.6% |
| Not in Labor Force | 30.9% | 31.4% | 31.6% |

2009 Civilian Population 16+ in Labor Force

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|---------------------|-----------------------|-----------------------|-----------------------|
| Civilian Employed | 93.6% | 93.3% | 93.4% |
| Civilian Unemployed | 6.4% | 6.7% | 6.6% |

2014 Civilian Population 16+ in Labor Force

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|---------------------|-----------------------|-----------------------|-----------------------|
| Civilian Employed | 95.5% | 95.3% | 95.4% |
| Civilian Unemployed | 4.5% | 4.7% | 4.6% |

2000 Females 16+ by Employment Status and Age of Children

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|--------------------------|-----------------------|-----------------------|-----------------------|
| Total | 116,515 | 187,004 | 281,051 |
| Own Children < 6 Only | 6.8% | 6.9% | 6.9% |
| Employed/in Armed Forces | 4.8% | 4.8% | 4.8% |
| Unemployed | 0.1% | 0.2% | 0.2% |
| Not in Labor Force | 1.9% | 1.9% | 1.9% |
| Own Children <6 and 6-17 | 5.0% | 5.0% | 5.0% |
| Employed/in Armed Forces | 3.2% | 3.3% | 3.2% |
| Unemployed | 0.1% | 0.2% | 0.1% |
| Not in Labor Force | 1.6% | 1.6% | 1.6% |
| Own Children 6-17 Only | 16.7% | 16.8% | 17.0% |
| Employed/in Armed Forces | 13.4% | 13.7% | 13.8% |
| Unemployed | 0.3% | 0.3% | 0.3% |
| Not in Labor Force | 3.0% | 2.8% | 2.9% |
| No Own Children <18 | 71.5% | 71.2% | 71.1% |
| Employed/in Armed Forces | 40.2% | 39.0% | 38.7% |
| Unemployed | 1.6% | 1.7% | 1.6% |
| Not in Labor Force | 29.7% | 30.5% | 30.8% |

Source: ESRI forecasts for 2009 and 2014.; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Portland, ME

Site Type: Drive Tim
 Latitude: 43.65915
 Longitude: -70.25665

Portland, ME

Portland, ME

Portland, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2009 Employed Population 16+ by Industry

| | Portland, ME | Portland, ME | Portland, ME |
|-------------------------------|--------------|--------------|--------------|
| Total | 158,661 | 251,185 | 380,174 |
| Agriculture/Mining | 0.6% | 0.8% | 0.9% |
| Construction | 5.3% | 5.9% | 6.2% |
| Manufacturing | 6.9% | 8.7% | 9.3% |
| Wholesale Trade | 3.5% | 3.5% | 3.4% |
| Retail Trade | 12.7% | 12.8% | 12.8% |
| Transportation/Utilities | 3.3% | 3.3% | 3.4% |
| Information | 3.6% | 3.2% | 2.8% |
| Finance/Insurance/Real Estate | 10.6% | 9.3% | 8.5% |
| Services | 49.4% | 48.5% | 47.7% |
| Public Administration | 4.0% | 4.2% | 5.0% |

2009 Employed Population 16+ by Occupation

| | Portland, ME | Portland, ME | Portland, ME |
|---------------------------------|--------------|--------------|--------------|
| Total | 158,661 | 251,185 | 380,174 |
| White Collar | 68.0% | 65.6% | 64.8% |
| Management/Business/Financial | 14.5% | 13.7% | 13.5% |
| Professional | 26.8% | 25.4% | 25.1% |
| Sales | 12.0% | 11.8% | 11.7% |
| Administrative Support | 14.7% | 14.7% | 14.5% |
| Services | 15.3% | 15.3% | 15.3% |
| Blue Collar | 16.6% | 19.1% | 20.0% |
| Farming/Forestry/Fishing | 0.4% | 0.5% | 0.6% |
| Construction/Extraction | 4.7% | 5.6% | 5.8% |
| Installation/Maintenance/Repair | 2.6% | 2.9% | 3.1% |
| Production | 4.7% | 5.5% | 5.8% |
| Transportation/Material Moving | 4.2% | 4.6% | 4.6% |



2000 Workers 16+ by Means of Transportation to Work

| | Portland, ME | Portland, ME | Portland, ME |
|----------------------------------|--------------|--------------|--------------|
| Total | 144,660 | 230,456 | 346,824 |
| Drove Alone - Car, Truck, or Van | 79.7% | 79.3% | 79.8% |
| Carpooled - Car, Truck, or Van | 9.5% | 10.5% | 10.6% |
| Public Transportation | 1.5% | 1.3% | 1.1% |
| Walked | 4.3% | 4.2% | 3.7% |
| Other Means | 0.9% | 0.9% | 0.9% |
| Worked at Home | 4.0% | 3.9% | 4.0% |

2000 Workers 16+ by Travel Time to Work

| | Portland, ME | Portland, ME | Portland, ME |
|--------------------------------------|--------------|--------------|--------------|
| Total | 144,660 | 230,456 | 346,824 |
| Did not Work at Home | 96.0% | 96.1% | 96.0% |
| Less than 5 minutes | 3.8% | 4.0% | 3.9% |
| 5 to 9 minutes | 12.7% | 12.8% | 12.8% |
| 10 to 19 minutes | 36.0% | 33.7% | 32.8% |
| 20 to 24 minutes | 15.3% | 14.0% | 13.9% |
| 25 to 34 minutes | 16.6% | 16.5% | 16.0% |
| 35 to 44 minutes | 4.3% | 5.8% | 5.6% |
| 45 to 59 minutes | 3.2% | 5.1% | 5.7% |
| 60 to 89 minutes | 2.2% | 2.4% | 3.3% |
| 90 or more minutes | 1.8% | 1.9% | 2.1% |
| Worked at Home | 4.0% | 3.9% | 4.0% |
| Average Travel Time to Work (in min) | 21.1 | 22.2 | 22.9 |

2000 Households by Vehicles Available

| | Portland, ME | Portland, ME | Portland, ME |
|--------------------------------------|--------------|--------------|--------------|
| Total | 114,962 | 183,700 | 278,206 |
| None | 9.4% | 8.9% | 8.1% |
| 1 | 36.4% | 35.4% | 35.2% |
| 2 | 40.8% | 41.1% | 41.4% |
| 3 | 10.4% | 11.1% | 11.6% |
| 4 | 2.2% | 2.5% | 2.6% |
| 5+ | 0.8% | 1.0% | 1.0% |
| Average Number of Vehicles Available | 1.6 | 1.7 | 1.7 |

Source: ESRI forecasts for 2009; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Portland, ME

Site Type: Drive Tim
 Latitude: 43.65915
 Longitude: -70.25665

Portland, ME

Portland, ME

Portland, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Households by Type

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|---|-----------------------|-----------------------|-----------------------|
| Total | 114,953 | 183,591 | 278,201 |
| Family Households | 61.3% | 63.3% | 63.7% |
| Married-couple Family | 48.3% | 49.9% | 50.4% |
| With Related Children | 22.1% | 22.5% | 22.4% |
| Other Family (No Spouse) | 13.1% | 13.4% | 13.3% |
| With Related Children | 8.7% | 9.1% | 9.1% |
| Nonfamily Households | 38.7% | 36.7% | 36.3% |
| Householder Living Alone | 29.6% | 28.4% | 28.2% |
| Householder Not Living Alone | 9.1% | 8.3% | 8.1% |
| Households with Related Children | 30.8% | 31.6% | 31.5% |
| Households with Persons 65+ | 23.0% | 23.1% | 23.3% |

2000 Households by Size

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|---------------------|-----------------------|-----------------------|-----------------------|
| Total | 114,953 | 183,591 | 278,201 |
| 1 Person Household | 29.6% | 28.4% | 28.2% |
| 2 Person Household | 35.1% | 35.5% | 35.8% |
| 3 Person Household | 15.4% | 15.6% | 15.7% |
| 4 Person Household | 13.3% | 13.5% | 13.5% |
| 5 Person Household | 4.8% | 5.0% | 4.9% |
| 6 Person Household | 1.3% | 1.4% | 1.4% |
| 7+ Person Household | 0.5% | 0.6% | 0.6% |

2000 Households by Year Householder Moved In

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|----------------------------------|-----------------------|-----------------------|-----------------------|
| Total | 114,962 | 183,700 | 278,206 |
| Moved in 1999 to March 2000 | 20.8% | 20.1% | 19.6% |
| Moved in 1995 to 1998 | 28.8% | 28.0% | 27.7% |
| Moved in 1990 to 1994 | 15.2% | 15.1% | 15.1% |
| Moved in 1980 to 1989 | 16.2% | 17.3% | 17.7% |
| Moved in 1970 to 1979 | 9.1% | 9.8% | 10.0% |
| Moved in 1969 or Earlier | 9.7% | 9.7% | 9.9% |
| Median Year Householder Moved In | 1995 | 1994 | 1994 |



2000 Housing Units by Units in Structure

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|--------------|-----------------------|-----------------------|-----------------------|
| Total | 123,120 | 204,216 | 318,258 |
| 1, Detached | 55.7% | 58.3% | 60.4% |
| 1, Attached | 4.6% | 3.6% | 3.4% |
| 2 | 9.1% | 8.2% | 7.5% |
| 3 or 4 | 9.9% | 8.8% | 7.9% |
| 5 to 9 | 7.1% | 6.9% | 6.3% |
| 10 to 19 | 3.3% | 2.8% | 2.7% |
| 20+ | 6.6% | 5.4% | 4.9% |
| Mobile Home | 3.8% | 5.9% | 6.8% |
| Other | 0.0% | 0.1% | 0.2% |

2000 Housing Units by Year Structure Built

| | Portland, ME (30 Min) | Portland, ME (45 Min) | Portland, ME (60 Min) |
|-----------------------------|-----------------------|-----------------------|-----------------------|
| Total | 123,120 | 204,216 | 318,258 |
| 1999 to March 2000 | 1.9% | 2.0% | 1.9% |
| 1995 to 1998 | 4.7% | 5.0% | 5.1% |
| 1990 to 1994 | 5.8% | 6.1% | 6.2% |
| 1980 to 1989 | 15.9% | 16.4% | 16.6% |
| 1970 to 1979 | 13.9% | 14.8% | 15.2% |
| 1969 or Earlier | 57.7% | 55.8% | 55.0% |
| Median Year Structure Built | 1962 | 1964 | 1965 |

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Portland, ME

Site Type: Drive Tim
 Latitude: 43.65915
 Longitude: -70.25665

Portland, ME

Portland, ME

Portland, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes

[Top 3 Tapestry Segments](#)

| Rank | Segment 1 | Segment 2 | Segment 3 |
|------|-------------------|-------------------|-------------------|
| 1. | Main Street, USA | Green Acres | Green Acres |
| 2. | Green Acres | Main Street, USA | Main Street, USA |
| 3. | Old and Newcomers | Old and Newcomers | Old and Newcomers |



2009 Consumer Spending shows the amount spent on a variety of goods and services by households that reside in the market area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue.

| | | | |
|--|------------------------|------------------------|------------------------|
| Apparel & Services: Total \$ | \$217,355,236 | \$332,152,604 | \$498,773,937 |
| Average Spent | \$1,754.99 | \$1,664.54 | \$1,638.31 |
| Spending Potential Index | 70 | 66 | 65 |
| Computers & Accessories: Total \$ | \$28,229,379 | \$43,154,862 | \$64,908,507 |
| Average Spent | \$227.93 | \$216.27 | \$213.20 |
| Spending Potential Index | 100 | 95 | 93 |
| Education: Total \$ | \$161,206,651 | \$242,948,433 | \$360,066,630 |
| Average Spent | \$1,301.63 | \$1,217.51 | \$1,182.70 |
| Spending Potential Index | 104 | 97 | 94 |
| Entertainment/Recreation: Total \$ | \$396,839,181 | \$615,083,793 | \$933,169,256 |
| Average Spent | \$3,204.19 | \$3,082.42 | \$3,065.16 |
| Spending Potential Index | 99 | 95 | 95 |
| Food at Home: Total \$ | \$555,851,034 | \$860,746,045 | \$1,302,467,140 |
| Average Spent | \$4,488.10 | \$4,313.52 | \$4,278.18 |
| Spending Potential Index | 98 | 95 | 94 |
| Food Away from Home: Total \$ | \$409,728,646 | \$630,079,903 | \$949,445,327 |
| Average Spent | \$3,308.27 | \$3,157.57 | \$3,118.62 |
| Spending Potential Index | 99 | 95 | 94 |
| Health Care: Total \$ | \$456,240,948 | \$720,703,384 | \$1,100,556,149 |
| Average Spent | \$3,683.82 | \$3,611.72 | \$3,614.97 |
| Spending Potential Index | 98 | 96 | 96 |
| Household Furnishings & Equip: Total \$ | \$235,227,444 | \$361,332,007 | \$545,095,980 |
| Average Spent | \$1,899.29 | \$1,810.77 | \$1,790.46 |
| Spending Potential Index | 87 | 83 | 82 |
| Investments: Total \$ | \$168,948,832 | \$262,097,148 | \$404,238,313 |
| Average Spent | \$1,364.14 | \$1,313.47 | \$1,327.79 |
| Spending Potential Index | 95 | 91 | 92 |
| Retail Goods: Total \$ | \$2,979,484,907 | \$4,627,719,642 | \$7,027,109,960 |
| Average Spent | \$24,057.21 | \$23,191.24 | \$23,081.78 |
| Spending Potential Index | 94 | 90 | 90 |
| Shelter: Total \$ | \$1,945,230,120 | \$2,938,265,041 | \$4,392,795,400 |
| Average Spent | \$15,706.34 | \$14,724.75 | \$14,428.91 |
| Spending Potential Index | 100 | 94 | 92 |
| TV/Video/Sound Equipment: Total \$ | \$148,391,979 | \$229,257,023 | \$346,063,474 |
| Average Spent | \$1,198.16 | \$1,148.89 | \$1,136.71 |
| Spending Potential Index | 99 | 95 | 94 |
| Travel: Total \$ | \$228,816,579 | \$349,354,486 | \$526,252,926 |
| Average Spent | \$1,847.53 | \$1,750.75 | \$1,728.57 |
| Spending Potential Index | 100 | 95 | 94 |
| Vehicle Maintenance & Repairs: Total \$ | \$113,871,382 | \$176,424,064 | \$267,649,603 |
| Average Spent | \$919.43 | \$884.13 | \$879.14 |
| Spending Potential Index | 98 | 94 | 94 |

Data Note: The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2005 and 2006 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI



Augusta, ME

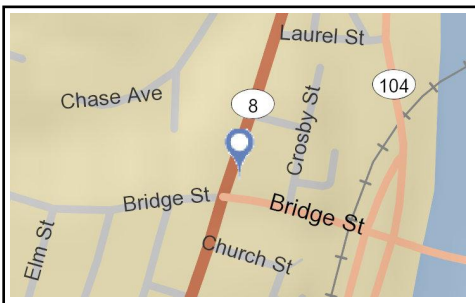
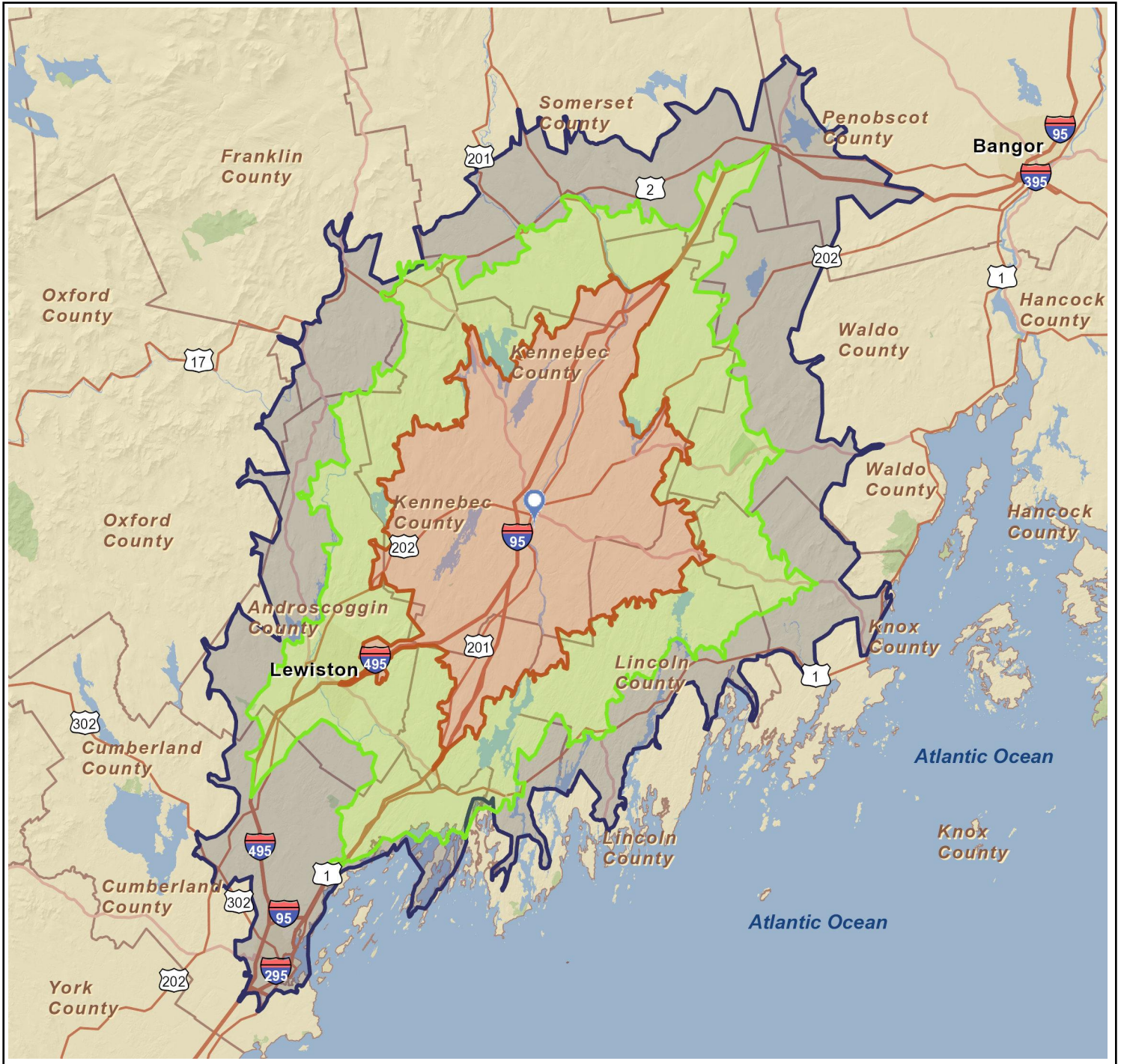
Augusta, Maine

Latitude: 44.31804

Longitude: -69.77622

Site Type: Drive Time

Drive Time 30, 45, 60 Minutes





Market Profile

Augusta, ME

Site Type: Drive Tim
 Latitude: 44.31804
 Longitude: -69.77622

Augusta, ME

Augusta, ME

Augusta, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



| | | | |
|-------------------------|---------|---------|---------|
| 2000 Total Population | 117,597 | 290,731 | 539,673 |
| 2000 Group Quarters | 3,963 | 10,102 | 16,082 |
| 2009 Total Population | 123,178 | 304,250 | 564,839 |
| 2014 Total Population | 125,304 | 309,165 | 573,799 |
| 2009 - 2014 Annual Rate | 0.34% | 0.32% | 0.32% |



| | | | |
|-----------------------------|--------|---------|---------|
| 2000 Households | 47,855 | 117,530 | 221,549 |
| 2000 Average Household Size | 2.37 | 2.39 | 2.36 |
| 2009 Households | 51,889 | 127,154 | 239,048 |
| 2009 Average Household Size | 2.30 | 2.31 | 2.29 |
| 2014 Households | 53,360 | 130,612 | 245,318 |
| 2014 Average Household Size | 2.28 | 2.29 | 2.27 |
| 2009 - 2014 Annual Rate | 0.56% | 0.54% | 0.52% |
| 2000 Families | 31,247 | 76,844 | 140,747 |
| 2000 Average Family Size | 2.89 | 2.91 | 2.91 |
| 2009 Families | 33,204 | 81,411 | 148,710 |
| 2009 Average Family Size | 2.78 | 2.80 | 2.80 |
| 2014 Families | 33,797 | 82,742 | 150,996 |
| 2014 Average Family Size | 2.74 | 2.76 | 2.76 |
| 2009 - 2014 Annual Rate | 0.35% | 0.32% | 0.31% |



| | | | |
|-------------------------------|--------|---------|---------|
| 2000 Housing Units | 54,554 | 133,308 | 252,169 |
| Owner Occupied Housing Units | 61.7% | 60.0% | 59.1% |
| Renter Occupied Housing Units | 26.1% | 28.2% | 28.8% |
| Vacant Housing Units | 12.3% | 11.8% | 12.1% |
| 2009 Housing Units | 59,535 | 145,509 | 275,287 |
| Owner Occupied Housing Units | 61.1% | 59.4% | 58.3% |
| Renter Occupied Housing Units | 26.0% | 28.0% | 28.5% |
| Vacant Housing Units | 12.8% | 12.6% | 13.2% |
| 2014 Housing Units | 61,326 | 149,689 | 282,864 |
| Owner Occupied Housing Units | 60.4% | 58.6% | 57.6% |
| Renter Occupied Housing Units | 26.6% | 28.6% | 29.1% |
| Vacant Housing Units | 13.0% | 12.7% | 13.3% |

Median Household Income

| | | | |
|------|----------|----------|----------|
| 2000 | \$36,385 | \$36,687 | \$37,794 |
| 2009 | \$44,492 | \$45,235 | \$47,415 |
| 2014 | \$47,006 | \$47,429 | \$49,176 |

Median Home Value

| | | | |
|------|-----------|-----------|-----------|
| 2000 | \$83,917 | \$87,757 | \$96,174 |
| 2009 | \$156,973 | \$158,706 | \$171,428 |
| 2014 | \$197,487 | \$194,852 | \$211,916 |

Per Capita Income

| | | | |
|------|----------|----------|----------|
| 2000 | \$18,435 | \$18,667 | \$20,102 |
| 2009 | \$22,669 | \$22,970 | \$25,161 |
| 2014 | \$23,309 | \$23,653 | \$25,918 |

Median Age

| | | | |
|------|------|------|------|
| 2000 | 38.5 | 37.7 | 37.9 |
| 2009 | 41.5 | 40.6 | 40.8 |
| 2014 | 42.4 | 41.4 | 41.6 |

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by total population. Detail may not sum to totals due to rounding.

[Source: ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile

Augusta, ME

Site Type: Drive Tim
 Latitude: 44.31804
 Longitude: -69.77622

Augusta, ME

Augusta, ME

Augusta, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Households by Income

| Household Income Base | Augusta, ME (30 Min) | Augusta, ME (45 Min) | Augusta, ME (60 Min) |
|--------------------------|----------------------|----------------------|----------------------|
| < \$15,000 | 18.7% | 18.0% | 17.4% |
| \$15,000 - \$24,999 | 14.6% | 15.1% | 14.5% |
| \$25,000 - \$34,999 | 14.7% | 14.5% | 14.2% |
| \$35,000 - \$49,999 | 19.1% | 19.0% | 18.7% |
| \$50,000 - \$74,999 | 19.6% | 19.7% | 19.6% |
| \$75,000 - \$99,999 | 7.6% | 7.8% | 8.3% |
| \$100,000 - \$149,999 | 4.1% | 4.1% | 4.7% |
| \$150,000 - \$199,999 | 0.7% | 0.8% | 1.1% |
| \$200,000 + | 0.9% | 1.0% | 1.4% |
| Average Household Income | \$44,426 | \$45,253 | \$48,126 |

2009 Households by Income

| Household Income Base | Augusta, ME (30 Min) | Augusta, ME (45 Min) | Augusta, ME (60 Min) |
|--------------------------|----------------------|----------------------|----------------------|
| < \$15,000 | 14.4% | 13.8% | 13.1% |
| \$15,000 - \$24,999 | 12.0% | 12.0% | 11.2% |
| \$25,000 - \$34,999 | 12.7% | 12.4% | 12.0% |
| \$35,000 - \$49,999 | 16.8% | 17.1% | 16.2% |
| \$50,000 - \$74,999 | 24.7% | 23.8% | 22.9% |
| \$75,000 - \$99,999 | 10.2% | 11.4% | 13.2% |
| \$100,000 - \$149,999 | 6.6% | 6.8% | 7.4% |
| \$150,000 - \$199,999 | 1.3% | 1.4% | 1.9% |
| \$200,000 + | 1.3% | 1.3% | 2.0% |
| Average Household Income | \$52,938 | \$54,017 | \$58,611 |

2014 Households by Income

| Household Income Base | Augusta, ME (30 Min) | Augusta, ME (45 Min) | Augusta, ME (60 Min) |
|--------------------------|----------------------|----------------------|----------------------|
| < \$15,000 | 14.1% | 13.6% | 12.8% |
| \$15,000 - \$24,999 | 11.1% | 11.0% | 10.3% |
| \$25,000 - \$34,999 | 11.0% | 10.8% | 10.5% |
| \$35,000 - \$49,999 | 19.0% | 19.0% | 17.5% |
| \$50,000 - \$74,999 | 25.1% | 24.4% | 23.9% |
| \$75,000 - \$99,999 | 10.3% | 11.6% | 13.4% |
| \$100,000 - \$149,999 | 6.7% | 6.9% | 7.6% |
| \$150,000 - \$199,999 | 1.3% | 1.4% | 1.9% |
| \$200,000 + | 1.3% | 1.3% | 2.0% |
| Average Household Income | \$53,773 | \$54,946 | \$59,695 |

2000 Owner Occupied Housing Units by Value

| Total | Augusta, ME (30 Min) | Augusta, ME (45 Min) | Augusta, ME (60 Min) |
|-----------------------|----------------------|----------------------|----------------------|
| < \$50,000 | 14.2% | 14.1% | 12.3% |
| \$50,000 - \$99,999 | 54.1% | 49.1% | 41.4% |
| \$100,000 - \$149,999 | 21.2% | 23.0% | 26.1% |
| \$150,000 - \$199,999 | 6.2% | 7.8% | 10.2% |
| \$200,000 - \$299,999 | 3.0% | 4.4% | 6.4% |
| \$300,000 - \$499,999 | 0.9% | 1.2% | 2.6% |
| \$500,000 - \$999,999 | 0.3% | 0.4% | 0.8% |
| \$1,000,000+ | 0.1% | 0.1% | 0.2% |
| Average Home Value | \$96,016 | \$102,693 | \$118,947 |

2000 Specified Renter Occ. Housing Units by Contract Rent

| Total | Augusta, ME (30 Min) | Augusta, ME (45 Min) | Augusta, ME (60 Min) |
|----------------|----------------------|----------------------|----------------------|
| With Cash Rent | 94.6% | 94.1% | 94.6% |
| No Cash Rent | 5.4% | 5.9% | 5.4% |
| Median Rent | \$392 | \$404 | \$443 |
| Average Rent | \$384 | \$404 | \$457 |

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest, dividends, net rents, pensions, SSI and welfare payments, child support and alimony. Specified Renter Occupied Housing Units exclude houses on 10+ acres. Average Rent excludes units paying no cash rent.

[Source: ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile

Augusta, ME

Site Type: Drive Tim
 Latitude: 44.31804
 Longitude: -69.77622

Augusta, ME

Augusta, ME

Augusta, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Population by Age

| | Augusta, ME (30 Min) | Augusta, ME (45 Min) | Augusta, ME (60 Min) |
|--------------|----------------------|----------------------|----------------------|
| Total | 117,597 | 290,731 | 539,673 |
| Age 0 - 4 | 5.5% | 5.8% | 5.7% |
| Age 5 - 9 | 6.5% | 6.7% | 6.5% |
| Age 10 - 14 | 7.4% | 7.4% | 7.2% |
| Age 15 - 19 | 7.5% | 7.3% | 6.9% |
| Age 20 - 24 | 5.5% | 5.8% | 5.8% |
| Age 25 - 34 | 12.0% | 12.6% | 13.2% |
| Age 35 - 44 | 16.7% | 16.6% | 16.7% |
| Age 45 - 54 | 15.1% | 14.5% | 14.7% |
| Age 55 - 64 | 9.6% | 9.3% | 9.3% |
| Age 65 - 74 | 7.4% | 7.1% | 7.1% |
| Age 75 - 84 | 5.0% | 5.0% | 5.1% |
| Age 85+ | 1.8% | 1.9% | 1.9% |
| Age 18+ | 76.1% | 75.8% | 76.4% |

2009 Population by Age

| | Augusta, ME (30 Min) | Augusta, ME (45 Min) | Augusta, ME (60 Min) |
|--------------|----------------------|----------------------|----------------------|
| Total | 123,178 | 304,250 | 564,839 |
| Age 0 - 4 | 5.4% | 5.7% | 5.6% |
| Age 5 - 9 | 5.6% | 5.8% | 5.7% |
| Age 10 - 14 | 6.0% | 6.1% | 6.0% |
| Age 15 - 19 | 7.0% | 7.1% | 6.8% |
| Age 20 - 24 | 6.5% | 6.7% | 6.6% |
| Age 25 - 34 | 11.2% | 11.5% | 11.8% |
| Age 35 - 44 | 13.2% | 13.4% | 13.6% |
| Age 45 - 54 | 16.6% | 16.2% | 16.3% |
| Age 55 - 64 | 13.6% | 13.0% | 13.1% |
| Age 65 - 74 | 7.7% | 7.4% | 7.3% |
| Age 75 - 84 | 5.0% | 4.9% | 4.9% |
| Age 85+ | 2.2% | 2.3% | 2.4% |
| Age 18+ | 78.9% | 78.3% | 78.7% |

2014 Population by Age

| | Augusta, ME (30 Min) | Augusta, ME (45 Min) | Augusta, ME (60 Min) |
|--------------|----------------------|----------------------|----------------------|
| Total | 125,304 | 309,165 | 573,799 |
| Age 0 - 4 | 5.2% | 5.6% | 5.4% |
| Age 5 - 9 | 5.6% | 5.7% | 5.6% |
| Age 10 - 14 | 6.0% | 6.1% | 6.0% |
| Age 15 - 19 | 6.2% | 6.4% | 6.2% |
| Age 20 - 24 | 6.2% | 6.5% | 6.4% |
| Age 25 - 34 | 12.2% | 12.3% | 12.7% |
| Age 35 - 44 | 11.8% | 11.9% | 12.0% |
| Age 45 - 54 | 14.9% | 14.8% | 14.9% |
| Age 55 - 64 | 14.9% | 14.4% | 14.4% |
| Age 65 - 74 | 9.8% | 9.2% | 9.2% |
| Age 75 - 84 | 4.9% | 4.8% | 4.8% |
| Age 85+ | 2.3% | 2.4% | 2.4% |
| Age 18+ | 79.6% | 79.0% | 79.4% |

2000 Population by Sex

| | Augusta, ME (30 Min) | Augusta, ME (45 Min) | Augusta, ME (60 Min) |
|---------|----------------------|----------------------|----------------------|
| Males | 48.3% | 48.5% | 48.4% |
| Females | 51.7% | 51.5% | 51.6% |

2009 Population by Sex

| | Augusta, ME (30 Min) | Augusta, ME (45 Min) | Augusta, ME (60 Min) |
|---------|----------------------|----------------------|----------------------|
| Males | 48.4% | 48.7% | 48.6% |
| Females | 51.6% | 51.3% | 51.4% |

2014 Population by Sex

| | Augusta, ME (30 Min) | Augusta, ME (45 Min) | Augusta, ME (60 Min) |
|---------|----------------------|----------------------|----------------------|
| Males | 48.4% | 48.7% | 48.7% |
| Females | 51.6% | 51.3% | 51.3% |

Source: ESRI forecasts for 2009 and 2014.; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Augusta, ME

Site Type: Drive Tim
 Latitude: 44.31804
 Longitude: -69.77622

Augusta, ME

Augusta, ME

Augusta, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|---------|---------|
| Total | 117,597 | 290,731 | 539,673 |
| White Alone | 97.4% | 96.9% | 96.5% |
| Black Alone | 0.4% | 0.6% | 0.8% |
| American Indian Alone | 0.4% | 0.3% | 0.3% |
| Asian or Pacific Islander Alone | 0.6% | 0.7% | 1.0% |
| Some Other Race Alone | 0.2% | 0.2% | 0.3% |
| Two or More Races | 1.0% | 1.1% | 1.1% |
| Hispanic Origin | 0.7% | 0.9% | 0.9% |
| Diversity Index | 6.5 | 7.7 | 8.4 |

2009 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|---------|---------|
| Total | 123,178 | 304,250 | 564,839 |
| White Alone | 96.8% | 96.2% | 95.7% |
| Black Alone | 0.5% | 0.8% | 1.0% |
| American Indian Alone | 0.5% | 0.4% | 0.4% |
| Asian or Pacific Islander Alone | 0.9% | 1.0% | 1.4% |
| Some Other Race Alone | 0.3% | 0.4% | 0.4% |
| Two or More Races | 1.1% | 1.2% | 1.2% |
| Hispanic Origin | 1.1% | 1.4% | 1.4% |
| Diversity Index | 8.3 | 9.9 | 10.9 |

2014 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|---------|---------|
| Total | 125,304 | 309,165 | 573,799 |
| White Alone | 96.4% | 95.7% | 95.1% |
| Black Alone | 0.6% | 1.0% | 1.1% |
| American Indian Alone | 0.5% | 0.4% | 0.4% |
| Asian or Pacific Islander Alone | 1.1% | 1.3% | 1.7% |
| Some Other Race Alone | 0.3% | 0.4% | 0.5% |
| Two or More Races | 1.1% | 1.2% | 1.2% |
| Hispanic Origin | 1.4% | 1.7% | 1.7% |
| Diversity Index | 9.6 | 11.4 | 12.6 |



2000 Population 3+ by School Enrollment

| | | | |
|-------------------------------|---------|---------|---------|
| Total | 113,847 | 280,890 | 521,416 |
| Enrolled in Nursery/Preschool | 1.5% | 1.4% | 1.4% |
| Enrolled in Kindergarten | 1.2% | 1.3% | 1.3% |
| Enrolled in Grade 1-8 | 12.2% | 12.2% | 11.9% |
| Enrolled in Grade 9-12 | 6.2% | 6.0% | 5.9% |
| Enrolled in College | 4.8% | 5.1% | 4.8% |
| Enrolled in Grad/Prof School | 0.8% | 0.7% | 0.9% |
| Not Enrolled in School | 73.3% | 73.3% | 73.9% |

2009 Population 25+ by Educational Attainment

| | | | |
|------------------------------|--------|---------|---------|
| Total | 85,635 | 208,891 | 391,520 |
| Less than 9th Grade | 4.5% | 5.1% | 4.1% |
| 9th - 12th Grade, No Diploma | 7.0% | 7.7% | 7.0% |
| High School Graduate | 38.1% | 37.9% | 35.5% |
| Some College, No Degree | 18.0% | 18.0% | 17.7% |
| Associate Degree | 8.9% | 8.6% | 8.6% |
| Bachelor's Degree | 15.2% | 14.9% | 17.8% |
| Graduate/Professional Degree | 8.2% | 7.9% | 9.4% |

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: [ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile

Augusta, ME

Site Type: Drive Tim
 Latitude: 44.31804
 Longitude: -69.77622

Augusta, ME

Augusta, ME

Augusta, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2009 Population 15+ by Marital Status

| | Augusta, ME | Augusta, ME | Augusta, ME |
|---------------|-------------|-------------|-------------|
| Total | 102,153 | 250,705 | 467,410 |
| Never Married | 24.5% | 24.9% | 25.8% |
| Married | 54.9% | 55.1% | 54.7% |
| Widowed | 6.7% | 6.6% | 6.6% |
| Divorced | 14.0% | 13.4% | 12.9% |



2000 Population 16+ by Employment Status

| | Augusta, ME | Augusta, ME | Augusta, ME |
|---------------------|-------------|-------------|-------------|
| Total | 92,945 | 228,897 | 427,564 |
| In Labor Force | 65.4% | 66.0% | 66.5% |
| Civilian Employed | 62.2% | 62.0% | 62.9% |
| Civilian Unemployed | 3.0% | 3.0% | 3.0% |
| In Armed Forces | 0.2% | 0.9% | 0.6% |
| Not in Labor Force | 34.6% | 34.0% | 33.5% |

2009 Civilian Population 16+ in Labor Force

| | Augusta, ME | Augusta, ME | Augusta, ME |
|---------------------|-------------|-------------|-------------|
| Civilian Employed | 92.5% | 92.3% | 92.5% |
| Civilian Unemployed | 7.5% | 7.7% | 7.5% |

2014 Civilian Population 16+ in Labor Force

| | Augusta, ME | Augusta, ME | Augusta, ME |
|---------------------|-------------|-------------|-------------|
| Civilian Employed | 94.7% | 94.6% | 94.7% |
| Civilian Unemployed | 5.3% | 5.4% | 5.3% |

2000 Females 16+ by Employment Status and Age of Children

| | Augusta, ME | Augusta, ME | Augusta, ME |
|--------------------------|-------------|-------------|-------------|
| Total | 48,737 | 119,628 | 224,035 |
| Own Children < 6 Only | 6.1% | 6.3% | 6.5% |
| Employed/in Armed Forces | 4.1% | 4.3% | 4.4% |
| Unemployed | 0.3% | 0.3% | 0.3% |
| Not in Labor Force | 1.7% | 1.7% | 1.9% |
| Own Children <6 and 6-17 | 4.8% | 5.2% | 4.9% |
| Employed/in Armed Forces | 3.4% | 3.5% | 3.1% |
| Unemployed | 0.1% | 0.2% | 0.2% |
| Not in Labor Force | 1.3% | 1.5% | 1.6% |
| Own Children 6-17 Only | 18.6% | 17.9% | 17.2% |
| Employed/in Armed Forces | 15.1% | 14.6% | 13.9% |
| Unemployed | 0.5% | 0.4% | 0.4% |
| Not in Labor Force | 2.9% | 2.9% | 3.0% |
| No Own Children <18 | 70.6% | 70.6% | 71.4% |
| Employed/in Armed Forces | 35.7% | 35.7% | 37.0% |
| Unemployed | 2.0% | 1.9% | 1.9% |
| Not in Labor Force | 32.9% | 33.0% | 32.5% |

Source: ESRI forecasts for 2009 and 2014.; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Augusta, ME

Site Type: Drive Tim
 Latitude: 44.31804
 Longitude: -69.77622

Augusta, ME

Augusta, ME

Augusta, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2009 Employed Population 16+ by Industry

| | Augusta, ME | Augusta, ME | Augusta, ME |
|-------------------------------|-------------|-------------|-------------|
| Total | 60,240 | 147,769 | 282,321 |
| Agriculture/Mining | 1.3% | 1.4% | 1.6% |
| Construction | 6.6% | 6.7% | 6.5% |
| Manufacturing | 7.6% | 9.6% | 8.8% |
| Wholesale Trade | 3.6% | 3.1% | 3.2% |
| Retail Trade | 12.0% | 12.8% | 12.5% |
| Transportation/Utilities | 3.9% | 3.5% | 3.4% |
| Information | 2.5% | 2.5% | 3.0% |
| Finance/Insurance/Real Estate | 5.0% | 5.7% | 7.3% |
| Services | 46.6% | 47.0% | 47.8% |
| Public Administration | 11.0% | 7.7% | 5.9% |

2009 Employed Population 16+ by Occupation

| | Augusta, ME | Augusta, ME | Augusta, ME |
|---------------------------------|-------------|-------------|-------------|
| Total | 60,240 | 147,769 | 282,321 |
| White Collar | 62.6% | 60.7% | 62.4% |
| Management/Business/Financial | 11.8% | 11.4% | 12.5% |
| Professional | 25.6% | 24.0% | 24.8% |
| Sales | 9.7% | 10.2% | 10.7% |
| Administrative Support | 15.5% | 15.1% | 14.5% |
| Services | 15.9% | 16.3% | 15.9% |
| Blue Collar | 21.6% | 23.0% | 21.6% |
| Farming/Forestry/Fishing | 0.7% | 0.9% | 1.0% |
| Construction/Extraction | 6.8% | 7.0% | 6.3% |
| Installation/Maintenance/Repair | 3.5% | 3.6% | 3.3% |
| Production | 5.4% | 6.4% | 6.0% |
| Transportation/Material Moving | 5.1% | 5.2% | 5.0% |



2000 Workers 16+ by Means of Transportation to Work

| | Augusta, ME | Augusta, ME | Augusta, ME |
|----------------------------------|-------------|-------------|-------------|
| Total | 57,090 | 141,380 | 266,143 |
| Drove Alone - Car, Truck, or Van | 78.5% | 77.8% | 77.7% |
| Carpooled - Car, Truck, or Van | 12.0% | 12.2% | 11.5% |
| Public Transportation | 0.8% | 0.8% | 1.1% |
| Walked | 3.6% | 4.4% | 4.5% |
| Other Means | 0.9% | 0.9% | 1.0% |
| Worked at Home | 4.3% | 3.9% | 4.2% |

2000 Workers 16+ by Travel Time to Work

| | Augusta, ME | Augusta, ME | Augusta, ME |
|--------------------------------------|-------------|-------------|-------------|
| Total | 57,090 | 141,380 | 266,143 |
| Did not Work at Home | 95.7% | 96.1% | 95.8% |
| Less than 5 minutes | 4.6% | 4.8% | 4.8% |
| 5 to 9 minutes | 13.9% | 14.4% | 13.9% |
| 10 to 19 minutes | 31.2% | 31.8% | 33.1% |
| 20 to 24 minutes | 13.9% | 12.9% | 13.1% |
| 25 to 34 minutes | 16.5% | 15.7% | 15.3% |
| 35 to 44 minutes | 4.1% | 5.1% | 4.7% |
| 45 to 59 minutes | 5.5% | 6.1% | 5.5% |
| 60 to 89 minutes | 4.2% | 3.2% | 3.2% |
| 90 or more minutes | 1.8% | 2.1% | 2.2% |
| Worked at Home | 4.3% | 3.9% | 4.2% |
| Average Travel Time to Work (in min) | 22.5 | 22.6 | 22.4 |

2000 Households by Vehicles Available

| | Augusta, ME | Augusta, ME | Augusta, ME |
|--------------------------------------|-------------|-------------|-------------|
| Total | 47,872 | 117,622 | 221,554 |
| None | 7.7% | 8.6% | 9.2% |
| 1 | 36.1% | 35.7% | 35.6% |
| 2 | 40.7% | 40.7% | 40.4% |
| 3 | 11.9% | 11.3% | 11.3% |
| 4 | 2.6% | 2.7% | 2.5% |
| 5+ | 1.0% | 1.0% | 1.0% |
| Average Number of Vehicles Available | 1.7 | 1.7 | 1.7 |

Source: ESRI forecasts for 2009; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Augusta, ME

Site Type: Drive Tim
 Latitude: 44.31804
 Longitude: -69.77622

Augusta, ME

Augusta, ME

Augusta, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Households by Type

| | 47,855 | 117,530 | 221,549 |
|----------------------------------|--------|---------|---------|
| Total | 47,855 | 117,530 | 221,549 |
| Family Households | 65.3% | 65.4% | 63.5% |
| Married-couple Family | 50.9% | 51.0% | 49.8% |
| With Related Children | 22.0% | 22.3% | 21.7% |
| Other Family (No Spouse) | 14.4% | 14.4% | 13.7% |
| With Related Children | 10.3% | 10.4% | 9.6% |
| Nonfamily Households | 34.7% | 34.6% | 36.5% |
| Householder Living Alone | 28.0% | 27.8% | 28.6% |
| Householder Not Living Alone | 6.7% | 6.8% | 7.9% |
| Households with Related Children | 32.3% | 32.6% | 31.3% |
| Households with Persons 65+ | 24.1% | 23.9% | 23.8% |

2000 Households by Size

| | 47,855 | 117,530 | 221,549 |
|---------------------|--------|---------|---------|
| Total | 47,855 | 117,530 | 221,549 |
| 1 Person Household | 28.0% | 27.8% | 28.6% |
| 2 Person Household | 35.9% | 35.7% | 35.9% |
| 3 Person Household | 16.1% | 16.0% | 15.6% |
| 4 Person Household | 13.6% | 13.6% | 13.2% |
| 5 Person Household | 4.7% | 4.9% | 4.8% |
| 6 Person Household | 1.3% | 1.4% | 1.4% |
| 7+ Person Household | 0.5% | 0.5% | 0.6% |

2000 Households by Year Householder Moved In

| | 47,872 | 117,622 | 221,554 |
|----------------------------------|--------|---------|---------|
| Total | 47,872 | 117,622 | 221,554 |
| Moved in 1999 to March 2000 | 16.8% | 18.2% | 18.5% |
| Moved in 1995 to 1998 | 25.2% | 25.9% | 26.9% |
| Moved in 1990 to 1994 | 15.3% | 15.3% | 15.2% |
| Moved in 1980 to 1989 | 19.5% | 18.7% | 18.2% |
| Moved in 1970 to 1979 | 11.0% | 10.6% | 10.5% |
| Moved in 1969 or Earlier | 12.2% | 11.3% | 10.6% |
| Median Year Householder Moved In | 1992 | 1993 | 1993 |



2000 Housing Units by Units in Structure

| | 54,536 | 133,411 | 252,174 |
|-------------|--------|---------|---------|
| Total | 54,536 | 133,411 | 252,174 |
| 1, Detached | 62.1% | 59.4% | 60.2% |
| 1, Attached | 1.5% | 2.0% | 2.5% |
| 2 | 7.8% | 7.5% | 7.3% |
| 3 or 4 | 6.8% | 7.4% | 7.4% |
| 5 to 9 | 5.8% | 6.8% | 6.0% |
| 10 to 19 | 1.9% | 2.1% | 2.4% |
| 20+ | 2.6% | 3.2% | 4.4% |
| Mobile Home | 11.4% | 11.5% | 9.8% |
| Other | 0.1% | 0.1% | 0.1% |

2000 Housing Units by Year Structure Built

| | 54,536 | 133,411 | 252,174 |
|-----------------------------|--------|---------|---------|
| Total | 54,536 | 133,411 | 252,174 |
| 1999 to March 2000 | 1.1% | 1.5% | 1.7% |
| 1995 to 1998 | 4.8% | 4.9% | 5.0% |
| 1990 to 1994 | 7.0% | 7.0% | 6.7% |
| 1980 to 1989 | 14.1% | 15.0% | 15.1% |
| 1970 to 1979 | 16.5% | 15.8% | 15.2% |
| 1969 or Earlier | 56.6% | 55.8% | 56.3% |
| Median Year Structure Built | 1963 | 1964 | 1963 |

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Augusta, ME

Site Type: Drive Tim
 Latitude: 44.31804
 Longitude: -69.77622

Augusta, ME

Augusta, ME

Augusta, ME

Drive Time: 30 Minutes Drive Time: 45 Minutes Drive Time: 60 Minutes

[Top 3 Tapestry Segments](#)

| | | | |
|----|------------------|-------------------|-----------------------|
| 1. | Midland Crowd | Midland Crowd | Midland Crowd |
| 2. | Midlife Junction | Midlife Junction | Midlife Junction |
| 3. | Simple Living | Salt of the Earth | Rural Resort Dwellers |



2009 Consumer Spending shows the amount spent on a variety of goods and services by households that reside in the market area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue.

| | | | |
|--|----------------------|------------------------|------------------------|
| Apparel & Services: Total \$ | \$67,604,732 | \$169,727,023 | \$346,912,889 |
| Average Spent | \$1,302.87 | \$1,334.81 | \$1,451.23 |
| Spending Potential Index | 52 | 53 | 58 |
| Computers & Accessories: Total \$ | \$8,752,861 | \$21,989,708 | \$44,997,820 |
| Average Spent | \$168.68 | \$172.94 | \$188.24 |
| Spending Potential Index | 74 | 76 | 82 |
| Education: Total \$ | \$46,829,809 | \$118,063,325 | \$242,693,203 |
| Average Spent | \$902.50 | \$928.51 | \$1,015.25 |
| Spending Potential Index | 72 | 74 | 81 |
| Entertainment/Recreation: Total \$ | \$129,125,512 | \$322,837,502 | \$658,535,915 |
| Average Spent | \$2,488.49 | \$2,538.95 | \$2,754.83 |
| Spending Potential Index | 77 | 78 | 85 |
| Food at Home: Total \$ | \$182,276,494 | \$455,901,685 | \$925,489,873 |
| Average Spent | \$3,512.82 | \$3,585.43 | \$3,871.57 |
| Spending Potential Index | 77 | 79 | 85 |
| Food Away from Home: Total \$ | \$130,696,024 | \$327,358,923 | \$666,447,518 |
| Average Spent | \$2,518.76 | \$2,574.51 | \$2,787.92 |
| Spending Potential Index | 76 | 77 | 84 |
| Health Care: Total \$ | \$160,061,415 | \$396,000,825 | \$796,694,724 |
| Average Spent | \$3,084.69 | \$3,114.34 | \$3,332.78 |
| Spending Potential Index | 82 | 83 | 88 |
| Household Furnishings & Equip: Total \$ | \$73,771,304 | \$184,431,579 | \$377,334,018 |
| Average Spent | \$1,421.71 | \$1,450.46 | \$1,578.49 |
| Spending Potential Index | 65 | 67 | 73 |
| Investments: Total \$ | \$55,194,242 | \$137,089,439 | \$287,053,591 |
| Average Spent | \$1,063.70 | \$1,078.14 | \$1,200.82 |
| Spending Potential Index | 74 | 75 | 83 |
| Retail Goods: Total \$ | \$982,932,727 | \$2,451,778,691 | \$4,985,884,679 |
| Average Spent | \$18,942.99 | \$19,281.96 | \$20,857.25 |
| Spending Potential Index | 74 | 75 | 81 |
| Shelter: Total \$ | \$577,887,601 | \$1,452,026,833 | \$2,990,218,130 |
| Average Spent | \$11,137.00 | \$11,419.43 | \$12,508.86 |
| Spending Potential Index | 71 | 73 | 80 |
| TV/Video/Sound Equipment: Total \$ | \$48,300,513 | \$120,655,991 | \$244,611,980 |
| Average Spent | \$930.84 | \$948.90 | \$1,023.28 |
| Spending Potential Index | 77 | 78 | 84 |
| Travel: Total \$ | \$69,505,497 | \$174,191,855 | \$359,427,817 |
| Average Spent | \$1,339.50 | \$1,369.93 | \$1,503.58 |
| Spending Potential Index | 73 | 74 | 81 |
| Vehicle Maintenance & Repairs: Total \$ | \$37,262,379 | \$93,012,960 | \$189,408,452 |
| Average Spent | \$718.12 | \$731.50 | \$792.34 |
| Spending Potential Index | 77 | 78 | 85 |

Data Note: The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2005 and 2006 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI



Bangor, ME

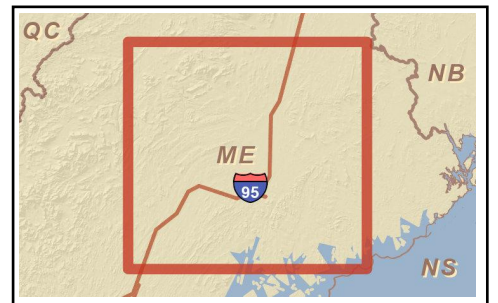
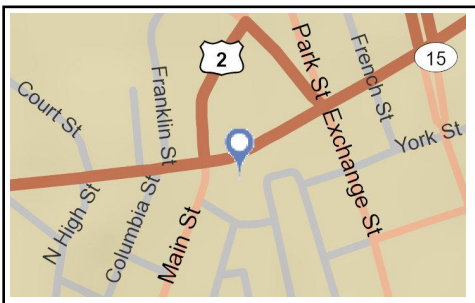
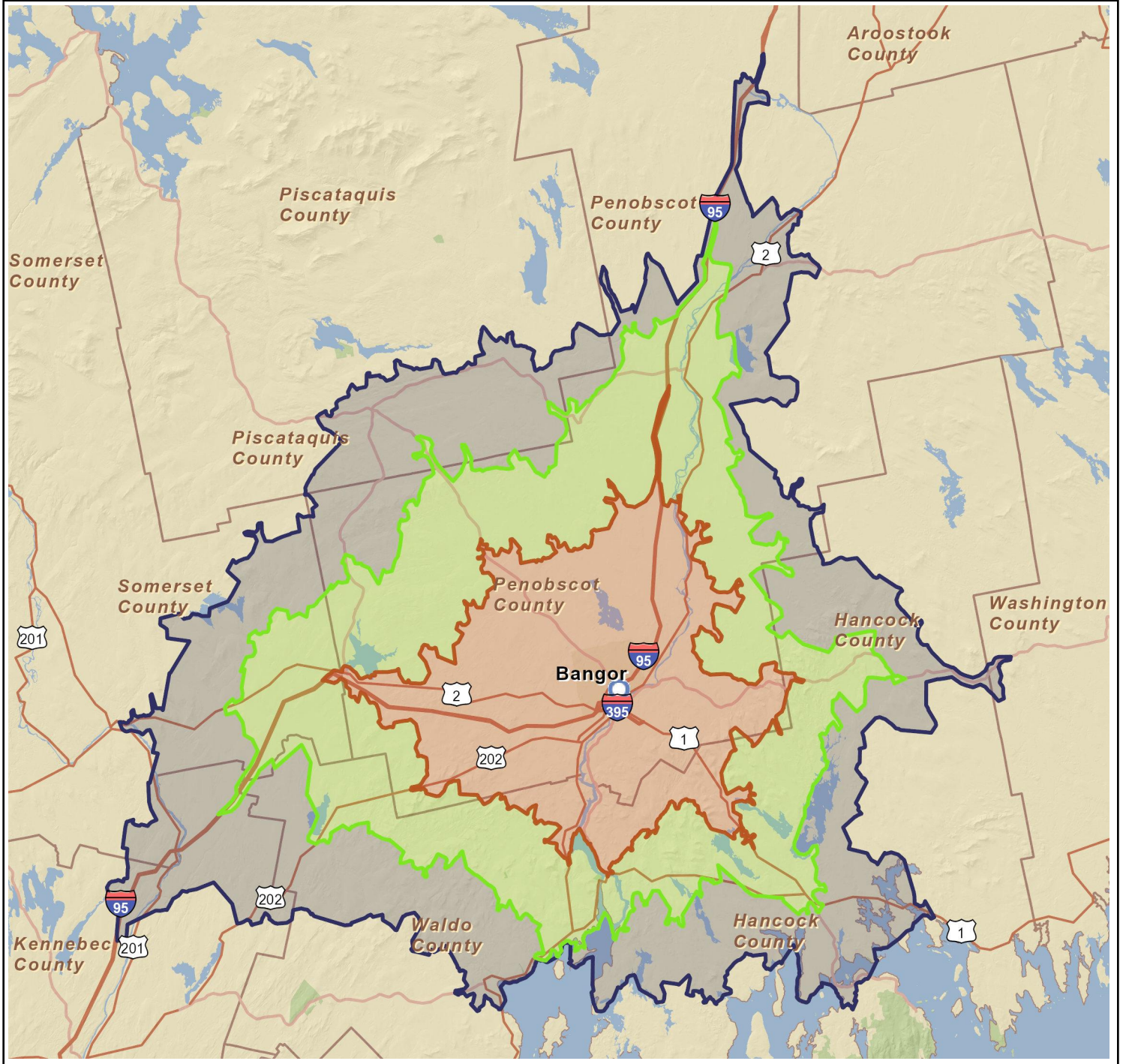
Bangor, Maine

Latitude: 44.80172

Longitude: -68.77079

Site Type: Drive Time

Drive Time 30, 45, 60 Minutes





Market Profile

Bangor, ME

Site Type: Drive Tim
 Latitude: 44.80172
 Longitude: -68.77079

Bangor, ME

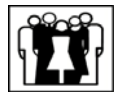
Bangor, ME

Bangor, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



| | | | |
|-------------------------|---------|---------|---------|
| 2000 Total Population | 107,762 | 152,094 | 238,015 |
| 2000 Group Quarters | 5,966 | 6,601 | 10,786 |
| 2009 Total Population | 113,437 | 160,220 | 249,500 |
| 2014 Total Population | 115,562 | 163,180 | 253,439 |
| 2009 - 2014 Annual Rate | 0.37% | 0.37% | 0.31% |



| | | | |
|-----------------------------|--------|--------|---------|
| 2000 Households | 43,213 | 60,827 | 95,326 |
| 2000 Average Household Size | 2.36 | 2.39 | 2.38 |
| 2009 Households | 46,735 | 66,044 | 103,269 |
| 2009 Average Household Size | 2.29 | 2.32 | 2.30 |
| 2014 Households | 48,132 | 68,033 | 106,150 |
| 2014 Average Household Size | 2.27 | 2.29 | 2.28 |
| 2009 - 2014 Annual Rate | 0.59% | 0.60% | 0.55% |
| 2000 Families | 27,156 | 39,548 | 62,330 |
| 2000 Average Family Size | 2.88 | 2.89 | 2.88 |
| 2009 Families | 28,832 | 42,147 | 66,225 |
| 2009 Average Family Size | 2.77 | 2.77 | 2.76 |
| 2014 Families | 29,404 | 42,994 | 67,390 |
| 2014 Average Family Size | 2.73 | 2.73 | 2.71 |
| 2009 - 2014 Annual Rate | 0.39% | 0.40% | 0.35% |



| | | | |
|-------------------------------|--------|--------|---------|
| 2000 Housing Units | 47,037 | 68,664 | 112,019 |
| Owner Occupied Housing Units | 60.4% | 62.0% | 60.4% |
| Renter Occupied Housing Units | 31.4% | 26.6% | 24.7% |
| Vacant Housing Units | 8.1% | 11.4% | 14.9% |
| 2009 Housing Units | 51,276 | 75,252 | 122,705 |
| Owner Occupied Housing Units | 60.0% | 61.5% | 59.7% |
| Renter Occupied Housing Units | 31.1% | 26.3% | 24.5% |
| Vacant Housing Units | 8.9% | 12.2% | 15.8% |
| 2014 Housing Units | 52,898 | 77,635 | 126,290 |
| Owner Occupied Housing Units | 59.4% | 60.8% | 59.0% |
| Renter Occupied Housing Units | 31.6% | 26.8% | 25.0% |
| Vacant Housing Units | 9.0% | 12.4% | 15.9% |

Median Household Income

| | | | |
|------|----------|----------|----------|
| 2000 | \$35,940 | \$35,283 | \$33,881 |
| 2009 | \$44,803 | \$43,693 | \$41,857 |
| 2014 | \$47,159 | \$46,397 | \$45,314 |

Median Home Value

| | | | |
|------|-----------|-----------|-----------|
| 2000 | \$85,696 | \$82,297 | \$80,011 |
| 2009 | \$148,371 | \$143,761 | \$143,204 |
| 2014 | \$175,543 | \$171,223 | \$171,203 |

Per Capita Income

| | | | |
|------|----------|----------|----------|
| 2000 | \$18,846 | \$18,181 | \$17,499 |
| 2009 | \$23,372 | \$22,529 | \$21,723 |
| 2014 | \$24,106 | \$23,203 | \$22,390 |

Median Age

| | | | |
|------|------|------|------|
| 2000 | 36.0 | 36.7 | 37.3 |
| 2009 | 38.4 | 39.2 | 40.1 |
| 2014 | 39.2 | 40.1 | 41.0 |

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by total population. Detail may not sum to totals due to rounding.

[Source: ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile

Bangor, ME

Site Type: Drive Tim
 Latitude: 44.80172
 Longitude: -68.77079

Bangor, ME

Bangor, ME

Bangor, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Households by Income

| Household Income Base | 43,279 | 60,864 | 95,371 |
|--------------------------|----------|----------|----------|
| < \$15,000 | 20.2% | 19.9% | 20.6% |
| \$15,000 - \$24,999 | 14.2% | 15.0% | 16.1% |
| \$25,000 - \$34,999 | 14.3% | 14.6% | 14.7% |
| \$35,000 - \$49,999 | 17.7% | 18.1% | 18.6% |
| \$50,000 - \$74,999 | 18.5% | 18.2% | 17.2% |
| \$75,000 - \$99,999 | 8.0% | 7.9% | 7.3% |
| \$100,000 - \$149,999 | 4.9% | 4.4% | 3.9% |
| \$150,000 - \$199,999 | 1.0% | 0.9% | 0.8% |
| \$200,000 + | 1.1% | 0.9% | 0.8% |
| Average Household Income | \$45,901 | \$44,605 | \$42,843 |

2009 Households by Income

| Household Income Base | 46,732 | 66,041 | 103,266 |
|--------------------------|----------|----------|----------|
| < \$15,000 | 15.0% | 14.9% | 15.5% |
| \$15,000 - \$24,999 | 12.3% | 12.7% | 13.6% |
| \$25,000 - \$34,999 | 11.4% | 12.1% | 12.7% |
| \$35,000 - \$49,999 | 17.3% | 17.7% | 17.7% |
| \$50,000 - \$74,999 | 21.4% | 21.4% | 21.4% |
| \$75,000 - \$99,999 | 11.8% | 11.2% | 10.1% |
| \$100,000 - \$149,999 | 7.5% | 7.1% | 6.4% |
| \$150,000 - \$199,999 | 1.7% | 1.5% | 1.3% |
| \$200,000 + | 1.6% | 1.3% | 1.2% |
| Average Household Income | \$55,077 | \$53,366 | \$51,153 |

2014 Households by Income

| Household Income Base | 48,129 | 68,030 | 106,147 |
|--------------------------|----------|----------|----------|
| < \$15,000 | 14.6% | 14.5% | 15.1% |
| \$15,000 - \$24,999 | 11.1% | 11.5% | 12.4% |
| \$25,000 - \$34,999 | 9.8% | 10.6% | 11.3% |
| \$35,000 - \$49,999 | 19.6% | 20.4% | 20.4% |
| \$50,000 - \$74,999 | 22.0% | 21.6% | 21.5% |
| \$75,000 - \$99,999 | 11.9% | 11.4% | 10.3% |
| \$100,000 - \$149,999 | 7.7% | 7.3% | 6.5% |
| \$150,000 - \$199,999 | 1.6% | 1.4% | 1.3% |
| \$200,000 + | 1.6% | 1.3% | 1.2% |
| Average Household Income | \$56,062 | \$54,238 | \$51,993 |

2000 Owner Occupied Housing Units by Value

| Total | 28,417 | 42,556 | 67,651 |
|-----------------------|----------|----------|----------|
| < \$50,000 | 16.2% | 19.1% | 20.8% |
| \$50,000 - \$99,999 | 49.3% | 49.3% | 49.3% |
| \$100,000 - \$149,999 | 23.4% | 21.1% | 19.2% |
| \$150,000 - \$199,999 | 6.8% | 6.4% | 6.2% |
| \$200,000 - \$299,999 | 3.4% | 3.1% | 3.2% |
| \$300,000 - \$499,999 | 0.8% | 0.7% | 1.0% |
| \$500,000 - \$999,999 | 0.1% | 0.1% | 0.2% |
| \$1,000,000+ | 0.1% | 0.2% | 0.2% |
| Average Home Value | \$95,340 | \$93,106 | \$92,463 |

2000 Specified Renter Occ. Housing Units by Contract Rent

| Total | 14,632 | 17,881 | 26,905 |
|----------------|--------|--------|--------|
| With Cash Rent | 95.5% | 93.9% | 93.1% |
| No Cash Rent | 4.5% | 6.1% | 6.9% |
| Median Rent | \$431 | \$416 | \$402 |
| Average Rent | \$416 | \$401 | \$390 |

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest, dividends, net rents, pensions, SSI and welfare payments, child support and alimony. Specified Renter Occupied Housing Units exclude houses on 10+ acres. Average Rent excludes units paying no cash rent.

[Source: ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile

Bangor, ME

Site Type: Drive Tim
 Latitude: 44.80172
 Longitude: -68.77079

Bangor, ME

Bangor, ME

Bangor, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Population by Age

| | Bangor, ME | Bangor, ME | Bangor, ME |
|-------------|------------|------------|------------|
| Total | 107,762 | 152,094 | 238,015 |
| Age 0 - 4 | 5.4% | 5.5% | 5.5% |
| Age 5 - 9 | 6.1% | 6.3% | 6.3% |
| Age 10 - 14 | 6.8% | 7.0% | 7.1% |
| Age 15 - 19 | 8.3% | 8.0% | 7.9% |
| Age 20 - 24 | 8.8% | 7.6% | 7.1% |
| Age 25 - 34 | 13.0% | 12.8% | 12.4% |
| Age 35 - 44 | 16.4% | 16.6% | 16.1% |
| Age 45 - 54 | 14.4% | 14.7% | 14.7% |
| Age 55 - 64 | 8.6% | 8.9% | 9.3% |
| Age 65 - 74 | 6.6% | 6.9% | 7.3% |
| Age 75 - 84 | 4.1% | 4.1% | 4.6% |
| Age 85+ | 1.5% | 1.4% | 1.7% |
| Age 18+ | 77.5% | 76.8% | 76.8% |

2009 Population by Age

| | Bangor, ME | Bangor, ME | Bangor, ME |
|-------------|------------|------------|------------|
| Total | 113,437 | 160,220 | 249,500 |
| Age 0 - 4 | 5.3% | 5.4% | 5.4% |
| Age 5 - 9 | 5.3% | 5.5% | 5.5% |
| Age 10 - 14 | 5.6% | 5.9% | 5.9% |
| Age 15 - 19 | 8.1% | 7.7% | 7.6% |
| Age 20 - 24 | 9.0% | 7.9% | 7.6% |
| Age 25 - 34 | 12.4% | 12.2% | 11.7% |
| Age 35 - 44 | 13.2% | 13.5% | 13.3% |
| Age 45 - 54 | 15.7% | 16.1% | 15.9% |
| Age 55 - 64 | 12.3% | 12.7% | 13.1% |
| Age 65 - 74 | 6.9% | 7.0% | 7.4% |
| Age 75 - 84 | 4.4% | 4.3% | 4.7% |
| Age 85+ | 1.8% | 1.8% | 2.0% |
| Age 18+ | 79.9% | 79.2% | 79.2% |

2014 Population by Age

| | Bangor, ME | Bangor, ME | Bangor, ME |
|-------------|------------|------------|------------|
| Total | 115,562 | 163,180 | 253,439 |
| Age 0 - 4 | 5.2% | 5.3% | 5.2% |
| Age 5 - 9 | 5.3% | 5.4% | 5.4% |
| Age 10 - 14 | 5.6% | 5.8% | 5.9% |
| Age 15 - 19 | 7.4% | 7.1% | 7.0% |
| Age 20 - 24 | 8.7% | 7.7% | 7.3% |
| Age 25 - 34 | 12.7% | 12.4% | 12.0% |
| Age 35 - 44 | 12.4% | 12.6% | 12.2% |
| Age 45 - 54 | 14.3% | 14.6% | 14.4% |
| Age 55 - 64 | 13.6% | 14.0% | 14.4% |
| Age 65 - 74 | 8.7% | 8.9% | 9.4% |
| Age 75 - 84 | 4.3% | 4.3% | 4.6% |
| Age 85+ | 1.8% | 1.8% | 2.1% |
| Age 18+ | 80.5% | 79.8% | 79.8% |

2000 Population by Sex

| | Bangor, ME | Bangor, ME | Bangor, ME |
|---------|------------|------------|------------|
| Males | 48.5% | 48.8% | 48.6% |
| Females | 51.5% | 51.2% | 51.4% |

2009 Population by Sex

| | Bangor, ME | Bangor, ME | Bangor, ME |
|---------|------------|------------|------------|
| Males | 48.8% | 49.0% | 48.9% |
| Females | 51.2% | 51.0% | 51.1% |

2014 Population by Sex

| | Bangor, ME | Bangor, ME | Bangor, ME |
|---------|------------|------------|------------|
| Males | 48.9% | 49.0% | 48.9% |
| Females | 51.1% | 51.0% | 51.1% |

Source: ESRI forecasts for 2009 and 2014.; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Bangor, ME

Site Type: Drive Tim
 Latitude: 44.80172
 Longitude: -68.77079

Bangor, ME

Bangor, ME

Bangor, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|---------|---------|
| Total | 107,762 | 152,094 | 238,015 |
| White Alone | 96.0% | 96.5% | 96.9% |
| Black Alone | 0.6% | 0.5% | 0.4% |
| American Indian Alone | 1.2% | 1.0% | 0.8% |
| Asian or Pacific Islander Alone | 0.9% | 0.7% | 0.6% |
| Some Other Race Alone | 0.3% | 0.2% | 0.2% |
| Two or More Races | 1.0% | 1.0% | 1.1% |
| Hispanic Origin | 0.7% | 0.6% | 0.6% |
| Diversity Index | 9.1 | 8.0 | 7.3 |

2009 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|---------|---------|
| Total | 113,437 | 160,220 | 249,500 |
| White Alone | 95.2% | 95.9% | 96.3% |
| Black Alone | 0.8% | 0.6% | 0.6% |
| American Indian Alone | 1.3% | 1.1% | 0.9% |
| Asian or Pacific Islander Alone | 1.3% | 1.1% | 0.9% |
| Some Other Race Alone | 0.4% | 0.3% | 0.3% |
| Two or More Races | 1.0% | 1.0% | 1.1% |
| Hispanic Origin | 1.1% | 1.0% | 1.0% |
| Diversity Index | 11.3 | 9.9 | 9.1 |

2014 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|---------|---------|
| Total | 115,562 | 163,180 | 253,439 |
| White Alone | 94.6% | 95.4% | 95.9% |
| Black Alone | 0.9% | 0.7% | 0.6% |
| American Indian Alone | 1.4% | 1.1% | 0.9% |
| Asian or Pacific Islander Alone | 1.6% | 1.3% | 1.1% |
| Some Other Race Alone | 0.4% | 0.4% | 0.3% |
| Two or More Races | 1.1% | 1.1% | 1.1% |
| Hispanic Origin | 1.4% | 1.2% | 1.2% |
| Diversity Index | 12.9 | 11.2 | 10.3 |



2000 Population 3+ by School Enrollment

| | | | |
|-------------------------------|---------|---------|---------|
| Total | 104,360 | 147,170 | 230,198 |
| Enrolled in Nursery/Preschool | 1.4% | 1.4% | 1.4% |
| Enrolled in Kindergarten | 1.1% | 1.2% | 1.2% |
| Enrolled in Grade 1-8 | 11.1% | 11.5% | 11.7% |
| Enrolled in Grade 9-12 | 5.9% | 6.1% | 6.2% |
| Enrolled in College | 9.3% | 7.6% | 7.0% |
| Enrolled in Grad/Prof School | 1.3% | 1.1% | 0.9% |
| Not Enrolled in School | 69.8% | 71.1% | 71.7% |

2009 Population 25+ by Educational Attainment

| | | | |
|------------------------------|--------|---------|---------|
| Total | 75,633 | 108,339 | 169,805 |
| Less than 9th Grade | 3.0% | 3.4% | 4.0% |
| 9th - 12th Grade, No Diploma | 6.3% | 7.0% | 7.6% |
| High School Graduate | 34.5% | 37.0% | 38.5% |
| Some College, No Degree | 18.6% | 18.2% | 17.7% |
| Associate Degree | 10.1% | 9.7% | 9.0% |
| Bachelor's Degree | 17.2% | 15.7% | 14.9% |
| Graduate/Professional Degree | 10.2% | 9.0% | 8.3% |

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: [ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile

Bangor, ME

Site Type: Drive Tim
 Latitude: 44.80172
 Longitude: -68.77079

Bangor, ME

Bangor, ME

Bangor, ME

Drive Time: 30 Minutes

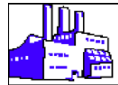
Drive Time: 45 Minutes

Drive Time: 60 Minutes



2009 Population 15+ by Marital Status

| | Bangor, ME (30 Min) | Bangor, ME (45 Min) | Bangor, ME (60 Min) |
|---------------|---------------------|---------------------|---------------------|
| Total | 95,046 | 133,363 | 207,651 |
| Never Married | 29.4% | 27.2% | 26.3% |
| Married | 52.4% | 54.6% | 54.7% |
| Widowed | 5.9% | 5.9% | 6.3% |
| Divorced | 12.3% | 12.3% | 12.7% |



2000 Population 16+ by Employment Status

| | Bangor, ME (30 Min) | Bangor, ME (45 Min) | Bangor, ME (60 Min) |
|---------------------|---------------------|---------------------|---------------------|
| Total | 86,750 | 121,400 | 189,624 |
| In Labor Force | 66.7% | 66.0% | 64.2% |
| Civilian Employed | 62.8% | 62.1% | 60.3% |
| Civilian Unemployed | 3.6% | 3.7% | 3.7% |
| In Armed Forces | 0.2% | 0.2% | 0.2% |
| Not in Labor Force | 33.3% | 34.0% | 35.8% |

2009 Civilian Population 16+ in Labor Force

| | Bangor, ME (30 Min) | Bangor, ME (45 Min) | Bangor, ME (60 Min) |
|---------------------|---------------------|---------------------|---------------------|
| Civilian Employed | 93.5% | 93.2% | 92.6% |
| Civilian Unemployed | 6.5% | 6.8% | 7.4% |

2014 Civilian Population 16+ in Labor Force

| | Bangor, ME (30 Min) | Bangor, ME (45 Min) | Bangor, ME (60 Min) |
|---------------------|---------------------|---------------------|---------------------|
| Civilian Employed | 95.5% | 95.2% | 94.8% |
| Civilian Unemployed | 4.5% | 4.8% | 5.2% |

2000 Females 16+ by Employment Status and Age of Children

| | Bangor, ME (30 Min) | Bangor, ME (45 Min) | Bangor, ME (60 Min) |
|--------------------------|---------------------|---------------------|---------------------|
| Total | 45,405 | 63,082 | 98,712 |
| Own Children < 6 Only | 6.5% | 6.6% | 6.2% |
| Employed/in Armed Forces | 4.3% | 4.2% | 3.9% |
| Unemployed | 0.2% | 0.2% | 0.3% |
| Not in Labor Force | 2.1% | 2.1% | 2.0% |
| Own Children <6 and 6-17 | 4.4% | 4.6% | 4.5% |
| Employed/in Armed Forces | 2.4% | 2.6% | 2.6% |
| Unemployed | 0.2% | 0.2% | 0.1% |
| Not in Labor Force | 1.8% | 1.8% | 1.7% |
| Own Children 6-17 Only | 16.7% | 17.2% | 17.3% |
| Employed/in Armed Forces | 13.3% | 13.4% | 13.2% |
| Unemployed | 0.4% | 0.5% | 0.5% |
| Not in Labor Force | 3.1% | 3.3% | 3.5% |
| No Own Children <18 | 72.4% | 71.6% | 72.0% |
| Employed/in Armed Forces | 38.7% | 37.4% | 36.0% |
| Unemployed | 2.4% | 2.2% | 2.3% |
| Not in Labor Force | 31.3% | 31.9% | 33.7% |

Source: ESRI forecasts for 2009 and 2014.; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Bangor, ME

Site Type: Drive Tim
 Latitude: 44.80172
 Longitude: -68.77079

Bangor, ME

Bangor, ME

Bangor, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2009 Employed Population 16+ by Industry

| | Bangor, ME | Bangor, ME | Bangor, ME |
|-------------------------------|------------|------------|------------|
| Total | 58,349 | 80,922 | 121,085 |
| Agriculture/Mining | 1.2% | 1.9% | 2.3% |
| Construction | 5.5% | 6.3% | 6.8% |
| Manufacturing | 5.5% | 7.0% | 7.9% |
| Wholesale Trade | 3.6% | 3.3% | 3.1% |
| Retail Trade | 12.5% | 12.3% | 12.1% |
| Transportation/Utilities | 4.5% | 4.4% | 4.1% |
| Information | 2.7% | 2.5% | 2.5% |
| Finance/Insurance/Real Estate | 4.8% | 4.9% | 5.3% |
| Services | 54.9% | 52.4% | 50.9% |
| Public Administration | 4.8% | 5.0% | 4.9% |

2009 Employed Population 16+ by Occupation

| | Bangor, ME | Bangor, ME | Bangor, ME |
|---------------------------------|------------|------------|------------|
| Total | 58,349 | 80,922 | 121,085 |
| White Collar | 63.9% | 61.1% | 59.4% |
| Management/Business/Financial | 10.6% | 10.5% | 10.3% |
| Professional | 26.8% | 25.4% | 24.5% |
| Sales | 12.2% | 11.4% | 11.1% |
| Administrative Support | 14.3% | 13.8% | 13.5% |
| Services | 17.5% | 17.4% | 17.6% |
| Blue Collar | 18.6% | 21.5% | 23.0% |
| Farming/Forestry/Fishing | 0.7% | 1.1% | 1.4% |
| Construction/Extraction | 4.8% | 5.5% | 6.1% |
| Installation/Maintenance/Repair | 4.0% | 4.2% | 4.1% |
| Production | 4.4% | 5.5% | 6.0% |
| Transportation/Material Moving | 4.7% | 5.1% | 5.4% |



2000 Workers 16+ by Means of Transportation to Work

| | Bangor, ME | Bangor, ME | Bangor, ME |
|----------------------------------|------------|------------|------------|
| Total | 53,570 | 74,068 | 112,300 |
| Drove Alone - Car, Truck, or Van | 79.2% | 79.0% | 77.9% |
| Carpooled - Car, Truck, or Van | 10.4% | 11.0% | 11.3% |
| Public Transportation | 1.0% | 0.8% | 0.8% |
| Walked | 4.8% | 4.3% | 4.9% |
| Other Means | 0.8% | 0.9% | 1.0% |
| Worked at Home | 3.7% | 4.0% | 4.2% |

2000 Workers 16+ by Travel Time to Work

| | Bangor, ME | Bangor, ME | Bangor, ME |
|--------------------------------------|------------|------------|------------|
| Total | 53,570 | 74,068 | 112,300 |
| Did not Work at Home | 96.3% | 96.0% | 95.8% |
| Less than 5 minutes | 5.0% | 5.2% | 6.0% |
| 5 to 9 minutes | 15.7% | 14.1% | 15.2% |
| 10 to 19 minutes | 36.8% | 32.8% | 31.6% |
| 20 to 24 minutes | 15.3% | 13.9% | 12.9% |
| 25 to 34 minutes | 14.0% | 15.9% | 15.0% |
| 35 to 44 minutes | 2.5% | 4.3% | 4.2% |
| 45 to 59 minutes | 2.8% | 4.7% | 5.2% |
| 60 to 89 minutes | 2.2% | 2.8% | 3.4% |
| 90 or more minutes | 1.9% | 2.2% | 2.3% |
| Worked at Home | 3.7% | 4.0% | 4.2% |
| Average Travel Time to Work (in min) | 19.5 | 21.8 | 22.0 |

2000 Households by Vehicles Available

| | Bangor, ME | Bangor, ME | Bangor, ME |
|--------------------------------------|------------|------------|------------|
| Total | 43,215 | 60,845 | 95,326 |
| None | 8.2% | 7.5% | 7.8% |
| 1 | 36.1% | 34.7% | 35.1% |
| 2 | 40.6% | 41.7% | 41.4% |
| 3 | 11.8% | 12.6% | 12.2% |
| 4 | 2.5% | 2.6% | 2.6% |
| 5+ | 0.8% | 0.9% | 0.9% |
| Average Number of Vehicles Available | 1.7 | 1.7 | 1.7 |

Source: ESRI forecasts for 2009; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Bangor, ME

Site Type: Drive Tim
 Latitude: 44.80172
 Longitude: -68.77079

Bangor, ME

Bangor, ME

Bangor, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Households by Type

| | | | |
|----------------------------------|--------|--------|--------|
| Total | 43,213 | 60,827 | 95,326 |
| Family Households | 62.8% | 65.0% | 65.4% |
| Married-couple Family | 48.7% | 51.2% | 51.4% |
| With Related Children | 21.4% | 22.2% | 21.7% |
| Other Family (No Spouse) | 14.1% | 13.8% | 14.0% |
| With Related Children | 9.9% | 9.7% | 10.0% |
| Nonfamily Households | 37.2% | 35.0% | 34.6% |
| Householder Living Alone | 27.9% | 26.6% | 26.9% |
| Householder Not Living Alone | 9.3% | 8.4% | 7.7% |
| Households with Related Children | 31.2% | 31.9% | 31.7% |
| Households with Persons 65+ | 21.7% | 22.1% | 23.7% |

2000 Households by Size

| | | | |
|---------------------|--------|--------|--------|
| Total | 43,213 | 60,827 | 95,326 |
| 1 Person Household | 27.9% | 26.6% | 26.9% |
| 2 Person Household | 36.2% | 36.7% | 36.9% |
| 3 Person Household | 16.7% | 16.7% | 16.4% |
| 4 Person Household | 13.1% | 13.4% | 13.1% |
| 5 Person Household | 4.5% | 4.8% | 4.8% |
| 6 Person Household | 1.2% | 1.3% | 1.3% |
| 7+ Person Household | 0.4% | 0.5% | 0.5% |

2000 Households by Year Householder Moved In

| | | | |
|----------------------------------|--------|--------|--------|
| Total | 43,215 | 60,845 | 95,326 |
| Moved in 1999 to March 2000 | 21.4% | 19.6% | 18.3% |
| Moved in 1995 to 1998 | 27.0% | 26.3% | 25.6% |
| Moved in 1990 to 1994 | 14.2% | 15.0% | 15.2% |
| Moved in 1980 to 1989 | 18.6% | 19.3% | 19.7% |
| Moved in 1970 to 1979 | 9.9% | 10.6% | 10.8% |
| Moved in 1969 or Earlier | 8.8% | 9.2% | 10.5% |
| Median Year Householder Moved In | 1994 | 1994 | 1993 |



2000 Housing Units by Units in Structure

| | | | |
|-------------|--------|--------|---------|
| Total | 47,032 | 68,672 | 112,019 |
| 1, Detached | 57.2% | 61.3% | 63.4% |
| 1, Attached | 2.3% | 1.9% | 1.7% |
| 2 | 7.5% | 6.0% | 6.3% |
| 3 or 4 | 9.4% | 7.2% | 6.5% |
| 5 to 9 | 6.1% | 4.8% | 4.3% |
| 10 to 19 | 2.3% | 1.8% | 1.4% |
| 20+ | 2.8% | 2.3% | 2.0% |
| Mobile Home | 12.3% | 14.4% | 14.1% |
| Other | 0.1% | 0.3% | 0.3% |

2000 Housing Units by Year Structure Built

| | | | |
|-----------------------------|--------|--------|---------|
| Total | 47,032 | 68,672 | 112,019 |
| 1999 to March 2000 | 1.4% | 1.7% | 1.6% |
| 1995 to 1998 | 4.9% | 5.7% | 5.7% |
| 1990 to 1994 | 7.4% | 8.2% | 7.9% |
| 1980 to 1989 | 14.8% | 15.4% | 15.4% |
| 1970 to 1979 | 16.1% | 17.2% | 17.0% |
| 1969 or Earlier | 55.4% | 51.7% | 52.4% |
| Median Year Structure Built | 1964 | 1968 | 1967 |

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Bangor, ME

Site Type: Drive Tim
 Latitude: 44.80172
 Longitude: -68.77079

Bangor, ME

Bangor, ME

Bangor, ME

Drive Time: 30 Minutes Drive Time: 45 Minutes Drive Time: 60 Minutes

[Top 3 Tapestry Segments](#)

| | | | |
|----|------------------|------------------|------------------|
| 1. | Midland Crowd | Midland Crowd | Midland Crowd |
| 2. | Midlife Junction | Midlife Junction | Rooted Rural |
| 3. | Green Acres | Green Acres | Midlife Junction |



2009 Consumer Spending shows the amount spent on a variety of goods and services by households that reside in the market area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue.

| | | | |
|--|----------------------|------------------------|------------------------|
| Apparel & Services: Total \$ | \$64,450,444 | \$87,273,175 | \$129,886,274 |
| Average Spent | \$1,379.06 | \$1,321.44 | \$1,257.75 |
| Spending Potential Index | 55 | 53 | 50 |
| Computers & Accessories: Total \$ | \$8,423,186 | \$11,351,046 | \$16,810,576 |
| Average Spent | \$180.23 | \$171.87 | \$162.78 |
| Spending Potential Index | 79 | 75 | 71 |
| Education: Total \$ | \$46,342,917 | \$60,225,398 | \$87,152,231 |
| Average Spent | \$991.61 | \$911.90 | \$843.93 |
| Spending Potential Index | 79 | 73 | 67 |
| Entertainment/Recreation: Total \$ | \$119,499,022 | \$166,156,318 | \$251,230,376 |
| Average Spent | \$2,556.95 | \$2,515.84 | \$2,432.78 |
| Spending Potential Index | 79 | 78 | 75 |
| Food at Home: Total \$ | \$169,407,170 | \$233,983,441 | \$353,540,313 |
| Average Spent | \$3,624.85 | \$3,542.84 | \$3,423.49 |
| Spending Potential Index | 79 | 78 | 75 |
| Food Away from Home: Total \$ | \$123,567,391 | \$168,613,568 | \$252,115,744 |
| Average Spent | \$2,644.00 | \$2,553.05 | \$2,441.35 |
| Spending Potential Index | 79 | 77 | 73 |
| Health Care: Total \$ | \$143,483,593 | \$203,011,533 | \$311,629,023 |
| Average Spent | \$3,070.15 | \$3,073.88 | \$3,017.64 |
| Spending Potential Index | 81 | 82 | 80 |
| Household Furnishings & Equip: Total \$ | \$69,555,459 | \$94,924,339 | \$141,663,202 |
| Average Spent | \$1,488.29 | \$1,437.29 | \$1,371.79 |
| Spending Potential Index | 68 | 66 | 63 |
| Investments: Total \$ | \$48,464,182 | \$70,684,499 | \$110,813,630 |
| Average Spent | \$1,037.00 | \$1,070.26 | \$1,073.06 |
| Spending Potential Index | 72 | 74 | 75 |
| Retail Goods: Total \$ | \$909,364,160 | \$1,266,053,131 | \$1,915,945,449 |
| Average Spent | \$19,457.88 | \$19,169.84 | \$18,552.96 |
| Spending Potential Index | 76 | 75 | 72 |
| Shelter: Total \$ | \$554,191,379 | \$737,961,034 | \$1,089,053,461 |
| Average Spent | \$11,858.17 | \$11,173.78 | \$10,545.79 |
| Spending Potential Index | 76 | 71 | 67 |
| TV/Video/Sound Equipment: Total \$ | \$45,405,578 | \$62,178,246 | \$93,253,717 |
| Average Spent | \$971.55 | \$941.47 | \$903.02 |
| Spending Potential Index | 80 | 77 | 74 |
| Travel: Total \$ | \$65,089,148 | \$88,431,334 | \$131,939,020 |
| Average Spent | \$1,392.73 | \$1,338.98 | \$1,277.62 |
| Spending Potential Index | 75 | 73 | 69 |
| Vehicle Maintenance & Repairs: Total \$ | \$34,635,228 | \$47,938,924 | \$72,403,807 |
| Average Spent | \$741.10 | \$725.86 | \$701.12 |
| Spending Potential Index | 79 | 78 | 75 |

Data Note: The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2005 and 2006 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI



Lewiston, ME

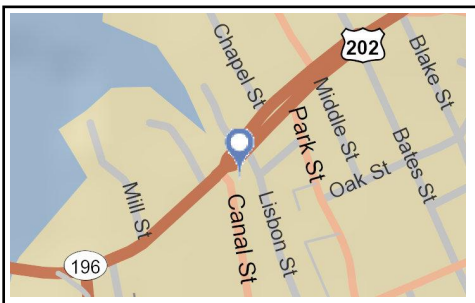
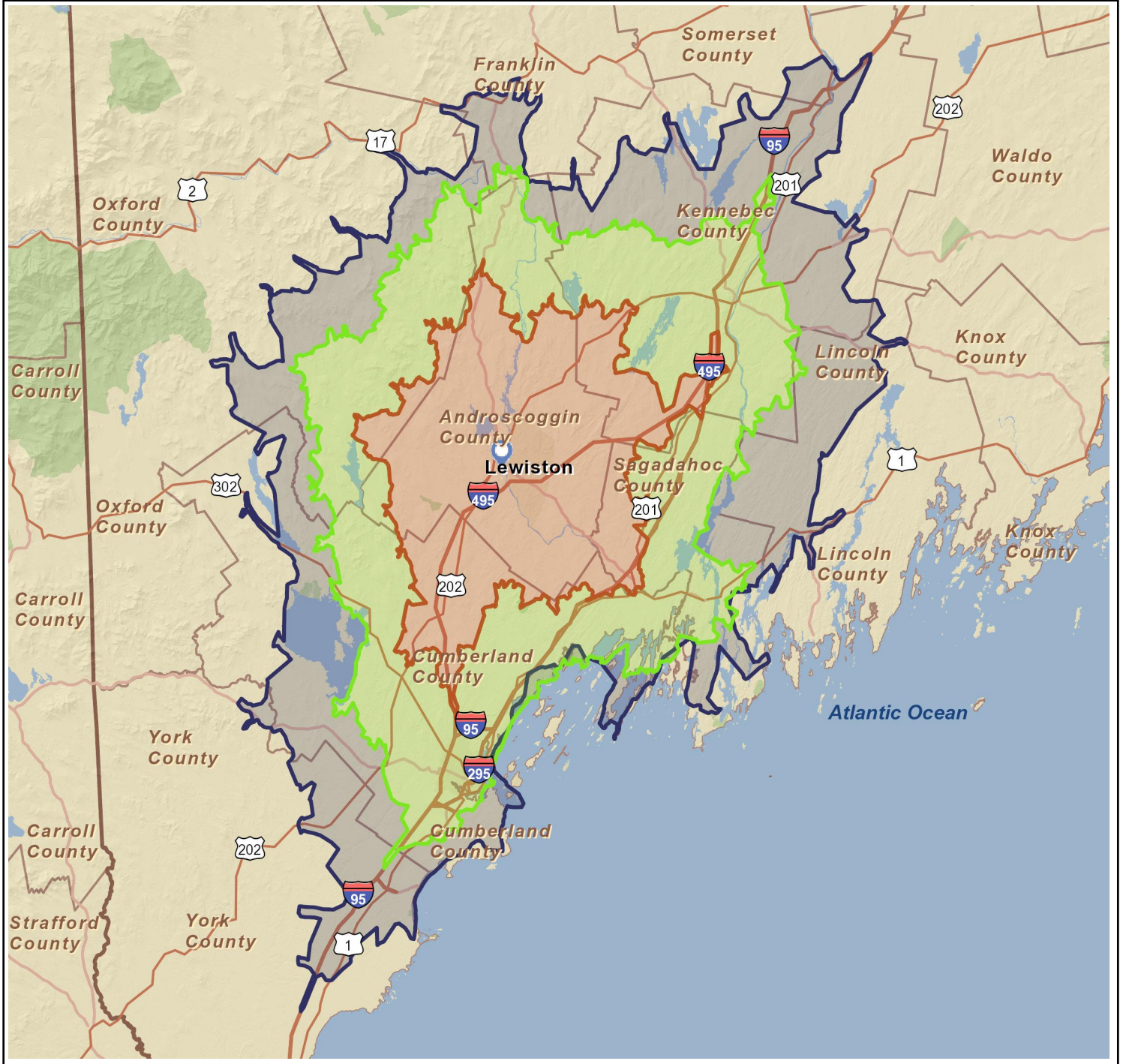
Lewiston, Maine

Latitude: 44.09856

Longitude: -70.21835

Site Type: Drive Time

Drive Time 30, 45, 60 Minutes





Market Profile

Lewiston, ME

Site Type: Drive Tim
 Latitude: 44.09856
 Longitude: -70.21835

Lewiston, ME

Lewiston, ME

Lewiston, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



| | | | |
|-------------------------|---------|---------|---------|
| 2000 Total Population | 127,482 | 409,424 | 589,612 |
| 2000 Group Quarters | 3,819 | 12,726 | 18,330 |
| 2009 Total Population | 134,031 | 431,302 | 624,943 |
| 2014 Total Population | 136,493 | 439,344 | 637,677 |
| 2009 - 2014 Annual Rate | 0.36% | 0.37% | 0.40% |



| | | | |
|-----------------------------|--------|---------|---------|
| 2000 Households | 50,909 | 167,958 | 239,844 |
| 2000 Average Household Size | 2.43 | 2.36 | 2.38 |
| 2009 Households | 55,246 | 181,796 | 260,906 |
| 2009 Average Household Size | 2.36 | 2.30 | 2.32 |
| 2014 Households | 56,818 | 186,908 | 268,683 |
| 2014 Average Household Size | 2.34 | 2.28 | 2.30 |
| 2009 - 2014 Annual Rate | 0.56% | 0.56% | 0.59% |
| 2000 Families | 33,753 | 105,436 | 153,407 |
| 2000 Average Family Size | 2.94 | 2.93 | 2.93 |
| 2009 Families | 35,897 | 111,782 | 163,472 |
| 2009 Average Family Size | 2.83 | 2.82 | 2.83 |
| 2014 Families | 36,546 | 113,717 | 166,581 |
| 2014 Average Family Size | 2.79 | 2.79 | 2.79 |
| 2009 - 2014 Annual Rate | 0.36% | 0.34% | 0.38% |



| | | | |
|-------------------------------|--------|---------|---------|
| 2000 Housing Units | 55,488 | 185,167 | 269,456 |
| Owner Occupied Housing Units | 61.0% | 58.6% | 59.4% |
| Renter Occupied Housing Units | 30.8% | 32.1% | 29.6% |
| Vacant Housing Units | 8.3% | 9.3% | 11.0% |
| 2009 Housing Units | 60,931 | 202,596 | 295,971 |
| Owner Occupied Housing Units | 60.5% | 58.0% | 58.8% |
| Renter Occupied Housing Units | 30.2% | 31.7% | 29.3% |
| Vacant Housing Units | 9.3% | 10.3% | 11.8% |
| 2014 Housing Units | 62,735 | 208,712 | 305,330 |
| Owner Occupied Housing Units | 59.6% | 57.3% | 58.1% |
| Renter Occupied Housing Units | 31.0% | 32.3% | 29.9% |
| Vacant Housing Units | 9.4% | 10.4% | 12.0% |

Median Household Income

| | | | |
|------|----------|----------|----------|
| 2000 | \$38,103 | \$39,695 | \$40,014 |
| 2009 | \$47,358 | \$50,397 | \$50,462 |
| 2014 | \$48,818 | \$51,697 | \$51,831 |

Median Home Value

| | | | |
|------|-----------|-----------|-----------|
| 2000 | \$90,800 | \$104,554 | \$104,815 |
| 2009 | \$156,768 | \$182,584 | \$184,300 |
| 2014 | \$190,180 | \$229,512 | \$231,405 |

Per Capita Income

| | | | |
|------|----------|----------|----------|
| 2000 | \$19,056 | \$21,104 | \$20,755 |
| 2009 | \$23,500 | \$26,549 | \$26,071 |
| 2014 | \$24,136 | \$27,350 | \$26,869 |

Median Age

| | | | |
|------|------|------|------|
| 2000 | 37.1 | 37.5 | 37.7 |
| 2009 | 40.2 | 40.4 | 40.5 |
| 2014 | 41.2 | 41.1 | 41.2 |

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by total population. Detail may not sum to totals due to rounding.

[Source: ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile

Lewiston, ME

Site Type: Drive Tim
 Latitude: 44.09856
 Longitude: -70.21835

Lewiston, ME

Lewiston, ME

Lewiston, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Households by Income

| Household Income Base | 50,946 | 168,146 | 240,154 |
|--------------------------|----------|----------|----------|
| < \$15,000 | 16.8% | 16.2% | 16.0% |
| \$15,000 - \$24,999 | 14.6% | 13.7% | 13.8% |
| \$25,000 - \$34,999 | 14.2% | 14.0% | 13.6% |
| \$35,000 - \$49,999 | 18.8% | 18.3% | 18.4% |
| \$50,000 - \$74,999 | 21.3% | 20.5% | 20.8% |
| \$75,000 - \$99,999 | 8.3% | 9.2% | 9.3% |
| \$100,000 - \$149,999 | 4.0% | 5.3% | 5.3% |
| \$150,000 - \$199,999 | 0.8% | 1.3% | 1.3% |
| \$200,000 + | 1.1% | 1.7% | 1.5% |
| Average Household Income | \$46,844 | \$50,533 | \$50,194 |

2009 Households by Income

| Household Income Base | 55,246 | 181,796 | 260,906 |
|--------------------------|----------|----------|----------|
| < \$15,000 | 12.9% | 12.2% | 12.0% |
| \$15,000 - \$24,999 | 11.1% | 10.3% | 10.4% |
| \$25,000 - \$34,999 | 11.6% | 11.3% | 11.4% |
| \$35,000 - \$49,999 | 17.3% | 15.7% | 15.6% |
| \$50,000 - \$74,999 | 24.0% | 22.9% | 23.0% |
| \$75,000 - \$99,999 | 13.3% | 14.8% | 14.9% |
| \$100,000 - \$149,999 | 6.8% | 8.2% | 8.4% |
| \$150,000 - \$199,999 | 1.5% | 2.3% | 2.2% |
| \$200,000 + | 1.5% | 2.3% | 2.2% |
| Average Household Income | \$56,235 | \$62,103 | \$61,548 |

2014 Households by Income

| Household Income Base | 56,818 | 186,908 | 268,683 |
|--------------------------|----------|----------|----------|
| < \$15,000 | 12.6% | 11.9% | 11.8% |
| \$15,000 - \$24,999 | 10.2% | 9.4% | 9.6% |
| \$25,000 - \$34,999 | 10.0% | 9.8% | 9.9% |
| \$35,000 - \$49,999 | 19.2% | 16.5% | 16.2% |
| \$50,000 - \$74,999 | 24.6% | 24.3% | 24.4% |
| \$75,000 - \$99,999 | 13.5% | 15.1% | 15.1% |
| \$100,000 - \$149,999 | 6.9% | 8.4% | 8.6% |
| \$150,000 - \$199,999 | 1.5% | 2.3% | 2.2% |
| \$200,000 + | 1.5% | 2.3% | 2.2% |
| Average Household Income | \$57,127 | \$63,316 | \$62,781 |

2000 Owner Occupied Housing Units by Value

| Total | 33,738 | 108,612 | 159,940 |
|-----------------------|-----------|-----------|-----------|
| < \$50,000 | 11.6% | 9.5% | 9.6% |
| \$50,000 - \$99,999 | 49.2% | 37.4% | 37.0% |
| \$100,000 - \$149,999 | 25.9% | 29.9% | 30.5% |
| \$150,000 - \$199,999 | 8.8% | 12.0% | 12.0% |
| \$200,000 - \$299,999 | 3.3% | 7.2% | 7.2% |
| \$300,000 - \$499,999 | 1.1% | 3.0% | 2.8% |
| \$500,000 - \$999,999 | 0.1% | 0.9% | 0.7% |
| \$1,000,000+ | 0.0% | 0.1% | 0.1% |
| Average Home Value | \$102,392 | \$126,548 | \$124,981 |

2000 Specified Renter Occ. Housing Units by Contract Rent

| Total | 16,994 | 58,761 | 78,787 |
|----------------|--------|--------|--------|
| With Cash Rent | 96.2% | 95.5% | 95.3% |
| No Cash Rent | 3.8% | 4.5% | 4.7% |
| Median Rent | \$406 | \$467 | \$465 |
| Average Rent | \$409 | \$478 | \$475 |

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest, dividends, net rents, pensions, SSI and welfare payments, child support and alimony. Specified Renter Occupied Housing Units exclude houses on 10+ acres. Average Rent excludes units paying no cash rent.

[Source: ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile

Lewiston, ME

Site Type: Drive Tim
 Latitude: 44.09856
 Longitude: -70.21835

Lewiston, ME

Lewiston, ME

Lewiston, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Population by Age

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|-------------|--------------|--------------|--------------|
| Total | 127,482 | 409,424 | 589,612 |
| Age 0 - 4 | 5.9% | 5.8% | 5.8% |
| Age 5 - 9 | 6.7% | 6.6% | 6.6% |
| Age 10 - 14 | 7.4% | 7.1% | 7.1% |
| Age 15 - 19 | 7.2% | 6.7% | 6.9% |
| Age 20 - 24 | 5.8% | 5.8% | 5.7% |
| Age 25 - 34 | 13.2% | 13.7% | 13.4% |
| Age 35 - 44 | 17.2% | 17.1% | 17.1% |
| Age 45 - 54 | 14.3% | 14.6% | 14.7% |
| Age 55 - 64 | 8.8% | 8.9% | 9.0% |
| Age 65 - 74 | 6.7% | 6.8% | 6.9% |
| Age 75 - 84 | 4.8% | 5.0% | 5.0% |
| Age 85+ | 1.9% | 2.0% | 1.9% |
| Age 18+ | 75.6% | 76.5% | 76.3% |

2009 Population by Age

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|-------------|--------------|--------------|--------------|
| Total | 134,031 | 431,302 | 624,943 |
| Age 0 - 4 | 5.9% | 5.7% | 5.7% |
| Age 5 - 9 | 6.0% | 5.7% | 5.7% |
| Age 10 - 14 | 6.2% | 6.0% | 6.0% |
| Age 15 - 19 | 6.8% | 6.7% | 6.9% |
| Age 20 - 24 | 6.3% | 6.8% | 6.6% |
| Age 25 - 34 | 11.7% | 12.1% | 11.8% |
| Age 35 - 44 | 14.2% | 13.8% | 13.8% |
| Age 45 - 54 | 16.5% | 16.2% | 16.3% |
| Age 55 - 64 | 12.6% | 12.7% | 12.8% |
| Age 65 - 74 | 6.9% | 7.0% | 7.1% |
| Age 75 - 84 | 4.6% | 4.9% | 4.9% |
| Age 85+ | 2.2% | 2.4% | 2.4% |
| Age 18+ | 77.8% | 78.7% | 78.5% |

2014 Population by Age

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|-------------|--------------|--------------|--------------|
| Total | 136,493 | 439,344 | 637,677 |
| Age 0 - 4 | 5.7% | 5.5% | 5.5% |
| Age 5 - 9 | 6.0% | 5.6% | 5.7% |
| Age 10 - 14 | 6.2% | 5.9% | 6.0% |
| Age 15 - 19 | 6.2% | 6.1% | 6.3% |
| Age 20 - 24 | 6.2% | 6.6% | 6.5% |
| Age 25 - 34 | 12.2% | 13.2% | 12.8% |
| Age 35 - 44 | 12.6% | 12.1% | 12.1% |
| Age 45 - 54 | 15.4% | 15.0% | 15.0% |
| Age 55 - 64 | 14.0% | 13.9% | 14.1% |
| Age 65 - 74 | 8.7% | 8.9% | 8.9% |
| Age 75 - 84 | 4.6% | 4.8% | 4.7% |
| Age 85+ | 2.2% | 2.5% | 2.4% |
| Age 18+ | 78.4% | 79.3% | 79.1% |

2000 Population by Sex

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|---------|--------------|--------------|--------------|
| Males | 48.6% | 48.5% | 48.4% |
| Females | 51.4% | 51.5% | 51.6% |

2009 Population by Sex

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|---------|--------------|--------------|--------------|
| Males | 48.8% | 48.6% | 48.6% |
| Females | 51.2% | 51.4% | 51.4% |

2014 Population by Sex

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|---------|--------------|--------------|--------------|
| Males | 48.9% | 48.7% | 48.7% |
| Females | 51.1% | 51.3% | 51.3% |

Source: ESRI forecasts for 2009 and 2014.; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile Lewiston, ME

Site Type: Drive Tim
Latitude: 44.09856
Longitude: -70.21835

Lewiston, ME

Lewiston, ME

Lewiston, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|---------|---------|
| Total | 127,482 | 409,424 | 589,612 |
| White Alone | 97.0% | 96.1% | 96.5% |
| Black Alone | 0.6% | 0.9% | 0.8% |
| American Indian Alone | 0.3% | 0.3% | 0.3% |
| Asian or Pacific Islander Alone | 0.6% | 1.1% | 1.0% |
| Some Other Race Alone | 0.3% | 0.3% | 0.3% |
| Two or More Races | 1.2% | 1.2% | 1.1% |
| Hispanic Origin | 0.9% | 1.0% | 0.9% |
| Diversity Index | 7.5 | 9.4 | 8.4 |

2009 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|---------|---------|
| Total | 134,031 | 431,302 | 624,943 |
| White Alone | 96.4% | 95.1% | 95.6% |
| Black Alone | 0.8% | 1.2% | 1.0% |
| American Indian Alone | 0.3% | 0.3% | 0.4% |
| Asian or Pacific Islander Alone | 0.9% | 1.7% | 1.5% |
| Some Other Race Alone | 0.4% | 0.5% | 0.4% |
| Two or More Races | 1.2% | 1.2% | 1.2% |
| Hispanic Origin | 1.4% | 1.5% | 1.3% |
| Diversity Index | 9.7 | 12.3 | 10.9 |

2014 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|---------|---------|
| Total | 136,493 | 439,344 | 637,677 |
| White Alone | 95.9% | 94.4% | 95.0% |
| Black Alone | 0.9% | 1.4% | 1.1% |
| American Indian Alone | 0.3% | 0.4% | 0.4% |
| Asian or Pacific Islander Alone | 1.1% | 2.0% | 1.8% |
| Some Other Race Alone | 0.5% | 0.6% | 0.5% |
| Two or More Races | 1.2% | 1.3% | 1.2% |
| Hispanic Origin | 1.8% | 1.9% | 1.7% |
| Diversity Index | 11.3 | 14.2 | 12.6 |



2000 Population 3+ by School Enrollment

| | | | |
|-------------------------------|---------|---------|---------|
| Total | 122,702 | 395,311 | 569,418 |
| Enrolled in Nursery/Preschool | 1.3% | 1.5% | 1.5% |
| Enrolled in Kindergarten | 1.4% | 1.2% | 1.3% |
| Enrolled in Grade 1-8 | 12.1% | 11.8% | 11.8% |
| Enrolled in Grade 9-12 | 6.0% | 5.8% | 5.9% |
| Enrolled in College | 4.8% | 4.6% | 4.9% |
| Enrolled in Grad/Prof School | 0.5% | 0.9% | 0.9% |
| Not Enrolled in School | 73.9% | 74.1% | 73.7% |

2009 Population 25+ by Educational Attainment

| | | | |
|------------------------------|--------|---------|---------|
| Total | 92,151 | 298,583 | 431,338 |
| Less than 9th Grade | 6.1% | 4.1% | 4.0% |
| 9th - 12th Grade, No Diploma | 8.3% | 6.7% | 6.6% |
| High School Graduate | 39.6% | 33.8% | 34.1% |
| Some College, No Degree | 18.0% | 17.8% | 18.0% |
| Associate Degree | 8.5% | 8.7% | 9.1% |
| Bachelor's Degree | 13.5% | 18.8% | 18.5% |
| Graduate/Professional Degree | 6.0% | 10.0% | 9.7% |

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: [ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile

Lewiston, ME

Site Type: Drive Tim
 Latitude: 44.09856
 Longitude: -70.21835

Lewiston, ME

Lewiston, ME

Lewiston, ME

Drive Time: 30 Minutes

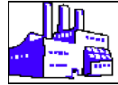
Drive Time: 45 Minutes

Drive Time: 60 Minutes



2009 Population 15+ by Marital Status

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|---------------|--------------|--------------|--------------|
| Total | 109,728 | 356,580 | 515,967 |
| Never Married | 25.1% | 26.4% | 26.1% |
| Married | 55.9% | 54.1% | 54.6% |
| Widowed | 6.4% | 6.5% | 6.5% |
| Divorced | 12.5% | 12.9% | 12.9% |



2000 Population 16+ by Employment Status

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|---------------------|--------------|--------------|--------------|
| Total | 100,060 | 324,333 | 466,267 |
| In Labor Force | 68.3% | 67.7% | 67.7% |
| Civilian Employed | 64.8% | 64.3% | 64.5% |
| Civilian Unemployed | 3.1% | 2.8% | 2.7% |
| In Armed Forces | 0.5% | 0.7% | 0.5% |
| Not in Labor Force | 31.7% | 32.3% | 32.3% |

2009 Civilian Population 16+ in Labor Force

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|---------------------|--------------|--------------|--------------|
| Civilian Employed | 92.1% | 92.7% | 93.0% |
| Civilian Unemployed | 7.9% | 7.3% | 7.0% |

2014 Civilian Population 16+ in Labor Force

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|---------------------|--------------|--------------|--------------|
| Civilian Employed | 94.4% | 94.8% | 95.1% |
| Civilian Unemployed | 5.6% | 5.2% | 4.9% |

2000 Females 16+ by Employment Status and Age of Children

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|--------------------------|--------------|--------------|--------------|
| Total | 52,033 | 169,723 | 244,213 |
| Own Children < 6 Only | 6.6% | 6.7% | 6.7% |
| Employed/in Armed Forces | 4.9% | 4.6% | 4.7% |
| Unemployed | 0.2% | 0.2% | 0.2% |
| Not in Labor Force | 1.5% | 1.9% | 1.8% |
| Own Children <6 and 6-17 | 5.3% | 5.0% | 5.0% |
| Employed/in Armed Forces | 3.7% | 3.2% | 3.3% |
| Unemployed | 0.3% | 0.2% | 0.2% |
| Not in Labor Force | 1.4% | 1.6% | 1.5% |
| Own Children 6-17 Only | 17.6% | 16.9% | 17.2% |
| Employed/in Armed Forces | 14.6% | 13.8% | 14.0% |
| Unemployed | 0.3% | 0.3% | 0.4% |
| Not in Labor Force | 2.7% | 2.8% | 2.9% |
| No Own Children <18 | 70.5% | 71.4% | 71.1% |
| Employed/in Armed Forces | 36.9% | 38.3% | 38.1% |
| Unemployed | 1.9% | 1.7% | 1.7% |
| Not in Labor Force | 31.7% | 31.4% | 31.3% |

Source: ESRI forecasts for 2009 and 2014.; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Lewiston, ME

Site Type: Drive Tim
 Latitude: 44.09856
 Longitude: -70.21835

Lewiston, ME

Lewiston, ME

Lewiston, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2009 Employed Population 16+ by Industry

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|-------------------------------|--------------|--------------|--------------|
| Total | 67,778 | 220,281 | 320,968 |
| Agriculture/Mining | 0.9% | 1.0% | 1.0% |
| Construction | 6.7% | 6.0% | 6.2% |
| Manufacturing | 11.7% | 8.6% | 8.8% |
| Wholesale Trade | 3.5% | 3.3% | 3.4% |
| Retail Trade | 13.3% | 13.0% | 12.7% |
| Transportation/Utilities | 3.3% | 3.3% | 3.3% |
| Information | 2.6% | 3.2% | 3.0% |
| Finance/Insurance/Real Estate | 7.2% | 8.2% | 8.3% |
| Services | 45.9% | 47.8% | 48.0% |
| Public Administration | 4.9% | 5.6% | 5.4% |

2009 Employed Population 16+ by Occupation

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|---------------------------------|--------------|--------------|--------------|
| Total | 67,778 | 220,281 | 320,968 |
| White Collar | 59.5% | 64.6% | 63.8% |
| Management/Business/Financial | 11.1% | 13.2% | 12.9% |
| Professional | 21.2% | 25.2% | 24.9% |
| Sales | 11.1% | 11.2% | 11.2% |
| Administrative Support | 16.1% | 15.0% | 14.8% |
| Services | 15.8% | 15.5% | 15.7% |
| Blue Collar | 24.7% | 19.9% | 20.5% |
| Farming/Forestry/Fishing | 0.5% | 0.6% | 0.7% |
| Construction/Extraction | 7.1% | 5.8% | 6.0% |
| Installation/Maintenance/Repair | 3.8% | 3.0% | 3.2% |
| Production | 7.6% | 5.7% | 5.8% |
| Transportation/Material Moving | 5.6% | 4.8% | 4.8% |



2000 Workers 16+ by Means of Transportation to Work

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|----------------------------------|--------------|--------------|--------------|
| Total | 64,061 | 206,548 | 297,276 |
| Drove Alone - Car, Truck, or Van | 78.4% | 78.4% | 78.9% |
| Carpooled - Car, Truck, or Van | 12.8% | 11.2% | 11.1% |
| Public Transportation | 0.8% | 1.2% | 1.1% |
| Walked | 3.8% | 4.4% | 4.0% |
| Other Means | 0.9% | 1.0% | 1.0% |
| Worked at Home | 3.3% | 3.9% | 3.9% |

2000 Workers 16+ by Travel Time to Work

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|--------------------------------------|--------------|--------------|--------------|
| Total | 64,061 | 206,548 | 297,276 |
| Did not Work at Home | 96.7% | 96.1% | 96.1% |
| Less than 5 minutes | 4.1% | 4.2% | 4.1% |
| 5 to 9 minutes | 13.0% | 13.4% | 13.2% |
| 10 to 19 minutes | 30.7% | 34.4% | 32.9% |
| 20 to 24 minutes | 13.9% | 13.6% | 14.1% |
| 25 to 34 minutes | 16.4% | 14.9% | 16.1% |
| 35 to 44 minutes | 6.2% | 5.1% | 5.2% |
| 45 to 59 minutes | 7.4% | 5.6% | 5.4% |
| 60 to 89 minutes | 3.0% | 2.9% | 3.1% |
| 90 or more minutes | 2.0% | 2.0% | 2.0% |
| Worked at Home | 3.3% | 3.9% | 3.9% |
| Average Travel Time to Work (in min) | 23.4 | 22.2 | 22.5 |

2000 Households by Vehicles Available

| | Lewiston, ME | Lewiston, ME | Lewiston, ME |
|--------------------------------------|--------------|--------------|--------------|
| Total | 50,895 | 167,979 | 239,856 |
| None | 9.6% | 9.4% | 8.7% |
| 1 | 34.0% | 35.9% | 35.4% |
| 2 | 40.7% | 40.4% | 41.0% |
| 3 | 11.4% | 10.8% | 11.3% |
| 4 | 3.1% | 2.5% | 2.6% |
| 5+ | 1.2% | 0.9% | 1.0% |
| Average Number of Vehicles Available | 1.7 | 1.6 | 1.7 |

Source: ESRI forecasts for 2009; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Lewiston, ME

Site Type: Drive Tim
 Latitude: 44.09856
 Longitude: -70.21835

Lewiston, ME

Lewiston, ME

Lewiston, ME

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Households by Type

| | 50,909 | 167,958 | 239,844 |
|----------------------------------|--------|---------|---------|
| Total | 50,909 | 167,958 | 239,844 |
| Family Households | 66.3% | 62.8% | 64.0% |
| Married-couple Family | 51.7% | 49.1% | 50.2% |
| With Related Children | 23.0% | 21.8% | 22.3% |
| Other Family (No Spouse) | 14.6% | 13.7% | 13.7% |
| With Related Children | 10.4% | 9.5% | 9.5% |
| Nonfamily Households | 33.7% | 37.2% | 36.0% |
| Householder Living Alone | 26.6% | 29.1% | 28.2% |
| Householder Not Living Alone | 7.1% | 8.2% | 7.9% |
| Households with Related Children | 33.4% | 31.4% | 31.9% |
| Households with Persons 65+ | 22.9% | 23.3% | 23.4% |

2000 Households by Size

| | 50,909 | 167,958 | 239,844 |
|---------------------|--------|---------|---------|
| Total | 50,909 | 167,958 | 239,844 |
| 1 Person Household | 26.6% | 29.1% | 28.2% |
| 2 Person Household | 35.4% | 35.3% | 35.6% |
| 3 Person Household | 16.4% | 15.5% | 15.9% |
| 4 Person Household | 14.3% | 13.3% | 13.6% |
| 5 Person Household | 5.1% | 4.8% | 4.9% |
| 6 Person Household | 1.6% | 1.4% | 1.4% |
| 7+ Person Household | 0.5% | 0.5% | 0.5% |

2000 Households by Year Householder Moved In

| | 50,895 | 167,979 | 239,856 |
|----------------------------------|--------|---------|---------|
| Total | 50,895 | 167,979 | 239,856 |
| Moved in 1999 to March 2000 | 18.7% | 19.7% | 19.1% |
| Moved in 1995 to 1998 | 26.4% | 27.8% | 27.4% |
| Moved in 1990 to 1994 | 15.3% | 15.2% | 15.2% |
| Moved in 1980 to 1989 | 18.2% | 17.1% | 17.6% |
| Moved in 1970 to 1979 | 10.8% | 9.9% | 10.1% |
| Moved in 1969 or Earlier | 10.7% | 10.3% | 10.5% |
| Median Year Householder Moved In | 1993 | 1994 | 1994 |



2000 Housing Units by Units in Structure

| | 55,484 | 185,222 | 269,421 |
|-------------|--------|---------|---------|
| Total | 55,484 | 185,222 | 269,421 |
| 1, Detached | 55.8% | 57.1% | 59.6% |
| 1, Attached | 1.6% | 3.1% | 3.0% |
| 2 | 8.0% | 7.9% | 7.8% |
| 3 or 4 | 8.3% | 8.6% | 7.9% |
| 5 to 9 | 8.6% | 7.1% | 6.5% |
| 10 to 19 | 2.5% | 2.9% | 2.5% |
| 20+ | 4.0% | 5.3% | 4.5% |
| Mobile Home | 11.1% | 7.9% | 8.1% |
| Other | 0.1% | 0.1% | 0.1% |

2000 Housing Units by Year Structure Built

| | 55,484 | 185,222 | 269,421 |
|-----------------------------|--------|---------|---------|
| Total | 55,484 | 185,222 | 269,421 |
| 1999 to March 2000 | 1.7% | 1.6% | 1.7% |
| 1995 to 1998 | 4.8% | 4.9% | 5.1% |
| 1990 to 1994 | 6.6% | 6.3% | 6.6% |
| 1980 to 1989 | 15.5% | 14.6% | 15.3% |
| 1970 to 1979 | 15.5% | 14.8% | 15.2% |
| 1969 or Earlier | 56.0% | 57.7% | 56.2% |
| Median Year Structure Built | 1964 | 1962 | 1964 |

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Lewiston, ME

Site Type: Drive Tim
 Latitude: 44.09856
 Longitude: -70.21835

Lewiston, ME

Lewiston, ME

Lewiston, ME

Drive Time: 30 Minutes Drive Time: 45 Minutes Drive Time: 60 Minutes

Top 3 Tapestry Segments

| | | | |
|----|-------------------|-------------------|------------------|
| 1. | Green Acres | Green Acres | Green Acres |
| 2. | Salt of the Earth | Midlife Junction | Midlife Junction |
| 3. | Midland Crowd | Salt of the Earth | Midland Crowd |



2009 Consumer Spending shows the amount spent on a variety of goods and services by households that reside in the market area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue.

| | | | |
|--|------------------------|------------------------|------------------------|
| Apparel & Services: Total \$ | \$77,227,730 | \$281,558,849 | \$399,215,614 |
| Average Spent | \$1,397.89 | \$1,548.76 | \$1,530.11 |
| Spending Potential Index | 56 | 62 | 61 |
| Computers & Accessories: Total \$ | \$9,990,445 | \$36,545,718 | \$51,842,461 |
| Average Spent | \$180.84 | \$201.03 | \$198.70 |
| Spending Potential Index | 79 | 88 | 87 |
| Education: Total \$ | \$55,675,163 | \$202,574,801 | \$286,337,488 |
| Average Spent | \$1,007.77 | \$1,114.30 | \$1,097.47 |
| Spending Potential Index | 80 | 89 | 87 |
| Entertainment/Recreation: Total \$ | \$145,076,750 | \$525,778,337 | \$749,223,080 |
| Average Spent | \$2,626.01 | \$2,892.13 | \$2,871.62 |
| Spending Potential Index | 81 | 89 | 89 |
| Food at Home: Total \$ | \$204,576,057 | \$739,698,798 | \$1,051,463,204 |
| Average Spent | \$3,703.00 | \$4,068.84 | \$4,030.05 |
| Spending Potential Index | 81 | 89 | 88 |
| Food Away from Home: Total \$ | \$148,019,454 | \$537,111,984 | \$762,652,511 |
| Average Spent | \$2,679.28 | \$2,954.48 | \$2,923.09 |
| Spending Potential Index | 81 | 89 | 88 |
| Health Care: Total \$ | \$175,564,081 | \$626,420,123 | \$893,356,479 |
| Average Spent | \$3,177.86 | \$3,445.73 | \$3,424.05 |
| Spending Potential Index | 84 | 91 | 91 |
| Household Furnishings & Equip: Total \$ | \$83,422,995 | \$304,695,856 | \$433,953,718 |
| Average Spent | \$1,510.03 | \$1,676.03 | \$1,663.26 |
| Spending Potential Index | 69 | 77 | 77 |
| Investments: Total \$ | \$58,615,737 | \$222,980,561 | \$320,486,488 |
| Average Spent | \$1,061.00 | \$1,226.54 | \$1,228.36 |
| Spending Potential Index | 74 | 85 | 85 |
| Retail Goods: Total \$ | \$1,094,938,799 | \$3,967,727,845 | \$5,652,870,307 |
| Average Spent | \$19,819.33 | \$21,825.17 | \$21,666.31 |
| Spending Potential Index | 77 | 85 | 84 |
| Shelter: Total \$ | \$665,603,470 | \$2,456,806,164 | \$3,484,995,157 |
| Average Spent | \$12,047.99 | \$13,514.08 | \$13,357.28 |
| Spending Potential Index | 77 | 86 | 85 |
| TV/Video/Sound Equipment: Total \$ | \$54,330,493 | \$196,390,046 | \$278,808,058 |
| Average Spent | \$983.43 | \$1,080.28 | \$1,068.61 |
| Spending Potential Index | 81 | 89 | 88 |
| Travel: Total \$ | \$79,580,632 | \$292,499,790 | \$416,781,779 |
| Average Spent | \$1,440.48 | \$1,608.95 | \$1,597.44 |
| Spending Potential Index | 78 | 87 | 86 |
| Vehicle Maintenance & Repairs: Total \$ | \$41,488,106 | \$151,043,103 | \$215,078,006 |
| Average Spent | \$750.97 | \$830.84 | \$824.35 |
| Spending Potential Index | 80 | 89 | 88 |

Data Note: The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2005 and 2006 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI



Market Profile

Lowell, MA

Site Type: Drive Tim
 Latitude: 42.64589
 Longitude: -71.31284

Lowell, MA

Lowell, MA

Lowell, MA

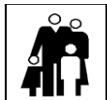
Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



| | | | |
|-------------------------|-----------|-----------|-----------|
| 2000 Total Population | 1,667,556 | 4,162,862 | 5,336,231 |
| 2000 Group Quarters | 48,363 | 145,153 | 174,542 |
| 2009 Total Population | 1,705,095 | 4,268,292 | 5,501,983 |
| 2014 Total Population | 1,718,639 | 4,305,494 | 5,558,860 |
| 2009 - 2014 Annual Rate | 0.16% | 0.17% | 0.21% |



| | | | |
|-----------------------------|---------|-----------|-----------|
| 2000 Households | 631,261 | 1,606,505 | 2,043,904 |
| 2000 Average Household Size | 2.57 | 2.50 | 2.53 |
| 2009 Households | 647,989 | 1,653,042 | 2,115,381 |
| 2009 Average Household Size | 2.56 | 2.50 | 2.52 |
| 2014 Households | 654,875 | 1,671,772 | 2,143,109 |
| 2014 Average Household Size | 2.55 | 2.49 | 2.51 |
| 2009 - 2014 Annual Rate | 0.21% | 0.23% | 0.26% |
| 2000 Families | 418,327 | 1,010,624 | 1,316,215 |
| 2000 Average Family Size | 3.14 | 3.13 | 3.13 |
| 2009 Families | 427,591 | 1,035,139 | 1,356,232 |
| 2009 Average Family Size | 3.12 | 3.10 | 3.11 |
| 2014 Families | 431,104 | 1,044,128 | 1,370,450 |
| 2014 Average Family Size | 3.10 | 3.09 | 3.09 |
| 2009 - 2014 Annual Rate | 0.16% | 0.17% | 0.21% |



| | | | |
|-------------------------------|---------|-----------|-----------|
| 2000 Housing Units | 649,462 | 1,666,029 | 2,123,381 |
| Owner Occupied Housing Units | 61.8% | 55.7% | 58.4% |
| Renter Occupied Housing Units | 35.4% | 40.7% | 37.9% |
| Vacant Housing Units | 2.8% | 3.6% | 3.7% |
| 2009 Housing Units | 679,806 | 1,750,962 | 2,242,102 |
| Owner Occupied Housing Units | 60.9% | 55.2% | 57.8% |
| Renter Occupied Housing Units | 34.4% | 39.2% | 36.6% |
| Vacant Housing Units | 4.7% | 5.6% | 5.7% |
| 2014 Housing Units | 686,699 | 1,770,175 | 2,270,065 |
| Owner Occupied Housing Units | 60.7% | 55.0% | 57.6% |
| Renter Occupied Housing Units | 34.7% | 39.4% | 36.8% |
| Vacant Housing Units | 4.6% | 5.6% | 5.6% |

Median Household Income

| | | | |
|------|----------|----------|----------|
| 2000 | \$59,479 | \$53,230 | \$53,491 |
| 2009 | \$81,166 | \$73,242 | \$73,159 |
| 2014 | \$85,112 | \$76,855 | \$76,714 |

Median Home Value

| | | | |
|------|-----------|-----------|-----------|
| 2000 | \$223,465 | \$205,606 | \$193,646 |
| 2009 | \$345,623 | \$327,973 | \$311,711 |
| 2014 | \$403,259 | \$386,523 | \$371,586 |

Per Capita Income

| | | | |
|------|----------|----------|----------|
| 2000 | \$29,812 | \$27,835 | \$27,311 |
| 2009 | \$40,909 | \$37,792 | \$36,829 |
| 2014 | \$43,804 | \$40,352 | \$39,214 |

Median Age

| | | | |
|------|------|------|------|
| 2000 | 36.5 | 35.8 | 36.1 |
| 2009 | 38.6 | 37.7 | 38.0 |
| 2014 | 39.0 | 37.8 | 38.2 |

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by total population. Detail may not sum to totals due to rounding.

[Source: ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile

Lowell, MA

Site Type: Drive Tim
 Latitude: 42.64589
 Longitude: -71.31284

Lowell, MA

Lowell, MA

Lowell, MA

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Households by Income

| Household Income Base | 631,959 | 1,607,045 | 2,044,749 |
|--------------------------|----------|-----------|-----------|
| < \$15,000 | 10.9% | 13.6% | 13.1% |
| \$15,000 - \$24,999 | 8.4% | 9.4% | 9.4% |
| \$25,000 - \$34,999 | 8.9% | 9.8% | 9.8% |
| \$35,000 - \$49,999 | 13.4% | 14.1% | 14.2% |
| \$50,000 - \$74,999 | 20.1% | 19.7% | 20.2% |
| \$75,000 - \$99,999 | 14.5% | 13.2% | 13.5% |
| \$100,000 - \$149,999 | 14.2% | 12.1% | 12.0% |
| \$150,000 - \$199,999 | 4.7% | 3.9% | 3.8% |
| \$200,000 + | 4.9% | 4.2% | 3.9% |
| Average Household Income | \$77,775 | \$71,065 | \$70,273 |

2009 Households by Income

| Household Income Base | 647,987 | 1,653,040 | 2,115,379 |
|--------------------------|-----------|-----------|-----------|
| < \$15,000 | 7.1% | 9.3% | 9.0% |
| \$15,000 - \$24,999 | 6.1% | 6.8% | 6.8% |
| \$25,000 - \$34,999 | 6.1% | 7.1% | 7.0% |
| \$35,000 - \$49,999 | 9.3% | 10.5% | 10.6% |
| \$50,000 - \$74,999 | 16.6% | 17.3% | 17.6% |
| \$75,000 - \$99,999 | 15.4% | 14.8% | 15.4% |
| \$100,000 - \$149,999 | 21.6% | 19.4% | 19.5% |
| \$150,000 - \$199,999 | 8.1% | 6.9% | 6.8% |
| \$200,000 + | 9.6% | 7.9% | 7.3% |
| Average Household Income | \$106,492 | \$96,245 | \$94,525 |

2014 Households by Income

| Household Income Base | 654,873 | 1,671,770 | 2,143,107 |
|--------------------------|-----------|-----------|-----------|
| < \$15,000 | 6.8% | 8.9% | 8.5% |
| \$15,000 - \$24,999 | 5.3% | 6.0% | 6.0% |
| \$25,000 - \$34,999 | 5.5% | 6.3% | 6.3% |
| \$35,000 - \$49,999 | 9.2% | 10.5% | 10.6% |
| \$50,000 - \$74,999 | 15.6% | 16.8% | 17.0% |
| \$75,000 - \$99,999 | 15.9% | 15.8% | 16.3% |
| \$100,000 - \$149,999 | 22.3% | 19.6% | 19.7% |
| \$150,000 - \$199,999 | 8.9% | 7.5% | 7.5% |
| \$200,000 + | 10.5% | 8.7% | 8.0% |
| Average Household Income | \$113,665 | \$102,428 | \$100,303 |

2000 Owner Occupied Housing Units by Value

| Total | 401,624 | 928,211 | 1,239,334 |
|-----------------------|-----------|-----------|-----------|
| < \$50,000 | 1.6% | 1.5% | 1.7% |
| \$50,000 - \$99,999 | 5.8% | 7.0% | 7.9% |
| \$100,000 - \$149,999 | 16.3% | 18.3% | 20.8% |
| \$150,000 - \$199,999 | 19.0% | 21.4% | 22.3% |
| \$200,000 - \$299,999 | 28.3% | 27.2% | 25.8% |
| \$300,000 - \$499,999 | 20.9% | 17.4% | 15.5% |
| \$500,000 - \$999,999 | 6.8% | 6.0% | 5.1% |
| \$1,000,000+ | 1.2% | 1.2% | 1.0% |
| Average Home Value | \$271,390 | \$256,267 | \$241,918 |

2000 Specified Renter Occ. Housing Units by Contract Rent

| Total | 229,281 | 676,892 | 802,477 |
|----------------|---------|---------|---------|
| With Cash Rent | 96.6% | 97.1% | 96.9% |
| No Cash Rent | 3.4% | 2.9% | 3.1% |
| Median Rent | \$693 | \$671 | \$649 |
| Average Rent | \$741 | \$716 | \$694 |

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest, dividends, net rents, pensions, SSI and welfare payments, child support and alimony. Specified Renter Occupied Housing Units exclude houses on 10+ acres. Average Rent excludes units paying no cash rent.

[Source: ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile

Lowell, MA

Site Type: Drive Tim
 Latitude: 42.64589
 Longitude: -71.31284

Lowell, MA

Lowell, MA

Lowell, MA

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Population by Age

| | Lowell, MA (30 Min) | Lowell, MA (45 Min) | Lowell, MA (60 Min) |
|--------------|---------------------|---------------------|---------------------|
| Total | 1,667,556 | 4,162,862 | 5,336,231 |
| Age 0 - 4 | 6.5% | 6.3% | 6.4% |
| Age 5 - 9 | 6.9% | 6.7% | 6.9% |
| Age 10 - 14 | 6.8% | 6.6% | 6.8% |
| Age 15 - 19 | 6.1% | 6.4% | 6.4% |
| Age 20 - 24 | 5.8% | 6.8% | 6.4% |
| Age 25 - 34 | 15.2% | 15.8% | 15.2% |
| Age 35 - 44 | 17.5% | 17.0% | 17.2% |
| Age 45 - 54 | 13.9% | 13.5% | 13.7% |
| Age 55 - 64 | 8.6% | 8.3% | 8.4% |
| Age 65 - 74 | 6.4% | 6.4% | 6.3% |
| Age 75 - 84 | 4.5% | 4.6% | 4.5% |
| Age 85+ | 1.7% | 1.7% | 1.7% |
| Age 18+ | 76.2% | 76.8% | 76.2% |

2009 Population by Age

| | Lowell, MA (30 Min) | Lowell, MA (45 Min) | Lowell, MA (60 Min) |
|--------------|---------------------|---------------------|---------------------|
| Total | 1,705,095 | 4,268,292 | 5,501,983 |
| Age 0 - 4 | 6.3% | 6.2% | 6.2% |
| Age 5 - 9 | 6.3% | 6.1% | 6.3% |
| Age 10 - 14 | 6.6% | 6.3% | 6.4% |
| Age 15 - 19 | 6.9% | 7.1% | 7.1% |
| Age 20 - 24 | 6.5% | 7.5% | 7.1% |
| Age 25 - 34 | 12.4% | 13.2% | 12.7% |
| Age 35 - 44 | 14.7% | 14.5% | 14.5% |
| Age 45 - 54 | 15.9% | 15.3% | 15.6% |
| Age 55 - 64 | 11.4% | 11.1% | 11.3% |
| Age 65 - 74 | 6.3% | 6.1% | 6.2% |
| Age 75 - 84 | 4.5% | 4.4% | 4.4% |
| Age 85+ | 2.2% | 2.2% | 2.2% |
| Age 18+ | 76.9% | 77.5% | 77.1% |

2014 Population by Age

| | Lowell, MA (30 Min) | Lowell, MA (45 Min) | Lowell, MA (60 Min) |
|--------------|---------------------|---------------------|---------------------|
| Total | 1,718,639 | 4,305,494 | 5,558,860 |
| Age 0 - 4 | 6.1% | 6.0% | 6.1% |
| Age 5 - 9 | 6.2% | 6.1% | 6.2% |
| Age 10 - 14 | 6.4% | 6.1% | 6.3% |
| Age 15 - 19 | 6.5% | 6.6% | 6.6% |
| Age 20 - 24 | 6.7% | 7.7% | 7.3% |
| Age 25 - 34 | 13.3% | 14.2% | 13.7% |
| Age 35 - 44 | 12.5% | 12.4% | 12.4% |
| Age 45 - 54 | 15.3% | 14.7% | 14.9% |
| Age 55 - 64 | 12.5% | 12.2% | 12.4% |
| Age 65 - 74 | 7.8% | 7.6% | 7.7% |
| Age 75 - 84 | 4.3% | 4.2% | 4.2% |
| Age 85+ | 2.2% | 2.2% | 2.2% |
| Age 18+ | 77.5% | 78.1% | 77.7% |

2000 Population by Sex

| | Lowell, MA (30 Min) | Lowell, MA (45 Min) | Lowell, MA (60 Min) |
|---------|---------------------|---------------------|---------------------|
| Males | 48.4% | 48.3% | 48.4% |
| Females | 51.6% | 51.7% | 51.6% |

2009 Population by Sex

| | Lowell, MA (30 Min) | Lowell, MA (45 Min) | Lowell, MA (60 Min) |
|---------|---------------------|---------------------|---------------------|
| Males | 48.6% | 48.5% | 48.6% |
| Females | 51.4% | 51.5% | 51.4% |

2014 Population by Sex

| | Lowell, MA (30 Min) | Lowell, MA (45 Min) | Lowell, MA (60 Min) |
|---------|---------------------|---------------------|---------------------|
| Males | 48.7% | 48.6% | 48.6% |
| Females | 51.3% | 51.4% | 51.4% |

Source: ESRI forecasts for 2009 and 2014.; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Lowell, MA

Site Type: Drive Tim
 Latitude: 42.64589
 Longitude: -71.31284

Lowell, MA

Lowell, MA

Lowell, MA

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Population by Race/Ethnicity

| | | | |
|---------------------------------|-----------|-----------|-----------|
| Total | 1,667,556 | 4,162,862 | 5,336,231 |
| White Alone | 86.8% | 82.1% | 84.4% |
| Black Alone | 2.5% | 6.2% | 5.4% |
| American Indian Alone | 0.2% | 0.2% | 0.2% |
| Asian or Pacific Islander Alone | 5.1% | 5.2% | 4.4% |
| Some Other Race Alone | 3.4% | 3.8% | 3.3% |
| Two or More Races | 2.0% | 2.4% | 2.2% |
| Hispanic Origin | 6.7% | 7.6% | 6.4% |
| Diversity Index | 33.7 | 41.5 | 36.9 |

2009 Population by Race/Ethnicity

| | | | |
|---------------------------------|-----------|-----------|-----------|
| Total | 1,705,095 | 4,268,292 | 5,501,983 |
| White Alone | 82.8% | 78.1% | 80.9% |
| Black Alone | 2.9% | 6.8% | 6.0% |
| American Indian Alone | 0.2% | 0.2% | 0.2% |
| Asian or Pacific Islander Alone | 7.4% | 7.3% | 6.2% |
| Some Other Race Alone | 4.4% | 4.8% | 4.1% |
| Two or More Races | 2.3% | 2.8% | 2.6% |
| Hispanic Origin | 8.7% | 9.8% | 8.3% |
| Diversity Index | 41.8 | 49.0 | 43.9 |

2014 Population by Race/Ethnicity

| | | | |
|---------------------------------|-----------|-----------|-----------|
| Total | 1,718,639 | 4,305,494 | 5,558,860 |
| White Alone | 80.3% | 75.6% | 78.7% |
| Black Alone | 3.1% | 7.1% | 6.2% |
| American Indian Alone | 0.2% | 0.2% | 0.2% |
| Asian or Pacific Islander Alone | 9.0% | 8.7% | 7.4% |
| Some Other Race Alone | 4.9% | 5.4% | 4.7% |
| Two or More Races | 2.5% | 3.0% | 2.8% |
| Hispanic Origin | 10.0% | 11.1% | 9.5% |
| Diversity Index | 46.4 | 53.1 | 47.9 |



2000 Population 3+ by School Enrollment

| | | | |
|-------------------------------|-----------|-----------|-----------|
| Total | 1,603,699 | 4,005,502 | 5,132,626 |
| Enrolled in Nursery/Preschool | 2.2% | 2.0% | 2.0% |
| Enrolled in Kindergarten | 1.4% | 1.4% | 1.4% |
| Enrolled in Grade 1-8 | 11.6% | 11.3% | 11.6% |
| Enrolled in Grade 9-12 | 5.3% | 5.4% | 5.5% |
| Enrolled in College | 5.1% | 6.2% | 5.8% |
| Enrolled in Grad/Prof School | 2.2% | 2.3% | 2.1% |
| Not Enrolled in School | 72.2% | 71.4% | 71.5% |

2009 Population 25+ by Educational Attainment

| | | | |
|------------------------------|-----------|-----------|-----------|
| Total | 1,149,441 | 2,855,076 | 3,678,164 |
| Less than 9th Grade | 4.0% | 4.6% | 4.2% |
| 9th - 12th Grade, No Diploma | 6.0% | 6.6% | 6.6% |
| High School Graduate | 24.9% | 25.8% | 26.7% |
| Some College, No Degree | 14.4% | 14.7% | 15.3% |
| Associate Degree | 7.2% | 7.2% | 7.6% |
| Bachelor's Degree | 23.9% | 23.3% | 23.0% |
| Graduate/Professional Degree | 19.7% | 17.9% | 16.6% |

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: [ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile

Lowell, MA

Site Type: Drive Tim
 Latitude: 42.64589
 Longitude: -71.31284

Lowell, MA

Lowell, MA

Lowell, MA

Drive Time: 30 Minutes

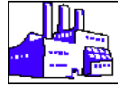
Drive Time: 45 Minutes

Drive Time: 60 Minutes



2009 Population 15+ by Marital Status

| | 2009 | 2014 | 2020 |
|---------------|-----------|-----------|-----------|
| Total | 1,378,355 | 3,474,619 | 4,459,735 |
| Never Married | 31.8% | 34.5% | 33.0% |
| Married | 53.9% | 50.8% | 52.2% |
| Widowed | 5.9% | 6.0% | 6.0% |
| Divorced | 8.4% | 8.6% | 8.8% |



2000 Population 16+ by Employment Status

| | 2000 | 2009 | 2014 |
|---------------------|-----------|-----------|-----------|
| Total | 1,312,094 | 3,297,310 | 4,199,367 |
| In Labor Force | 68.4% | 67.1% | 67.6% |
| Civilian Employed | 65.9% | 64.1% | 64.7% |
| Civilian Unemployed | 2.4% | 2.9% | 2.8% |
| In Armed Forces | 0.1% | 0.1% | 0.1% |
| Not in Labor Force | 31.6% | 32.9% | 32.4% |

2009 Civilian Population 16+ in Labor Force

| | 2009 | 2014 | 2020 |
|---------------------|-------|-------|-------|
| Civilian Employed | 90.8% | 90.1% | 90.2% |
| Civilian Unemployed | 9.2% | 9.9% | 9.8% |

2014 Civilian Population 16+ in Labor Force

| | 2014 | 2020 |
|---------------------|-------|-------|
| Civilian Employed | 95.2% | 94.8% |
| Civilian Unemployed | 4.8% | 5.2% |

2000 Females 16+ by Employment Status and Age of Children

| | 2000 | 2009 | 2014 |
|--------------------------|---------|-----------|-----------|
| Total | 687,496 | 1,730,241 | 2,201,937 |
| Own Children < 6 Only | 7.8% | 7.4% | 7.5% |
| Employed/in Armed Forces | 4.9% | 4.6% | 4.7% |
| Unemployed | 0.2% | 0.2% | 0.2% |
| Not in Labor Force | 2.7% | 2.7% | 2.7% |
| Own Children <6 and 6-17 | 5.5% | 5.4% | 5.6% |
| Employed/in Armed Forces | 3.3% | 3.2% | 3.3% |
| Unemployed | 0.1% | 0.1% | 0.1% |
| Not in Labor Force | 2.1% | 2.1% | 2.1% |
| Own Children 6-17 Only | 16.2% | 15.6% | 16.1% |
| Employed/in Armed Forces | 12.2% | 11.5% | 12.1% |
| Unemployed | 0.3% | 0.4% | 0.4% |
| Not in Labor Force | 3.7% | 3.6% | 3.6% |
| No Own Children <18 | 70.5% | 71.6% | 70.8% |
| Employed/in Armed Forces | 39.6% | 39.3% | 39.0% |
| Unemployed | 1.5% | 1.9% | 1.8% |
| Not in Labor Force | 29.4% | 30.4% | 30.0% |

Source: ESRI forecasts for 2009 and 2014.; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Lowell, MA

Site Type: Drive Tim
 Latitude: 42.64589
 Longitude: -71.31284

Lowell, MA

Lowell, MA

Lowell, MA

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2009 Employed Population 16+ by Industry

| | 844,321 | 2,056,423 | 2,660,237 |
|-------------------------------|---------|-----------|-----------|
| Total | 844,321 | 2,056,423 | 2,660,237 |
| Agriculture/Mining | 0.2% | 0.2% | 0.3% |
| Construction | 4.7% | 4.7% | 5.1% |
| Manufacturing | 10.7% | 9.2% | 9.4% |
| Wholesale Trade | 3.0% | 3.0% | 3.1% |
| Retail Trade | 10.4% | 10.5% | 11.0% |
| Transportation/Utilities | 3.4% | 3.7% | 3.7% |
| Information | 3.7% | 3.4% | 3.2% |
| Finance/Insurance/Real Estate | 7.7% | 8.4% | 8.4% |
| Services | 52.0% | 52.7% | 51.5% |
| Public Administration | 4.0% | 4.2% | 4.2% |

2009 Employed Population 16+ by Occupation

| | 844,321 | 2,056,423 | 2,660,237 |
|---------------------------------|---------|-----------|-----------|
| Total | 844,321 | 2,056,423 | 2,660,237 |
| White Collar | 72.6% | 70.8% | 70.0% |
| Management/Business/Financial | 18.0% | 17.2% | 16.9% |
| Professional | 31.4% | 29.8% | 28.9% |
| Sales | 10.5% | 10.7% | 10.9% |
| Administrative Support | 12.6% | 13.0% | 13.2% |
| Services | 13.3% | 15.1% | 15.1% |
| Blue Collar | 14.1% | 14.1% | 14.9% |
| Farming/Forestry/Fishing | 0.1% | 0.1% | 0.1% |
| Construction/Extraction | 3.7% | 3.8% | 4.1% |
| Installation/Maintenance/Repair | 2.5% | 2.4% | 2.6% |
| Production | 4.3% | 4.1% | 4.2% |
| Transportation/Material Moving | 3.5% | 3.6% | 3.8% |



2000 Workers 16+ by Means of Transportation to Work

| | 851,080 | 2,074,108 | 2,666,799 |
|----------------------------------|---------|-----------|-----------|
| Total | 851,080 | 2,074,108 | 2,666,799 |
| Drove Alone - Car, Truck, or Van | 75.6% | 70.7% | 73.1% |
| Carpooled - Car, Truck, or Van | 8.5% | 8.8% | 8.8% |
| Public Transportation | 7.9% | 11.2% | 9.6% |
| Walked | 3.4% | 4.9% | 4.3% |
| Other Means | 1.0% | 1.1% | 1.0% |
| Worked at Home | 3.5% | 3.2% | 3.2% |

2000 Workers 16+ by Travel Time to Work

| | 851,080 | 2,074,108 | 2,666,799 |
|--------------------------------------|---------|-----------|-----------|
| Total | 851,080 | 2,074,108 | 2,666,799 |
| Did not Work at Home | 96.5% | 96.8% | 96.8% |
| Less than 5 minutes | 2.2% | 2.3% | 2.5% |
| 5 to 9 minutes | 8.9% | 8.9% | 9.2% |
| 10 to 19 minutes | 26.5% | 26.4% | 26.3% |
| 20 to 24 minutes | 13.7% | 13.2% | 13.1% |
| 25 to 34 minutes | 20.5% | 20.0% | 19.5% |
| 35 to 44 minutes | 8.0% | 7.8% | 7.6% |
| 45 to 59 minutes | 9.0% | 9.5% | 9.4% |
| 60 to 89 minutes | 5.8% | 6.4% | 6.9% |
| 90 or more minutes | 1.8% | 2.1% | 2.2% |
| Worked at Home | 3.5% | 3.2% | 3.2% |
| Average Travel Time to Work (in min) | 26.7 | 27.3 | 27.5 |

2000 Households by Vehicles Available

| | 631,358 | 1,606,448 | 2,043,912 |
|--------------------------------------|---------|-----------|-----------|
| Total | 631,358 | 1,606,448 | 2,043,912 |
| None | 9.9% | 14.2% | 12.7% |
| 1 | 35.1% | 37.4% | 36.3% |
| 2 | 40.9% | 36.3% | 38.1% |
| 3 | 10.4% | 9.0% | 9.6% |
| 4 | 2.8% | 2.2% | 2.4% |
| 5+ | 1.0% | 0.8% | 0.9% |
| Average Number of Vehicles Available | 1.6 | 1.5 | 1.6 |

Source: ESRI forecasts for 2009; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Lowell, MA

Site Type: Drive Tim
 Latitude: 42.64589
 Longitude: -71.31284

Lowell, MA

Lowell, MA

Lowell, MA

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Households by Type

| | Lowell, MA | Lowell, MA | Lowell, MA |
|----------------------------------|------------|------------|------------|
| Total | 631,261 | 1,606,505 | 2,043,904 |
| Family Households | 66.3% | 62.9% | 64.4% |
| Married-couple Family | 52.3% | 47.7% | 49.5% |
| With Related Children | 25.7% | 23.2% | 24.2% |
| Other Family (No Spouse) | 14.0% | 15.2% | 14.9% |
| With Related Children | 7.9% | 8.9% | 8.8% |
| Nonfamily Households | 33.7% | 37.1% | 35.6% |
| Householder Living Alone | 26.1% | 28.6% | 27.7% |
| Householder Not Living Alone | 7.6% | 8.5% | 7.9% |
| Households with Related Children | 33.6% | 32.0% | 33.0% |
| Households with Persons 65+ | 23.5% | 23.2% | 23.1% |

2000 Households by Size

| | Lowell, MA | Lowell, MA | Lowell, MA |
|---------------------|------------|------------|------------|
| Total | 631,261 | 1,606,505 | 2,043,904 |
| 1 Person Household | 26.1% | 28.6% | 27.7% |
| 2 Person Household | 31.6% | 31.3% | 31.4% |
| 3 Person Household | 16.9% | 16.3% | 16.5% |
| 4 Person Household | 15.5% | 14.3% | 14.8% |
| 5 Person Household | 6.7% | 6.3% | 6.5% |
| 6 Person Household | 2.2% | 2.1% | 2.1% |
| 7+ Person Household | 1.0% | 1.1% | 1.1% |

2000 Households by Year Householder Moved In

| | Lowell, MA | Lowell, MA | Lowell, MA |
|----------------------------------|------------|------------|------------|
| Total | 631,358 | 1,606,448 | 2,043,912 |
| Moved in 1999 to March 2000 | 16.5% | 17.7% | 17.1% |
| Moved in 1995 to 1998 | 28.6% | 29.6% | 29.1% |
| Moved in 1990 to 1994 | 15.3% | 15.3% | 15.6% |
| Moved in 1980 to 1989 | 15.8% | 15.2% | 15.7% |
| Moved in 1970 to 1979 | 10.4% | 9.6% | 9.8% |
| Moved in 1969 or Earlier | 13.5% | 12.5% | 12.6% |
| Median Year Householder Moved In | 1993 | 1994 | 1994 |



2000 Housing Units by Units in Structure

| | Lowell, MA | Lowell, MA | Lowell, MA |
|-------------|------------|------------|------------|
| Total | 649,532 | 1,665,990 | 2,123,389 |
| 1, Detached | 50.7% | 44.4% | 48.5% |
| 1, Attached | 5.1% | 4.7% | 4.5% |
| 2 | 14.5% | 13.1% | 12.0% |
| 3 or 4 | 9.3% | 12.8% | 11.7% |
| 5 to 9 | 5.1% | 6.4% | 6.2% |
| 10 to 19 | 5.0% | 5.5% | 5.0% |
| 20+ | 9.4% | 12.4% | 11.0% |
| Mobile Home | 0.8% | 0.8% | 1.1% |
| Other | 0.0% | 0.0% | 0.0% |

2000 Housing Units by Year Structure Built

| | Lowell, MA | Lowell, MA | Lowell, MA |
|-----------------------------|------------|------------|------------|
| Total | 649,532 | 1,665,990 | 2,123,389 |
| 1999 to March 2000 | 0.9% | 0.9% | 1.0% |
| 1995 to 1998 | 3.3% | 3.0% | 3.4% |
| 1990 to 1994 | 3.9% | 3.6% | 4.0% |
| 1980 to 1989 | 11.9% | 10.9% | 11.7% |
| 1970 to 1979 | 12.4% | 12.1% | 12.6% |
| 1969 or Earlier | 67.5% | 69.5% | 67.2% |
| Median Year Structure Built | 1956 | 1954 | 1956 |

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile

Lowell, MA

Site Type: Drive Tim
 Latitude: 42.64589
 Longitude: -71.31284

Lowell, MA

Lowell, MA

Lowell, MA

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes

[Top 3 Tapestry Segments](#)

| | | | |
|----|--------------------------|------------------|------------------|
| 1. | Pleasant-Ville | City Lights | Pleasant-Ville |
| 2. | Wealthy Seaboard Suburbs | Pleasant-Ville | Main Street, USA |
| 3. | City Lights | Main Street, USA | City Lights |



2009 Consumer Spending shows the amount spent on a variety of goods and services by households that reside in the market area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue.

| | | | |
|--|-------------------------|-------------------------|-------------------------|
| Apparel & Services: Total \$ | \$1,755,082,203 | \$4,099,009,905 | \$5,118,261,350 |
| Average Spent | \$2,708.51 | \$2,479.68 | \$2,419.55 |
| Spending Potential Index | 108 | 99 | 97 |
| Computers & Accessories: Total \$ | \$225,712,541 | \$522,194,843 | \$653,996,130 |
| Average Spent | \$348.33 | \$315.90 | \$309.16 |
| Spending Potential Index | 153 | 138 | 135 |
| Education: Total \$ | \$1,353,322,284 | \$3,146,468,691 | \$3,937,063,283 |
| Average Spent | \$2,088.50 | \$1,903.44 | \$1,861.16 |
| Spending Potential Index | 166 | 152 | 148 |
| Entertainment/Recreation: Total \$ | \$3,154,707,618 | \$7,242,672,168 | \$9,123,997,570 |
| Average Spent | \$4,868.46 | \$4,381.42 | \$4,313.17 |
| Spending Potential Index | 150 | 135 | 133 |
| Food at Home: Total \$ | \$4,349,179,590 | \$10,186,191,984 | \$12,752,033,486 |
| Average Spent | \$6,711.81 | \$6,162.09 | \$6,028.24 |
| Spending Potential Index | 147 | 135 | 132 |
| Food Away from Home: Total \$ | \$3,214,010,742 | \$7,512,765,042 | \$9,411,275,199 |
| Average Spent | \$4,959.98 | \$4,544.81 | \$4,448.97 |
| Spending Potential Index | 149 | 137 | 134 |
| Health Care: Total \$ | \$3,409,447,900 | \$7,875,561,780 | \$9,978,036,744 |
| Average Spent | \$5,261.58 | \$4,764.28 | \$4,716.90 |
| Spending Potential Index | 140 | 126 | 125 |
| Household Furnishings & Equip: Total \$ | \$1,894,775,522 | \$4,309,761,705 | \$5,433,039,498 |
| Average Spent | \$2,924.09 | \$2,607.17 | \$2,568.35 |
| Spending Potential Index | 135 | 120 | 118 |
| Investments: Total \$ | \$1,543,871,588 | \$3,409,666,642 | \$4,297,494,707 |
| Average Spent | \$2,382.56 | \$2,062.66 | \$2,031.55 |
| Spending Potential Index | 166 | 143 | 141 |
| Retail Goods: Total \$ | \$23,434,491,094 | \$53,928,584,001 | \$67,921,715,058 |
| Average Spent | \$36,164.95 | \$32,623.84 | \$32,108.50 |
| Spending Potential Index | 141 | 127 | 125 |
| Shelter: Total \$ | \$16,401,716,238 | \$37,859,397,443 | \$47,252,136,357 |
| Average Spent | \$25,311.72 | \$22,902.86 | \$22,337.41 |
| Spending Potential Index | 162 | 147 | 143 |
| TV/Video/Sound Equipment: Total \$ | \$1,144,517,347 | \$2,678,862,286 | \$3,359,479,645 |
| Average Spent | \$1,766.26 | \$1,620.57 | \$1,588.12 |
| Spending Potential Index | 145 | 133 | 131 |
| Travel: Total \$ | \$1,934,504,893 | \$4,369,756,195 | \$5,501,500,313 |
| Average Spent | \$2,985.40 | \$2,643.46 | \$2,600.71 |
| Spending Potential Index | 162 | 143 | 141 |
| Vehicle Maintenance & Repairs: Total \$ | \$896,824,754 | \$2,067,155,477 | \$2,599,682,388 |
| Average Spent | \$1,384.01 | \$1,250.52 | \$1,228.94 |
| Spending Potential Index | 148 | 134 | 131 |

Data Note: The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2005 and 2006 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI



Manchester, NH

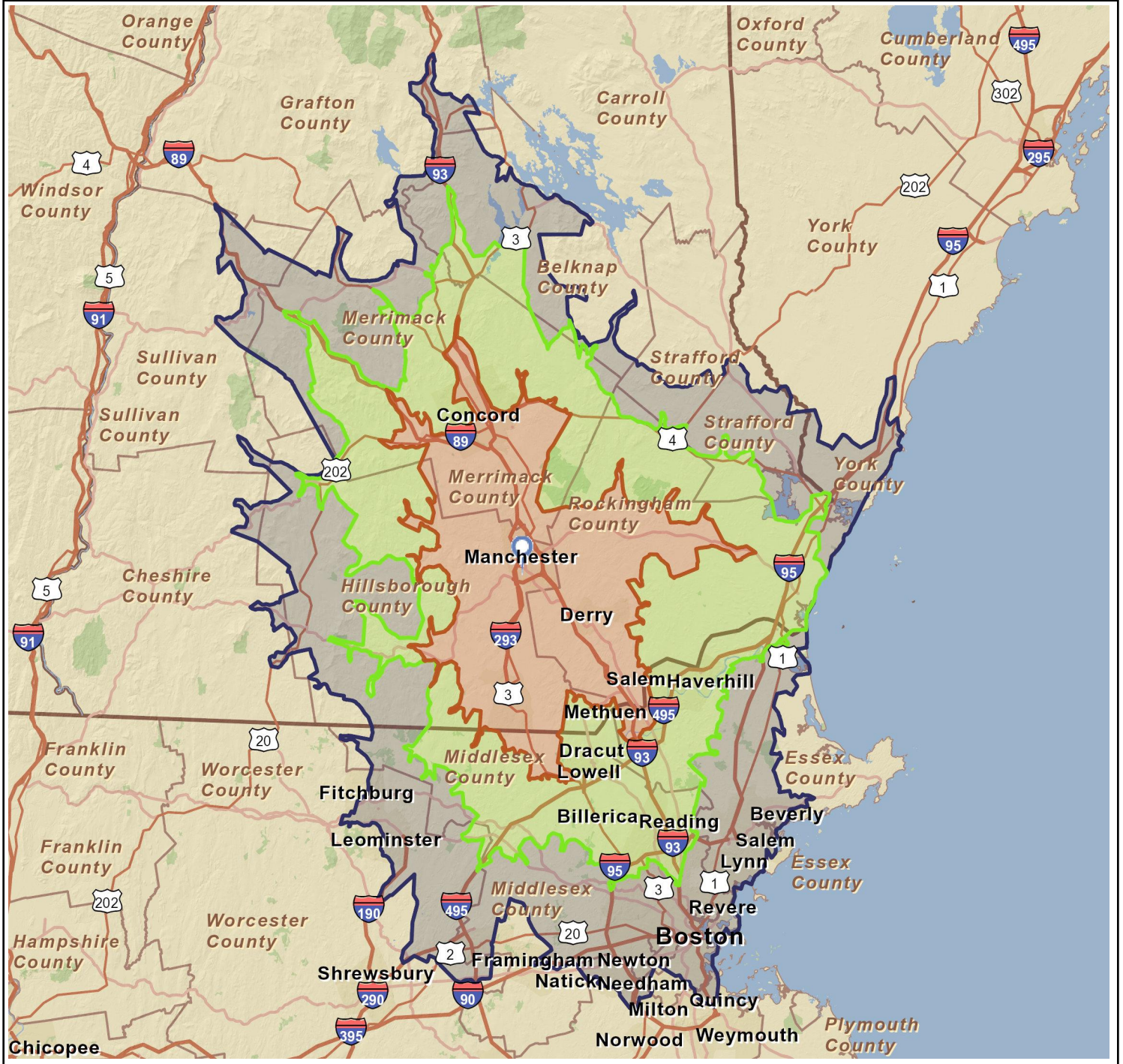
Manchester, New Hampshire

Latitude: 42.99118

Longitude: -71.46309

Site Type: Drive Time

Drive Time 30, 45, 60 Minutes





Market Profile Manchester, NH

Site Type: Drive Tim
Latitude: 42.99118
Longitude: -71.46309

Manchester, NH

Manchester, NH

Manchester, NH

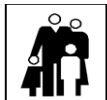
Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



| | | | |
|-------------------------|---------|-----------|-----------|
| 2000 Total Population | 594,824 | 1,460,640 | 3,744,250 |
| 2000 Group Quarters | 12,822 | 32,733 | 130,009 |
| 2009 Total Population | 632,923 | 1,541,506 | 3,876,722 |
| 2014 Total Population | 645,578 | 1,570,504 | 3,925,213 |
| 2009 - 2014 Annual Rate | 0.40% | 0.37% | 0.25% |



| | | | |
|-----------------------------|---------|---------|-----------|
| 2000 Households | 222,790 | 537,423 | 1,445,249 |
| 2000 Average Household Size | 2.61 | 2.66 | 2.50 |
| 2009 Households | 236,912 | 569,001 | 1,502,787 |
| 2009 Average Household Size | 2.61 | 2.65 | 2.49 |
| 2014 Households | 242,370 | 581,577 | 1,525,973 |
| 2014 Average Household Size | 2.61 | 2.64 | 2.49 |
| 2009 - 2014 Annual Rate | 0.46% | 0.44% | 0.31% |
| 2000 Families | 153,529 | 378,969 | 909,350 |
| 2000 Average Family Size | 3.14 | 3.16 | 3.11 |
| 2009 Families | 161,978 | 398,581 | 941,342 |
| 2009 Average Family Size | 3.12 | 3.14 | 3.09 |
| 2014 Families | 165,013 | 405,980 | 953,271 |
| 2014 Average Family Size | 3.10 | 3.12 | 3.07 |
| 2009 - 2014 Annual Rate | 0.37% | 0.37% | 0.25% |



| | | | |
|-------------------------------|---------|---------|-----------|
| 2000 Housing Units | 229,955 | 559,504 | 1,515,913 |
| Owner Occupied Housing Units | 62.5% | 65.7% | 55.5% |
| Renter Occupied Housing Units | 34.3% | 30.3% | 39.8% |
| Vacant Housing Units | 3.1% | 3.9% | 4.7% |
| 2009 Housing Units | 248,839 | 603,166 | 1,609,988 |
| Owner Occupied Housing Units | 62.3% | 64.8% | 55.2% |
| Renter Occupied Housing Units | 32.9% | 29.5% | 38.2% |
| Vacant Housing Units | 4.8% | 5.7% | 6.7% |
| 2014 Housing Units | 253,861 | 615,402 | 1,634,410 |
| Owner Occupied Housing Units | 61.8% | 64.5% | 54.9% |
| Renter Occupied Housing Units | 33.6% | 30.0% | 38.5% |
| Vacant Housing Units | 4.5% | 5.5% | 6.6% |

Median Household Income

| | | | |
|------|----------|----------|----------|
| 2000 | \$52,712 | \$55,134 | \$52,518 |
| 2009 | \$69,368 | \$73,167 | \$71,218 |
| 2014 | \$73,488 | \$76,924 | \$75,413 |

Median Home Value

| | | | |
|------|-----------|-----------|-----------|
| 2000 | \$138,676 | \$162,446 | \$192,584 |
| 2009 | \$221,506 | \$255,471 | \$303,815 |
| 2014 | \$265,765 | \$302,770 | \$361,963 |

Per Capita Income

| | | | |
|------|----------|----------|----------|
| 2000 | \$24,313 | \$25,339 | \$27,248 |
| 2009 | \$31,961 | \$33,721 | \$36,848 |
| 2014 | \$33,443 | \$35,514 | \$39,246 |

Median Age

| | | | |
|------|------|------|------|
| 2000 | 35.6 | 36.0 | 35.7 |
| 2009 | 37.8 | 38.2 | 37.5 |
| 2014 | 37.8 | 38.3 | 37.7 |

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by total population. Detail may not sum to totals due to rounding.

[Source: ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile Manchester, NH

Site Type: Drive Tim
Latitude: 42.99118
Longitude: -71.46309

Manchester, NH

Manchester, NH

Manchester, NH

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Households by Income

| Household Income Base | 223,068 | 537,970 | 1,445,829 |
|--------------------------|----------|----------|-----------|
| < \$15,000 | 10.9% | 10.8% | 13.3% |
| \$15,000 - \$24,999 | 9.8% | 9.2% | 9.5% |
| \$25,000 - \$34,999 | 10.5% | 9.7% | 10.1% |
| \$35,000 - \$49,999 | 15.7% | 14.9% | 14.6% |
| \$50,000 - \$74,999 | 23.0% | 22.1% | 20.2% |
| \$75,000 - \$99,999 | 14.1% | 14.6% | 13.2% |
| \$100,000 - \$149,999 | 10.7% | 12.3% | 11.6% |
| \$150,000 - \$199,999 | 3.0% | 3.6% | 3.7% |
| \$200,000 + | 2.3% | 2.9% | 3.9% |
| Average Household Income | \$64,087 | \$68,048 | \$69,526 |

2009 Households by Income

| Household Income Base | 236,912 | 569,001 | 1,502,785 |
|--------------------------|----------|----------|-----------|
| < \$15,000 | 7.4% | 7.3% | 9.2% |
| \$15,000 - \$24,999 | 7.0% | 6.6% | 6.9% |
| \$25,000 - \$34,999 | 7.5% | 7.0% | 7.1% |
| \$35,000 - \$49,999 | 11.6% | 10.7% | 11.0% |
| \$50,000 - \$74,999 | 20.9% | 19.7% | 18.2% |
| \$75,000 - \$99,999 | 17.3% | 16.6% | 15.2% |
| \$100,000 - \$149,999 | 17.7% | 19.8% | 18.6% |
| \$150,000 - \$199,999 | 6.0% | 6.7% | 6.4% |
| \$200,000 + | 4.6% | 5.7% | 7.4% |
| Average Household Income | \$84,475 | \$90,420 | \$93,716 |

2014 Households by Income

| Household Income Base | 242,370 | 581,577 | 1,525,971 |
|--------------------------|----------|----------|-----------|
| < \$15,000 | 7.1% | 7.0% | 8.7% |
| \$15,000 - \$24,999 | 6.3% | 5.9% | 6.1% |
| \$25,000 - \$34,999 | 7.0% | 6.4% | 6.4% |
| \$35,000 - \$49,999 | 11.6% | 10.7% | 10.9% |
| \$50,000 - \$74,999 | 19.0% | 18.1% | 17.4% |
| \$75,000 - \$99,999 | 19.7% | 18.3% | 16.4% |
| \$100,000 - \$149,999 | 18.0% | 20.3% | 18.8% |
| \$150,000 - \$199,999 | 6.3% | 7.2% | 7.0% |
| \$200,000 + | 4.9% | 6.2% | 8.1% |
| Average Household Income | \$88,072 | \$94,868 | \$99,459 |

2000 Owner Occupied Housing Units by Value

| Total | 143,993 | 368,147 | 841,620 |
|-----------------------|-----------|-----------|-----------|
| < \$50,000 | 4.2% | 3.5% | 2.6% |
| \$50,000 - \$99,999 | 17.6% | 12.9% | 9.5% |
| \$100,000 - \$149,999 | 37.1% | 27.3% | 20.1% |
| \$150,000 - \$199,999 | 22.1% | 22.4% | 20.7% |
| \$200,000 - \$299,999 | 13.8% | 21.7% | 24.7% |
| \$300,000 - \$499,999 | 4.5% | 10.1% | 15.8% |
| \$500,000 - \$999,999 | 0.6% | 1.9% | 5.5% |
| \$1,000,000+ | 0.1% | 0.2% | 1.1% |
| Average Home Value | \$156,012 | \$191,210 | \$243,052 |

2000 Specified Renter Occ. Housing Units by Contract Rent

| Total | 78,496 | 168,160 | 601,576 |
|----------------|--------|---------|---------|
| With Cash Rent | 97.4% | 96.8% | 97.0% |
| No Cash Rent | 2.6% | 3.2% | 3.0% |
| Median Rent | \$598 | \$599 | \$667 |
| Average Rent | \$600 | \$611 | \$719 |

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest, dividends, net rents, pensions, SSI and welfare payments, child support and alimony. Specified Renter Occupied Housing Units exclude houses on 10+ acres. Average Rent excludes units paying no cash rent.

[Source: ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile Manchester, NH

Site Type: Drive Tim
Latitude: 42.99118
Longitude: -71.46309

Manchester, NH

Manchester, NH

Manchester, NH

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Population by Age

| | Manchester, NH (30 Min) | Manchester, NH (45 Min) | Manchester, NH (60 Min) |
|--------------|-------------------------|-------------------------|-------------------------|
| Total | 594,824 | 1,460,640 | 3,744,250 |
| Age 0 - 4 | 6.9% | 6.9% | 6.2% |
| Age 5 - 9 | 7.7% | 7.7% | 6.7% |
| Age 10 - 14 | 7.8% | 7.7% | 6.7% |
| Age 15 - 19 | 6.7% | 6.7% | 6.5% |
| Age 20 - 24 | 5.4% | 5.3% | 6.9% |
| Age 25 - 34 | 14.4% | 13.8% | 15.8% |
| Age 35 - 44 | 18.5% | 18.3% | 17.1% |
| Age 45 - 54 | 14.2% | 14.3% | 13.6% |
| Age 55 - 64 | 8.0% | 8.3% | 8.3% |
| Age 65 - 74 | 5.3% | 5.7% | 6.2% |
| Age 75 - 84 | 3.7% | 3.9% | 4.4% |
| Age 85+ | 1.4% | 1.4% | 1.6% |
| Age 18+ | 73.4% | 73.5% | 76.7% |

2009 Population by Age

| | Manchester, NH (30 Min) | Manchester, NH (45 Min) | Manchester, NH (60 Min) |
|--------------|-------------------------|-------------------------|-------------------------|
| Total | 632,923 | 1,541,506 | 3,876,722 |
| Age 0 - 4 | 6.7% | 6.7% | 6.1% |
| Age 5 - 9 | 6.7% | 6.8% | 6.1% |
| Age 10 - 14 | 6.9% | 7.1% | 6.2% |
| Age 15 - 19 | 7.3% | 7.4% | 7.1% |
| Age 20 - 24 | 6.5% | 6.3% | 7.6% |
| Age 25 - 34 | 12.1% | 11.4% | 13.5% |
| Age 35 - 44 | 14.7% | 14.6% | 14.4% |
| Age 45 - 54 | 16.5% | 16.5% | 15.4% |
| Age 55 - 64 | 11.4% | 11.5% | 11.2% |
| Age 65 - 74 | 5.8% | 6.0% | 6.1% |
| Age 75 - 84 | 3.7% | 3.9% | 4.3% |
| Age 85+ | 1.8% | 1.8% | 2.1% |
| Age 18+ | 75.3% | 75.0% | 77.7% |

2014 Population by Age

| | Manchester, NH (30 Min) | Manchester, NH (45 Min) | Manchester, NH (60 Min) |
|--------------|-------------------------|-------------------------|-------------------------|
| Total | 645,578 | 1,570,504 | 3,925,213 |
| Age 0 - 4 | 6.6% | 6.5% | 5.9% |
| Age 5 - 9 | 6.7% | 6.8% | 6.0% |
| Age 10 - 14 | 6.8% | 7.0% | 6.1% |
| Age 15 - 19 | 6.6% | 6.8% | 6.6% |
| Age 20 - 24 | 6.6% | 6.5% | 7.7% |
| Age 25 - 34 | 13.3% | 12.6% | 14.4% |
| Age 35 - 44 | 12.8% | 12.4% | 12.5% |
| Age 45 - 54 | 15.4% | 15.5% | 14.7% |
| Age 55 - 64 | 12.4% | 12.7% | 12.3% |
| Age 65 - 74 | 7.3% | 7.6% | 7.6% |
| Age 75 - 84 | 3.6% | 3.8% | 4.1% |
| Age 85+ | 1.8% | 1.8% | 2.1% |
| Age 18+ | 75.9% | 75.7% | 78.4% |

2000 Population by Sex

| | Manchester, NH (30 Min) | Manchester, NH (45 Min) | Manchester, NH (60 Min) |
|---------|-------------------------|-------------------------|-------------------------|
| Males | 49.2% | 49.0% | 48.5% |
| Females | 50.8% | 51.0% | 51.5% |

2009 Population by Sex

| | Manchester, NH (30 Min) | Manchester, NH (45 Min) | Manchester, NH (60 Min) |
|---------|-------------------------|-------------------------|-------------------------|
| Males | 49.2% | 49.1% | 48.7% |
| Females | 50.8% | 50.9% | 51.3% |

2014 Population by Sex

| | Manchester, NH (30 Min) | Manchester, NH (45 Min) | Manchester, NH (60 Min) |
|---------|-------------------------|-------------------------|-------------------------|
| Males | 49.2% | 49.1% | 48.8% |
| Females | 50.8% | 50.9% | 51.2% |

Source: ESRI forecasts for 2009 and 2014.; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile Manchester, NH

Site Type: Drive Tim
Latitude: 42.99118
Longitude: -71.46309

Manchester, NH

Manchester, NH

Manchester, NH

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|-----------|-----------|
| Total | 594,824 | 1,460,640 | 3,744,250 |
| White Alone | 91.6% | 90.3% | 83.9% |
| Black Alone | 1.4% | 1.4% | 5.2% |
| American Indian Alone | 0.3% | 0.2% | 0.2% |
| Asian or Pacific Islander Alone | 2.3% | 3.4% | 4.9% |
| Some Other Race Alone | 3.0% | 3.2% | 3.6% |
| Two or More Races | 1.6% | 1.6% | 2.3% |
| Hispanic Origin | 6.1% | 6.2% | 7.1% |
| Diversity Index | 25.6 | 27.8 | 38.5 |

2009 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|-----------|-----------|
| Total | 632,923 | 1,541,506 | 3,876,722 |
| White Alone | 89.3% | 87.6% | 80.3% |
| Black Alone | 1.6% | 1.6% | 5.6% |
| American Indian Alone | 0.3% | 0.2% | 0.2% |
| Asian or Pacific Islander Alone | 3.4% | 4.8% | 6.8% |
| Some Other Race Alone | 3.7% | 4.0% | 4.4% |
| Two or More Races | 1.7% | 1.8% | 2.6% |
| Hispanic Origin | 7.7% | 7.9% | 9.1% |
| Diversity Index | 31.5 | 34.3 | 45.5 |

2014 Population by Race/Ethnicity

| | | | |
|---------------------------------|---------|-----------|-----------|
| Total | 645,578 | 1,570,504 | 3,925,213 |
| White Alone | 87.7% | 85.8% | 78.1% |
| Black Alone | 1.7% | 1.7% | 5.8% |
| American Indian Alone | 0.3% | 0.2% | 0.2% |
| Asian or Pacific Islander Alone | 4.3% | 5.8% | 8.1% |
| Some Other Race Alone | 4.2% | 4.5% | 5.0% |
| Two or More Races | 1.8% | 1.9% | 2.8% |
| Hispanic Origin | 8.7% | 8.9% | 10.3% |
| Diversity Index | 35.0 | 38.0 | 49.4 |



2000 Population 3+ by School Enrollment

| | | | |
|-------------------------------|---------|-----------|-----------|
| Total | 571,303 | 1,401,294 | 3,605,316 |
| Enrolled in Nursery/Preschool | 2.0% | 2.1% | 1.9% |
| Enrolled in Kindergarten | 1.4% | 1.5% | 1.4% |
| Enrolled in Grade 1-8 | 13.5% | 13.3% | 11.4% |
| Enrolled in Grade 9-12 | 5.9% | 5.9% | 5.4% |
| Enrolled in College | 4.5% | 4.7% | 6.2% |
| Enrolled in Grad/Prof School | 1.2% | 1.2% | 2.3% |
| Not Enrolled in School | 71.5% | 71.2% | 71.3% |

2009 Population 25+ by Educational Attainment

| | | | |
|------------------------------|---------|-----------|-----------|
| Total | 417,476 | 1,013,024 | 2,595,389 |
| Less than 9th Grade | 4.0% | 4.0% | 4.5% |
| 9th - 12th Grade, No Diploma | 7.3% | 6.9% | 6.7% |
| High School Graduate | 29.0% | 28.7% | 26.3% |
| Some College, No Degree | 18.2% | 17.2% | 15.1% |
| Associate Degree | 9.5% | 8.8% | 7.4% |
| Bachelor's Degree | 20.9% | 21.5% | 22.8% |
| Graduate/Professional Degree | 11.2% | 12.8% | 17.3% |

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: [ESRI forecasts for 2009 and 2014; U.S. Bureau of the Census, 2000 Census of Population and Housing](#)



Market Profile Manchester, NH

Site Type: Drive Tim
Latitude: 42.99118
Longitude: -71.46309

Manchester, NH

Manchester, NH

Manchester, NH

Drive Time: 30 Minutes

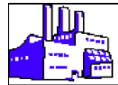
Drive Time: 45 Minutes

Drive Time: 60 Minutes



2009 Population 15+ by Marital Status

| | Manchester, NH | Manchester, NH | Manchester, NH |
|---------------|----------------|----------------|----------------|
| Total | 504,637 | 1,224,317 | 3,165,198 |
| Never Married | 26.9% | 27.3% | 34.1% |
| Married | 56.8% | 57.2% | 51.1% |
| Widowed | 5.3% | 5.5% | 5.8% |
| Divorced | 10.9% | 10.0% | 9.0% |



2000 Population 16+ by Employment Status

| | Manchester, NH | Manchester, NH | Manchester, NH |
|---------------------|----------------|----------------|----------------|
| Total | 453,285 | 1,113,485 | 2,964,757 |
| In Labor Force | 71.3% | 70.1% | 67.7% |
| Civilian Employed | 68.6% | 67.5% | 64.8% |
| Civilian Unemployed | 2.6% | 2.5% | 2.8% |
| In Armed Forces | 0.1% | 0.1% | 0.1% |
| Not in Labor Force | 28.7% | 29.9% | 32.3% |

2009 Civilian Population 16+ in Labor Force

| | Manchester, NH | Manchester, NH | Manchester, NH |
|---------------------|----------------|----------------|----------------|
| Civilian Employed | 92.2% | 91.7% | 90.6% |
| Civilian Unemployed | 7.8% | 8.3% | 9.4% |

2014 Civilian Population 16+ in Labor Force

| | Manchester, NH | Manchester, NH | Manchester, NH |
|---------------------|----------------|----------------|----------------|
| Civilian Employed | 95.8% | 95.6% | 95.0% |
| Civilian Unemployed | 4.2% | 4.4% | 5.0% |

2000 Females 16+ by Employment Status and Age of Children

| | Manchester, NH | Manchester, NH | Manchester, NH |
|--------------------------|----------------|----------------|----------------|
| Total | 233,332 | 576,494 | 1,547,594 |
| Own Children < 6 Only | 8.2% | 8.3% | 7.3% |
| Employed/in Armed Forces | 5.2% | 5.3% | 4.5% |
| Unemployed | 0.2% | 0.2% | 0.2% |
| Not in Labor Force | 2.7% | 2.8% | 2.6% |
| Own Children <6 and 6-17 | 6.5% | 6.3% | 5.3% |
| Employed/in Armed Forces | 4.0% | 3.8% | 3.2% |
| Unemployed | 0.2% | 0.1% | 0.1% |
| Not in Labor Force | 2.4% | 2.3% | 2.0% |
| Own Children 6-17 Only | 19.2% | 18.9% | 15.9% |
| Employed/in Armed Forces | 15.1% | 14.6% | 11.9% |
| Unemployed | 0.4% | 0.4% | 0.4% |
| Not in Labor Force | 3.7% | 3.9% | 3.6% |
| No Own Children <18 | 66.1% | 66.5% | 71.5% |
| Employed/in Armed Forces | 37.9% | 37.6% | 39.8% |
| Unemployed | 1.6% | 1.5% | 1.8% |
| Not in Labor Force | 26.5% | 27.4% | 29.8% |

Source: ESRI forecasts for 2009 and 2014.; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile Manchester, NH

Site Type: Drive Tim
Latitude: 42.99118
Longitude: -71.46309

Manchester, NH

Manchester, NH

Manchester, NH

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2009 Employed Population 16+ by Industry

| | Manchester, NH | Manchester, NH | Manchester, NH |
|-------------------------------|----------------|----------------|----------------|
| Total | 318,500 | 764,920 | 1,900,891 |
| Agriculture/Mining | 0.3% | 0.3% | 0.3% |
| Construction | 5.7% | 5.8% | 5.0% |
| Manufacturing | 13.3% | 13.0% | 9.6% |
| Wholesale Trade | 3.8% | 3.6% | 3.0% |
| Retail Trade | 14.2% | 12.7% | 11.1% |
| Transportation/Utilities | 4.1% | 3.9% | 3.7% |
| Information | 2.6% | 2.9% | 3.3% |
| Finance/Insurance/Real Estate | 8.2% | 7.3% | 8.1% |
| Services | 43.5% | 45.9% | 51.7% |
| Public Administration | 4.3% | 4.5% | 4.3% |

2009 Employed Population 16+ by Occupation

| | Manchester, NH | Manchester, NH | Manchester, NH |
|---------------------------------|----------------|----------------|----------------|
| Total | 318,500 | 764,920 | 1,900,891 |
| White Collar | 66.6% | 67.2% | 69.9% |
| Management/Business/Financial | 15.4% | 16.1% | 16.8% |
| Professional | 24.1% | 25.6% | 29.1% |
| Sales | 12.9% | 11.7% | 10.9% |
| Administrative Support | 14.3% | 13.7% | 13.1% |
| Services | 13.5% | 14.0% | 14.9% |
| Blue Collar | 19.8% | 18.8% | 15.1% |
| Farming/Forestry/Fishing | 0.2% | 0.2% | 0.2% |
| Construction/Extraction | 4.9% | 4.8% | 4.1% |
| Installation/Maintenance/Repair | 3.8% | 3.6% | 2.7% |
| Production | 6.0% | 5.7% | 4.4% |
| Transportation/Material Moving | 4.9% | 4.5% | 3.8% |



2000 Workers 16+ by Means of Transportation to Work

| | Manchester, NH | Manchester, NH | Manchester, NH |
|----------------------------------|----------------|----------------|----------------|
| Total | 305,312 | 739,263 | 1,886,514 |
| Drove Alone - Car, Truck, or Van | 83.3% | 82.7% | 70.9% |
| Carpooled - Car, Truck, or Van | 9.9% | 9.3% | 8.9% |
| Public Transportation | 1.1% | 1.9% | 10.4% |
| Walked | 2.0% | 2.1% | 5.1% |
| Other Means | 0.7% | 0.7% | 1.2% |
| Worked at Home | 3.1% | 3.2% | 3.4% |

2000 Workers 16+ by Travel Time to Work

| | Manchester, NH | Manchester, NH | Manchester, NH |
|--------------------------------------|----------------|----------------|----------------|
| Total | 305,312 | 739,263 | 1,886,514 |
| Did not Work at Home | 96.9% | 96.8% | 96.6% |
| Less than 5 minutes | 2.6% | 2.7% | 2.5% |
| 5 to 9 minutes | 10.0% | 9.7% | 9.2% |
| 10 to 19 minutes | 31.4% | 28.8% | 26.6% |
| 20 to 24 minutes | 13.8% | 13.5% | 13.5% |
| 25 to 34 minutes | 17.1% | 18.2% | 20.1% |
| 35 to 44 minutes | 6.1% | 7.0% | 7.6% |
| 45 to 59 minutes | 7.1% | 8.1% | 8.8% |
| 60 to 89 minutes | 6.5% | 6.4% | 6.0% |
| 90 or more minutes | 2.3% | 2.3% | 2.2% |
| Worked at Home | 3.1% | 3.2% | 3.4% |
| Average Travel Time to Work (in min) | 25.6 | 26.4 | 26.9 |

2000 Households by Vehicles Available

| | Manchester, NH | Manchester, NH | Manchester, NH |
|--------------------------------------|----------------|----------------|----------------|
| Total | 222,808 | 537,408 | 1,445,255 |
| None | 7.6% | 7.5% | 13.9% |
| 1 | 31.6% | 31.1% | 36.6% |
| 2 | 43.9% | 44.2% | 36.6% |
| 3 | 12.3% | 12.6% | 9.5% |
| 4 | 3.3% | 3.4% | 2.4% |
| 5+ | 1.3% | 1.3% | 0.9% |
| Average Number of Vehicles Available | 1.8 | 1.8 | 1.5 |

Source: ESRI forecasts for 2009; U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile Manchester, NH

Site Type: Drive Tim
Latitude: 42.99118
Longitude: -71.46309

Manchester, NH

Manchester, NH

Manchester, NH

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes



2000 Households by Type

| | Manchester, NH | Manchester, NH | Manchester, NH |
|----------------------------------|----------------|----------------|----------------|
| Total | 222,790 | 537,423 | 1,445,249 |
| Family Households | 68.9% | 70.5% | 62.9% |
| Married-couple Family | 54.4% | 55.9% | 48.0% |
| With Related Children | 27.9% | 28.5% | 23.2% |
| Other Family (No Spouse) | 14.5% | 14.7% | 14.9% |
| With Related Children | 9.7% | 9.4% | 8.9% |
| Nonfamily Households | 31.1% | 29.5% | 37.1% |
| Householder Living Alone | 24.2% | 23.3% | 28.2% |
| Householder Not Living Alone | 6.9% | 6.2% | 8.9% |
| Households with Related Children | 37.7% | 37.9% | 32.1% |
| Households with Persons 65+ | 19.4% | 20.9% | 22.4% |

2000 Households by Size

| | Manchester, NH | Manchester, NH | Manchester, NH |
|---------------------|----------------|----------------|----------------|
| Total | 222,790 | 537,423 | 1,445,249 |
| 1 Person Household | 24.2% | 23.3% | 28.2% |
| 2 Person Household | 31.9% | 31.5% | 31.8% |
| 3 Person Household | 17.3% | 17.5% | 16.3% |
| 4 Person Household | 16.6% | 17.0% | 14.4% |
| 5 Person Household | 6.9% | 7.3% | 6.2% |
| 6 Person Household | 2.1% | 2.3% | 2.1% |
| 7+ Person Household | 1.0% | 1.1% | 1.1% |

2000 Households by Year Householder Moved In

| | Manchester, NH | Manchester, NH | Manchester, NH |
|----------------------------------|----------------|----------------|----------------|
| Total | 222,808 | 537,408 | 1,445,255 |
| Moved in 1999 to March 2000 | 18.9% | 16.9% | 18.3% |
| Moved in 1995 to 1998 | 31.2% | 29.7% | 29.8% |
| Moved in 1990 to 1994 | 15.3% | 15.8% | 15.3% |
| Moved in 1980 to 1989 | 17.1% | 17.3% | 15.8% |
| Moved in 1970 to 1979 | 8.9% | 9.8% | 9.4% |
| Moved in 1969 or Earlier | 8.6% | 10.5% | 11.5% |
| Median Year Householder Moved In | 1995 | 1994 | 1994 |



2000 Housing Units by Units in Structure

| | Manchester, NH | Manchester, NH | Manchester, NH |
|-------------|----------------|----------------|----------------|
| Total | 229,972 | 559,464 | 1,515,920 |
| 1, Detached | 53.8% | 58.1% | 45.1% |
| 1, Attached | 5.7% | 5.2% | 4.6% |
| 2 | 9.0% | 8.9% | 12.6% |
| 3 or 4 | 7.9% | 7.1% | 12.3% |
| 5 to 9 | 5.7% | 5.0% | 6.5% |
| 10 to 19 | 4.9% | 4.5% | 5.2% |
| 20+ | 9.8% | 8.1% | 11.8% |
| Mobile Home | 3.1% | 3.0% | 1.7% |
| Other | 0.0% | 0.0% | 0.0% |

2000 Housing Units by Year Structure Built

| | Manchester, NH | Manchester, NH | Manchester, NH |
|-----------------------------|----------------|----------------|----------------|
| Total | 229,972 | 559,464 | 1,515,920 |
| 1999 to March 2000 | 1.8% | 1.6% | 1.0% |
| 1995 to 1998 | 4.8% | 5.0% | 3.3% |
| 1990 to 1994 | 5.7% | 5.8% | 3.8% |
| 1980 to 1989 | 21.6% | 18.4% | 12.4% |
| 1970 to 1979 | 18.5% | 16.2% | 12.6% |
| 1969 or Earlier | 47.6% | 53.0% | 66.8% |
| Median Year Structure Built | 1971 | 1968 | 1955 |

Source: U.S. Bureau of the Census, 2000 Census of Population and Housing



Market Profile Manchester, NH

Site Type: Drive Tim
Latitude: 42.99118
Longitude: -71.46309

Manchester, NH

Manchester, NH

Manchester, NH

Drive Time: 30 Minutes

Drive Time: 45 Minutes

Drive Time: 60 Minutes

[Top 3 Tapestry Segments](#)

| | | | |
|----|-----------------------|-----------------------|------------------|
| 1. | Sophisticated Squires | Sophisticated Squires | City Lights |
| 2. | Main Street, USA | Main Street, USA | Main Street, USA |
| 3. | Suburban Splendor | Pleasant-Ville | Pleasant-Ville |



2009 Consumer Spending shows the amount spent on a variety of goods and services by households that reside in the market area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue.

| | | | |
|--|------------------------|-------------------------|-------------------------|
| Apparel & Services: Total \$ | \$504,830,811 | \$1,295,049,733 | \$3,620,332,002 |
| Average Spent | \$2,130.88 | \$2,276.01 | \$2,409.08 |
| Spending Potential Index | 85 | 91 | 96 |
| Computers & Accessories: Total \$ | \$65,458,844 | \$167,293,831 | \$463,301,988 |
| Average Spent | \$276.30 | \$294.01 | \$308.30 |
| Spending Potential Index | 121 | 129 | 135 |
| Education: Total \$ | \$379,876,751 | \$990,080,764 | \$2,755,519,477 |
| Average Spent | \$1,603.45 | \$1,740.03 | \$1,833.61 |
| Spending Potential Index | 128 | 139 | 146 |
| Entertainment/Recreation: Total \$ | \$915,991,750 | \$2,358,537,011 | \$6,426,313,285 |
| Average Spent | \$3,866.38 | \$4,145.05 | \$4,276.26 |
| Spending Potential Index | 119 | 128 | 132 |
| Food at Home: Total \$ | \$1,270,327,341 | \$3,251,742,850 | \$9,025,185,884 |
| Average Spent | \$5,362.02 | \$5,714.83 | \$6,005.63 |
| Spending Potential Index | 118 | 125 | 132 |
| Food Away from Home: Total \$ | \$943,051,539 | \$2,406,518,611 | \$6,659,046,954 |
| Average Spent | \$3,980.60 | \$4,229.38 | \$4,431.13 |
| Spending Potential Index | 120 | 127 | 133 |
| Health Care: Total \$ | \$1,009,791,024 | \$2,599,365,933 | \$7,005,540,234 |
| Average Spent | \$4,262.30 | \$4,568.30 | \$4,661.70 |
| Spending Potential Index | 113 | 121 | 124 |
| Household Furnishings & Equip: Total \$ | \$550,312,777 | \$1,414,232,277 | \$3,823,785,627 |
| Average Spent | \$2,322.86 | \$2,485.47 | \$2,544.46 |
| Spending Potential Index | 107 | 114 | 117 |
| Investments: Total \$ | \$397,977,609 | \$1,081,236,030 | \$2,980,982,313 |
| Average Spent | \$1,679.85 | \$1,900.24 | \$1,983.64 |
| Spending Potential Index | 117 | 132 | 138 |
| Retail Goods: Total \$ | \$6,863,553,633 | \$17,613,326,071 | \$47,899,790,042 |
| Average Spent | \$28,970.90 | \$30,954.82 | \$31,873.97 |
| Spending Potential Index | 113 | 120 | 124 |
| Shelter: Total \$ | \$4,586,429,500 | \$11,890,647,559 | \$33,259,105,887 |
| Average Spent | \$19,359.21 | \$20,897.41 | \$22,131.62 |
| Spending Potential Index | 124 | 134 | 142 |
| TV/Video/Sound Equipment: Total \$ | \$338,127,572 | \$860,926,299 | \$2,377,379,926 |
| Average Spent | \$1,427.23 | \$1,513.05 | \$1,581.98 |
| Spending Potential Index | 117 | 125 | 130 |
| Travel: Total \$ | \$538,722,678 | \$1,409,633,447 | \$3,848,245,419 |
| Average Spent | \$2,273.94 | \$2,477.38 | \$2,560.74 |
| Spending Potential Index | 123 | 134 | 139 |
| Vehicle Maintenance & Repairs: Total \$ | \$261,389,617 | \$670,801,811 | \$1,834,837,554 |
| Average Spent | \$1,103.32 | \$1,178.91 | \$1,220.96 |
| Spending Potential Index | 118 | 126 | 130 |

Data Note: The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2005 and 2006 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI

C. Case Studies Review

 CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE
Economic Analysis of Potential Renovation Options

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Case Studies Review

Overview

| Facility | Location | Hockey Capacity | Year Built | Year(s) Renovated | Renovation Costs | Hockey Tenant |
|------------------------------------|----------------|-----------------|------------|-------------------|------------------|-------------------------|
| Allen County War Memorial Coliseum | Fort Wayne, IN | 10,000 | 1952 | 2001 | \$32,000,000 | Fort Wayne Komets (IHL) |
| Dunkin' Donuts Center | Providence, RI | 11,000 | 1972 | 2005 - 2008 | \$62,000,000 | Providence Bruins (AHL) |
| Peoria Civic Center | Peoria, IL | 9,000 | 1982 | 2007 | \$55,000,000 | Peoria Rivermen (AHL) |

Sources: Facility websites, periodicals, and interviews with building managers

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options Case Studies Review

Allen County War Memorial Coliseum

General Information

| | | | |
|--------------------|--|-------------------|----------------------|
| Location: | Fort Wayne, IN | Maximum Capacity: | 13,000 |
| Year Built: | 1952 | Hockey Capacity: | 10,000 |
| Year(s) Renovated: | 2001 | Loge Box Seats: | 0 |
| Renovation Costs: | \$32,000,000 | Club Seats: | 322 |
| Funding: | NA | Price: | \$600 |
| Owner: | Allen County, IN | Term: | 5 Years |
| Operator: | Allen County, IN | Luxury Suites: | 24 |
| Tenant(s): | Fort Wayne Komets (IHL) | Seats per Suite: | 16 to 26 |
| | Indiana University-Purdue University Fort Wayne (NCAA) | Price: | \$24,000 to \$34,000 |
| | Fort Wayne Firehawks (CIFL) | Term: | 3 to 10 Years |
| | Fort Wayne Mad Ants (NBADL) | Naming Rights: | None |
| Uses: | Sporting events, concerts, family shows, conferences, meetings, touring shows, etc. | Annual Proceeds: | - |
| | | Term: | - |

Summary of Renovations and Economic Impacts

The Allen County War Memorial Coliseum renovation project was completed in 2001 at a cost of \$32,000,000. The project required the roof to be raised to allow for the addition of 24 luxury suites, 322 club seats, and an increase in seating capacity from 7,500 to 10,000. The renovations also included accessibility enhancements throughout the concourse and seating areas; sound system upgrades and installation of new dasher boards; addition and expansion of concession stands; and building mechanical/electrical/plumbing systems upgrades. The renovations created potential new revenue opportunities for the building, through concession stand revenues, and premium seating revenues. Building management indicated that the additional seating capacity allowed the building to host larger concerts. The increase in events led to the development of a 151-room hotel nearby.

Facility Images



Sources: Facility websites, periodicals, and interviews with building managers

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options Case Studies Review

Dunkin' Donuts Center

General Information

| | | | |
|--------------------|--|-------------------|----------------|
| Location: | Downtown Providence, RI | Maximum Capacity: | 13,000 |
| Year Built: | 1972 | Hockey Capacity: | 11,000 |
| Year(s) Renovated: | 2005-2008 | Loge Box Seats: | 0 |
| Renovation Costs: | \$60,000,000 | Club Seats: | 0 |
| Funding: | State Bonds | Luxury Suites: | 20 |
| Owner: | State of Rhode Island | Seats per Suite: | 15 |
| Operator: | SMG | Price: | \$50,000 |
| Tenant(s): | Providence Bruins (AHL) Providence College Friars (NCAA) | Term: | 3 Years |
| Uses: | Sporting events, concerts, dirt shows, family shows, touring shows, etc. | Naming Rights: | Dunkin' Donuts |
| | | Annual Proceeds: | \$700,000 |
| | | Term: | 10 Years |

Summary of Renovations and Economic Impacts

The State of Rhode Island purchased the arena from the City of Providence in 2005 for \$20,000,000 and began a 3-year, \$60,000,000 renovation project. The stated goal of the renovation was to enhance event schedule, patron experience, and quality of life in Providence. The renovation plan included the construction of an ADA accessible entrance; new luxury suites (20) and two open party suites; replacement of seats; new scoreboard and signage; upgrades of the food service kitchens, the restaurant, and the bar; relocation of the box office; addition and expansion of concession stands, and restrooms; upgrade of tenant locker rooms and dressing rooms; expansion of lobby and concourses; new pedestrian bridge to the convention center; and mechanical/electrical/plumbing/fire/life safety systems upgrades. The renovations created potential new revenue opportunities for the building, through concession stand revenues, restaurant and bar revenues, and suite rentals. The renovations allowed for better synergies between the area and the convention center. The arena now has the ability host NCAA Division I tournaments, as it meets NCAA venue requirements. In anticipation of the renovations, the inventory of hotel rooms in Providence increased by approximately 30%.

Facility Images



Sources: Facility websites, periodicals, and interviews with building managers

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options Case Studies Review

Peoria Civic Center

General Information

| | | | |
|--------------------|--|-------------------|--------|
| Location: | Downtown Peoria, IL | Maximum Capacity: | 10,400 |
| Year Built: | 1982 | Hockey Capacity: | 9,000 |
| Year(s) Renovated: | 2007 | Loge Box Seats: | None |
| Renovation Costs: | \$55,000,000 | Club Seats: | None |
| Funding: | NA | Luxury Suites: | None |
| Owner: | City of Peoria, IL / Peoria Civic Center Authority | Seats per Suite: | - |
| Operator: | SMG | Price: | - |
| Tenant(s): | Peoria Rivermen (AHL) Bradley University (NCAA) | Term: | - |
| Uses: | Sporting events, concerts, family shows, conferences, touring shows, etc. | Naming Rights: | None |
| | | Annual Proceeds: | - |
| | | Term: | - |

Summary of Renovations and Economic Impacts


The renovation of the Peoria Civic Center focused on the exhibit hall and arena and included the expansion of the exhibit hall, ballroom, and prefunction space. The arena renovations included new concession stands and food court; upgraded and expanded administrative offices, ticket booths, and box office; upgraded and expanded restrooms; and the expansion of the cover loading docks (12). The Civic Center continued to operate during the renovations. The renovations created potential new revenue opportunities for the building, through concession stand and food court revenues. To compliment the renovations, a \$102,000,000 private development project was proposed but not started due to lack of support. The project would have included a new 200-room hotel, parking garage, retail space, and a walkway to the Civic Center.

Facility Images



Sources: Facility websites, periodicals, and interviews with building managers

D. Financial Models

 CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE
Economic Analysis of Potential Renovation Options

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario A

Project Economics Worksheet

Revenues

| | | |
|-----------------------|-----------|------------------|
| Event Income | \$ | 521,000 |
| Concessions Income | \$ | 1,088,000 |
| Hospitality Income | \$ | 189,000 |
| Merchandise Income | \$ | 19,000 |
| Advertising Income | \$ | 258,000 |
| Naming Rights | \$ | 200,000 |
| Other Income | \$ | - |
| Loge Box Seats | \$ | - |
| Club Seats | \$ | - |
| Premium Seating F&B | \$ | - |
| Total Revenues | \$ | 2,275,000 |

Expenses

| | | |
|--------------------------|-----------|------------------|
| Salaries & Benefits | \$ | 674,000 |
| Utilities | \$ | 512,000 |
| Repairs & Maintenance | \$ | 109,000 |
| Materials & Supplies | \$ | 32,000 |
| Insurance | \$ | 102,000 |
| Advertising | \$ | 68,000 |
| General & Administrative | \$ | 61,000 |
| Contract Services | \$ | 57,000 |
| Other | \$ | 38,000 |
| Total Expenses | \$ | 1,653,000 |

| | | |
|-----------------------------|-----------|----------------|
| Net Operating Income | \$ | 622,000 |
|-----------------------------|-----------|----------------|

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario A

Civic Center Operating Pro Forma

| | 2008 - 2009 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-----------------------------|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 1 Revenues* | <i>Budgeted</i> | | | | | | | | | | |
| 2 Event Income | \$ 447,000 | \$ 521,000 | \$ 535,000 | \$ 552,000 | \$ 568,000 | \$ 586,000 | \$ 603,000 | \$ 621,000 | \$ 639,000 | \$ 659,000 | \$ 678,000 |
| 3 Concessions Income | \$ 750,000 | \$ 1,088,000 | \$ 1,120,000 | \$ 1,154,000 | \$ 1,188,000 | \$ 1,224,000 | \$ 1,261,000 | \$ 1,299,000 | \$ 1,338,000 | \$ 1,377,000 | \$ 1,419,000 |
| 4 Hospitality Income | \$ - | \$ 189,000 | \$ 195,000 | \$ 201,000 | \$ 207,000 | \$ 213,000 | \$ 219,000 | \$ 226,000 | \$ 232,000 | \$ 240,000 | \$ 247,000 |
| 5 Merchandise Income | \$ - | \$ 19,000 | \$ 19,000 | \$ 20,000 | \$ 20,000 | \$ 21,000 | \$ 22,000 | \$ 22,000 | \$ 23,000 | \$ 24,000 | \$ 24,000 |
| 6 Advertising Income | \$ 177,100 | \$ 258,000 | \$ 265,000 | \$ 273,000 | \$ 281,000 | \$ 290,000 | \$ 299,000 | \$ 307,000 | \$ 317,000 | \$ 326,000 | \$ 336,000 |
| 7 Naming Rights | \$ - | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 |
| 8 Other Income | \$ 69,663 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 9 Loge Box Seats | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 10 Club Seats | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 11 Premium Seating F&B | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 12 Total Revenues* | \$ 1,444,000 | \$ 2,275,000 | \$ 2,334,000 | \$ 2,400,000 | \$ 2,464,000 | \$ 2,534,000 | \$ 2,604,000 | \$ 2,675,000 | \$ 2,749,000 | \$ 2,826,000 | \$ 2,904,000 |
| 13 Expenses | | | | | | | | | | | |
| 14 Salaries & Benefits | \$ 595,000 | \$ 674,000 | \$ 694,000 | \$ 715,000 | \$ 737,000 | \$ 759,000 | \$ 782,000 | \$ 805,000 | \$ 829,000 | \$ 854,000 | \$ 880,000 |
| 15 Utilities | \$ 432,000 | \$ 512,000 | \$ 527,000 | \$ 543,000 | \$ 559,000 | \$ 576,000 | \$ 593,000 | \$ 611,000 | \$ 629,000 | \$ 648,000 | \$ 668,000 |
| 16 Repairs & Maintenance | \$ 96,000 | \$ 109,000 | \$ 112,000 | \$ 115,000 | \$ 119,000 | \$ 122,000 | \$ 126,000 | \$ 130,000 | \$ 134,000 | \$ 138,000 | \$ 142,000 |
| 17 Materials & Supplies | \$ 28,000 | \$ 32,000 | \$ 33,000 | \$ 34,000 | \$ 35,000 | \$ 36,000 | \$ 37,000 | \$ 38,000 | \$ 39,000 | \$ 40,000 | \$ 41,000 |
| 18 Insurance | \$ 90,000 | \$ 102,000 | \$ 105,000 | \$ 108,000 | \$ 111,000 | \$ 115,000 | \$ 118,000 | \$ 122,000 | \$ 125,000 | \$ 129,000 | \$ 133,000 |
| 19 Advertising | \$ 60,000 | \$ 68,000 | \$ 70,000 | \$ 72,000 | \$ 74,000 | \$ 77,000 | \$ 79,000 | \$ 81,000 | \$ 84,000 | \$ 86,000 | \$ 89,000 |
| 20 General & Administrative | \$ 54,000 | \$ 61,000 | \$ 63,000 | \$ 65,000 | \$ 67,000 | \$ 69,000 | \$ 71,000 | \$ 73,000 | \$ 75,000 | \$ 78,000 | \$ 80,000 |
| 21 Contract Services | \$ 53,000 | \$ 57,000 | \$ 59,000 | \$ 61,000 | \$ 63,000 | \$ 65,000 | \$ 66,000 | \$ 68,000 | \$ 70,000 | \$ 73,000 | \$ 75,000 |
| 22 Other | \$ 35,000 | \$ 38,000 | \$ 39,000 | \$ 40,000 | \$ 41,000 | \$ 43,000 | \$ 44,000 | \$ 45,000 | \$ 47,000 | \$ 48,000 | \$ 49,000 |
| 23 Total Expenses | \$ 1,443,000 | \$ 1,653,000 | \$ 1,702,000 | \$ 1,753,000 | \$ 1,806,000 | \$ 1,862,000 | \$ 1,916,000 | \$ 1,973,000 | \$ 2,032,000 | \$ 2,094,000 | \$ 2,157,000 |
| 24 Net Operating Income | \$ 1,000 | \$ 622,000 | \$ 632,000 | \$ 647,000 | \$ 658,000 | \$ 672,000 | \$ 688,000 | \$ 702,000 | \$ 717,000 | \$ 732,000 | \$ 747,000 |

*Does not include or make assumptions regarding the potential split of net new revenues with the hockey tenant

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario A

Revenue Assumptions

PROGRAM ASSUMPTIONS

| | |
|--|-------|
| Fixed Seating Capacity (Hockey Configuration) | 6,700 |
| Year Renovated | 2011 |

FIXED REVENUES

| | |
|-------------------------------|-------------|
| Advertising | \$250,000 |
| Naming Rights | \$2,000,000 |
| Term | 10 |
| Annual Naming Rights Proceeds | \$200,000 |

Loge Box Seats

| | |
|--|---------|
| Inventory | 0 |
| Loge Boxes | 0 |
| Annual Lease Rate | \$2,500 |
| Renewal Period (Yrs) | 1 |
| Renewal Rate Increase | 3% |
| Loge Box Expenses as % of Gross Revenues | 15.0% |
| Loge Box Per Cap | \$20.00 |
| Occupancy | 90% |
| Actual Attendance | 0 |

Club Seats

| | |
|--------------------------------------|---------|
| Club Seats | 0 |
| Inventory | 0 |
| Annual Rate (Yrs) | \$1,500 |
| Renewal Period (Yrs) | 1 |
| Renewal Rate Increase | 3% |
| Seat Expenses as % of Gross Revenues | 10.0% |
| Club Seat Per Cap | \$12 |
| Occupancy | 90% |
| Actual Attendance | 0 |

EVENT TYPE

| EVENT TYPE | Avg. Income | Attendance Factor | Avg. Attendance | # of Events / Performances | Concessions Per Cap | Merchandise Per Cap |
|------------------------|-------------|-------------------|-----------------|----------------------------|---------------------|---------------------|
| Ice Shows | \$3,500 | 12.5% | 4,500 | 13 | \$6.30 | \$0.25 |
| Rock Concerts | \$5,200 | 12.5% | 5,625 | 16 | \$6.00 | \$1.00 |
| Non-Rock Concerts | \$6,200 | 12.5% | 5,625 | 4 | \$6.00 | \$0.25 |
| Pirates Hockey | \$2,500 | 0.0% | 4,700 | 40 | \$5.70 | \$1.00 |
| Tradeshows/Conventions | \$2,000 | 12.5% | 1,406 | 24 | \$4.80 | \$0.00 |
| High School/College | \$2,600 | 12.5% | 1,125 | 21 | \$3.90 | \$0.00 |
| Family Events | \$2,500 | 12.5% | 3,375 | 20 | \$6.30 | \$0.25 |
| Wrestling/Other | \$1,000 | 12.5% | 2,250 | 9 | \$4.80 | \$0.25 |
| | | | Tenant Events | 40 | | |
| | | | Total Events | 147 | | |

REVENUE SHARING

| | |
|---|------|
| Building % of Gross Concession Revenues | 100% |
| Tenant % of Gross Concessions | 0% |
| Building % of Gross of Concert Merch. Revs. | 20% |
| Building % of Gross of Other Merch. Revs. | 0% |
| Tenant % of Gross Merchandise | 100% |
| Tenant % of Gross Gate Receipts | |
| Building % of Gross Gate Receipts | |
| Building % of Advertising | 100% |
| Building % of Naming Rights | 100% |
| Building % of Loge Box Seat Revenues | 100% |
| Building % of Club Seats Revenues | 100% |
| Concession Costs | 60% |
| Merchandise / Hospitality Costs | 75% |

OTHER REVENUES

| | |
|----------------------|----------|
| Annual Ice Rentals | \$55,000 |
| Other | \$35,000 |
| Revenue Inflator | 3.0% |
| Hospitality Per Cap | \$20.00 |
| Hospitality Capacity | 250 |
| Rental Capacity | 400 |

NO SHOW FACTORS

| | |
|----------------------------|-----|
| Hockey No Show Factor | 15% |
| Other Event No Show Factor | 5% |

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario A

Expense Assumptions

COSTS PER YEAR

| PERSONNEL | | Improvement Factor |
|--------------------------|----------------|--------------------|
| Salaries & Benefits | \$654,500 / YR | 10% |
| NON-PERSONNEL | | |
| Utilities | \$496,800 / YR | 15% |
| Repairs & Maintenance | \$105,600 / YR | 10% |
| Materials & Supplies | \$30,800 / YR | 10% |
| Insurance | \$99,000 / YR | 10% |
| Advertising | \$66,000 / YR | 10% |
| General & Administrative | \$59,400 / YR | 10% |
| Contract Services | \$55,650 / YR | 5% |
| Other | \$36,750 / YR | 5% |
| Expense Inflator | 3.0% | |

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario A

Operating Costs

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|--------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Operating Costs | | | | | | | | | | |
| Civic Center | | | | | | | | | | |
| Salaries & Benefits | \$ 674,000 | \$ 694,000 | \$ 715,000 | \$ 737,000 | \$ 759,000 | \$ 782,000 | \$ 805,000 | \$ 829,000 | \$ 854,000 | \$ 880,000 |
| Utilities | \$ 512,000 | \$ 527,000 | \$ 543,000 | \$ 559,000 | \$ 576,000 | \$ 593,000 | \$ 611,000 | \$ 629,000 | \$ 648,000 | \$ 668,000 |
| Repairs & Maintenance | \$ 109,000 | \$ 112,000 | \$ 115,000 | \$ 119,000 | \$ 122,000 | \$ 126,000 | \$ 130,000 | \$ 134,000 | \$ 138,000 | \$ 142,000 |
| Materials & Supplies | \$ 32,000 | \$ 33,000 | \$ 34,000 | \$ 35,000 | \$ 36,000 | \$ 37,000 | \$ 38,000 | \$ 39,000 | \$ 40,000 | \$ 41,000 |
| Insurance | \$ 102,000 | \$ 105,000 | \$ 108,000 | \$ 111,000 | \$ 115,000 | \$ 118,000 | \$ 122,000 | \$ 125,000 | \$ 129,000 | \$ 133,000 |
| Advertising | \$ 68,000 | \$ 70,000 | \$ 72,000 | \$ 74,000 | \$ 77,000 | \$ 79,000 | \$ 81,000 | \$ 84,000 | \$ 86,000 | \$ 89,000 |
| General & Administrative | \$ 61,000 | \$ 63,000 | \$ 65,000 | \$ 67,000 | \$ 69,000 | \$ 71,000 | \$ 73,000 | \$ 75,000 | \$ 78,000 | \$ 80,000 |
| Contract Services | \$ 57,000 | \$ 59,000 | \$ 61,000 | \$ 63,000 | \$ 65,000 | \$ 66,000 | \$ 68,000 | \$ 70,000 | \$ 73,000 | \$ 75,000 |
| Other | \$ 38,000 | \$ 39,000 | \$ 40,000 | \$ 41,000 | \$ 43,000 | \$ 44,000 | \$ 45,000 | \$ 47,000 | \$ 48,000 | \$ 49,000 |
| TOTAL | \$ 1,653,000 | \$ 1,702,000 | \$ 1,753,000 | \$ 1,806,000 | \$ 1,862,000 | \$ 1,916,000 | \$ 1,973,000 | \$ 2,032,000 | \$ 2,094,000 | \$ 2,157,000 |

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario B

Project Economics Worksheet

Revenues

| | | |
|-----------------------|-----------|------------------|
| Event Income | \$ | 543,000 |
| Concessions Income | \$ | 1,145,000 |
| Hospitality Income | \$ | 196,000 |
| Merchandise Income | \$ | 23,000 |
| Advertising Income | \$ | 258,000 |
| Naming Rights | \$ | 200,000 |
| Other Income | \$ | - |
| Loge Box Seats | \$ | 239,000 |
| Club Seats | \$ | 607,000 |
| Premium Seating F&B | \$ | 106,000 |
| Total Revenues | \$ | 3,317,000 |

Expenses

| | | |
|--------------------------|-----------|------------------|
| Salaries & Benefits | \$ | 735,000 |
| Utilities | \$ | 534,000 |
| Repairs & Maintenance | \$ | 114,000 |
| Materials & Supplies | \$ | 33,000 |
| Insurance | \$ | 111,000 |
| Advertising | \$ | 68,000 |
| General & Administrative | \$ | 61,000 |
| Contract Services | \$ | 63,000 |
| Other | \$ | 41,000 |
| Total Expenses | \$ | 1,760,000 |

| | | |
|-----------------------------|-----------|------------------|
| Net Operating Income | \$ | 1,557,000 |
|-----------------------------|-----------|------------------|

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario B

Civic Center Operating Pro Forma

| | 2008 - 2009 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-----------------------------|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 1 Revenues* | <i>Budgeted</i> | | | | | | | | | | |
| 2 Event Income | \$ 447,000 | \$ 543,000 | \$ 558,000 | \$ 576,000 | \$ 592,000 | \$ 613,000 | \$ 629,000 | \$ 648,000 | \$ 668,000 | \$ 687,000 | \$ 707,000 |
| 3 Concessions Income | \$ 750,000 | \$ 1,145,000 | \$ 1,179,000 | \$ 1,214,000 | \$ 1,251,000 | \$ 1,288,000 | \$ 1,328,000 | \$ 1,367,000 | \$ 1,408,000 | \$ 1,450,000 | \$ 1,494,000 |
| 4 Hospitality Income | \$ - | \$ 196,000 | \$ 201,000 | \$ 208,000 | \$ 214,000 | \$ 220,000 | \$ 227,000 | \$ 234,000 | \$ 240,000 | \$ 248,000 | \$ 255,000 |
| 5 Merchandise Income | \$ - | \$ 23,000 | \$ 24,000 | \$ 25,000 | \$ 25,000 | \$ 26,000 | \$ 27,000 | \$ 28,000 | \$ 28,000 | \$ 29,000 | \$ 30,000 |
| 6 Advertising Income | \$ 177,100 | \$ 258,000 | \$ 265,000 | \$ 273,000 | \$ 281,000 | \$ 290,000 | \$ 299,000 | \$ 307,000 | \$ 317,000 | \$ 326,000 | \$ 336,000 |
| 7 Naming Rights | \$ - | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 |
| 8 Other Income | \$ 69,663 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 9 Loge Box Seats | \$ - | \$ 239,000 | \$ 248,000 | \$ 248,000 | \$ 257,000 | \$ 266,000 | \$ 275,000 | \$ 285,000 | \$ 294,000 | \$ 303,000 | \$ 312,000 |
| 10 Club Seats | \$ - | \$ 607,000 | \$ 648,000 | \$ 648,000 | \$ 688,000 | \$ 688,000 | \$ 729,000 | \$ 729,000 | \$ 769,000 | \$ 810,000 | \$ 810,000 |
| 11 Premium Seating F&B | \$ - | \$ 106,000 | \$ 109,000 | \$ 112,000 | \$ 116,000 | \$ 119,000 | \$ 123,000 | \$ 126,000 | \$ 130,000 | \$ 134,000 | \$ 138,000 |
| 12 Total Revenues* | \$ 1,444,000 | \$ 3,317,000 | \$ 3,432,000 | \$ 3,504,000 | \$ 3,624,000 | \$ 3,710,000 | \$ 3,837,000 | \$ 3,924,000 | \$ 4,054,000 | \$ 4,187,000 | \$ 4,282,000 |
| 13 Expenses | | | | | | | | | | | |
| 14 Salaries & Benefits | \$ 595,000 | \$ 735,000 | \$ 757,000 | \$ 780,000 | \$ 804,000 | \$ 828,000 | \$ 853,000 | \$ 878,000 | \$ 904,000 | \$ 932,000 | \$ 960,000 |
| 15 Utilities | \$ 432,000 | \$ 534,000 | \$ 550,000 | \$ 566,000 | \$ 583,000 | \$ 601,000 | \$ 619,000 | \$ 638,000 | \$ 657,000 | \$ 676,000 | \$ 697,000 |
| 16 Repairs & Maintenance | \$ 96,000 | \$ 114,000 | \$ 117,000 | \$ 121,000 | \$ 124,000 | \$ 128,000 | \$ 132,000 | \$ 136,000 | \$ 140,000 | \$ 144,000 | \$ 148,000 |
| 17 Materials & Supplies | \$ 28,000 | \$ 33,000 | \$ 34,000 | \$ 35,000 | \$ 36,000 | \$ 37,000 | \$ 38,000 | \$ 40,000 | \$ 41,000 | \$ 42,000 | \$ 43,000 |
| 18 Insurance | \$ 90,000 | \$ 111,000 | \$ 115,000 | \$ 118,000 | \$ 122,000 | \$ 125,000 | \$ 129,000 | \$ 133,000 | \$ 137,000 | \$ 141,000 | \$ 145,000 |
| 19 Advertising | \$ 60,000 | \$ 68,000 | \$ 70,000 | \$ 72,000 | \$ 74,000 | \$ 77,000 | \$ 79,000 | \$ 81,000 | \$ 84,000 | \$ 86,000 | \$ 89,000 |
| 20 General & Administrative | \$ 54,000 | \$ 61,000 | \$ 63,000 | \$ 65,000 | \$ 67,000 | \$ 69,000 | \$ 71,000 | \$ 73,000 | \$ 75,000 | \$ 78,000 | \$ 80,000 |
| 21 Contract Services | \$ 53,000 | \$ 63,000 | \$ 65,000 | \$ 67,000 | \$ 69,000 | \$ 71,000 | \$ 73,000 | \$ 75,000 | \$ 77,000 | \$ 80,000 | \$ 82,000 |
| 22 Other | \$ 35,000 | \$ 41,000 | \$ 43,000 | \$ 44,000 | \$ 45,000 | \$ 47,000 | \$ 48,000 | \$ 50,000 | \$ 51,000 | \$ 53,000 | \$ 54,000 |
| 23 Total Expenses | \$ 1,443,000 | \$ 1,760,000 | \$ 1,814,000 | \$ 1,868,000 | \$ 1,924,000 | \$ 1,983,000 | \$ 2,042,000 | \$ 2,104,000 | \$ 2,166,000 | \$ 2,232,000 | \$ 2,298,000 |
| 24 Net Operating Income | \$ 1,000 | \$ 1,557,000 | \$ 1,618,000 | \$ 1,636,000 | \$ 1,700,000 | \$ 1,727,000 | \$ 1,795,000 | \$ 1,820,000 | \$ 1,888,000 | \$ 1,955,000 | \$ 1,984,000 |

*Does not include or make assumptions regarding the potential split of net new revenues with the hockey tenant

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario B

Revenue Assumptions

PROGRAM ASSUMPTIONS

| | |
|--|-------|
| Fixed Seating Capacity (Hockey Configuration) | 6,700 |
| Year Renovated | 2011 |

FIXED REVENUES

| | |
|-------------------------------|-------------|
| Advertising | \$250,000 |
| Naming Rights | \$2,000,000 |
| Term | 10 |
| Annual Naming Rights Proceeds | \$200,000 |

Loge Box Seats

| | |
|--|---------|
| Inventory | 120 |
| Loge Boxes | 30 |
| Annual Lease Rate | \$2,500 |
| Renewal Period (Yrs) | 1 |
| Renewal Rate Increase | 3% |
| Loge Box Expenses as % of Gross Revenues | 15.0% |
| Loge Box Per Cap | \$20.00 |
| Occupancy | 90% |
| Actual Attendance | 92 |

Club Seats

| | |
|--------------------------------------|---------|
| Club Seats | 500 |
| Inventory | 500 |
| Annual Rate (Yrs) | \$1,500 |
| Renewal Period (Yrs) | 1 |
| Renewal Rate Increase | 3% |
| Seat Expenses as % of Gross Revenues | 10.0% |
| Club Seat Per Cap | \$12 |
| Occupancy | 90% |
| Actual Attendance | 383 |

EVENT TYPE

| EVENT TYPE | Avg. Income | Attendance Factor | Avg. Attendance | # of Events / Performances | Concessions Per Cap | Merchandise Per Cap |
|------------------------|-------------|-------------------|-----------------|----------------------------|---------------------|---------------------|
| Ice Shows | \$3,500 | 12.5% | 4,500 | 13 | \$6.30 | \$0.25 |
| Rock Concerts | \$5,200 | 12.5% | 5,625 | 20 | \$6.00 | \$1.00 |
| Non-Rock Concerts | \$6,200 | 12.5% | 5,625 | 4 | \$6.00 | \$0.25 |
| Pirates Hockey | \$2,500 | 0.0% | 4,700 | 40 | \$5.70 | \$1.00 |
| Tradeshows/Conventions | \$2,000 | 12.5% | 1,406 | 24 | \$4.80 | \$0.00 |
| High School/College | \$2,600 | 12.5% | 1,125 | 21 | \$3.90 | \$0.00 |
| Family Events | \$2,500 | 12.5% | 3,375 | 20 | \$6.30 | \$0.25 |
| Wrestling/Other | \$1,000 | 12.5% | 2,250 | 10 | \$4.80 | \$0.25 |
| | | | Tenant Events | 40 | | |
| | | | Total Events | 152 | | |

REVENUE SHARING

| | |
|---|------|
| Building % of Gross Concession Revenues | 100% |
| Tenant % of Gross Concessions | 0% |
| Building % of Gross of Concert Merch. Revs. | 20% |
| Building % of Gross of Other Merch. Revs. | 0% |
| Tenant % of Gross Merchandise | 100% |
| Tenant % of Gross Gate Receipts | |
| Building % of Gross Gate Receipts | |
| Building % of Advertising | 100% |
| Building % of Naming Rights | 100% |
| Building % of Loge Box Seat Revenues | 100% |
| Building % of Club Seats Revenues | 100% |
| Concession Costs | 60% |
| Merchandise / Hospitality Costs | 75% |

OTHER REVENUES

| | |
|----------------------|----------|
| Annual Ice Rentals | \$55,000 |
| Other | \$35,000 |
| Revenue Inflatior | 3.0% |
| Hospitality Per Cap | \$20.00 |
| Hospitality Capacity | 250 |
| Rental Capacity | 400 |

NO SHOW FACTORS

| | |
|----------------------------|-----|
| Hockey No Show Factor | 15% |
| Other Event No Show Factor | 5% |

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario B

Expense Assumptions

COSTS PER YEAR

PERSONNEL

| | | Improvement Factor |
|---------------------|----------------|--------------------|
| Salaries & Benefits | \$714,000 / YR | 20% |

NON-PERSONNEL

| | | |
|--------------------------|----------------|-----|
| Utilities | \$518,400 / YR | 20% |
| Repairs & Maintenance | \$110,400 / YR | 15% |
| Materials & Supplies | \$32,200 / YR | 15% |
| Insurance | \$108,000 / YR | 20% |
| Advertising | \$66,000 / YR | 10% |
| General & Administrative | \$59,400 / YR | 10% |
| Contract Services | \$60,950 / YR | 15% |
| Other | \$40,250 / YR | 15% |

| | |
|-------------------|------|
| Expense Inflation | 3.0% |
|-------------------|------|

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario B

Operating Costs

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|--------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Operating Costs | | | | | | | | | | |
| Civic Center | | | | | | | | | | |
| Salaries & Benefits | \$ 735,000 | \$ 757,000 | \$ 780,000 | \$ 804,000 | \$ 828,000 | \$ 853,000 | \$ 878,000 | \$ 904,000 | \$ 932,000 | \$ 960,000 |
| Utilities | \$ 534,000 | \$ 550,000 | \$ 566,000 | \$ 583,000 | \$ 601,000 | \$ 619,000 | \$ 638,000 | \$ 657,000 | \$ 676,000 | \$ 697,000 |
| Repairs & Maintenance | \$ 114,000 | \$ 117,000 | \$ 121,000 | \$ 124,000 | \$ 128,000 | \$ 132,000 | \$ 136,000 | \$ 140,000 | \$ 144,000 | \$ 148,000 |
| Materials & Supplies | \$ 33,000 | \$ 34,000 | \$ 35,000 | \$ 36,000 | \$ 37,000 | \$ 38,000 | \$ 40,000 | \$ 41,000 | \$ 42,000 | \$ 43,000 |
| Insurance | \$ 111,000 | \$ 115,000 | \$ 118,000 | \$ 122,000 | \$ 125,000 | \$ 129,000 | \$ 133,000 | \$ 137,000 | \$ 141,000 | \$ 145,000 |
| Advertising | \$ 68,000 | \$ 70,000 | \$ 72,000 | \$ 74,000 | \$ 77,000 | \$ 79,000 | \$ 81,000 | \$ 84,000 | \$ 86,000 | \$ 89,000 |
| General & Administrative | \$ 61,000 | \$ 63,000 | \$ 65,000 | \$ 67,000 | \$ 69,000 | \$ 71,000 | \$ 73,000 | \$ 75,000 | \$ 78,000 | \$ 80,000 |
| Contract Services | \$ 63,000 | \$ 65,000 | \$ 67,000 | \$ 69,000 | \$ 71,000 | \$ 73,000 | \$ 75,000 | \$ 77,000 | \$ 80,000 | \$ 82,000 |
| Other | \$ 41,000 | \$ 43,000 | \$ 44,000 | \$ 45,000 | \$ 47,000 | \$ 48,000 | \$ 50,000 | \$ 51,000 | \$ 53,000 | \$ 54,000 |
| TOTAL | \$ 1,760,000 | \$ 1,814,000 | \$ 1,868,000 | \$ 1,924,000 | \$ 1,983,000 | \$ 2,042,000 | \$ 2,104,000 | \$ 2,166,000 | \$ 2,232,000 | \$ 2,298,000 |

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario B

Fixed Revenues

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-----------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Advertising / Sponsorships | | | | | | | | | | |
| Total Building Revenue | \$ 258,000 | \$ 265,000 | \$ 273,000 | \$ 281,000 | \$ 290,000 | \$ 299,000 | \$ 307,000 | \$ 317,000 | \$ 326,000 | \$ 336,000 |
| Less Tenant Capture | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Net Building Revenue | \$ 258,000 | \$ 265,000 | \$ 273,000 | \$ 281,000 | \$ 290,000 | \$ 299,000 | \$ 307,000 | \$ 317,000 | \$ 326,000 | \$ 336,000 |

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-----------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Naming Rights | | | | | | | | | | |
| Total Building Revenue | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 |
| Less Tenant Capture | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Net Building Revenue | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 |

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Loge Box Seats | | | | | | | | | | |
| Lease Rate | \$ 2,600 | \$ 2,700 | \$ 2,700 | \$ 2,800 | \$ 2,900 | \$ 3,000 | \$ 3,100 | \$ 3,200 | \$ 3,300 | \$ 3,400 |
| Total Loge Box Seat Inventory | 108 | | | | | | | | | |
| Total Revenue | \$ 281,000 | \$ 292,000 | \$ 292,000 | \$ 302,000 | \$ 313,000 | \$ 324,000 | \$ 335,000 | \$ 346,000 | \$ 356,000 | \$ 367,000 |
| Less Expenses | \$ 42,000 | \$ 44,000 | \$ 44,000 | \$ 45,000 | \$ 47,000 | \$ 49,000 | \$ 50,000 | \$ 52,000 | \$ 53,000 | \$ 55,000 |
| Less Tenant Share | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Net Building Revenue | \$ 239,000 | \$ 248,000 | \$ 248,000 | \$ 257,000 | \$ 266,000 | \$ 275,000 | \$ 285,000 | \$ 294,000 | \$ 303,000 | \$ 312,000 |

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-----------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Club Seats | | | | | | | | | | |
| Lease Rate | \$ 1,500 | \$ 1,600 | \$ 1,600 | \$ 1,700 | \$ 1,700 | \$ 1,800 | \$ 1,800 | \$ 1,900 | \$ 2,000 | \$ 2,000 |
| Total Club Seat Inventory | 450 | | | | | | | | | |
| Total Revenue | \$ 675,000 | \$ 720,000 | \$ 720,000 | \$ 765,000 | \$ 765,000 | \$ 810,000 | \$ 810,000 | \$ 855,000 | \$ 900,000 | \$ 900,000 |
| Less Expenses | \$ 68,000 | \$ 72,000 | \$ 72,000 | \$ 77,000 | \$ 77,000 | \$ 81,000 | \$ 81,000 | \$ 86,000 | \$ 90,000 | \$ 90,000 |
| Less Tenant Share | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Net Building Revenue | \$ 607,000 | \$ 648,000 | \$ 648,000 | \$ 688,000 | \$ 688,000 | \$ 729,000 | \$ 729,000 | \$ 769,000 | \$ 810,000 | \$ 810,000 |

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario C

Project Economics Worksheet

Revenues

| | | |
|-----------------------|-----------|------------------|
| Event Income | \$ | 557,000 |
| Concessions Income | \$ | 1,211,000 |
| Hospitality Income | \$ | 202,000 |
| Merchandise Income | \$ | 27,000 |
| Advertising Income | \$ | 258,000 |
| Naming Rights | \$ | 200,000 |
| Other Income | \$ | - |
| Loge Box Seats | \$ | 239,000 |
| Club Seats | \$ | 607,000 |
| Premium Seating F&B | \$ | 106,000 |
| Total Revenues | \$ | 3,407,000 |

Expenses

| | | |
|--------------------------|-----------|------------------|
| Salaries & Benefits | \$ | 735,000 |
| Utilities | \$ | 534,000 |
| Repairs & Maintenance | \$ | 114,000 |
| Materials & Supplies | \$ | 33,000 |
| Insurance | \$ | 114,000 |
| Advertising | \$ | 68,000 |
| General & Administrative | \$ | 63,000 |
| Contract Services | \$ | 63,000 |
| Other | \$ | 41,000 |
| Total Expenses | \$ | 1,765,000 |

| | | |
|-----------------------------|-----------|------------------|
| Net Operating Income | \$ | 1,642,000 |
|-----------------------------|-----------|------------------|

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario C

Civic Center Operating Pro Forma

| | <i>2008 - 2009</i> | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-----------------------------|--------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| 1 Revenues* | <i>Budgeted</i> | | | | | | | | | | |
| 2 Event Income | \$ 447,000 | \$ 557,000 | \$ 572,000 | \$ 590,000 | \$ 608,000 | \$ 628,000 | \$ 646,000 | \$ 665,000 | \$ 684,000 | \$ 704,000 | \$ 725,000 |
| 3 Concessions Income | \$ 750,000 | \$ 1,211,000 | \$ 1,246,000 | \$ 1,284,000 | \$ 1,323,000 | \$ 1,362,000 | \$ 1,403,000 | \$ 1,445,000 | \$ 1,489,000 | \$ 1,533,000 | \$ 1,580,000 |
| 4 Hospitality Income | \$ - | \$ 202,000 | \$ 208,000 | \$ 214,000 | \$ 221,000 | \$ 227,000 | \$ 234,000 | \$ 241,000 | \$ 248,000 | \$ 256,000 | \$ 263,000 |
| 5 Merchandise Income | \$ - | \$ 27,000 | \$ 28,000 | \$ 29,000 | \$ 29,000 | \$ 30,000 | \$ 31,000 | \$ 32,000 | \$ 33,000 | \$ 34,000 | \$ 35,000 |
| 6 Advertising Income | \$ 177,100 | \$ 258,000 | \$ 265,000 | \$ 273,000 | \$ 281,000 | \$ 290,000 | \$ 299,000 | \$ 307,000 | \$ 317,000 | \$ 326,000 | \$ 336,000 |
| 7 Naming Rights | \$ - | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 |
| 8 Other Income | \$ 69,663 | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| 9 Loge Box Seats | \$ - | \$ 239,000 | \$ 248,000 | \$ 248,000 | \$ 257,000 | \$ 266,000 | \$ 275,000 | \$ 285,000 | \$ 294,000 | \$ 303,000 | \$ 312,000 |
| 10 Club Seats | \$ - | \$ 607,000 | \$ 648,000 | \$ 648,000 | \$ 688,000 | \$ 688,000 | \$ 729,000 | \$ 729,000 | \$ 769,000 | \$ 810,000 | \$ 810,000 |
| 11 Premium Seating F&B | \$ - | \$ 106,000 | \$ 109,000 | \$ 112,000 | \$ 116,000 | \$ 119,000 | \$ 123,000 | \$ 126,000 | \$ 130,000 | \$ 134,000 | \$ 138,000 |
| 12 Total Revenues* | \$ 1,444,000 | \$ 3,407,000 | \$ 3,524,000 | \$ 3,598,000 | \$ 3,723,000 | \$ 3,810,000 | \$ 3,940,000 | \$ 4,030,000 | \$ 4,164,000 | \$ 4,300,000 | \$ 4,399,000 |
| 13 Expenses | | | | | | | | | | | |
| 14 Salaries & Benefits | \$ 595,000 | \$ 735,000 | \$ 757,000 | \$ 780,000 | \$ 804,000 | \$ 828,000 | \$ 853,000 | \$ 878,000 | \$ 904,000 | \$ 932,000 | \$ 960,000 |
| 15 Utilities | \$ 432,000 | \$ 534,000 | \$ 550,000 | \$ 566,000 | \$ 583,000 | \$ 601,000 | \$ 619,000 | \$ 638,000 | \$ 657,000 | \$ 676,000 | \$ 697,000 |
| 16 Repairs & Maintenance | \$ 96,000 | \$ 114,000 | \$ 117,000 | \$ 121,000 | \$ 124,000 | \$ 128,000 | \$ 132,000 | \$ 136,000 | \$ 140,000 | \$ 144,000 | \$ 148,000 |
| 17 Materials & Supplies | \$ 28,000 | \$ 33,000 | \$ 34,000 | \$ 35,000 | \$ 36,000 | \$ 37,000 | \$ 38,000 | \$ 40,000 | \$ 41,000 | \$ 42,000 | \$ 43,000 |
| 18 Insurance | \$ 90,000 | \$ 114,000 | \$ 117,000 | \$ 120,000 | \$ 124,000 | \$ 128,000 | \$ 132,000 | \$ 136,000 | \$ 140,000 | \$ 144,000 | \$ 148,000 |
| 19 Advertising | \$ 60,000 | \$ 68,000 | \$ 70,000 | \$ 72,000 | \$ 74,000 | \$ 77,000 | \$ 79,000 | \$ 81,000 | \$ 84,000 | \$ 86,000 | \$ 89,000 |
| 20 General & Administrative | \$ 54,000 | \$ 63,000 | \$ 64,000 | \$ 66,000 | \$ 68,000 | \$ 70,000 | \$ 73,000 | \$ 75,000 | \$ 77,000 | \$ 79,000 | \$ 82,000 |
| 21 Contract Services | \$ 53,000 | \$ 63,000 | \$ 65,000 | \$ 67,000 | \$ 69,000 | \$ 71,000 | \$ 73,000 | \$ 75,000 | \$ 77,000 | \$ 80,000 | \$ 82,000 |
| 22 Other | \$ 35,000 | \$ 41,000 | \$ 43,000 | \$ 44,000 | \$ 45,000 | \$ 47,000 | \$ 48,000 | \$ 50,000 | \$ 51,000 | \$ 53,000 | \$ 54,000 |
| 23 Total Expenses | \$ 1,443,000 | \$ 1,765,000 | \$ 1,817,000 | \$ 1,871,000 | \$ 1,927,000 | \$ 1,987,000 | \$ 2,047,000 | \$ 2,109,000 | \$ 2,171,000 | \$ 2,236,000 | \$ 2,303,000 |
| 24 Net Operating Income | \$ 1,000 | \$ 1,642,000 | \$ 1,707,000 | \$ 1,727,000 | \$ 1,796,000 | \$ 1,823,000 | \$ 1,893,000 | \$ 1,921,000 | \$ 1,993,000 | \$ 2,064,000 | \$ 2,096,000 |

**Does not include or make assumptions regarding the potential split of net new revenues with the hockey tenant*

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario C

Revenue Assumptions

PROGRAM ASSUMPTIONS

| | |
|--|-------|
| Fixed Seating Capacity (Hockey Configuration) | 7,700 |
| Year Renovated | 2011 |

FIXED REVENUES

| | |
|-------------------------------|-------------|
| Advertising | \$250,000 |
| Naming Rights | \$2,000,000 |
| Term | 10 |
| Annual Naming Rights Proceeds | \$200,000 |

Loge Box Seats

| | |
|--|---------|
| Inventory | 120 |
| Loge Boxes | 30 |
| Annual Lease Rate | \$2,500 |
| Renewal Period (Yrs) | 1 |
| Renewal Rate Increase | 3% |
| Loge Box Expenses as % of Gross Revenues | 15.0% |
| Loge Box Per Cap | \$20.00 |
| Occupancy | 90% |
| Actual Attendance | 92 |

Club Seats

| | |
|--------------------------------------|---------|
| Club Seats | 500 |
| Inventory | 500 |
| Annual Rate (Yrs) | \$1,500 |
| Renewal Period (Yrs) | 1 |
| Renewal Rate Increase | 3% |
| Seat Expenses as % of Gross Revenues | 10.0% |
| Club Seat Per Cap | \$12 |
| Occupancy | 90% |
| Actual Attendance | 383 |

EVENT TYPE

| EVENT TYPE | Avg. Income | Attendance Factor | Avg. Attendance | # of Events / Performances | Concessions Per Cap | Merchandise Per Cap |
|------------------------|-------------|-------------------|-----------------|----------------------------|---------------------|---------------------|
| Ice Shows | \$3,500 | 12.5% | 4,500 | 13 | \$6.30 | \$0.25 |
| Rock Concerts | \$5,200 | 20.0% | 6,000 | 22 | \$6.00 | \$1.00 |
| Non-Rock Concerts | \$6,200 | 20.0% | 6,000 | 4 | \$6.00 | \$0.25 |
| Pirates Hockey | \$2,500 | 0.0% | 4,700 | 40 | \$5.70 | \$1.00 |
| Tradeshows/Conventions | \$2,000 | 12.5% | 1,406 | 24 | \$4.80 | \$0.00 |
| High School/College | \$2,600 | 12.5% | 1,125 | 21 | \$3.90 | \$0.00 |
| Family Events | \$2,500 | 12.5% | 3,375 | 20 | \$6.30 | \$0.25 |
| Wrestling/Other | \$1,000 | 20.0% | 2,400 | 13 | \$4.80 | \$0.25 |
| | | | Tenant Events | 40 | | |
| | | | Total Events | 157 | | |

REVENUE SHARING

| | |
|---|------|
| Building % of Gross Concession Revenues | 100% |
| Tenant % of Gross Concessions | 0% |
| Building % of Gross of Concert Merch. Revs. | 20% |
| Building % of Gross of Other Merch. Revs. | 0% |
| Tenant % of Gross Merchandise | 100% |
| Tenant % of Gross Gate Receipts | |
| Building % of Gross Gate Receipts | |
| Building % of Advertising | 100% |
| Building % of Naming Rights | 100% |
| Building % of Loge Box Seat Revenues | 100% |
| Building % of Club Seats Revenues | 100% |
| Concession Costs | 60% |
| Merchandise / Hospitality Costs | 75% |

OTHER REVENUES

| | |
|----------------------|----------|
| Annual Ice Rentals | \$55,000 |
| Other | \$35,000 |
| Revenue Inflatior | 3.0% |
| Hospitality Per Cap | \$20.00 |
| Hospitality Capacity | 250 |
| Rental Capacity | 400 |

NO SHOW FACTORS

| | |
|----------------------------|-----|
| Hockey No Show Factor | 15% |
| Other Event No Show Factor | 5% |

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario C

Expense Assumptions

COSTS PER YEAR

PERSONNEL

| | | Improvement Factor |
|---------------------|----------------|--------------------|
| Salaries & Benefits | \$714,000 / YR | 20% |

NON-PERSONNEL

| | | |
|--------------------------|----------------|-----|
| Utilities | \$518,400 / YR | 20% |
| Repairs & Maintenance | \$110,400 / YR | 15% |
| Materials & Supplies | \$32,200 / YR | 15% |
| Insurance | \$110,250 / YR | 23% |
| Advertising | \$66,000 / YR | 10% |
| General & Administrative | \$60,750 / YR | 13% |
| Contract Services | \$60,950 / YR | 15% |
| Other | \$40,250 / YR | 15% |

| | |
|-------------------|------|
| Expense Inflation | 3.0% |
|-------------------|------|

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario C

Operating Costs

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|--------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Operating Costs | | | | | | | | | | |
| Civic Center | | | | | | | | | | |
| Salaries & Benefits | \$ 735,000 | \$ 757,000 | \$ 780,000 | \$ 804,000 | \$ 828,000 | \$ 853,000 | \$ 878,000 | \$ 904,000 | \$ 932,000 | \$ 960,000 |
| Utilities | \$ 534,000 | \$ 550,000 | \$ 566,000 | \$ 583,000 | \$ 601,000 | \$ 619,000 | \$ 638,000 | \$ 657,000 | \$ 676,000 | \$ 697,000 |
| Repairs & Maintenance | \$ 114,000 | \$ 117,000 | \$ 121,000 | \$ 124,000 | \$ 128,000 | \$ 132,000 | \$ 136,000 | \$ 140,000 | \$ 144,000 | \$ 148,000 |
| Materials & Supplies | \$ 33,000 | \$ 34,000 | \$ 35,000 | \$ 36,000 | \$ 37,000 | \$ 38,000 | \$ 40,000 | \$ 41,000 | \$ 42,000 | \$ 43,000 |
| Insurance | \$ 114,000 | \$ 117,000 | \$ 120,000 | \$ 124,000 | \$ 128,000 | \$ 132,000 | \$ 136,000 | \$ 140,000 | \$ 144,000 | \$ 148,000 |
| Advertising | \$ 68,000 | \$ 70,000 | \$ 72,000 | \$ 74,000 | \$ 77,000 | \$ 79,000 | \$ 81,000 | \$ 84,000 | \$ 86,000 | \$ 89,000 |
| General & Administrative | \$ 63,000 | \$ 64,000 | \$ 66,000 | \$ 68,000 | \$ 70,000 | \$ 73,000 | \$ 75,000 | \$ 77,000 | \$ 79,000 | \$ 82,000 |
| Contract Services | \$ 63,000 | \$ 65,000 | \$ 67,000 | \$ 69,000 | \$ 71,000 | \$ 73,000 | \$ 75,000 | \$ 77,000 | \$ 80,000 | \$ 82,000 |
| Other | \$ 41,000 | \$ 43,000 | \$ 44,000 | \$ 45,000 | \$ 47,000 | \$ 48,000 | \$ 50,000 | \$ 51,000 | \$ 53,000 | \$ 54,000 |
| TOTAL | \$ 1,765,000 | \$ 1,817,000 | \$ 1,871,000 | \$ 1,927,000 | \$ 1,987,000 | \$ 2,047,000 | \$ 2,109,000 | \$ 2,171,000 | \$ 2,236,000 | \$ 2,303,000 |

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Financial Model - Scenario C

Fixed Revenues

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-----------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Advertising / Sponsorships | | | | | | | | | | |
| Total Building Revenue | \$ 258,000 | \$ 265,000 | \$ 273,000 | \$ 281,000 | \$ 290,000 | \$ 299,000 | \$ 307,000 | \$ 317,000 | \$ 326,000 | \$ 336,000 |
| Less Tenant Capture | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Net Building Revenue | \$ 258,000 | \$ 265,000 | \$ 273,000 | \$ 281,000 | \$ 290,000 | \$ 299,000 | \$ 307,000 | \$ 317,000 | \$ 326,000 | \$ 336,000 |

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-----------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Naming Rights | | | | | | | | | | |
| Total Building Revenue | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 |
| Less Tenant Capture | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Net Building Revenue | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 | \$ 200,000 |

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Loge Box Seats | | | | | | | | | | |
| Lease Rate | \$ 2,600 | \$ 2,700 | \$ 2,700 | \$ 2,800 | \$ 2,900 | \$ 3,000 | \$ 3,100 | \$ 3,200 | \$ 3,300 | \$ 3,400 |
| Total Loge Box Seat Inventory | 108 | | | | | | | | | |
| Total Revenue | \$ 281,000 | \$ 292,000 | \$ 292,000 | \$ 302,000 | \$ 313,000 | \$ 324,000 | \$ 335,000 | \$ 346,000 | \$ 356,000 | \$ 367,000 |
| Less Expenses | \$ 42,000 | \$ 44,000 | \$ 44,000 | \$ 45,000 | \$ 47,000 | \$ 49,000 | \$ 50,000 | \$ 52,000 | \$ 53,000 | \$ 55,000 |
| Less Tenant Share | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Net Building Revenue | \$ 239,000 | \$ 248,000 | \$ 248,000 | \$ 257,000 | \$ 266,000 | \$ 275,000 | \$ 285,000 | \$ 294,000 | \$ 303,000 | \$ 312,000 |

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-----------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Club Seats | | | | | | | | | | |
| Lease Rate | \$ 1,500 | \$ 1,600 | \$ 1,600 | \$ 1,700 | \$ 1,700 | \$ 1,800 | \$ 1,800 | \$ 1,900 | \$ 2,000 | \$ 2,000 |
| Total Club Seat Inventory | 450 | | | | | | | | | |
| Total Revenue | \$ 675,000 | \$ 720,000 | \$ 720,000 | \$ 765,000 | \$ 765,000 | \$ 810,000 | \$ 810,000 | \$ 855,000 | \$ 900,000 | \$ 900,000 |
| Less Expenses | \$ 68,000 | \$ 72,000 | \$ 72,000 | \$ 77,000 | \$ 77,000 | \$ 81,000 | \$ 81,000 | \$ 86,000 | \$ 90,000 | \$ 90,000 |
| Less Tenant Share | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - |
| Net Building Revenue | \$ 607,000 | \$ 648,000 | \$ 648,000 | \$ 688,000 | \$ 688,000 | \$ 729,000 | \$ 729,000 | \$ 769,000 | \$ 810,000 | \$ 810,000 |

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Supplemental Information

American Hockey League Attendance Review

| AHL Team | 2009-2010 | | | 2008-2009 | | | 2007-2008 | | |
|-----------------------|----------------|-------------|---------------------|----------------|-------------|---------------------|----------------|-------------|---------------------|
| | Total Attn. | Total Games | Avg. Attn. Per Game | Total Attn. | Total Games | Avg. Attn. Per Game | Total Attn. | Total Games | Avg. Attn. Per Game |
| Abbotsford | 155,891 | 40 | 3,897 | - | - | - | - | - | - |
| Adirondack | 160,722 | 40 | 4,018 | - | - | - | - | - | - |
| Albany | 150,022 | 40 | 3,751 | 141,550 | 40 | 3,539 | 157,601 | 40 | 3,940 |
| Binghamton | 145,163 | 40 | 3,629 | 156,671 | 40 | 3,917 | 162,772 | 40 | 4,069 |
| Bridgeport | 163,663 | 40 | 4,092 | 181,114 | 40 | 4,528 | 167,847 | 40 | 4,196 |
| Chicago | 318,514 | 40 | 7,963 | 292,635 | 40 | 7,316 | 298,951 | 40 | 7,474 |
| Grand Rapids | 280,627 | 40 | 7,016 | 297,905 | 40 | 7,448 | 275,905 | 40 | 6,898 |
| Hamilton | 174,952 | 40 | 4,374 | 184,952 | 40 | 4,624 | 182,991 | 40 | 4,575 |
| Hartford | 167,512 | 40 | 4,188 | 167,606 | 40 | 4,190 | 176,213 | 40 | 4,405 |
| Hershey | 380,791 | 40 | 9,520 | 359,499 | 40 | 8,987 | 350,815 | 40 | 8,770 |
| Houston | 230,806 | 40 | 5,770 | 239,281 | 40 | 5,982 | 251,191 | 40 | 6,280 |
| Iowa | - | - | - | 172,881 | 40 | 4,322 | 151,561 | 40 | 3,789 |
| Lake Erie | 259,346 | 40 | 6,484 | 237,370 | 40 | 5,934 | 238,965 | 40 | 5,974 |
| Lowell | 99,919 | 40 | 2,498 | 91,728 | 40 | 2,293 | 84,094 | 40 | 2,102 |
| Manchester | 211,704 | 40 | 5,293 | 235,289 | 40 | 5,882 | 268,249 | 40 | 6,706 |
| Manitoba | 323,428 | 40 | 8,086 | 310,761 | 40 | 7,769 | 312,288 | 40 | 7,807 |
| Milwaukee | 241,073 | 40 | 6,027 | 235,107 | 40 | 5,878 | 220,698 | 40 | 5,517 |
| Norfolk | 154,197 | 40 | 3,855 | 164,363 | 40 | 4,109 | 169,621 | 40 | 4,241 |
| Peoria | 182,386 | 40 | 4,560 | 160,759 | 40 | 4,019 | 177,637 | 40 | 4,441 |
| Philadelphia | - | - | - | 258,376 | 40 | 6,459 | 267,148 | 40 | 6,679 |
| Portland | 173,795 | 40 | 4,345 | 193,132 | 40 | 4,828 | 194,435 | 40 | 4,861 |
| Providence | 270,781 | 40 | 6,770 | 253,718 | 40 | 6,343 | 244,276 | 40 | 6,107 |
| Quad City | - | - | - | 121,396 | 40 | 3,035 | 140,908 | 40 | 3,523 |
| Rochester | 169,459 | 40 | 4,236 | 163,188 | 40 | 4,080 | 273,404 | 40 | 6,835 |
| Rockford | 159,120 | 40 | 3,978 | 156,352 | 40 | 3,909 | 153,056 | 40 | 3,826 |
| San Antonio | 209,414 | 40 | 5,235 | 206,680 | 40 | 5,167 | 180,808 | 40 | 4,520 |
| Springfield | 145,764 | 40 | 3,644 | 158,064 | 40 | 3,952 | 139,242 | 40 | 3,481 |
| Syracuse | 211,771 | 40 | 5,294 | 208,429 | 40 | 5,211 | 217,694 | 40 | 5,442 |
| Texas | 214,209 | 40 | 5,355 | - | - | - | - | - | - |
| Toronto | 162,784 | 40 | 4,070 | 149,139 | 40 | 3,728 | 173,926 | 40 | 4,348 |
| W-B/Scranton | 250,790 | 40 | 6,270 | 279,347 | 40 | 6,984 | 306,662 | 40 | 7,667 |
| Worcester | 146,877 | 40 | 3,672 | 156,089 | 40 | 3,902 | 173,745 | 40 | 4,344 |
| League Average | | | 5,100 | | | 5,115 | | | 5,270 |

Source: The American Hockey League website

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Supplemental Information

Venue Naming Rights Review

| Venue | Location | Naming Rights | Term (Yrs.) | Annual Naming Rights Proceeds |
|---|------------------|---------------|-------------|-------------------------------|
| Allstate Arena | Rosemont, IL | \$11,000,000 | 10 | \$1,100,000 |
| Alltel | Little Rock, AR | \$7,000,000 | 15 | \$466,667 |
| Bancorp South Center | Tupelo, MS | \$2,500,000 | 12 | \$208,333 |
| Big Sandy Superstore Arena | Huntington, WV | \$1,400,000 | 10 | \$140,000 |
| Bi-Lo Center | Greenville, SC | \$3,000,000 | 10 | \$300,000 |
| Blue Cross Arena at War Memorial Coliseum | Rochester, NY | \$2,975,000 | 15 | \$198,333 |
| Bojangles Coliseum | Charlotte, NC | \$1,250,000 | 10 | \$125,000 |
| Budweiser Events Center | Loveland, CO | \$1,500,000 | 20 | \$75,000 |
| Chevrolet Centre | Youngstown, OH | \$4,000,000 | 15 | \$266,667 |
| Cricket Arena | Charlotte, NC | \$750,000 | 5 | \$150,000 |
| DCU Center | Worcester, MA | \$10,800,000 | 10 | \$1,080,000 |
| Dunkin' Donuts Center | Providence, RI | \$7,000,000 | 10 | \$700,000 |
| First Union Arena | Wilkes-Barre, PA | \$2,300,000 | 10 | \$230,000 |
| Giant Center | Hershey, PA | \$4,500,000 | 10 | \$450,000 |
| Huntington Center | Toledo, OH | \$2,100,000 | 6 | \$350,000 |
| iWireless Center | Moline, IL | \$4,250,000 | 10 | \$425,000 |
| Times Union Center | Albany, NY | \$3,500,000 | 10 | \$350,000 |
| Pepsi Coliseum | Indianapolis, IN | \$850,000 | 5 | \$170,000 |
| Rabobank Arena | Bakersfield, CA | \$2,500,000 | 10 | \$250,000 |
| Reading Sovereign Center | Reading, PA | \$2,000,000 | 5 | \$400,000 |
| Sovereign Bank Arena | Trenton, NJ | \$2,675,000 | 10 | \$267,500 |
| Taco Bell Arena | Boise, ID | \$4,000,000 | 15 | \$266,667 |
| Town Toyota Center | Wenatchee, WA | \$1,000,000 | 5 | \$200,000 |
| U.S. Cellular Center | Cedar Rapids, IA | \$125,000 | 5 | \$25,000 |
| Verizon Wireless Arena | Manchester, NH | \$11,000,000 | 15 | \$733,333 |
| Total Average | | | | \$364,000 |

Source: Revenues from Sports Venues

CUMBERLAND COUNTY CIVIC CENTER JOINT TASK FORCE

Economic Analysis of Potential Renovation Options

Supplemental Information

American Hockey League Premium Seating Review

| AHL Team [1] | Venue | Luxury Suites | | | | Club Seats | | | |
|-------------------------|--------------------------|---------------|-------------|-----------------|-----------------|------------|-------------|----------------|----------------|
| | | Suites | Term (Yrs.) | High-Price | Low-Price | Club Seats | Term (Yrs.) | High-Price | Low-Price |
| Bridgeport | The Arena at Harbor Yard | 42 | 3 to 7 | \$31,500 | \$65,000 | 1,300 | 1 to 5 | \$1,295 | \$1,295 |
| Chicago | Allstate Arena | 40 | 5 | \$35,000 | \$35,000 | 0 | - | - | - |
| Grand Rapids | Van Andel Arena | 44 | 3 to 7 | \$25,000 | \$25,000 | 1,800 | 1 to 3 | \$859 | \$859 |
| Hamilton | Copps Coliseum | 10 | 1 | \$30,000 | \$30,000 | 0 | - | - | - |
| Hartford | XL Center | 45 | 1 | \$45,000 | \$70,000 | 0 | - | - | - |
| Hershey | Giant Center | 40 | NA | \$40,000 | \$55,000 | 688 | NA | \$590 | \$590 |
| Milwaukee | Bradley Center | 52 | 3 to 5 | \$95,000 | \$157,000 | 70 | 1 | \$4,300 | \$4,300 |
| Providence | Dunkin Donuts Center | 20 | 3 | \$50,000 | \$50,000 | 0 | - | - | - |
| Rochester | Blue Cross Arena | 25 | 3 to 7 | \$40,000 | \$50,000 | 0 | - | - | - |
| Rockford | Rockford Metro Centre | 0 | - | - | - | 120 | 1 | \$2,000 | \$2,000 |
| Wilkes-Barre/Scranton | Wachovia Arena | 32 | 3 to 5 | \$35,000 | \$37,500 | 624 | 1 to 5 | \$1,000 | \$1,500 |
| Total Average | | | | \$42,700 | \$57,500 | | | \$1,700 | \$1,800 |
| Adjusted Average | | | | \$38,300 | \$49,100 | | | \$1,300 | \$1,400 |

[1] Does not include venues located in Canada or venues with NBA tenants

Source: Revenues from Sports Venues Edition 2009

