



BRAILSFORD & DUNLAVEY

Facility Planners • Project Managers

Catalysts for Building Community

memo

DATE: January 27, 1999

TO: City of Portland
Bayside Area Task Force
Sports Complex Subcommittee

FROM: Chris Dunlavy

MESSAGE: Attached please find some materials for your review prior to our meeting on the Sports Complex Feasibility Study this Monday, February 1. Included are:

1. A draft of the written survey to be distributed throughout the Greater Portland area to assess unmet demand for sports and entertainment events;
2. A "quick and dirty" financial analysis of the facility concept, outlining a very preliminary look at the economics of the arena, supported by an initial outline program;
3. A series of charts comprising a preliminary market analysis, illustrating the Portland market's strength relative to other markets with similar facilities; and
4. An outline matrix which we will use in Monday's meeting to evaluate various potential sports complex sites in order to select one site to study in detail along with the detailed study of the Libra Foundation site.

Our team looks forward to meeting with the Subcommittee again this Monday.

The City of Portland Sports Complex Subcommittee

Indoor Arena Community Survey

Dear Community Resident,

The City of Portland's Bayside Area Task Force is currently studying the feasibility of building a new indoor arena in the City of Portland, in response to an offer by the Libra Foundation to contribute land in downtown Portland for such a use.

This survey is being conducted in order to offer citizens the opportunity to have input into the programs and services that may be provided through the facility. The survey is divided into two sections: spectator facility usage and demographics. Please take the time to fill out the survey and return it to the Bayside Area Task Force in the enclosed self-addressed stamped envelope so that your individual needs can be represented. All responses will be kept strictly confidential.

Please complete and return the survey by:

February 24, 1999

Thank You,

George Campbell
Chair, Sports Complex Subcommittee
Bayside Area Task Force

Part I - About Your Current Spectator Facilities Usage

Please provide us with information about your household's experiences with spectator sports facilities in the region; as well as your opinions about how well your needs are being met and the types of facility amenities that you and your household would value the most. Except where otherwise indicated, please select one response per question.

- | | | | | | | | | | | | | | | | | | | |
|---|---|--|---|---|--|---|--|--|--|---|---|---|---|--|---|--|---|--|
| <p>1. What types of PROFESSIONAL sporting events do you or any other members of your household attend, whether in Portland or elsewhere? (select all that apply)</p> <table border="0" style="width: 100%;"> <tr> <td><input type="checkbox"/> 1 NBA Basketball</td> <td><input type="checkbox"/> 7 Minor League Hockey</td> </tr> <tr> <td><input type="checkbox"/> 2 Minor League Basketball</td> <td><input type="checkbox"/> 8 Major League Baseball</td> </tr> <tr> <td><input type="checkbox"/> 3 Women's Professional Basketball</td> <td><input type="checkbox"/> 9 Minor League Baseball</td> </tr> <tr> <td><input type="checkbox"/> 4 NFL Football</td> <td><input type="checkbox"/> 10 Professional Lacrosse</td> </tr> <tr> <td><input type="checkbox"/> 5 Arena Football</td> <td><input type="checkbox"/> 11 Indoor/outdoor Soccer</td> </tr> <tr> <td><input type="checkbox"/> 6 NHL Hockey</td> <td><input type="checkbox"/> 12 Other professional sport(s)</td> </tr> </table> | <input type="checkbox"/> 1 NBA Basketball | <input type="checkbox"/> 7 Minor League Hockey | <input type="checkbox"/> 2 Minor League Basketball | <input type="checkbox"/> 8 Major League Baseball | <input type="checkbox"/> 3 Women's Professional Basketball | <input type="checkbox"/> 9 Minor League Baseball | <input type="checkbox"/> 4 NFL Football | <input type="checkbox"/> 10 Professional Lacrosse | <input type="checkbox"/> 5 Arena Football | <input type="checkbox"/> 11 Indoor/outdoor Soccer | <input type="checkbox"/> 6 NHL Hockey | <input type="checkbox"/> 12 Other professional sport(s) | <p>2. In total, how often do you or any other members of your household attend PROFESSIONAL sporting events?</p> <table border="0" style="width: 100%;"> <tr> <td><input type="checkbox"/> 1 I/we never attend sporting events</td> </tr> <tr> <td><input type="checkbox"/> 2 One to three times per year</td> </tr> <tr> <td><input type="checkbox"/> 3 Four to seven times per year</td> </tr> <tr> <td><input type="checkbox"/> 4 Eight to twelve times per year</td> </tr> <tr> <td><input type="checkbox"/> 5 More than twelve times per year</td> </tr> </table> | <input type="checkbox"/> 1 I/we never attend sporting events | <input type="checkbox"/> 2 One to three times per year | <input type="checkbox"/> 3 Four to seven times per year | <input type="checkbox"/> 4 Eight to twelve times per year | <input type="checkbox"/> 5 More than twelve times per year |
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| <input type="checkbox"/> 3 Women's Professional Basketball | <input type="checkbox"/> 9 Minor League Baseball | | | | | | | | | | | | | | | | | |
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| <input type="checkbox"/> 5 More than twelve times per year | | | | | | | | | | | | | | | | | | |
| <p>3. What types of COLLEGE sporting events do you or any other members of your household attend? (select all that apply)</p> <table border="0" style="width: 100%;"> <tr> <td><input type="checkbox"/> 1 Men's Basketball</td> <td><input type="checkbox"/> 4 Football</td> </tr> <tr> <td><input type="checkbox"/> 2 Women's Basketball</td> <td><input type="checkbox"/> 5 Other men's varsity sport(s)</td> </tr> <tr> <td><input type="checkbox"/> 3 Men's/Women's Hockey</td> <td><input type="checkbox"/> 6 Other women's varsity sport(s)</td> </tr> </table> | <input type="checkbox"/> 1 Men's Basketball | <input type="checkbox"/> 4 Football | <input type="checkbox"/> 2 Women's Basketball | <input type="checkbox"/> 5 Other men's varsity sport(s) | <input type="checkbox"/> 3 Men's/Women's Hockey | <input type="checkbox"/> 6 Other women's varsity sport(s) | <p>4. In total, how often do you or any other members of your household attend COLLEGE sporting events?</p> <table border="0" style="width: 100%;"> <tr> <td><input type="checkbox"/> 1 I/we never attend local college sporting events</td> </tr> <tr> <td><input type="checkbox"/> 2 One to three times per year</td> </tr> <tr> <td><input type="checkbox"/> 3 Four to seven times per year</td> </tr> <tr> <td><input type="checkbox"/> 4 Eight to twelve times per year</td> </tr> <tr> <td><input type="checkbox"/> 5 More than twelve times per year</td> </tr> </table> | <input type="checkbox"/> 1 I/we never attend local college sporting events | <input type="checkbox"/> 2 One to three times per year | <input type="checkbox"/> 3 Four to seven times per year | <input type="checkbox"/> 4 Eight to twelve times per year | <input type="checkbox"/> 5 More than twelve times per year | | | | | | |
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| <p>7. What types of PROFESSIONAL concerts and/or family shows do you or any other members of your household attend? (select all that apply)</p> <table border="0" style="width: 100%;"> <tr> <td><input type="checkbox"/> 1 Pop/Rock/Rap Concerts</td> <td><input type="checkbox"/> 6 Ice Shows</td> </tr> <tr> <td><input type="checkbox"/> 2 Country/Western Concerts</td> <td><input type="checkbox"/> 7 Circuses</td> </tr> <tr> <td><input type="checkbox"/> 3 Classical Concerts</td> <td><input type="checkbox"/> 8 Childrens' Shows</td> </tr> <tr> <td><input type="checkbox"/> 4 Jazz Concerts</td> <td><input type="checkbox"/> 9 Other concert(s)</td> </tr> <tr> <td><input type="checkbox"/> 5 Opera/Musical Performances</td> <td><input type="checkbox"/> 10 Other family show(s)</td> </tr> </table> | <input type="checkbox"/> 1 Pop/Rock/Rap Concerts | <input type="checkbox"/> 6 Ice Shows | <input type="checkbox"/> 2 Country/Western Concerts | <input type="checkbox"/> 7 Circuses | <input type="checkbox"/> 3 Classical Concerts | <input type="checkbox"/> 8 Childrens' Shows | <input type="checkbox"/> 4 Jazz Concerts | <input type="checkbox"/> 9 Other concert(s) | <input type="checkbox"/> 5 Opera/Musical Performances | <input type="checkbox"/> 10 Other family show(s) | <p>8. In total, how often do you or any other members of your household attend PROFESSIONAL concerts or family shows?</p> <table border="0" style="width: 100%;"> <tr> <td><input type="checkbox"/> 1 I/we never attend concerts or family shows</td> </tr> <tr> <td><input type="checkbox"/> 2 One to three times per year</td> </tr> <tr> <td><input type="checkbox"/> 3 Four to seven times per year</td> </tr> <tr> <td><input type="checkbox"/> 4 Eight to twelve times per year</td> </tr> <tr> <td><input type="checkbox"/> 5 More than twelve times per year</td> </tr> </table> | <input type="checkbox"/> 1 I/we never attend concerts or family shows | <input type="checkbox"/> 2 One to three times per year | <input type="checkbox"/> 3 Four to seven times per year | <input type="checkbox"/> 4 Eight to twelve times per year | <input type="checkbox"/> 5 More than twelve times per year | | |
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9. How often do you or other members of your household attend events at Boston's Fleet Center?

- 1 Never
- 2 One to three times per year
- 3 Four to seven times per year
- 4 Eight to twelve times per year
- 5 More than twelve times per year

11. How often do you or other members of your household attend events at the Hartford Civic Center in Hartford, CT?

- 1 Never
- 2 One to three times per year
- 3 Four to seven times per year
- 4 Eight to twelve times per year
- 5 More than twelve times per year

13. How often do you or other members of your household attend events at the Paul Tsongas Arena in Lowell, MA?

- 1 Never
- 2 One to three times per year
- 3 Four to seven times per year
- 4 Eight to twelve times per year
- 5 More than twelve times per year

15. How often do you or other members of your household attend events at the Cumberland ~~County~~ County Civic Center?

- 1 Never
- 2 One to three times per year
- 3 Four to seven times per year
- 4 Eight to twelve times per year
- 5 More than twelve times per year

17. How often do you or other members of your household attend events at Hadlock Field?

- 1 Never
- 2 One to three times per year
- 3 Four to seven times per year
- 4 Eight to twelve times per year
- 5 More than twelve times per year

10. What kinds of events do you or members of your household attend at Boston's Fleet Center?

(select all that apply)

- 1 NBA Basketball
- 2 NHL Hockey
- 3 Arena Football
- 4 Other professional sports
- 5 Family Shows
- 6 Concerts
- 7 Other events
- 8 None of the above

12. What kinds of events do you or members of your household attend at the Hartford Civic Center?

(select all that apply)

- 1 AHL Hockey
- 2 Professional Basketball
- 3 Other professional sports
- 4 Amateur Sports
- 5 Family Shows
- 6 Concerts
- 7 Other events
- 8 None of the above

14. What kinds of events do you or members of your household attend events at the Paul Tsongas Arena?

(select all that apply)

- 1 Minor League Hockey
- 2 Professional Basketball
- 3 Other professional sports
- 4 Amateur Sports
- 5 Family Shows
- 6 Concerts
- 7 Other events
- 8 None of the above

16. What kinds of events do you or members of your household attend at the Cumberland County Civic Center? (select all that apply)

- 1 Minor League Hockey
- 2 Other professional sports
- 3 College Sports
- 4 Amateur Sports
- 5 Family Shows
- 6 Concerts
- 7 Other events
- 8 None of the above

18. For any given spectator event, would you be more likely to attend if the facility were located in downtown Portland or downtown Manchester, New Hampshire?

- 1 Downtown Portland
- 2 Downtown Manchester, NH

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Whittmore Ch

Part II - About Yourself and Your Household

Please provide us with information about yourself and the other members of your household. Your answers to the following questions will only be used to compare the demographics of the survey response to the demographics of the Portland area. Except where otherwise indicated, please select one response per question.

All responses will be kept strictly anonymous.

24. Including yourself, how many people are in your household?

- 1 Only one
- 2 Two
- 3 Three to four
- 4 Five to six
- 5 Seven or more

25. What is your gender?

- 1 Male
- 2 Female

26. To which categories do members of your household belong?

(Select all that apply)

- 1 Infant
- 2 Preschool aged
- 3 Elementary school aged
- 4 Secondary school aged
- 5 College/University student
- 6 Adult not in school
- 7 Retired/Senior citizen

27. What age group are you in?

- 1 18 to 21
- 2 22 to 25
- 3 26 to 30
- 4 31 to 40
- 5 41 to 50
- 6 51 to 60
- 7 61 or over

28. How many adults (18 & over) live in your household?

- 1 Only one
- 2 Two
- 3 Three
- 4 Four or more

29. What level of education have you completed?

- 1 No high school diploma
- 2 High school diploma
- 3 2 years college or Assoc. Degree
- 4 Bachelors degree
- 5 Masters degree or more

30. What is your approximate annual household income?

- 1 less than \$10,000
- 2 \$10,000 to \$14,999
- 3 \$15,000 to \$19,999
- 4 \$20,000 to \$24,999
- 5 \$25,000 to \$34,999
- 6 \$35,000 to \$49,999
- 7 \$50,000 to \$74,999
- 8 \$75,000 or more

31. Is the home you live in rented or owned by a household member?

- 1 Rented
- 2 Owned

32. What is the 5-digit Zip code of your current home address?

Please use the space below to provide any comments on the City of Portland's arena proposal.

Please return this survey in the enclosed postage-paid envelope by Wednesday, February 24, 1999.

Thank You!

Assumptions

<i>Capital Costs:</i>	
Hard Costs of Construction:	
Site Clearance	\$500,000
New Arena	\$33,396,000
Site/Infrastructure Improvements	\$439,000
Total Hard Costs	\$34,335,000
Soft Costs Estimated @ 30.00%	\$10,300,500
Total Project Costs	\$44,635,500
<i>Facility Characteristics</i>	
Ice Event Capacity	9,500
Basketball Capacity	10,000
Stage Event Capacity	10,792
Parking Capacity	0
<i>Event Projections</i>	
Portland Pirates Hockey	40
Other Sports Anchor Tenant	0
University Sports Events	10
Other Arena Events	80
Total Events	130
<i>Average Event Attendance</i>	
Portland Pirates Hockey	5,600
Other Sport Anchor Tenant	n/a
University Sports Events	4,000
Other Arena Events	7,500
Total Attendance	864,000
Total Parking	0
<i>Income Projections</i>	
Anchor Tenant Annual Rent	\$180,000
Rental Income Per Major Event	\$8,000
Rental Income Per Minor Event	\$4,000
Skybox Lease Rate	\$25,000
Building Percentage of Skybox Income	50%
Other Arena Facility Rentals (Camps, etc)	\$0
Other Ice Facility Rentals (Leagues, etc)	\$100,000
Advertising Income	\$400,000
Building Percentage of Advertising Income	50%
Annual Naming Rights Income	\$500,000
Concessions & Novelties per Capita	\$6.50
Concessions Commission %	40%
Building Percentage of Commissions	60%
Parking Per Space	n/a
<i>Operating Expenses</i>	
Arena Operating Expenses (@ \$7 per square foot)	\$1,567,374
<i>Financing Assumptions</i>	
State Contribution	\$0
Charitable Contribution	\$20,000,000
Debt Coverage Ratio	1.10
Interest Rate	6.00%
Term	30

- increased by 300,000

204,000
 x
 40% x 60%

CITY OF PORTLAND
 ARENA FEASIBILITY STUDY
 "Quick and Dirty" Financial Analysis

Brailsford & Dunlavy
 27-Jan-99

Option: 10,000 Seat Arena and Base Scenario

Simplified Annual Operating Statement

Revenues

Anchor Tenant Rent	\$180,000
Other Rental Income	\$560,000
Skybox Rental Income	\$250,000
Concessions Income	\$1,347,840
Total Event Income	\$2,337,840

Naming Rights Income	\$500,000
Advertising Income	\$200,000
Total Non-Event Income	\$700,000

s/n/B line

Total Revenues \$3,040,000

Costs

Debt Service	\$1,970,000
Operating Costs	\$1,567,374

Total Costs \$3,537,374

Total Annual Surplus / (Required Subsidy):	(\$497,000)
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Add'l Equity Required to Achieve Zero Subsidy:	\$26,208,000
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Building/ Zone/ Program Element	Quantity	NASF	Total NASF	Element Cost/SF	Total Cost
Site Requirements					
Drop-Off/Entry Drop-Off Area	1	10,000	10,000	\$5.00	\$50,000
Media Service Area					
Local T.V Trucks	4	300	1,200	\$5.00	\$6,000
Satellite Vans	2	600	1,200	\$5.00	\$6,000
T.V Trucks	4	1,600	6,400	\$5.00	\$32,000
Parking					
Administration Spaces	10	300	3,000	\$5.00	\$15,000
Barrier Free Spaces	60	450	27,000	\$5.00	\$135,000
Charter Bus Spaces	4	2,000	8,000	\$5.00	\$40,000
Public Areas					
Landscaping	1	10,000	10,000	\$5.00	\$50,000
Walkways	1	3,000	3,000	\$5.00	\$15,000
Service Area					
Fire Access	1	2,000	2,000	\$5.00	\$10,000
Tour Busses	4	2,000	8,000	\$5.00	\$40,000
Truck Staging (5 trucks)	5	1,600	8,000	\$5.00	\$40,000
Total Site Requirements			87,800		\$439,000
New Arena					
Circulation					
Concourses	1	17,000	17,000	\$100.00	\$1,700,000
Entry Lobbys	4	800	3,200	\$100.00	\$320,000
Public Elevators	1	300	300	\$250.00	\$75,000
Public Stairs	1	5,000	5,000	\$100.00	\$500,000
Ticket Lobby	1	500	500	\$100.00	\$50,000
Public Toilets					
Men's Toilets (Distributed throughout)	1	3,300	3,300	\$135.00	\$445,500
Uni-sex Toilets (2 on main concourse)	2	60	120	\$135.00	\$16,200
Women's Toilets (Distributed throughout)	1	4,000	4,000	\$135.00	\$540,000
Seating					
Barrier-Free Seating (100 B.F., 100 Comp)	200	30	6,000	\$125.00	\$750,000
Fixed General Seating	7,560	6	45,360	\$125.00	\$5,670,000
Fixed V.I.P Seating	2,000	8	16,000	\$125.00	\$2,000,000
Suites/Boxes					
Suites (12-seat capacity)	20 ²⁻¹⁰	400	8,000	\$135.00	\$1,080,000
Total Seating Capacity	10,000				

Building/ Zone/ Program Element	Quantity	NASF	Total NASF	Element Cost/SF	Total Cost
Commissary					
Catering Kitchen (Concessionaire Equips)	1	1,200	1,200	\$75.00	\$90,000
Commissary Administration	1	500	500	\$100.00	\$50,000
Concession Stands					
Drink stands	6	100	600	\$135.00	\$81,000
Food Stands (1 POS/225 spectators)	44	100	4,400	\$135.00	\$594,000
Space for Temporary Stands	4	100	400	\$100.00	\$40,000
Merch. Sales					
Merchandise Stands	8	50	400	\$135.00	\$54,000
Pro Shop (Exterior Access Retail)	1	1,500	1,500	\$200.00	\$300,000
Space for Temporary Stands	4	100	400	\$100.00	\$40,000
Merchandise Support					
Merchandise Administration	1	100	100	\$100.00	\$10,000
Storage	1	200	200	\$100.00	\$20,000
Pantries					
Suite Pantries (at suite level)	2	400	800	\$100.00	\$80,000
Vendor Staging (at seating level)	2	400	800	\$100.00	\$80,000
Broadcast Facility					
Camera Platforms	11	30	330	\$100.00	\$33,000
Radio Broadcast	1	100	100	\$100.00	\$10,000
T.V. Booth	1	100	100	\$100.00	\$10,000
Media Support					
Connect Room	1	250	250	\$100.00	\$25,000
Interview Room	1	800	800	\$100.00	\$80,000
Press Toilets	1	100	100	\$135.00	\$13,500
Workroom	1	500	500	\$100.00	\$50,000
Writer's Stations	10	25	250	\$100.00	\$25,000
Photographers' Facility					
Dark Rooms	1	300	300	\$100.00	\$30,000
Photo Station	1	300	300	\$100.00	\$30,000
Dressing Rooms					
Official's Dressing Room	1	250	250	\$135.00	\$33,750
Performer's Dressing Room	1	200	200	\$135.00	\$27,000
Star Dressing (1)	1	250	250	\$135.00	\$33,750
Star Dressing (2)	1	250	250	\$135.00	\$33,750

Building/ Zone/ Program Element	Quantity	NASF	Total NASF	Element Cost/SF	Total Cost
Equipment Room					
Equipment Manager's Office	1	150	150	\$100.00	\$15,000
General Laundry	1	200	200	\$100.00	\$20,000
General Storage	1	400	400	\$100.00	\$40,000
Other Sports Event Storage	1	400	400	\$100.00	\$40,000
Tenant #1 Storage	1	800	800	\$100.00	\$80,000
Tenant #2 Storage	1	800	800	\$100.00	\$80,000
Work Room	1	100	100	\$100.00	\$10,000
Lockers, Visitors					
Lockers	2	800	1,600	\$125.00	\$200,000
Showers	2	150	300	\$135.00	\$40,500
Toilet	2	150	300	\$135.00	\$40,500
Lockers, Tenant #1					
Locker Room	1	1,000	1,000	\$125.00	\$125,000
Shower Room	1	200	200	\$135.00	\$27,000
Taping Room	1	250	250	\$125.00	\$31,250
Team Meeting Room	1	300	300	\$100.00	\$30,000
Toilet	1	200	200	\$135.00	\$27,000
Lockers, Tenant #2 (Future)					
Locker Room	1	1,000	1,000	\$125.00	\$125,000
Shower Room	1	200	200	\$135.00	\$27,000
Taping Room	1	250	250	\$125.00	\$31,250
Team Meeting Room	1	300	300	\$100.00	\$30,000
Toilet	1	200	200	\$135.00	\$27,000
Training Room					
Bathroom	1	200	200	\$135.00	\$27,000
Exam room	1	100	100	\$100.00	\$10,000
Exam room #2	1	120	120	\$100.00	\$12,000
Hydro Therapy	1	300	300	\$125.00	\$37,500
Lockers	1	100	100	\$125.00	\$12,500
Office - Assistants	1	150	150	\$100.00	\$15,000
Office - Trainers	1	100	100	\$100.00	\$10,000
Pool Therapy	1	300	300	\$150.00	\$45,000
Storage	1	120	120	\$100.00	\$12,000
Treatment Room	1	600	600	\$100.00	\$60,000
Employee Facilities					
Employee Uniform Issue	1	150	150	\$100.00	\$15,000
Lounge	1	300	300	\$100.00	\$30,000
M. Employee Locker	1	150	150	\$125.00	\$18,750
M. Employee Toilet/Shower	1	150	150	\$135.00	\$20,250
W Employee Locker	1	150	150	\$125.00	\$18,750
W. Employee Toilet/Shower	1	150	150	\$135.00	\$20,250

Building/ Zone/ Program Element	Quantity	NASF	Total NASF	Element Cost/SF	Total Cost
Event Area					
Basketball Court	1	15,000	15,000	\$100.00	\$1,500,000
Ice Sheet & Dashers	1	0	0	\$100.00	\$1,000,000
Facility Administration					
Offices	1	1,500	1,500	\$100.00	\$150,000
Reception	1	150	150	\$100.00	\$15,000
Storage/Copy	1	300	300	\$100.00	\$30,000
Toilets	1	100	100	\$135.00	\$13,500
First Aid					
Cot Room	1	200	200	\$100.00	\$20,000
Exam Room	1	120	120	\$100.00	\$12,000
Waiting Room	1	100	100	\$100.00	\$10,000
Loading/Storage					
Dock Toilet	1	50	50	\$135.00	\$6,750
Event Storage	1	2,500	2,500	\$100.00	\$250,000
General Storage	1	6,000	6,000	\$100.00	\$600,000
Loading Docks	4	800	3,200	\$125.00	\$400,000
Staging Area	1	2,500	2,500	\$100.00	\$250,000
Trash Room	1	400	400	\$100.00	\$40,000
Recycling Room	1	400	400	\$100.00	\$40,000
Operations					
Conversion Manager Office	1	125	125	\$100.00	\$12,500
Janitor's closets (Distributed throughout)	1	500	500	\$100.00	\$50,000
Janitors' Supply Room	1	500	500	\$100.00	\$50,000
Maintenance Office	1	100	100	\$100.00	\$10,000
Maintenance Shops	1	500	500	\$100.00	\$50,000
Operations Manager's Office	1	150	150	\$100.00	\$15,000
Personnel Office	1	200	200	\$100.00	\$20,000
Security					
Detention Rooms	2	60	120	\$100.00	\$12,000
Security Office	1	100	100	\$100.00	\$10,000
Security Toilet	1	50	50	\$100.00	\$5,000
System Support					
Lighting Control	1	150	150	\$150.00	\$22,500
Scoreboard Control	1	150	150	\$150.00	\$22,500
Sound Control	1	150	150	\$150.00	\$22,500

CITY OF PORTLAND
 ARENA FEASIBILITY STUDY
 Outline Program Option 10,000 Seat Arena

Brailsford & Dunlavy
 27-Jan-99

Building/ Zone/ Program Element	Quantity	NASF	Total NASF	Element Cost/SF	Total Cost
Ticketing					
Counting Room	1	200	200	\$125.00	\$25,000
Assistant Manager's Office	2	100	200	\$100.00	\$20,000
Printer Room	1	100	100	\$125.00	\$12,500
Storage	1	100	100	\$100.00	\$10,000
Ticket Manager's Office	1	100	100	\$100.00	\$10,000
Ticket Sales	1	800	800	\$125.00	\$100,000
Vault Room	1	100	100	\$300.00	\$30,000
Work area	1	500	500	\$125.00	\$62,500
Team Administration - Tenant #1					
Coach-Assistant	1	120	120	\$100.00	\$12,000
Coach-Assistant	1	120	120	\$100.00	\$12,000
Coach-Assistant	1	120	120	\$100.00	\$12,000
Coach-Head	1	240	240	\$100.00	\$24,000
Film Edit	1	100	100	\$100.00	\$10,000
Film View	1	100	100	\$100.00	\$10,000
Reception	1	300	300	\$100.00	\$30,000
Secretary	1	160	160	\$100.00	\$16,000
Storage	1	100	100	\$100.00	\$10,000
Meeting Room	1	200	200	\$100.00	\$20,000
Work Room	1	160	160	\$100.00	\$16,000
Building Services					
Chilled Water Storage	1	1,300	1,300	\$300.00	\$390,000
Electrical Closets	1	700	700	\$300.00	\$210,000
Electrical Switch Gear	1	2,500	2,500	\$300.00	\$750,000
Emergency Generator	1	700	700	\$300.00	\$210,000
Fan Rooms	1	8000	8,000	\$300.00	\$2,400,000
Fire Pump Room	1	600	600	\$300.00	\$180,000
Telephone Closets	1	700	700	\$300.00	\$210,000
Telephone Equipment Room	1	250	250	\$300.00	\$75,000
Misc. Support.					
Catwalk	1	3,000	3,000	\$100.00	\$300,000
Gen. Circulation	1	10,000	10,000	\$100.00	\$1,000,000
Rigging	1	0	0	\$0.00	\$0
Roof Access	1	0	0	\$0.00	\$0
Scoreboard	1	0	0	\$0.00	\$0
Service Elevator	1	200	200	\$100.00	\$20,000
Spot Platforms	1	320	320	\$100.00	\$32,000
Total Assignable & Circulation - New Arena			203,555		\$27,289,200
Structure, Chases etc @ 10%			20,356	\$300.00	\$6,106,650
Gross Total - New Arena			223,911		\$33,395,850

**CITY OF PORTLAND
ARENA FEASIBILITY STUDY
Market Demographics**

**Table 1. Population and Income vs. Cities with New Minor League Arenas
Ranked by Median Household Effective Buying Income**

Metro Area	1998 Population	1998 Households (1)	Median Household Effective Buying Income (2)	Households By Effective Buying Income (2)						Buying Power Index (2)
				\$20,000 - \$34,999		\$35,000 - \$49,999		\$50,000 & Over		
				Percent	Number	Percent	Number	Percent	Number	
Bridgeport-Stamford-Norwalk-Danbury, CT (4)	835,500	308,400	\$60,374	13.2%	40,700	13.2%	40,700	59.2%	182,600	0.4953
Manchester-Nashua, NH (4)	358,900	134,600	\$44,771	18.6%	25,000	20.7%	27,900	0.426	57,300	0.1559
Nashville, TN	1,147,600	442,400	\$39,595	20.9%	92,500	18.7%	82,700	37.2%	164,600	0.4874
Grand Rapids-Muskegon-Holland, MI	1,033,400	371,200	\$38,640	22.3%	82,800	20.9%	77,600	34.2%	127,000	0.3906
Portland, ME (4)	255,500	100,600	\$37,143	23.3%	23,400	20.4%	20,500	0.326	32,800	0.1076
Rochester, NY	1,088,600	408,000	\$35,963	22.9%	93,400	20.2%	82,400	31.1%	126,900	0.3934
Albany-Schenectady-Troy, NY	874,400	337,100	\$34,295	23.7%	79,900	20.0%	67,400	30.6%	103,200	0.324
Memphis, TN	1,087,500	398,200	\$34,170	21.3%	84,800	17.3%	68,900	31.6%	125,800	0.4064
Greenville-Spartanburg-Anderson, SC	922,500	355,000	\$31,540	24.5%	87,000	19.0%	67,500	25.6%	90,900	0.3353
Oklahoma City, OK	1,036,100	396,400	\$31,235	25.1%	99,500	18.2%	72,100	26.1%	103,500	0.3706

Source: 1998 Survey of Buying Power

(1) - "Households" does not include persons living in group quarters (eg. students), although the income of such persons is included in total Effective Buying Income.

(2) - Effective Buying Income is defined by Sales and Marketing Management as "money income less personal tax and nontax payments" or "disposable" or "after-tax" income".

(3) - Weighted index for a region given by .5 times the region's percent of total U.S. Effective Buying Income, .3 times the region's percent of total U.S. retail sales, and .2 times the region's percent of total U.S. population.

(4) - New Minor League Arena is currently in the planning phase.

CITY OF PORTLAND
ARENA FEASIBILITY STUDY
Market Demographics

Table 2. Growth Trends vs. Cities with New Minor League Arenas
Ranked By 2003 Population Percent Increase

Metro Area	1998 Population	Estimated 2003 Population	% Change 1998 - 2003	1998 Households	Estimated 2003 Households	% Change 1998 - 2003
Greenville-Spartanburg-Anderson, SC Nashville, TN	922,500	999,300	8.3%	355,000	394,200	11.0%
Grand Rapids-Muskegon-Holland, MI Manchester-Nashua, NH	1,147,600	1,241,200	8.2%	442,400	486,100	9.9%
<i>Portland, ME</i>	1,033,400	1,091,700	5.6%	371,200	399,900	7.7%
Memphis, TN	358,900	375,500	4.6%	134,600	143,200	6.4%
Oklahoma City, OK	255,500	265,600	4.0%	100,600	106,700	6.1%
Bridgeport-Stamford-Norwalk-Danbury, CT	1,087,500	1,125,700	3.5%	398,200	419,300	5.3%
Rochester, NY	1,036,100	1,073,900	3.6%	396,400	414,800	4.6%
Albany-Schenectady-Troy, NY	835,500	848,800	1.6%	308,400	316,700	2.7%
	1,088,600	1,083,900	-0.4%	408,000	412,000	1.0%
	874,400	857,900	-1.9%	337,100	334,600	-0.7%

Source: 1998 Survey of Buying Power

CITY OF PORTLAND
ARENA FEASIBILITY STUDY
Market Demographics

Table 3. Target Market Size vs. Cities with New Minor League Arenas
Ranked By Percentage of Target Market

Metro Area	1998 Population	Estimated 1998 18-24 Pop.	Estimated 1998 25-34 Pop.	Percentage of Target Market 18-34	Target Market Population	Median Age of Population {1}
Manchester-Nashua, NH	358,900	8.5%	17.3%	25.8%	92,600	34.1
Nashville, TN	1,147,600	9.2%	16.4%	25.6%	293,800	34.4
<i>Portland, ME</i>	<i>255,500</i>	<i>9.3%</i>	<i>16.0%</i>	<i>25.3%</i>	<i>64,600</i>	<i>35.7</i>
Oklahoma City, OK	1,036,100	9.4%	15.8%	25.2%	261,100	33.8
Memphis, TN	1,087,500	9.2%	15.7%	24.9%	270,800	32.9
Grand Rapids-Muskegon-Holland, MI	1,033,400	9.0%	15.6%	24.6%	254,200	32.8
Albany-Schenectady-Troy, NY	874,400	10.0%	14.6%	24.6%	215,100	36.3
Rochester, NY	1,088,600	9.4%	15.1%	24.5%	266,700	35.3
Greenville-Spartanburg-Anderson, SC	922,500	9.8%	14.1%	23.9%	220,500	36.0
Bridgeport-Stamford-Norwalk-Danbury, CT	835,500	7.9%	14.9%	22.8%	190,500	37.9

Source: 1998 Survey of Buying Power

{1} Median Age of Population is given for DMA (Dominant Market Area for local media as defined by Neilson Media Research). All metro areas listed are unique DMAs except for Bridgeport-Stamford-Norwalk-Danbury, CT which is part of the New York, NY DMA.

CITY OF PORTLAND
ARENA FEASIBILITY STUDY
Market Demographics

Table 4. Corporate Market Strength vs. Cities with New Minor League Arenas
Ranked by Highest County Business Per Capita

Metro Area	1998 Population	Total Business Establishments {1}	Metro Business Per Capita {2}	Number of Business Establishments Rank
<i>Portland, ME</i>	255,500	9,018	0.0353	131
Bridgeport-Stamford-Norwalk-Danbury, CT	835,500	27,115	0.0325	53
Manchester-Nashua, NH	358,900	9,929	0.0277	118
Oklahoma City, OK	1,036,100	27,269	0.0263	52
Nashville, TN	1,147,600	30,109	0.0262	45
Greenville-Spartanburg-Anderson, SC	922,500	22,200	0.0241	64
Grand Rapids-Muskegon-Holland, MI	1,033,400	24,267	0.0235	60
Albany-Schenectady-Troy, NY	874,400	20,011	0.0229	70
Memphis, TN	1,087,500	23,357	0.0215	62
Rochester, NY	1,088,600	23,257	0.0214	63

Source: 1998 Survey of Buying Power

{1} Total Business Establishments are per MSA and are based on 1998 Survey of Buying Power.

{2} Total businesses in the MSA as defined by the 1998 Survey of Buying Power divided by the 1998 MSA population.

CITY OF PORTLAND
ARENA FEASIBILITY STUDY
Effective Buying Income

Table 5. Top 25 U.S. MSAs for Median Household Effective Buying Income

Rank	Metro Area	Median Household EBI	Total EBI Rank	Households with EBI of \$150,000+ Rank
1	Bridgeport-Stamford-Norwalk-Danbury	\$60,374	36	10
2	Middlesex-Somerset-Hunterdon	\$54,492	40	27
3	San Jose	\$54,407	26	16
4	Nassau-Suffolk	\$52,697	11	9
5	Washington	\$49,977	4	4
6	Trenton	\$48,502	110	67
7	Newark	\$46,959	21	12
8	Seattle-Bellevue-Everett	\$46,567	13	14
9	Portsmouth-Rochester	\$46,428	106	92
10	Bergen-Passaic	\$46,394	34	19
11	Hartford	\$46,347	45	37
12	Anchorage	\$46,295	150	107
13	New London-Norwich	\$46,013	148	133
14	Ventura	\$45,991	71	62
15	Boston-Lawrence-Lowell-Brockton	\$45,729	6	7
16	Honolulu	\$45,176	65	53
17	San Francisco	\$44,994	22	15
18	Manchester-Nashua	\$44,771	118	104
19	Chicago	\$44,276	2	2
20	New Haven-Waterbury-Meriden	\$44,254	63	52
21	Oakland	\$44,112	17	18
22	Ann Arbor	\$43,830	85	69
23	Santa Cruz-Watsonville	\$43,815	153	109
24	Wilmington-Newark	\$43,797	82	78
25	Dutchess County, N.Y.	\$42,950	162	177
87	Portland, ME	\$37,143	159	133

Source: 1998 Survey of Buying Power

**CITY OF PORTLAND
ARENA FEASIBILITY STUDY
Competitive Context - Market Demographics**

**Table 6. Target Market Size
Ranked By Percentage of Target Market**

City / County	1998 MSA Population	Estimated 1998 18-24	Estimated 1998 25-34	Percentage of Target Market	Target Market Population	1998 0-17
Portland, ME	255,500	9.3%	16.0%	25.30%	64,642	60,043
Manchester-Nashua, NH	358,900	8.5%	17.3%	25.80%	92,596	92,596

*Source: Sales & Marketing Management, 1998 Survey of Buying Power

**CITY OF PORTLAND
ARENA FEASIBILITY STUDY
Arena Development**

Table 7. Most Comparable New Arenas

City	Development Type	Estimated Opening	Market Size	Total Event Days	Anchor Tenant	Approx. Const. Cost	Number of Seats	Cost Per Seat	Luxury Suites	Means Factor	Adjusted Cost Per Seat
Greenville, South Carolina	Public-Private	1998	885,200	TBD	N/P	\$60,000,000	15,000	\$4,000.00	N/P	0.77	\$3,080.00
Grand Rapids, Michigan	Public-Private	Open	1,005,100	169	IHL	\$75,200,000	12,000	\$6,266.67	42-45	0.87	\$5,452.00
Albany, NY*	Public	1989	873,400	150-160	AHL	\$60,000,000	17,500	\$3,428.57	25	1.00	\$3,428.57
West Palm Beach, FL	Private	1998	983,600	141	AHL, CBA	\$36,000,000	10,000	\$3,600.00	N/P	0.85	\$3,060.00
Moline, Illinois		1993	358,700	216	Arena Football (all speculative) CBA & Continental Hockey League	\$29,000,000	12,000	\$2,416.67	15	0.98	\$2,368.33
Spokane, Washington	Public	1995	407,900	159	Canadian Hockey League	\$45,000,000	12,500	\$3,600.00	14	1.00	\$3,600.00
N. Charleston, SC		1993	514,600	130	ECHL	\$26,000,000	14,000	\$1,857.14	N/P	0.78	\$1,448.57

Table 8. New Arena Financing Strategies

City	Financing Information
Greenville, South Carolina	Sophisticated financial package including: 2.3% hotel tax, naming rights (BI-LO Inc.), sale/leasebacks.
Grand Rapids, Michigan	Public Donations = \$20,000,000, Premium Seating Drive(Best 1000 seats in the House available only with \$100,000 donation and \$25,000 lease fee per year)
Albany, NY	N/P
Palm Beach, FL	Using existing infrastructure as for Jai-Alai (4,000 seats)
Moline, Illinois	Revenue Bonds
Spokane, Washington	N/P
N. Charleston, SC	N/P

N/P - Not provided

N/A - Not applicable

* - Construction Completed in 1990

TBD - To Be Determined

**CITY OF PORTLAND
ARENA FEASIBILITY STUDY**

Table 9. Top 10 Facilities - 1996 Operating Statements
Ranked by Gross from Non-Anchor Outside Events

Facility	City	Total Gross	Total Attendance	Total Capacity	Shows/Sellouts	Closest Market (miles)	Characteristics
Centrum	Worcester, MA	\$8,068,499	320,874	466,284	45/9	Boston (45)	Privately-managed
Mark of the Quad Cities	Moline, Illinois	\$6,796,213	321,725	499,439	63/6	Peoria (80)	Isolated facility
Spokane Arena	Spokane, WA	\$6,237,504	342,078	508,594	55/13	Seattle (100+)	Completely Isolated
Bryce Jordan Center (PSU)	University Park, PA	\$5,646,576	246,356	365,975	35/8	Pittsburgh (100)	Isolated, large student pop.
Flanders Expo	Belgium	N/P	N/P	N/P	N/P	N/P	N/P
Hong Kong Coliseum	Hong Kong	N/P	N/P	N/P	N/P	N/P	N/P
Selland Arena	Fresno, CA	\$3,834,494	240,766	392,644	48/5	San Jose (100)	Isolated; on major event route
Tingley Coliseum	Albuquerque, NM	\$3,601,217	213,668	294,412	31/8	Las Vegas (80)	Isolated; Sante Fe w/i 60 miles
Nutter Center	Dayton, Ohio	\$3,463,294	142,278	165,469	18/5	Cincy (50+)	College Facility
San Diego Sports Arena	San Diego, CA	\$2,353,077	112,187	131,712	11/5	LA/Riverside (100)	

N/P - Not Provided

Summary:

Two of top-10 facilities are university owned and operated, two are overseas. Others are predominately isolated from major markets, and have large or reasonably large populations and city centers, and are on natural event routing routes, which makes scheduling of play dates easy.

Rental rates are in the low-moderate range (Dayton = \$6,000 vs. 10%, Spokane = \$4,000 vs. 12%, Fresno = \$2,600 vs. 10%).

Mark at Quad Cities has 1,500 hotel rooms available w/i 10 miles, making conference/training events possible.

CITY OF BRIDGEPORT
ARENA FEASIBILITY STUDY
Minor League Franchise Candidates

Table 10. Professional Sports Minor Leagues

League	Headquarters	Average Attendance	League Best	Minimum Seating Requirement	Home Dates*
Hockey					
International Hockey League	Bloomfield Hills, MI	7,420	13,300 - Detroit	10,000	41
American Hockey League	West Springfield, MA	5,650	11,809 - Philadelphia	None	40
East Coast Hockey League	Princeton, NJ	5,010	11,196 - Louisiana	None	35
Central Hockey League	Indianapolis, IN	4,340	9,454 - Oklahoma City	7,000	35
United Hockey League	Lake St. Louis, MO	3,050	8,647 - Quad City	5,000	37
United States Hockey League	Grand Forks, ND	2,330	6,124 - Omaha	None	28
West Coast Hockey League	Boise, ID	3,660	6,756 - San Diego	N/A	32
Western Pro Hockey League	Phoenix, AZ	3,930	6,194 - Austin	N/A	35
Basketball					
Continental Basketball Association	Phoenix, AZ	3,750	5,140 - Sioux Falls	5,000	28
International Basketball Association	Winnipeg, Man	1,910	3,460 - Des Moines	None	17
United States Basketball League	Milford, CT	1,500	N/A	None	13
Women					
WNBA	New York, NY	9,660	13,703 - Phoenix	4,000	15
American Basketball League	Palo Alto, CA	4,330	8,860 - New England	5,000	22
Arena Football					
Arena Football League	Chicago, IL	10,930	15,980 - Arizona	None	14
Professional Indoor Football League	Las Vegas, NV	N/A	N/A	4,000	14
Indoor Soccer					
National Professional Soccer League	Canton, OH	6,350	8,6400 - Philadelphia	N/A	20
Continental Indoor Soccer League	Encino, CA	5,450	9,160 - Dallas	N/A	14
Eastern Indoor Soccer League	Tallahassee, FL	N/A	N/A	N/A	14
Roller Hockey					
Roller Hockey International	Grass Valley, CA	4,700	Anaheim -8,000	N/A	12
Major League Roller Hockey	Florence, SC	1,500	Anaheim -8,000	N/A	10

Notes:

* - Regular season home games - may be additional dates for playoffs, preseason, etc.

N/A -Not Applicable/Not Available

CITY OF BRIDGEPORT
 ARENA FEASIBILITY STUDY
 Minor League Franchise Candidates

Table II. Arena League Trends

League	Type	Established	Franchises	Geographic Footprint	Expansion Trends
Hockey					
International Hockey League	Independent	1945	18	Coast to coast	League appears to be trying to become the "second" pro league after the NHL. Seeking expansion into major markets left unengaged by the NHL. Prefers markets with population over 900,000. Most arenas seat over 10,000.
American Hockey League	NHL Primary Affiliate	1936	18	Primarily New York, New England, and Eastern Canada. A few teams as far west as Cincinnati and Lexington, KY.	Stable league seeking to add two new franchises in the next few years. Not looking to break out of Northeastern footprint.
East Coast Hockey League	NHL Secondary Affiliate	1988	25	Southeastern States and along Gulf Coast to Louisiana. East Coast as far north as Trenton, NJ. Several teams in Ohio - holding west of Peoria, IL.	Very aggressive expansion plans. Seeking to grow to thirty-two teams in the next few years. Primarily focusing on filling in existing footprint. Will consider peripheral markets as well.
Central Hockey League	Independent	1992	10	Across the south from North Carolina to Oklahoma. Northernmost team is Topeka, KS.	Aggressively seeking expansion markets. Next wave will focus on MO, AK, LA. After that the league will look at TN, KY, IL.
United Hockey League	Independent	1991	10	Across the north from New York State, Michigan, Illinois, into Wisconsin, with no teams in Ohio (ECHL territory). Two teams in North Carolina.	Aggressively seeking expansion markets within and around the existing footprint. Targeting expansion to twenty-four teams within the next two years.
United States Hockey League	Top Amateur	1972	12	Primarily Upper Midwest including Wisconsin, Minnesota, Iowa, Nebraska.	Very stable "major junior" amateur league, governed by USA Hockey. Not aggressively seeking expansion.
Basketball					
Conditional Basketball Association	NBA Affiliate	1946	9	Across the northern states from Connecticut to Washington State.	Seeking expansion opportunities across the country. No formal market criteria. Currently examining markets in Trenton and St. Charles. Also considering New Orleans, Savannah, and Olatario, CA.
International Basketball Association	Independent	1995	8	Primarily Upper Midwest including Wisconsin, Minnesota, North Dakota, South Dakota.	Seeking steady expansion around the existing geographic footprint.
Women's WNBA	NBA Sponsored	1997	10	Major markets from coast to coast.	Show expansion into major markets. Adding Twin Cities and Orlando in 1999. Set 5,000 season ticket sales before granting franchise.
American Basketball League	Independent	1996	10	Major markets from coast to coast.	Show expansion into major markets. Adding Chicago in 1998.
Arena Football					
Arena Football League	Independent	1987	14	Coast to coast.	Slow and steady growth since inception. League has begun to receive solid television exposure. Continued slow expansion into major centers expected. Do not play in smaller venues.
Professional Indoor Football League	Independent	1998	8	Southern States, Colorado, Utah, Idaho, Hawaii, and Wisconsin.	Inaugural season revealed league instability. One team had a temporary hiatus, one shut down mid-season. Expansion is expected, though trends are difficult to predict.
Indoor Soccer					
National Professional Soccer League	Independent	1984	14	Across the central and northern States from Philadelphia to Wichita. Several Canadian teams.	Steady growth from six to fourteen teams since inception. Seeking to expand to most major markets (facilities over 15,000 capacity). Assisting in the development of a major league system for mid-size markets.
Continental Indoor Soccer League	Independent	1996	11	Coast to coast.	Ceased operations after 1997 season.
Roller Hockey					
Roller Hockey International	Independent	1993	10	Northeastern States and West Coast, with not much in between.	Suspended operations after 1997 season. May centralize ownership and restart.
Major League Roller Hockey	Independent	1997	14	Primarily East Coast from Buffalo to Tampa. Six team division in the U.S.	Seeking to build nationwide presence. Anaheim came over from RHL, and Phoenix should be the next expansion franchise. Prefer smaller venues in hockey cities. Franchise rights sold by state.