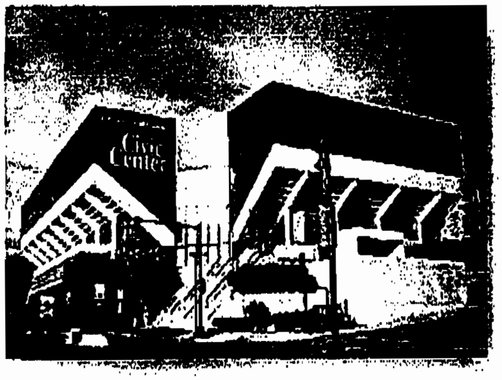

CUMBERLAND COUNTY CIVIC CENTER

THE CIVIC CENTER
Cumberland County
Portland, Maine

MARKET ANALYSIS

April 9, 2001

BRAILSFORD & DUNLAVEY
CATALYST FOR BUILDING COMMUNITY

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INTRODUCTION

In February 2001, Brailsford & Dunlavey, was retained by the Cumberland County Civic Center Authority to conduct a feasibility study for the proposed expansion and improvement of the Cumberland County Civic Center indoor arena in downtown Portland, ME. This document, representing the market research findings for that analaysis, was based on an update of the market analysis component of a previous new indoor arena feasibility study prepared by Brailsford & Dunlavey for the City of Portland in May 1999. This report represents Brailsford & Dunlavey's findings on the commissioned market analysis.

The findings contained herein represent the professional opinions of Brailsford & Dunlavey personnel based on the assumptions and conditions detailed. Brailsford & Dunlavey analysts have conducted research using both primary and secondary information sources which are deemed to be reliable, but whose accuracy Brailsford & Dunlavey cannot guarantee. Due to variations in national and global economic and legal conditions, actual project costs and revenues may vary from projections, and these variances may be material.

Executive Summary

Local Business Support

- Based on interviews with Greater Portland's largest employers and key industry players, the local economy is "healthy" at best and no worse than "fair." The survey demonstrated strong qualitative findings among local businesses supporting the proposed renovation of the Civic Center with a high demand for advertising opportunities as well as premium seating packages. Luxury suites will also be marketable with interest doubling since 1999.

Season Ticket Holder Preferences

- There is a clear demand among season ticket holders for improvements to the restroom and concession facilities. The crowded concourse was often cited as a concern, but this is in part a function of deficient restrooms and concession stands. There is also a clear interest in a restaurant and a market for higher profile, non-hockey events.

Promoter Interests

- Event Promoters felt that the Civic Center is a competitive facility in a distinct market with attractive rates. The Portland market is better positioned than it was in the 1970s and 1980s, but stands to lose events without an expanded seating capacity, additional event support facilities, and improved patron amenities. The Civic Center could also attract additional events if a curtaining system was in place to provide a flexible seating configuration.

Potential Sports Tenants

- The analysis revealed that non-hockey minor league sports are growing and in the process of expanding. Basketball, roller hockey, lacrosse, and arena football are all actively pursuing expansion. These sports and their respective leagues do not have a presence in the Northeast, but their expansion strategies include spreading to new, medium-sized markets. The Arena Football League 2 has an expansion plan in place that targets New England and specifically identifies the Portland market. Considering that the Civic Center has been the home to professional roller hockey and basketball franchises, it is possible for Portland to be included in this wave of minor sports league expansion.

Conclusion

- The Greater Portland area continues to have an attractive presence in the event community, but the Civic Center increasingly fails to schedule events due to the physical limitations of the facility. The improvement of the patron amenities, addition of event support facilities, increase in seating capacity, and retrofitting of luxury suites would make the Civic Center more attractive to event promoters and potential minor sports league tenants. While these improvements may result in a moderate number of net new events, they will maintain the facility's market competitiveness, protect the Civic Center from losing events, and create new revenue generators.

Introduction

This market analysis represents one component of a feasibility study for the proposed expansion and renovation of the Cumberland County Civic Center (Civic Center) in Portland, ME. This is based in part on a similar study completed by Brailsford & Dunlavey (B&D) in May 1999 for the City of Portland. That analysis was part of a larger feasibility study for a new indoor arena in Portland. The purpose of this analysis is to update the potential revenue sources identified in the first study by evaluating the strength of the Portland area as a market for typical arena events and identifying physical improvements that would strengthen the Cumberland County Civic Center's economic performance.

Methodology

Telephone interviews were conducted with event promoters, facility management companies, businesses in the Greater Portland area, and Portland Pirates season ticket holders. These participants were able to provide professional and educated insight based on their knowledge of the Portland market, familiarity with the venue and comparable facilities, and experiences at events hosted by the Civic Center. The following analyses were performed to evaluate the market:

- Telephone interviews with companies in the Greater Portland area to assess corporate demand for advertising and premium seating.
- Telephone interviews with Portland Pirates season ticket holders to identify ticket buying preferences and patron amenity demands.
- Telephone interviews with local promoters and entertainment providers to gauge interest in supporting the renovation through concerts, ice shows, etc., to identify suggested physical improvements, and to gain an understanding of the Portland market.
- Telephone interviews with minor league sports representatives to review potential sports tenants and identify the various leagues' expansion and relocation trends.

This survey was developed to yield qualitative data on potential support through revenue streams. It is not designed or intended to yield quanitative or statistically reliable responses.

Findings: Survey of Local Businesses

B&D conducted a series of telephone interviews with companies in the Portland area to determine local corporate support for the renovation of the Civic Center. The City of Portland's Department of Economic Development and the Greater Portland Chambers of Commerce provided directories of the area's largest employers and revenue generators. From these directories, targeted companies were selected as participants. Attempts were made to contact owners, managers, and marketing or business development directors to discuss their perception of the of the Portland business climate, exposure to sports and entertainment marketing, and their potential interest in supporting the renovation through advertising, premium seating, and naming rights.

Exhibit 2 includes a list of the companies contacted, with participants in bold, and Exhibit 3 is the telephone questionnaire. A total of

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sixteen companies representing the insurance, medical, banking, retail, and professional service industries participated.

Company representatives responded positively when asked to discuss Portland's business climate. Over 60% described the economy as "good" or "healthy;" none described the climate as less then "fair." In contrast, responses to the same question in the May 1999 analysis included "weak," "stagnant," or "improving." In the same study, the companies also expressed optimism for the future that, based on the present analysis, was realized. Current respondents acknowledged the recent growth and that a "leveling off" is possible, but expressed no concerns about a decline in the business climate.

The interviews revealed a considerable interest in season tickets and premium seating in a renovated Civic Center. For the purposes of this analysis, club seats were described as larger seats in premium locations with waiter/waitress service and luxury suites were said to include television, telephone service, waiter/waitress service, and a bar. Annual fees were quoted at $200 to $500 for season tickets, $1,000 to $2,000 for club seats, and $10,000 to $25,000 for the luxury suites. Nearly 55% had an interest in season tickets, 50% in club seats, and 42% in luxury suites. The response to season tickets and club seats is consistent with the May 1999 study, but the interest in luxury suites rose from 15% of the respondents to 42%. With this marked increase in luxury suite interest, a strong demand for all varieties of premium seating can be expected.

Interest in various advertising options, including programs, signage, ice logos, and naming rights, was expressed by over 62% of the respondents. This interest is considerably higher than that of similar sized markets. It should also be acknowledged that those companies expressing limited interest also have a focused marketing strategy and that they would not benefit from advertising in the arena. There was also considerable support for purchasing naming rights with 18% of the participants considering it an option, and one company expressing definite interest.

The survey exposed strong qualitative findings in support of the planned renovation of the Civic Center. Most importantly, there will be high demand among local companies for advertising opportunities as well as premium seating packages. Also, the luxury suites will be very marketable with interest among area businesses doubling since May 1999.

Findings: Survey of Season Ticket Holders

B&D conducted telephone interviews with a sample of present Portland Pirates season ticket holders. The purpose of this series of interviews was to determine the physical advantages of the present Civic Center, what features it lacks, individual interest in premium seating, support for a possible restaurant, and what events other than minor league hockey might be attractive. From a list provided by the Portland Pirates organization, forty individuals were contacted and twenty participated. Exhibit 4 is the questionnaire that was used.

Generally speaking, the respondents were satisfied with the Civic Center, but could not specifically identify positive features. While not necessarily physical components of the building, the several parking options and the location near the Old Port area were commonly cited as being advantages of the facility. Two participants were able to provide unique insight as they attended all Pirates road games as well as home games. Based on their familiarity with other facilities in the league, they were able to effectively comment on the Civic Center as it compares to other facilities. In this context, they spoke highly of the generous sizing of the seats, the proximity to the ice, and the unobstructed sight lines. Generally speaking, the fact that there "is not a bad seat in the arena" was considered an advantage of the Civic Center.

All participants were able to identify specific features that the building lacked or needed improved, particularly the service areas. Over 83% of the respondents faulted the narrow, crowded concourse; the aged and inadequate restroom facilities; the shortage of concession stands; and the limited variety of concession options. Those not identifying these features had a different level of expectations and, while being satisfied with and accepting of the patron amenities, acknowledged the inconveniences. Other suggested improvements included a new, advanced scoreboard and elimination of the steep, lengthy stairs approaching the building, particularly on the southeast corner.

Responses to premium seating were varied with club seats given the most consideration. Half of the participants expressed interest in club seating in the $1,000 to $2,000 range, but none could foresee spending between $15,000 and $25,000 for a luxury suite. When asked about the club seating, waiter/waitress service and privileged access to a restaurant was included as an amenity. This seemed to be an especially attractive feature as nearly 90% of the season ticket holders responded positively to the prospect of a restaurant. The same respondents also expressed interest in having the restaurant available when events are not being held. Support among season ticket holders appears to be strong as half of those participating were willing to increase their spending from between $200 and $500 for their present season tickets to between $1,000 and $2,000 for potential club seating.

The interviews revealed that a significant number of the season ticket holders attend events at the Civic Center beyond Pirates games and that they would potentially attend more given the right conditions. Over 50% purchase tickets for ice shows, circuses, concerts, and other family shows on a regular basis. A majority of the participants said that they would patronize the building more frequently if a higher profile and larger variety of events were hosted at the Civic Center. Additionally, four respondents cited poor marketing or a lack thereof as reasons for not attending more events outside of minor league hockey.

It is important to acknowledge the sense of civic pride among the respondents. All were passionate about Portland and the Civic Center and took the interview seriously. Several were aware of the previously planned new arena and were adamant about their disappointment that it was not built. Nonetheless, they made a point of adding that they would support the expansion and improvement of the Civic Center.

There is clearly a need for significant improvements to and addition of restrooms and concession stands, an increased selection of concessions, and a reduction of concourse traffic. The crowded concourse was a commonly cited problem, but this is in part a function of deficient restroom and concession facilities. Relieving the long lines of patrons waiting for these facilities would free concourse space and eliminate crowding. There is also a clear interest in adding a restaurant to the facility with year-round access. Lastly, demand for events beyond minor league hockey is considerable and a market exists for effectively promoted, higher profile events.

Findings: Promoter Interviews

Telephone interviews were conducted with event promoters, facility management companies, and entertainment providers to gauge their interest in a renovated Civic Center. B&D researched the relevant regional and national promoters and interviewed them to determine their perceptions of the Civic Center's competitive position, interest in support through touring musical events, and interest in support through non-music events.

Touring Music Events

A majority of the touring music promoters revealed that the Portland market misses available music events on a regular basis due to a lack of seating capacity. The respondents believed that a number of smaller acts that appeared at Boston's Fleet Center or Worcester's Centrum in 2000 would have considered the Civic Center if it had a larger seating capacity. A majority suggested that 2,000 additional seats would improve the facility's ability to attract events. Promoters also discussed a category of smaller concerts that target facilities in the 4,000 to 7,000 seat range. This portion of the market could be captured if a curtaining system was in place to allow changes in the seating configuration.

Non-music Events

Events in the non-music category, such as exhibition basketball, figure skating, professional wrestling, circuses, and other family shows, are important components of the Civic Center event calendar. Interviews were conducted with Feld Entertainment, the Harlem Globetrotters, the WWF, and various skating star shows to identify the needs of the facility and its competitiveness with other facilities in the region. These organizations have used the Civic Center in the past and have a comprehensive familiarity with the market.

Representatives from these companies considered a larger seating capacity, improved patron amenities, and additional event support areas essential renovation programming components. The WWF requires seating for 10,000, overhead rigging, significant staging areas, and parking for 12 television trucks for televised events. Skating shows would favor additional seating as well as improved and additional patron amenities, particularly novelty stands. While the facility is large by the Harlem Globetrotter's standards, they would also prefer additional novelty stands. The circus shows cited staging areas for animals as needed facilities.

Competition

Promoters mentioned two facilities, the Whittemore Center Arena at the University of New Hampshire and the Manchester Civic Center in Manchester, NH, as two potentially competing facilities that could impact the Civic

Center's ability to attract events. It was the respondent's opinion that neither facility would have a negative impact on the Portland market and the Civic Center. Opened in 1995, the 6,000-seat Whittemore Center Arena is considered small and geographically isolated. Furthermore, it suffers from the availability limitations inherent in college and university facilities. The 11,000-seat Manchester Civic Center is scheduled to open in November of 2001, but it is expected by promoters to have little impact on the Civic Center and instead be in competition with the Fleet Center in Boston, MA and the Worcester Centrum in Worcester, MA. Additionally, promoters doubt that the market would support events other than minor league hockey. Several commented that the new facility would have a positive impact on the Civic Center if a routing compatibility could develop between the facilities.

Promoters felt that the Civic Center is a competitive facility in a distinct market with attractive rates, but that the facility's economic performance is declining. While several participants considered the Portland market stronger and better positioned than it was in the 1970s and 1980s, they also believed that the Civic Center stands to lose events if physical improvements are not made to the facility.

Findings: Potential Sports Tenants

The Portland market currently supports the Portland Pirates AHL hockey team. This minor league franchise is the anchor tenant at the Civic Center. There are a number of other non-hockey, minor league professional sports that could potentially provide tenants and strengthen the Civic Center event calendar. In order to evaluate these possible tenants, summary information for the various leagues is as follows:

Basketball

- **International Basketball League (IBL):** The IBL is a men's basketball league formed in 2000. Teams are located in major and middle markets from New Jersey to New Mexico and play in facilities with capacities ranging from 8,000 to 18,000. The league is poised to expand and has added former Continental Basketball Association teams in St. Louis, MO and Rockford, IL.

- **American Basketball Association (ABA 2000):** The ABA200 is a start-up men's professional basketball league with eight teams in major markets. Teams target the smaller facilities in the market, such as the 10,000-seat Hinkle Fieldhouse in Indianapolis and the 7,500-seat San Diego sports Arena. The inaugural season started in December 2000 with franchises playing 60-game schedules. With the dissolving of the Continental Basketball Association, expansion is a possibility.

- **International Basketball Association (IBA):** Established in 1995, the IBA is the oldest basketball minor league. Ten teams are located in smaller markets throughout the upper Midwest and Canada and play in facilities with capacities under 10,000. The league is actively pursuing former Continental Basketball Association teams and plans to expand. The IBA is in the best financial position of the minor basketball leagues

- **Women's National Basketball Association (WNBA):** The league recently added franchises in Indiana, Miami, Portland, and Seattle. Franchises are located in NBA markets with arena seating capacities of 15,000-20,000. The 32-game schedule is played from June to August.

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- **National Basketball Development League (NBDL):** The league was created by the NBA and will begin play in 2001. The NBDL will include eight teams located in the Southeast. Two franchises have been awarded to North Charleston, SC and Fayetteville, NC.

Football

- **Arena Football League (AFL):** The Arena Football League (AFL) has 19 franchises playing in primarily top-25 markets. Teams play 16 games between April and July. The smallest facility in the league seats 10,600. The league is actively expanding and plans to add 15 franchises within the next five years.

- **Arena Football League 2 (af2):** The league was formed in 2000 and includes 27 franchises. Markets and facilities of all sizes are targeted with teams generally located east of Wichita, KS. Each team plays a 16 game schedule. Like the AFL, the league is aggressively looking to expand across the nation and plans to establish a presence in the Northeast. Portland has been identified as a possible expansion city.

- **Indoor Professional Football League (IPFL):** Established in 1997, the league has five teams from Idaho to New Jersey. Teams play in facilities with capacities below 12,000 and follow a 16 game schedule. The IPFL has experienced some difficulties and recently lost four teams.

Soccer

- **National Professional Soccer League (NPSL):** Franchises are located in major markets in the U.S. and Canada. Teams play a 40-game schedule between October and April in facilities with seating for 10,000-20,000. The league is planning to expand into major markets and is also considering a minor league system that would target smaller markets.

Indoor Lacrosse

- **National Lacrosse League (NLL):** The league includes 10 teams that play a 14-game schedule from December through April. Franchises are generally located in major markets, utilizing NBA and NHL facilities with seating in excess of 15,000. The league is actively going through an expansion, recently adding teams in Columbus, OH and Calgary. Franchises are also being considered for Vancouver and Montreal.

This analysis reveals that non-hockey minor league sports are growing and in the process of expanding. Between 1997 and 2001, minor league basketball will have gained four new leagues with 39 teams across the nation. Minor league indoor football has had a similar expansion, adding two leagues and 32 teams during the same time span. Professional roller hockey and indoor lacrosse are also growing with the addition of teams in Canada. These trends are summarized in tables 8 and 9.

These leagues do not have a presence in the Northeast, but their expansion strategies include spreading to new, medium-sized markets that may include Portland. The Arena Football League 2, for example, has an expansion plan in place that targets New England and specifically identifies the Portland market. Considering that the Civic Center has been the home to professional roller hockey and basketball franchises in the past, it is possible for Portland to be included in this wave of minor league sports expansion.

Conclusions

The Greater Portland market continues to have an attractive presence in the event community, but the Civic Center fails to schedule events due to the physical limitations of the facility. It is clear that there is demand for an increase in seating capacity, an improvement of patron amenities, the addition of event support facilities, and a curtaining system. There is also a significant demand within the Portland community for advertising, premium seating, and restaurant facilities. Considering these changes and the local support, the Civic Center could possibly attract a new minor league sports tenant. While these improvements may result in a moderate number of net new events, they will maintain the Civic Center's market competitiveness, protect the facility from losing events, and create new revenue generators.

CUMBERLAND COUNTY CIVIC CENTER
RENOVATION FEASIBILITY STUDY
Comparable Facilities Analysis

Exhibit 6: Comparable Facilities Involving Renovation
Capacities between 7,000 and 12,500

Facility	Location	Owner	Year Built	Capacity	Club Seats	Luxury Suites	Signs	Rate	Naming Rights	Year Renovated	Cost	Improvements
Pepsi Coliseum	Indianapolis, IN	State of Indiana	1939	8200	Yes [1]	No	101	$6,000-23,000	Yes [2]	2000	$3,000,000	HVAC, new seats and roof, additional support facilities.
Springfield Civic Center	Springfield, MA	Commonwealth of Massachusetts	1972	7442	No	No	53	$400-2,000	No	Planned	$65,500,000	Premium seats, new convention center.
Freeman Coliseum	San Antonio, TX	Bexar County	1949	9839	No	No	95	$2,500-10,000	No	Proposed		Threatening move to new San Antonio Spurs' facility if improvements are not made.
Kansas Coliseum	Wichita, KS	Sedgwick county	1974	9682	No	No	50	$2,500-5,000	No	2004	$37,500,00 **	Additional 2,000 seats, 34 suites
Augusta-Richmond County Civic Center	Augusta, GA	Augusta-Richmond County Coliseum Authority	1979	7000	No	No	85	$3,000-25,000	No	Planned	$5,000,000 ^	HVAC, 1,600 additional seats, 4 suites, food court. Previously invested $1,000,000 in ice floor.
Cricket Arena	Charlotte, NC	City of Charlotte	1955	9500	No	No	75	$4,500-35,000	Yes [3]	Proposed		Threatening move to new Charlotte Hornets' facility if improvements are not made.
Mississippi Coast Coliseum	Biloxi, MS	Mississippi Coast Coliseum	1977	9150	Yes [4]	Yes [5]	110	$4,000-28,000	No	2000		Luxury suites, club seats, new scoreboard.
Roanoke Civic Center	Roanoke, VA	City of Roanoke	1971	8373	No	No	44	$4,500	No	Planned		Luxury suites, club seats, exhibit space
Allen County War Memorial Coliseum	Fort Wayne, IN	Allen County	1952	8000	No	No	60	$2,200-7,200	No	2003	$25,000,000	24 Luxury suites, 2500 additional seats. Other improvements in 1989, 1993, 1996.
Selland Arena	Fresno, CA	City of Fresno	1966	9500	No	No	34	$6,000-10,000	No	Proposed		Will relocate if luxury suites are not added.
Tacoma Dome	Tacoma, WA	City of Tacoma	1983	9000	No	No	N/P	N/P	No	1998	$1,200,000	Improved sight lines.
Veterans Memorial Coliseum	Jacksonville, FL	City of Jacksonville	1963	8500	No	No	N/P	N/P	No	Proposed		Will relocate if improvements are not made.
San Diego Sports Arena	San Diego, CA	City of San Diego	1966	7500	No	No	N/P	N/P	No	1999		Concourse improvements, new scoreboard.
Blue Cross Arena at the War Memorial	Rochester, NY	City of Rochester	1955	12500	No	Yes [6]	47	$2,000-28,000	Yes [7]	1998	$30,000,000	Increased seating capacity, added 23 luxury suites.
Tallahassee-Leon County Civic Center	Tallahassee, FL	Civic Center Authority	1981	12500	Yes [8]	Yes [9]	80	$2,500-6,000	No	1999		Added luxury suites and a restaurant.
Manchester Civic Center *	Manchester, NH	City of Manchester	2001	10019	Yes [10]	Yes [11]	N/P	N/P	No	N/A		
The Arena at Harbor Yard *	Bridgeport, CT	City of Bridgeport	2001	10000	Yes [12]	Yes [13]	N/P	N/P	No	N/A		

[1] 2,000 club seats at $750 each
[2] $130,000 per year for five years
[3] $150,000 per year for five years
[4] Seven club seats at $7,000-10,000 each
[5] Four luxury suites at $7,000-20,000 each
[6] 23 luxury suites sell for $40,000 per year for 3 to 7 years
[7] $2,975,000 for 15 years
[8] 1,100 sell for $1,500-2,550 per year
[9] 34 luxury suites sell for $30,000-50,000 per year for 5 to 10 years
[10] 600 club seats sell for $1,600 per year
[11] 34 luxury suites sell for $37,000 per year for five years
[12] 1,300 club seats sold for $1,900 per year for 1 to 5 years
[13] 42 luxury suites sell for $31,500-65,000 per year for 3 to 7 years
* Facilities to be open by the end of 2001. Included for premium seating pricing context.
** Represents amount requested and is not based on an educated estimate
^ Considering $.50 renovation fee per ticket sold.

CUMBERLAND COUNTY CIVIC CENTER
RENOVATION FEASIBILITY STUDY
Event Capture Analysis

Exhibit 7: Comparable Facility Event Capture
Capacities between 7,000 and 12,500

Facility	Location	Professional Leagues	Other Pro Sports	College	Other Amateur	High School	Concerts	Family Shows	Auto Shows	Trade Shows	Other
Pepsi Coliseum	Indianapolis, IN	CHL	Rodeo		Yes	Yes	Yes	Yes	Yes	Yes	State Fair
Springfield Civic Center	Springfield, MA	AHL		Yes	Yes		Yes	Yes	Yes	Yes	Conferences
Freeman Coliseum	San Antonio, TX	CHL					Yes	Yes	Yes	Yes	Conferences
Kansas Coliseum	Wichita, KS	CHL, NPSL, af2			Yes	Yes	Yes	Yes		Yes	Flea Market
Augusta-Richmond County Civic Center	Augusta, GA	ECHL, af2	Rodeo	Yes	Yes		Yes	Yes		Yes	Ball
Cricket Arena	Charlotte, NC	ECHL	Rodeo	Yes	Yes		Yes	Yes		Yes	Conferences
Mississippi Coast Coliseum	Biloxi, MS	ECHL, IPFL	Rodeo	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Ball
Roanoke Civic Center	Roanoke, VA	ECHL, af2	Rodeo	Yes			Yes	Yes	Yes	Yes	Musical
Allen County War Memorial Coliseum	Fort Wayne, IN	UHL	Rodeo	Yes	Yes	Yes	Yes	Yes		Yes	Flea Market
Selland Arena	Fresno, CA	WCHL		Yes			Yes	Yes	Yes	Yes	Conferences
Tacoma Dome	Tacoma, WA	WCHL		Yes		Yes	Yes	Yes		Yes	Conferences
Veterans Memorial Coliseum	Jacksonville, FL	af2		Yes		Yes	Yes	Yes		Yes	Conferences
San Diego Sports Arena	San Diego, CA	ABA2000, WCHL, WISL	Wrestling		Yes		Yes	Yes		Yes	Conferences
Blue Cross Arena at the War Memorial	Rochester, NY	AHL, af2	Wrestling		Yes	Yes	Yes	Yes	Yes	Yes	Conferences
Tallahasee-Leon County Civic Center	Tallahasee, FL	ECHL, af2	Wrestling	Yes	Yes		Yes	Yes		Yes	Public Skating
Manchester Civic Center	Manchester, NH	AHL	N/A	Yes	N/A	N/A	N/A	N/A	N/A	N/A	
The Arena at Harbor Yard	Bridgeport, CT	AHL	N/A	Yes	N/A	N/A	N/A	N/A	N/A	N/A	

CHL: Central Hockey League
AHL: American Hockey League
UHL: United Hockey League
WCHL: West Coast Hockey League
NPSL: National Professional Soccer League
WISL: World Indoor Soccer League
IPFL: Indoor Professional Football League
af2: Arena Football League 2
ABA2000: American Basketball Association 2000

CUMBERLAND COUNTY CIVIC CENTER
RENOVATION FEASIBILITY STUDY
Minor Professional League Franchise Candidates

Table8: Analysis of Minor Sports Leagues

League	Headquarters	Average Attendance	League Best	Minimum Seating Requirement	Home Dates*
Hockey					
International Hockey League	Madison Heights, MI	7,222	13,300 - Detroit	10,000	41
American Hockey League	Springfield, MA	5,682	11,809 - Philadelphia	None	40
East Coast Hockey League	Princeton, NJ	4,862	11,196 - Louisiana	None	35
Central Hockey League	Indianapolis, IN	4,477	9,454 - Oklahoma City	7,000	35
United Hockey League	St. Louis, MO	3,871	8,647 - Quad City	5,000	37
West Coast Hockey League	Boise, ID	4,679	14,275 - Tacoma	None	32
Western Pro Hockey League	Phoenix, AZ	3,701	6,194 - Austin	5,000	35
Basketball					
International Basketball League	Baltimore, MD	N/A	N/A	None	32
International Basketball Association	St. Paul, MN	1,696	6,253 - Des Moines	None	17
United States Basketball League	Milford, CT	N/A	N/A	None	15
Women's National Basketball Association	New York, NY	9,062	N/A	NBA Facility	16
National Basketball Development League	New York, NY	N/A	N/A	N/A	28
American Basketball League 2000	Indianapolis, IN	N/A	N/A	None	30
Arena Football					
Arena Football League	Chicago, IL	9,846	28,746 - Tampa Bay	10,000	8
Arena Football League 2 (af2)	Chicago, IL	7,239	N/A	None	8
Indoor Professional Football League	Atlanta, GA	N/A	N/A	Under 12,000	8
Indoor Soccer					
National Professional Soccer League	Canton, OH	5,466	18,197 - Milwaukee	None	40
World Indoor Soccer League	Plano, TX	4,819	11,045 - Dallas	None	12
Roller Hockey					
Major League Roller Hockey	Florence, SC	1,500	8,000 - Anaheim	N/A	10
Indoor Lacrosse					
National Lacrosse League	Lyndhurst, NJ	9,161	18,911 - Philadelphia	None	7

Notes:
* Regular season home games - may be additional dates for playoffs, preseason, etc.
N/A -Not Applicable/Not Available

Table 9: Review of Minor Sports Leagues and Growth Trends

League	Type	Established	Franchises	Geographic Footprint	Expansion Trends
Hockey					
International Hockey League	Independent	1945	13	Coast to coast.	League appears to be trying to become the "second" pro league after the NHL. Seeking expansion into major markets left untapped by the NHL. Prefers markets with population over 900,000. Most arenas seat over 10,000.
American Hockey League	NHL Primary Affiliate	1936	20	Primarily New York, New England, and Eastern Canada. A few teams as far west as Cincinnati and Lexington, KY.	Stable league seeking to add franchises. Not looking to break out of Northeastern footprint.
East Coast Hockey League	NHL Secondary Affiliate	1988	27	Southeastern states and along Gulf Coast to Louisiana. East Coast as far north as Trenton, NJ. Several teams in Ohio - nothing 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	1963	12	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	14	Across the north from New York State, Michigan, Illinois, and 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.
Basketball					
United States Basketball League	Independent	1985	11	Across the eastern seaboard from New York to Florida ans as far west as Oklahoma.	Seeking expansion opportunities across the country with no formal market criteria. Franchises from the failed Continental Basketball Association are interested in joining the league.
International Basketball League	Independent	2000	7	Coast to coast.	Seeking expansion and is courting former Continental Basketball Association franchises.
International Basketball Association	Independent	1995	10	Primarily upper midwest including Wisconsin, Minnesota, North Dakota, South Dakota.	Seeking steady expansion around the existing geographic footprint.
WNBA	NBA Sponsored	1997	16	Major markets from coast to coast.	Slow expansion into major markets with an NBA franchise presence.
American Basketball Association 2000	Independent	2000	8	Primarily major markets in the midwest, but including Tampo Bay, Los Angeles, and San Diego.	Slow expansion into major markets depending on performance during inaugural season.
National Basketball Development League	NBA Sponsored	2001	8	Southeastern states.	Expansion opportunities will be addressed after inaugural season

Table 9: Review of Minor Sports Leagues and Growth Trends (Continued)

League	Type	Established	Franchises	Geographic Footprint	Expansion Trends
Arena Football					
Arena Football League	Independent	1987	19	Coast to coast.	Aggressive growth policy and expansion into major markets expected. League has begun to receive solid television exposure. Plans to expand to 34 teams within next 5 years. Do not play in smaller venues.
Arean Football League 2 (af2)	Independent	2000	27	Markets east of Wichita, KS.	Aggressively targeting expansion into markets of all sizes in the Northwest, Southwest, Texas, and the Northeast, including Portland.
Indoor Professional Football League	Independent	1997	5	Various locations from Idaho to New Jersey.	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	12	Across the central and northern states from Philadelphia to Wichita. Several Canadian teams.	Seeking to expand to most major markets (facilities over 15,000 capacity). Assisting in the development of a minor league system for mid-size markets.
World Indoor Soccer League	Independent	1999	8	Southwest, including Mexico.	Planning a manged expansion into major markets in the geographic area.
Roller Hockey					
Major League Roller Hockey	Independent	1997	14	Concentration of teams in Idaho, Utah, Colorado, and the mid-atlantic states.	Seeking to build nationwide presence and prefer smaller venues in hockey cities.
Indoor Lacrosse					
National Lacrosse League	Independent	1987	10	Mid-atlantic states.	Aggressively expanding, adding teams in Columbus, OH and Calgary within the past year. Considering Vancouver and Montreal for the 2002 season.

BRAILSFORD & DUNLAVEY
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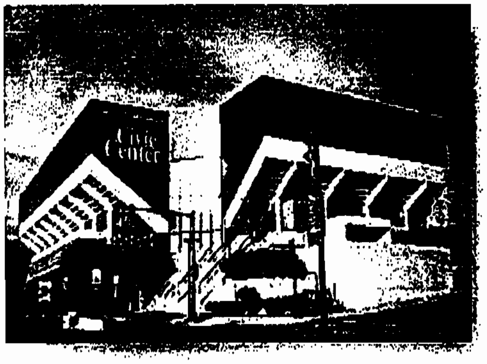
PAGES: 17 including cover

As per Chris Dunlavey's request, please find under this cover copies of selected portions of the Cumberland County Civic Center market analysis. Please call 202-266-3407 with any transmittal difficulties.



CUMBERLAND COUNTY CIVIC CENTER

MARKET ANALYSIS

April 9, 2001

THE CIVIC CENTER
Cumberland County
Portland, Maine

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