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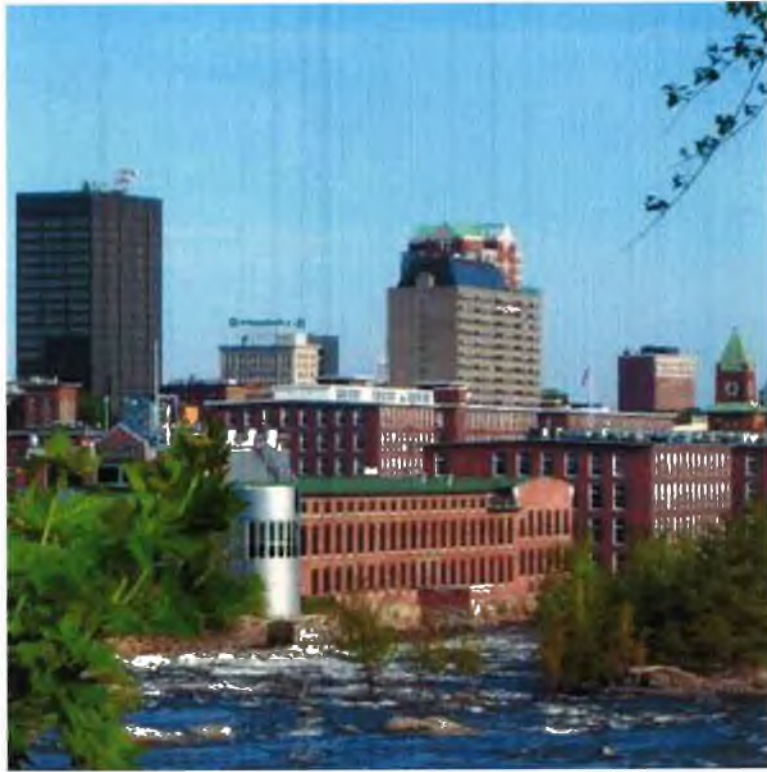
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Economic Development

Marketing Strategy

Submitted to the City of Manchester, NH
December 2011



Moran, Stahl & Boyer

Site Selection and Economic Development Consultants



TABLE OF CONTENTS

Section	Description	Page
1	Introduction and Background Information	1
2	Overview on Potential Opportunities	2
3	Marketing Strategy for Potential Opportunities	9
4	Evaluation of Resources That Support Economic Growth	11

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SECTION 1 • INTRODUCTION AND BACKGROUND INFORMATION

As the current economy has progressed, major employers in downtown Manchester have reduced their workforce resulting in a substantial increase in available office space. In addition, employers have sought out office environments with increased density that not only reduces overall space but adds additional pressure to the already challenged parking situation in the downtown area. The City of Manchester is seeking a strategy to attract additional businesses to the Manchester area to sustain economic growth and utilize the available space.

Key questions that the City seeks to address focus on the following:

- What types of industry segments would be most interested in the Manchester area?
- What are the best strategies to stimulate employers to expand in or to be attracted to Manchester?

Identification of Assets

The Manchester area has the following assets that can potentially attract business:

- Regional airport with non-stop access to 15 key destinations.
- Large student population and educational institutions with business, engineering, IT and other programs.
- Available business services and amenities (restaurants, services, retail).
- Available diverse types of office space at competitive rates (high rise/multi-tenant, stand-alone and renovated mill space).
- Favorable taxation.
- Industry presence (professional/technical services, back office operations, some small headquarters and selected manufacturing).

Situation Analysis: Competitive Position

Manchester is a very competitive location that has a low cost for labor and real estate while offering access to a regional airport with significant non-stop destinations. It is also further away from Boston than Nashua and has less influence on labor rates from Boston-related commuters.

The cost comparison for labor and real estate provided below is based on the following situation:

A company has 200 back office employees (using an accountant as the proxy position) utilizing 50,000 sq. ft. of Class A office space. Manchester is considered the “base case”.

Parameter	Manchester	Boston	Hartford	Providence	New York City	Philadelphia
Average Salary	\$66,150	\$77,890	\$72,290	\$68,100	\$87,590	\$77,150
Total Labor Cost	\$13,200,000	\$15,580,000	\$14,460,000	\$13,620,000	\$17,520,000	\$15,430,000
Office Rental Rate	\$19.50/SF	\$48.10/SF	\$24.50/SF	\$25.50/SF	\$70.15/SF	\$28.50/SF
Total Cost of Office Space	\$975,000	\$2,405,000	\$1,225,000	\$1,275,000	\$3,507,500	\$1,425,000
Total Annual Cost	\$14,175,000	\$17,985,000	\$15,685,000	\$14,895,000	\$21,027,500	\$16,855,000
Incremental Annual Cost*	-	\$3,810,000	\$1,510,000	\$720,000	\$6,852,500	\$2,680,000

*This is the incremental cost of not being located in Manchester.

■ SECTION 2 * OVERVIEW ON POTENTIAL OPPORTUNITIES

Types of Industries/Segments

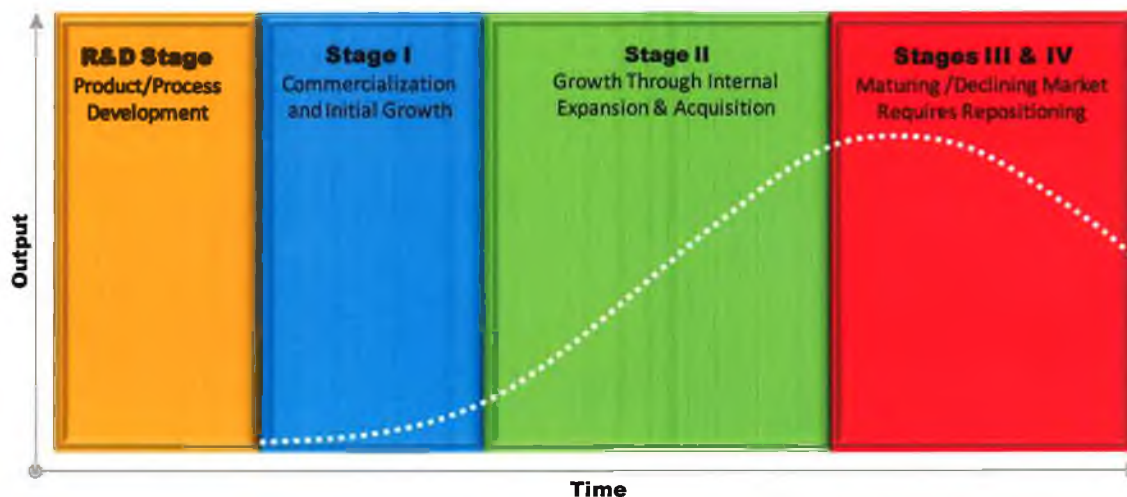
- Professional, Technical, Business and Creative Services
 - Professional (legal and accounting/payroll services)
 - Technical/Scientific Services (engineering, architecture, testing/lab services, software development)
 - Business (management consulting, marketing, advertising)
 - Creative (industrial and graphic design)
- Back Office/Shared Services Center (may have data center attached)
- Small Headquarters (may have data center attached)
- Technology-Related Manufacturing (primarily electronics and materials related)

Size and Life Cycle Stage of Companies (see chart below)

- <10 employees (start-up and emerging firms)
- 10-100 (second stage firms)
- 100+ (expanding firms)
- Late stage

Typically, a product or service evolves through a distinct life cycle beginning with the conceptualization of an idea with R&D support and then if there is a viable opportunity, there is a transition to commercialization, then expansion and ultimately market maturity. At each stage in the life cycle there is a need for specific resources that differ by type of product or service. It is important for communities and other resource providers to be aware and understand the evolving needs of companies. A product or service life cycle curve has the potential of being renewed by a radical improvement in the product/service or by entering a new market with limited competition. An example of a life cycle curve is noted below.

AN EXAMPLE OF A PRODUCT OR SERVICE LIFE CYCLE CURVE



For each defined life cycle stage, there are issues, challenges and resource needs that are unique to each stage as outlined below.

Life Stage ►	R&D Stage	Stage I	Stage II	Stages III & IV
Issues & Challenges	<ul style="list-style-type: none"> • Access to funding. • Access to R&D partners and talent. • Cutting edge ideas/technology. 	<ul style="list-style-type: none"> • Secure patents and licensing. • Secure government approvals. • Build market awareness and demand. 	<ul style="list-style-type: none"> • Build strong brand image, customer loyalty, hard to duplicate distribution channels, and long-term supply/sales channels as a competitive hedge. • Keep pace with market expansion. • Reach new markets. • Leverage technology to enhance productive and product performance. • Potential for acquisitions and for being acquired. 	<ul style="list-style-type: none"> • Competition resulting in price/margin erosion. • Market saturation and reduction in overall demand due to competition. • Consolidation and privatization. • Maximize productivity. • Technology erosion, need to develop next generation product. • Maximize productivity.
Capital Needs	Grants, seed capital and angel capital.	Venture capital.	Investment capital to fuel expansions.	Working capital.
Labor Needs	R&D talent.	High level multi-task talent.	Quality and quantity of labor available in strategic locations with market access.	Labor cost is critical issue.
Real Estate Needs	Lab, office and pilot space within R&D environment.	Low cost lab, office and production space.	Expand production and location to keep pace with market growth.	Consolidate and liquidate assets to reduce overhead costs.
Leadership Style	Creative, innovation, perseverant and realistic.	Multi-skilled and multi-task proficiencies.	Ability to build a span of control that manages diverse responsibilities/geography.	Multi-skilled, do more with less.

A product service life cycle is a dynamic process that causes companies to have evolving resource and leadership needs. Communities that are aware of and can address these needs will have the best chance to retain companies over multiple stages of their life cycle.

Details on Potential Opportunities

For each of the four economic opportunities identified in the previous section, there are details provided below to better understand the nature and specific needs of each opportunity.

1. Professional, Technical, R&D, Creative, Business Consulting and Other Knowledge-Based Services	
Description of Opportunity	<p>Knowledge-Based Services That Include:</p> <ul style="list-style-type: none"> › Professional Services: legal and accounting. › Technical Services: architectural, engineering, drafting, surveying/mapping and testing. › R&D Consulting: physical/life sciences and engineering. › Creative Services: interior, industrial and graphic design. › Computer Services: computer design and software development. › Business Consulting Services: management consulting (HR, process improvement, etc.), advertising, marketing, etc. › Other Services: market research, photography, etc.
Characteristics and Trends	<ul style="list-style-type: none"> › One of the fastest growing segments of the U.S. economy. › Includes a broad base of knowledge-based services. › Private industry clients are seeking reduction in operating costs (application of lean techniques, reduction in healthcare costs, etc.), optimization of e-commerce, eco-compliance, application of advanced technology in operations and optimize global deployment of company. › Smaller/emerging companies are a significant source of potential income balanced with assignments from larger/established clients. › Government clients may have expanded opportunities for infrastructure improvement projects but long term will have budgets cut severely at all levels. › Loss of property values has made an on-going challenge for local government funding of infrastructure projects.
Location Drivers	<ul style="list-style-type: none"> › Proximity/access to client base . . . some office presence in close proximity to client. › Access to local talent. › Quality of life to recruit talent into the area. › Reasonable operating costs (this varies by company . . . co-location with client base is critical and the cost of being in major cities is reflected in rates). › Availability of quality/unique office space (varies by industry and company).
Resource Requirements	<ul style="list-style-type: none"> › Access to airport (within 30 minutes) with non-stop flights to specific destinations. › Access to interstate for shorter-distance client access. › Industry presence and universities with selected programs for recruiting talent. › Office space with amenities (parking, restaurants, retail) that is functional and meets unique needs of business (ranges from high rise to converted mill space or renovated house). Technical and creative services will have more of an issue with cost of space. › Telecom that supports large file transfers and video conferencing.

2. Back Office/Shared Services Center

Description of Opportunity	<ul style="list-style-type: none"> › Larger/expanding companies tend to unhook back office/shared services centers from the headquarters operation and place them in lower cost destinations. These operations include a variety of specific functions such as: › Accounting (receivables, payables, internal cost accounting, project accounting, etc.) › Human Resources (recruiting, training, records, issues resolution, benefits, etc.) › IT (technical support for hardware and software) › Legal (product, real estate, employee issues, etc.) › Purchasing (commodities, equipment, technology, etc.) › Facilities (real estate, construction, maintenance services, etc.) › Customer support (internet order processing, product information, etc.) › R&D services within larger corporations.
Characteristics and Trends	<ul style="list-style-type: none"> › Larger companies are partnering with third-party service providers to deliver selected functions. › There was a trend of some U-S.-based firms to relocate some of these functions to India and other off-shore destinations but they are now returning to North America due to quality and cultural issues. › As companies become deployed globally, they are locating shared services centers within major market areas to serve local needs and culture.
Location Drivers	<ul style="list-style-type: none"> › Provide a service culture that meets local market demands. › Access to local talent. › Competitive operating costs (labor, real estate, taxes, energy) › Ability to support data center, teleconferencing and other high performance telecom activities. › Availability of office space (Class A/B) that meets the functional needs of the company.
Resource Requirements	<ul style="list-style-type: none"> › Existence of local talent and universities with specific programs. › Office space with required layout and parking capacity (4-5 parking spaces per 1,000 SF). › Access to high performance telecom to support potential data center and video conferencing. › Telecom that supports large file transfers and video conferencing.

3. Small Headquarters

Description of Opportunity	<ul style="list-style-type: none"> › Mid-sized companies with headquarters of <100 staff members and may have other functions attached (back office, R&D, etc.) › Typically privately held firms that are substantially controlled by owner/president/CEO who may have an interest in New Hampshire as a company destination.
Characteristics and Trends	<ul style="list-style-type: none"> › The small and mid-sized companies offer the highest growth rates and growth potential among companies in the economy. › Headquarters operations represent a vast diversity of industries but some industries do like to cluster together around a technology or specific industry segment. › Due to the housing issue, many large companies are not considering any significant relocation due to the cost and the inability to sell housing stock for employees.
Location Drivers	<ul style="list-style-type: none"> › The culture, amenities and recreational activities must meet the needs and desires of the top company executives. › Must be able to have easy access to markets/client base. › Offer competitive operating costs (labor, real estate, taxes and energy). This will vary by company and their individual needs. › Access to high performance telecom to support potential data center within operation. › Availability of office space (Class A) that meets the needs of the company. Some companies will opt to build a headquarters building if the right real estate is not available. Leasing is important to manage cash flow.
Resource Requirements	<ul style="list-style-type: none"> › Existence of local talent and universities with specific programs with headquarters-oriented skills and experience. › Office space with required layout, parking and cost. › Access to high performance telecom to support potential data center and video conferencing. › Air access to markets/major clients. › Quality of life that supports headquarters staff needs (schools, recreation, culture, health care capabilities, etc.)

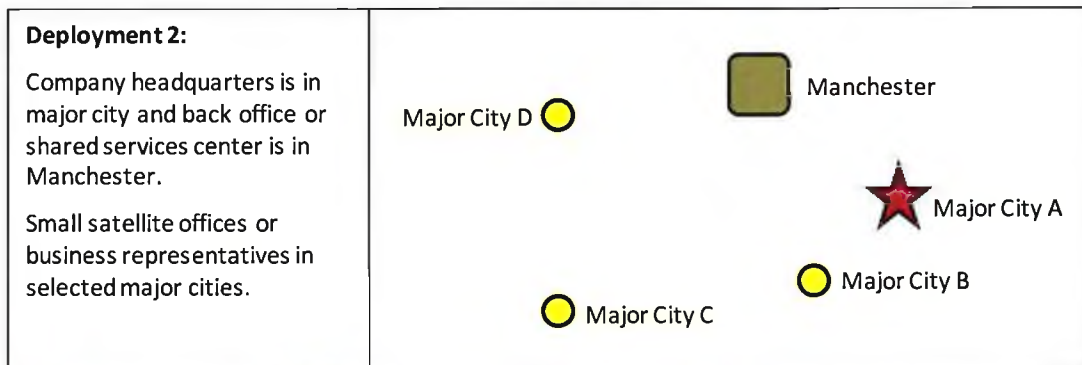
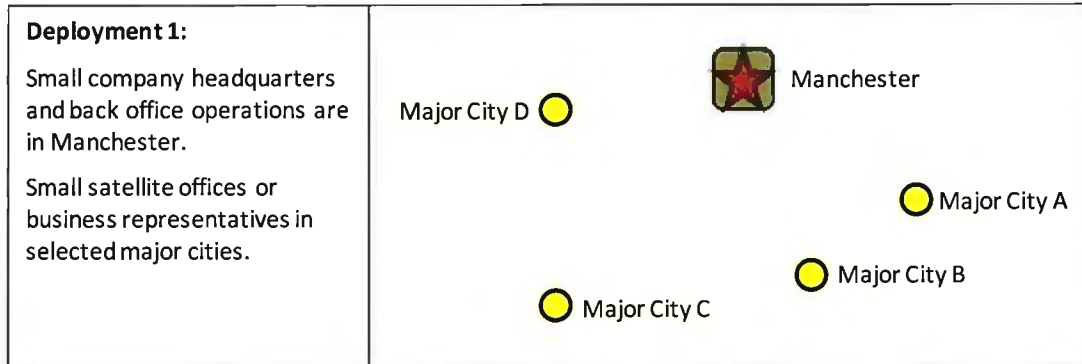
4. Technology-Related Manufacturing

Description of Opportunity	<ul style="list-style-type: none"> › Electronics and instruments. › Advanced materials converted into components and sub-assemblies. › Transportation, industrial and medical equipment, etc. components.
Characteristics and Trends	<ul style="list-style-type: none"> › Emerging opportunities in defense/security technology (detection of terrorism, remote actuated systems for surveillance and offensive actions, etc.) › On-going advancement in medical devices and instrumentation to improve delivery and cost of health care-related services. Opportunities for equipment or component production. › Opportunities for energy-related instrumentation and equipment components. › Increased opportunities to produce sophisticated components for hybrid, electric and other types of vehicles. › Companies bringing tech-driven operations back from Asia due to cost creep and lack of patent protection.
Location Drivers	<ul style="list-style-type: none"> › Access to markets (finished product logistics . . . primarily air shipments of small components). › Access to facilities that meet company needs. › Competitive operating costs (real estate, labor, taxes and energy). › Access to technical skills that understand different technologies and can adapt to evolving needs of company. › Access to R&D (internal, private third party and/or university sources).
Resource Requirements	<ul style="list-style-type: none"> › Access to regional airport within 30-minutes with commercial shipping services. › Available flex space or lots for build-to-suit with leasing options. › Access to labor talent that is trainable backed up by training capabilities in the area. › Competitive costs for real estate, labor, taxes and energy. › Assess to private third party R&D and/or university R&D capabilities.

Deployment Options for Knowledge-Based Services and Small Headquarters

When positioning Manchester in the marketplace, it can be viewed by knowledge-based firms and small headquarters as a destination for the following:

- As a headquarters with a back office attached
- As a back office/shared services destination for a company with its headquarters in a major city like Boston or New York City.



■ SECTION 3 • MARKETING STRATEGY FOR POTENTIAL OPPORTUNITIES

Available Marketing Tools

The three key steps to relationship-based marketing and sales are:

Building Awareness ▶ Screening for Prospects ▶ Establishing/Sustaining Relationships

In order to support this process a community needs to utilize specific techniques that initiate and support the process that include:

- Regional branding based on specific attributes.
- On-going interface with regional and state economic development agencies for lead generation.
- Develop a Resource Profile in pdf format that articulates the resources of an area as they apply to a specific industry or cluster.
- Develop profiles for specific sites/buildings that provide details on attributes important to an industry or type of operation.
- Utilize e-media to promote an area (web site, e-mails, Facebook, Twitter, blogs, etc.)
- Host familiarization tours for consultants, commercial realtors and key companies to the area to promote available resources and attributes that support specific industries.
- Host conferences that attract specific companies, industry representatives, media representatives and other influencers.
- Attend targeted conferences and trade shows that provide access to prospective companies and influencers.
- Develop an on-going series of media releases about the area that showcase specific attributes.
- Prepare articles for trade journals and business news publications that showcase specific attributes of the area.
- Word-of-mouth referrals from existing companies and influencers in the region.
- Direct communications with target companies (mailings, e-mails and phone contact).

Marketing Strategies That Support Specific Opportunities

Opportunity	Marketing Strategy
Professional, Technical, and Creative Services	<ul style="list-style-type: none"> ▸ Develop a profile on the area that stresses the key needs of this segment (access to talent based on industry presence and university programs that meet specific needs, quality of life that helps recruit talent, office space that meets company requirements and reasonable operating costs). ▸ Prepare articles for business magazines and journals about Manchester as a destination for small professional, technical and creative businesses – promote the “package”. ▸ Sponsor annual meetings and seminars in Manchester for professional, technical and creative industry groups/associations and promote the area when they are there. ▸ Target specific buildings for this segment and promote the available amenities. ▸ Promote Manchester as the “back office city” for larger firms in Boston, Hartford and New York based on the cost savings and transportation access.
Back Office and Shared Services Center	<ul style="list-style-type: none"> ▸ Develop a profile on the area that stresses the key needs of back offices and shared services centers. ▸ Prepare articles for business magazines and journals about Manchester as a destination for back office/shared service operations – promote the “package”. ▸ Attend/Sponsor conferences on back office/shared service centers and promote the area. ▸ Distribute information to commercial brokers around New England about the available real estate (and the comparative low operating cost) and attach a copy of the resource profile. ▸ Host a familiarization trip to Manchester for commercial brokers and site selection consultants to tour the area and see the adaptive reuse conversion of the Amoskeag Mill.
Small Headquarters	<ul style="list-style-type: none"> ▸ Develop a profile on the area that stresses the key needs of small headquarters (access to airport, low operating cost, unique “live free or die culture, available office space, quality of life attributes, etc.). ▸ Prepare articles for business magazines and journals about Manchester as a destination for small headquarters – promote the “package”.
Technology-Related Manufacturing	<ul style="list-style-type: none"> ▸ Develop a profile on the area that stresses the key needs of technology-based manufacturing (transportation access, industry presence, education/training programs, available sites and buildings, operating cost, etc.) ▸ Prepare articles for business magazines and journals about Manchester as a destination for technology-related companies – promote the “package”. ▸ Host a conference related to specific technology to will allow businesses to experience the area and its attributes.

■ SECTION 4 • EVALUATION OF RESOURCES THAT SUPPORT ECONOMIC GROWTH

Comparative Cost of Real Estate

Cost of Class A and Class B office space is very competitive in Manchester and significantly lower than Boston, New York City, Hartford and Providence. This positions Manchester to be an ideal back office location or a strategic location for a small headquarters (having access to a major regional airport).

ESTIMATED OFFICE SPACE RATES FOR SELECTED LOCATIONS		
Location	Class A Rent	Class B Rent
Manchester	\$19.50	\$13.10
Nashua	\$17.10	\$12.25
Portsmouth	\$18.50	\$14.70
Boston (City)	\$48.10	\$30.10
Cambridge	\$49.70	\$38.10
Inner Suburbs	\$27.60	\$21.50
Route 128 Corridor	\$27.15	\$19.75
Route 495 Corridor	\$21.40	\$19.40
Hartford	\$24.50	\$18.50
Providence	\$25.50	\$19.00
New York City	\$70.15	\$48.50
Philadelphia	\$28.50	\$23.85

Trends in Office Real Estate

- The influx of younger workers (millennials) is influencing office space layout/design . . . e-collaboration with less formal meetings, more casual settings, high dependence on technology (WIFI), quality of space (air quality and natural light).
- Companies are seeking to cut real estate costs . . . lean operating techniques result in fewer employees, more alternative office options (work from home with access to office hotel space).
- Upsurge in smaller/emerging companies that need flexible space with flexible terms.
- Green space (LEED Certified), parking spaces with plug-ins for electric vehicles, more natural light, renewable energy sources, optimum use of water, materials of construction, etc.

Available Office Space in Manchester

The City offers a unique diversity of office space that ranges from small stand-alone buildings, to renovated mill space to classic downtown high rise multi-tenant buildings. There are also a substantial number of properties on the market that are listed at rates that range from \$6 to \$12.95 in the Mill District and from \$11 to \$24/SF for high rise in the Elm Street Corridor. A sampling of available properties is listed below by area:

A SAMPLING OF AVAILABLE OFFICE SPACE IN THE CITY OF MANCHESTER			
	Description/Location	Contiguous Space	Asking Rental Rate
Mill District			
1	186 Granite Street	13,000	\$6/SF
2	175 Canal Street (RG Sullivan Building)	16,573	\$11/SF
3	250 Commercial Street (Waumbec Mill)	68,894	\$6-12/SF
4	670 North Commercial Street (Jefferson Mill)	47,587	\$6.95-12.95/SF
5	Hesser Center of Commerce	52,000	\$6.75/SF
6	195 McGregor Street (west of river)	128,277	\$10.95-12.95/SF
Elm Street Corridor			
1	650 Elm Street	30,792	\$21/SF
2	788 Elm Street	5,800	\$15.50/SF
3	801 Elm Street (small stand alone building)	6,700	\$5.37/SF
4	889 Elm Street	25,522	\$13.50-15.00/SF
5	900 Elm Street (City Hall Plaza)	14,709	\$23/SF
6	977-1001 Elm Street (The Atrium)	14,282	\$11/SF
7	1000 Elm Street (Brady Sullivan Plaza)	71,904	\$10-22/SF
8	1155 Elm Street (Bank of America Building)	23,008	\$24/SF
9	1230 Elm Street (Brady Sullivan Building)	67,747	\$12.50/SF
10	1750 Elm Street (Brady Sullivan Tower)	104,546	\$19.90-20.90/SF
11	1800/1802 Elm Street (Carpenter Historic Bldg.)	6,500	\$12/SF
12	One Wall Street	12,126	\$18.90/SF
13	Two Wall Street	21,000	\$19/SF

Not included is the Pandora Mill that was recently renovated and has 144,000 sq. ft. of potential office space.

Comparative Cost of labor

The Manchester area compares favorably with each of the major metro areas noted below and is similar in cost to Portsmouth. The City of Portsmouth is small and has a small labor force to draw from. Nashua and south into the I-495 and 128 Boston suburbs will be priced higher than Manchester due to their closer proximity to the Boston/Cambridge market.

LABOR COST COMPARISON: MEDIAN WAGES FOR SELECTED JOB TITLES							
Job Title	Manchester	Boston	Portsmouth	Providence	Hartford	New York	Philadelphia
Accountant	\$66,150	\$77,890	\$68,880	\$68,100	\$72,290	\$87,590	\$77,150
Credit Analyst	\$57,690	\$66,160	\$63,180	\$93,890	\$77,640	\$101,610	\$65,120
Financial Analyst	\$66,890	\$92,410	\$66,840	\$67,550	\$74,860	\$107,760	\$88,160
Insurance Underwriter	\$64,340	\$73,160	-	\$70,490	\$82,880	\$79,870	\$72,200
Computer Sys. Analyst	\$81,930	\$90,020	\$73,570	\$77,980	\$83,520	\$90,160	\$86,200
Database Administrator	\$82,300	\$83,710	-	\$77,360	\$72,910	\$85,320	\$78,280
Lawyer	\$126,910	\$133,810	\$110,130	\$115,380	\$143,060	\$194,640	\$143,470
Paralegal	\$44,920	\$51,580	\$47,540	\$49,640	\$52,560	\$98,630	\$53,990
Civil Engineer	\$85,020	\$87,250	\$79,160	\$85,730	\$82,800	\$89,740	\$82,310
Electronic Engineer	\$82,390	\$104,020	\$81,090	\$108,790	\$78,150	\$105,520	\$101,630
Customer Service Rep.	\$38,400	\$38,840	\$31,580	\$33,030	\$37,240	\$38,100	\$37,060
Admin. Assistant	\$32,290	\$41,630	\$48,870	\$35,200	\$39,730	\$57,790	\$34,630

Source: U.S. Bureau of Labor Statistics, Occupational Employment Statistics Survey (2010)

- Location with the lowest cost labor for the job title.
- Location with labor cost 15% to 25% above lowest cost location.
- Location with labor cost >25% above lowest cost labor location.

Major Colleges and Universities in the Manchester Area

There are over 30,000 students in area colleges and universities that are engaged in a wide diversity of programs. Examples of annual graduation rates for business, engineering and IT/computer academic programs are noted below. There is one research universities in the region that not only support the development of new ideas and products but also support doctorate programs in engineering, life sciences, math/computers and physical sciences.

MAJOR AREA COLLEGE AND UNIVERSITY STATISTICS									
College/University	Location	Enrollment	Business		Engineering			IT/Computers	
			B	M	B	M	D	B	M
University of New Hampshire	Durham	15,100	476	143	210	43	6	25	3
University of New Hampshire	Manchester	1,200	27					10	
Southern NH University	Manchester	8,050	749	506				29	27
Hesser College	Manchester	4,150	142						
Saint Anselm College	Manchester	1,900	103		3			2	

Source: U.S. Department of Education, National Center for Education Statistics. Degrees shown are completions 2009-10.

RESEARCH IN AREA UNIVERSITIES (\$ MILLIONS)							
University	Total R&D	Life Sc.	Env. Sc.	Physical Sc.	Math/Computer	Engineering	Other
University of New Hampshire	\$108.9	\$23.1	\$55.7	\$3.0	\$0.7	\$17.6	\$8.8

Source: National Science Foundation data for 2009.

Manchester is located <40 miles from the University of New Hampshire in Durham. Key areas of applied research in engineering include:

- Nanomanufacturing laboratory
- Design and Manufacturing Laboratory
- Design Automation Laboratory
- Material Science Program
- NH Industrial Research Center
- Robotics and Vibration Control Laboratory
- Synthetic Vision and Pattern Identity Laboratory

MAJOR AREA COMMUNITY COLLEGE STATISTICS					
College	Location	Enrollment	Business*	Engineering*	IT/Computers*
Manchester CC	Manchester	2,750	40		6
Hesser College	Manchester	4,150	197		

*Associate degrees.

Source: U.S. Department of Education, National Center for Education Statistics. Degrees shown are completions 2009-10.

Air Access

The Manchester International Airport, located just south of Manchester, is the major airport that serves the region. The major air carriers that service the airport include the following:

- Continental
- Delta
- Southwest
- United Airlines
- US Airways and affiliates

Non-stop destinations are provided in the table to the right.



NON-STOP DESTINATIONS
Atlanta, GA
Baltimore, MD
Charlotte, NC
Chicago, IL (O'Hare)
Cleveland, OH
Detroit, MI
Las Vegas
New York, NY (LGA, JFK)
Newark, NJ
Orlando, FL
Philadelphia, PA
Phoenix, AZ
Tampa, FL
Toronto, Ontario
Washington, DC

Interstate Access

Manchester has very good access to the interstate network with distance and times to key destinations noted below:

TRAVEL DISTANCE/TIME FROM MANCHESTER		
Destination	Distance (Miles)	Travel Time (Hours)
Boston, MA	54	<1
Cambridge, MA	52	<1
Hartford, CT	135	2.25
New York, NY	260	4.5
Providence, RI	102	<2