

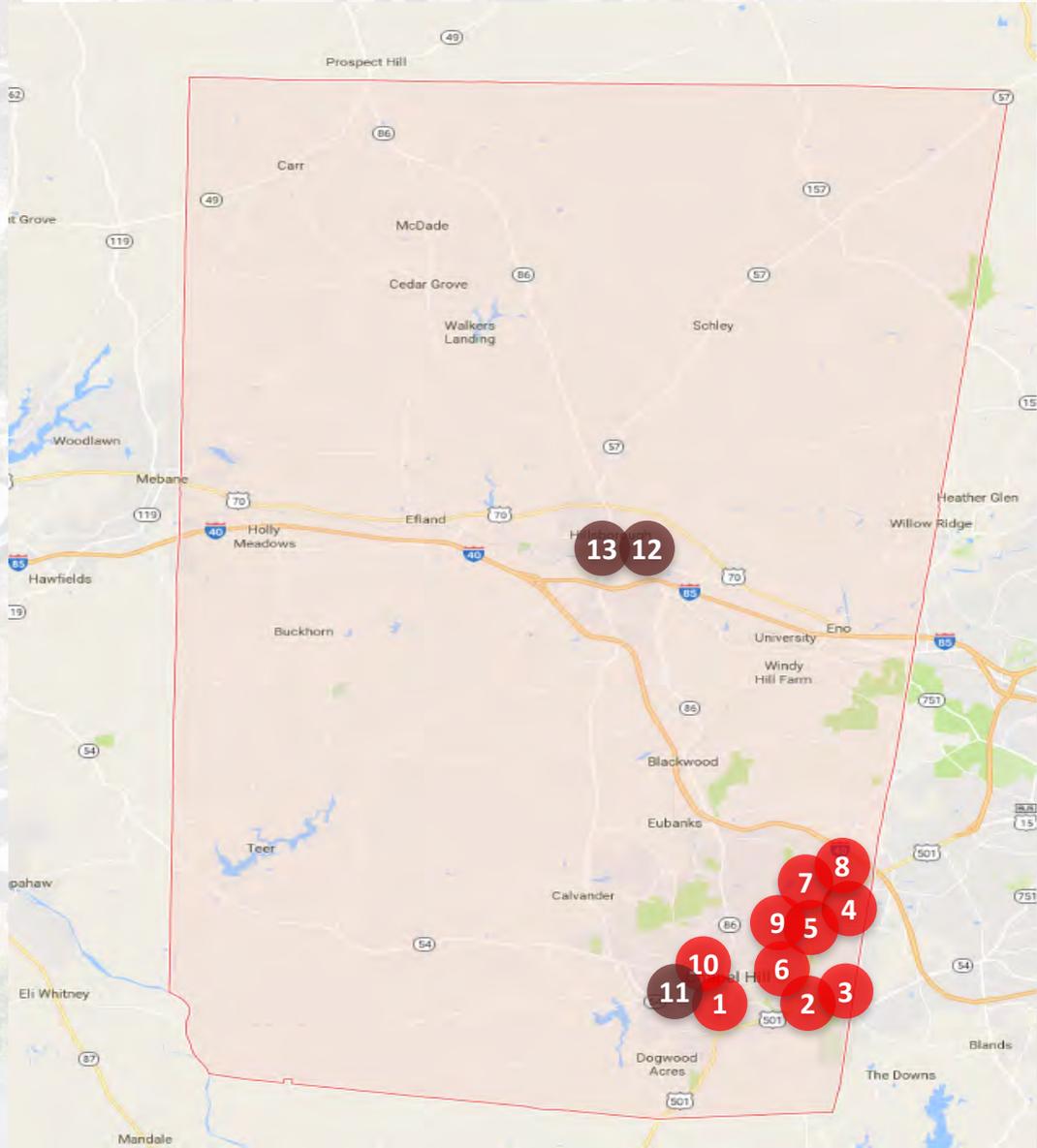
Typical Important Site Factors

1. Ability to leverage existing facility investment / infrastructure
2. Requirements / preferences of private partner (if applicable)
3. Size, cost and ownership complexity of site
4. Proximity to quality full-service hotel inventory
5. Proximity to restaurants, retail, nightlife, entertainment
6. Pedestrian-friendly walking environment
7. Parking availability
8. Ingress / egress
9. Site visibility
10. Synergy with other public sector development initiatives / master plans
11. Compatibility with surroundings
12. Other considerations

Local Market Conditions

Primary Orange County Hotels

Feasibility Study of Potential New Visitor-Oriented
 Facility Development in Orange County, North Carolina
LOCAL MARKET CONDITIONS



Map Key	Hotel	# of Rooms
1	Carolina Inn	185
2	Rizzo Center	183
3	Courtyard by Marriott	169
4	Sheraton Chapel Hill Hotel	168
5	Chapel Hill University Inn	132
6	Aloft Chapel Hill	130
7	Quality Inn Chapel Hill	119
8	Residence Inn by Marriott	108
9	Siena Hotel	79
10	Franklin Hotel	67
11	Hampton Inn & Suites	142
12	Holiday Inn Express	83
13	Microtel Inn & Suites	74

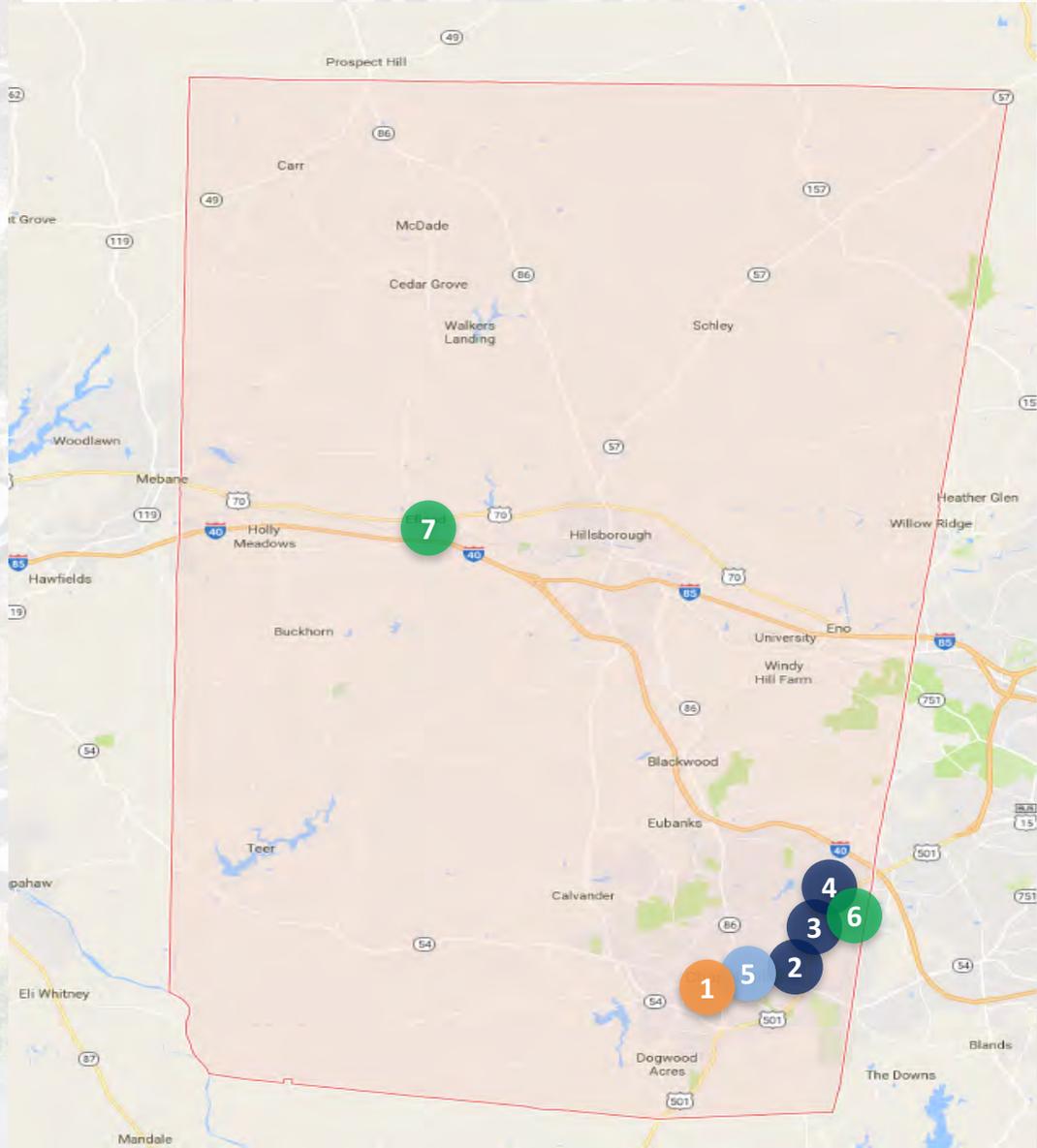
Total Hotel Rooms in Orange County = 1,639

Local Market Conditions

Key Orange County Destination Amenities

LOCAL MARKET CONDITIONS

Feasibility Study of Potential New Visitor-Oriented Facility Development in Orange County, North Carolina



Map Key

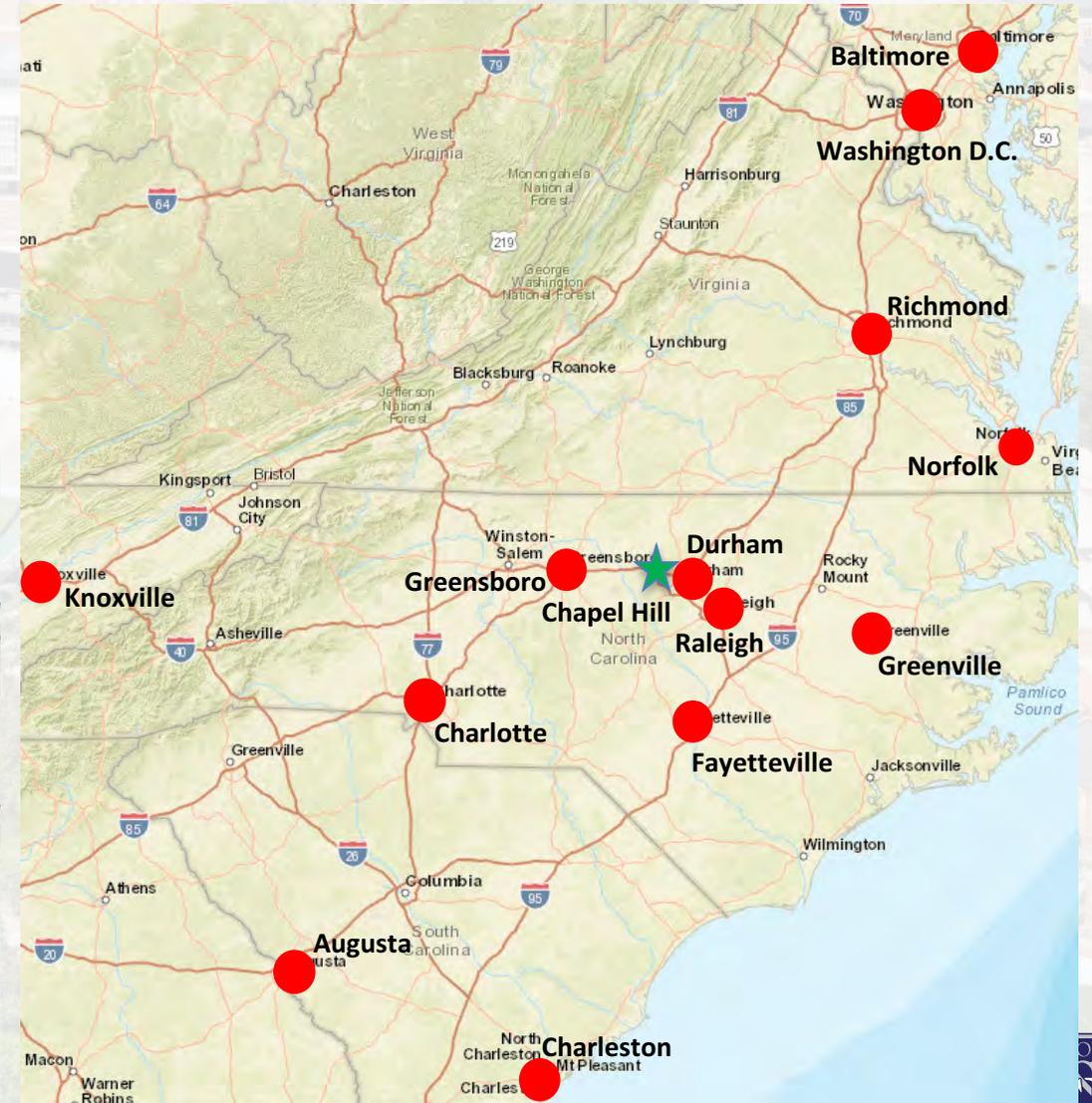
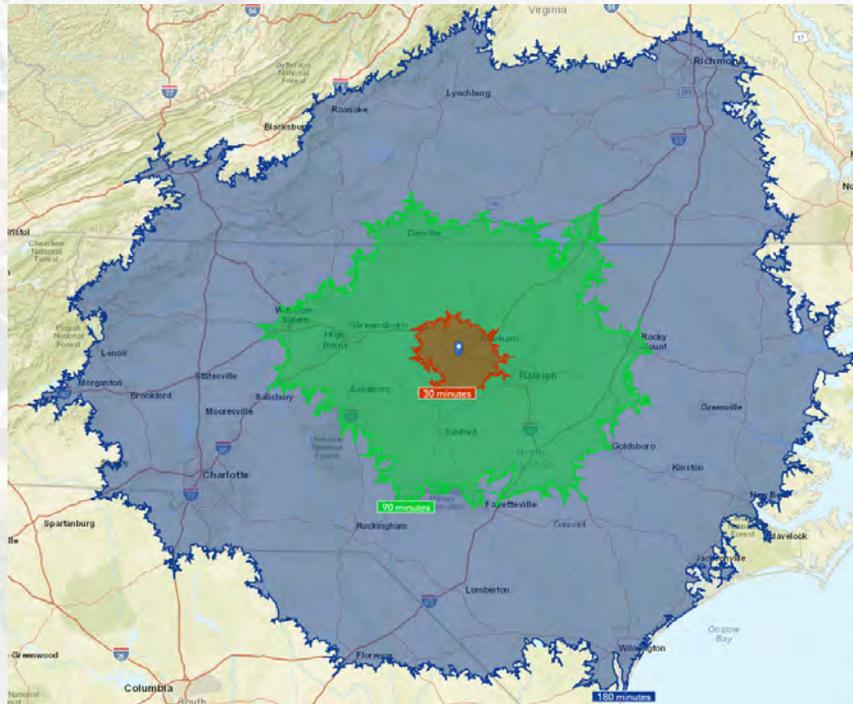
- 1** Downtown Chapel Hill
- 2** Friday Conference Center
- 3** Rizzo Center
- 4** Sheraton Chapel Hill
- 5** UNC Campus
- 6** Rainbow Soccer Complex
- 7** Soccer.com Center

Location and Accessibility

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Driving Distance to Regional Cities

City, State	Distance From Chapel Hill	Drive Time	Market Population
Durham, NC	15 mi.	0:27	557,297
Raleigh, NC	28 mi.	0:39	1,275,121
Greensboro, NC	50 mi.	0:53	752,607
Fayetteville, NC	73 mi.	1:32	391,392
Greenville, NC	111 mi.	1:55	177,788
Charlotte, NC	140 mi.	2:17	2,443,403
Richmond, VA	163 mi.	2:35	1,284,165
Norfolk, VA	197 mi.	3:28	1,746,934
Charleston, SC	308 mi.	4:41	739,086
Augusta, GA	272 mi.	4:54	600,545
Knoxville, TN	333 mi.	5:08	874,799
Washington D.C.	270 mi.	5:22	6,066,221
Baltimore, MD	315 mi.	5:25	2,812,758



Source: Google Maps, Esri MSA Data , 2016

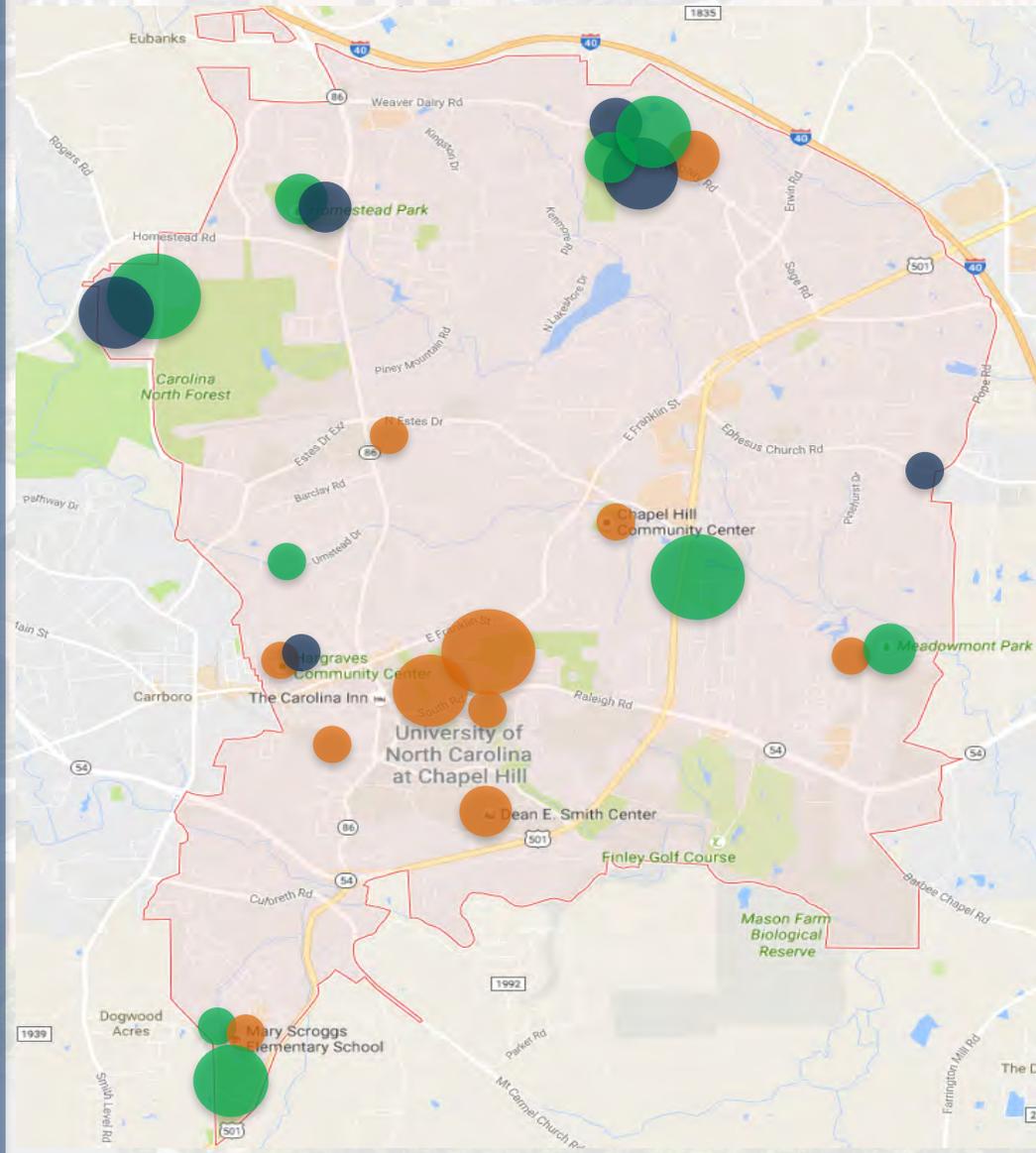


Local Market Conditions

Chapel Hill Sports & Recreation Facilities

LOCAL MARKET CONDITIONS

Feasibility Study of Potential New Visitor-Oriented
Facility Development in Orange County, North Carolina



Map Key

- 1 field or court
- 2 fields or courts
- 3 fields or courts
- 4+ fields or courts
- Rectangle
- Triangle
- Courts

Facility	# of triangle fields	# of rectangle fields	Indoor courts
Carmichael Arena (UNC)	-	-	1
Cedar Falls Park	3	2	-
Chapel Hill Community Center	-	-	1
Chapel Hill High School	3	5	2
Chapel Hill YMCA	-	-	1
Dean E. Smith Center (UNC)	-	-	2
East Chapel Hill High School	2	3	-
Ephesus Park	1	-	-
Fetzer Hall (UNC)	-	-	3
Hargraves Community Center	1	-	1
Homestead Park	2	2	-
Lincoln Gymnasium	-	-	1
Meadowmont Park	-	2	1
Rainbow Soccer Complex	-	6	-
Rashkis Gymnasium	-	-	1
Scroggs Elementary School	-	1	-
Southern Community Park	-	3	-
Umstead Park	-	1	-
Woollen Gym (UNC)	-	-	8

Note: Facilities sorted alphabetically
Source: Facility Management 2016

Demographics

Orange County Area Metrics

Demographic Variable	Town of Chapel Hill	Orange County	30-Minute	90-Minute	180-Minute	North Carolina	U.S.
Population (2000)	50,853	118,233	353,663	2,918,384	9,374,389	8,049,313	281,421,906
Population (2010)	57,285	133,801	463,381	3,535,252	10,953,464	9,535,483	308,745,538
Population (2016)	60,875	141,886	526,412	3,820,086	11,682,895	10,220,672	323,580,626
<i>% Change (2000-2016)</i>	19.7%	20.0%	48.8%	30.9%	24.6%	27.0%	15.0%
Population (2021 est.)	64,197	149,839	580,070	4,085,385	12,325,735	10,825,324	337,326,118
<i>% Change (2016-2021)</i>	5.5%	5.6%	10.2%	6.9%	5.5%	5.9%	4.2%
Avg. Household Inc. (2016)	\$94,760	\$91,522	\$85,369	\$71,041	\$67,196	\$66,480	\$77,008
Avg. Household Inc. (2021 est.)	\$103,410	\$100,034	\$93,073	\$77,759	\$73,275	\$72,785	\$84,021
<i>% Change (2016-2021)</i>	9.1%	9.3%	9.0%	9.5%	9.0%	9.5%	9.1%
Median Age (2016, in years)	27	34.1	34.7	37.2	38.1	38.3	38.0
Businesses (2016)	3,019	5,708	21,796	148,410	442,662	400,469	13,207,211
Employees (2016)	78,254	101,873	358,746	1,963,295	5,612,294	4,846,589	162,998,347
Employee/Residential Pop. Ratio	1.28:1	0.71:1	0.68:1	0.51:1	0.48:1	0.47:1	0.50:1

Source: ESRI, 2016

Competitive Facilities

Regional Indoor Sports and Recreation Facilities

Facility	Location	Distance	Basketball	Volleyball
North Carolina Volleyball Academy	Durham, NC	15	-	5
Triangle Volleyball Club	Morrisville, NC	18	-	7
J.S. Dorton Arena	Raleigh, NC	23	3	6
Carmichael Gymnasium	Raleigh, NC	26	11	22
Greensboro Sportsplex	Greensboro, NC	52	8	16
Greensboro Coliseum	Greensboro, NC	54	3	6
Freedom Courts Sportsplex	Fayetteville, NC	78	4	10
[1] Rocky Mount Downtown Community Facility	Rocky Mount, NC	84	8	16
Carolina Courts	Concord, NC	119	4	8
Carolina Courts	Indian Trail	150	4	8
Myrtle Beach Sports Center	Myrtle Beach, SC	191	8	16
Virginia Beach Sportsplex & Fieldhouse	Virginia Beach, VA	209	4	8
Boo Williams Sportsplex	Hampton, VA	210	8	16
Xcel Sportsplex	Hendersonville, NC	237	8	11
Rocky Top Sports World	Gatlinburg, TN	295	6	12

Note: Facilities sorted by distance to Chapel Hill

[1] Rocky Mount Facility is a project currently underway, facility is not open yet.

Source: Facility Management, 2016

Competitive Facilities

Regional Rectangle Field Complexes

Facility	Location	Distance to Chapel Hill	# of Rectangle Fields
Soccer.com Center	Efland, NC	16	6
WakeMed Soccer Park	Cary, NC	24	8
WRAL Soccer Park	Raleigh, NC	33	22
Greensboro Sportsplex	Greensboro, NC	52	4
[1] Pinehurst Outdoor Sports Complex	Pinhurst, NC	64	10
J. Burt Athletic Complex	Wilson, NC	77	8
Rocky Mount Sports Complex	Rocky Mount, NC	84	8
Pitt Greenville Soccerplex	Greenville, NC	111	5
River's Edge Sports Complex	Roanoke, VA	129	9
Creekside Park	New Bern, NC	143	8
Ramblewood Soccer Complex	Charlotte, NC	149	11
River City Sportsplex	Midlothian, VA	169	12
North Myrtle Beach Park and Sports Complex	North Myrtle Beach, SC	195	8
Virginia Beach Sportsplex & Fieldhouse	Virginia Beach, VA	209	3
Princess Anne Athletic Complex	Virginia Beach, VA	209	7

(1) Currently under initial development. Complex includes 4 triangular fields that can be converted to rectangular fields.
Note: Facilities sorted by distance to Chapel Hill
Source: Facility Management, 2016

Competitive Facilities

Regional Competitive Triangle Field Complexes

Facility	Location	Distance to Chapel Hill	# of Triangle Fields
USA Baseball National Training Complex	Cary, NC	15	8
Walnut Creek Softball Complex	Raleigh, NC	37	9
The Factory	Wake Forest, NC	37	9
Pinehurst Outdoor Sports Complex	Pinehurst, NC	64	4
Carolyn S. Allen Athletic Complex	Greensboro, NC	65	4
Rocky Mount Sports Complex	Rocky Mount, NC	84	15
Dinwiddie Sports Complex	Sutherland, VA	135	8
Petersburg Sports Complex	Petersburg, VA	141	4
Creekside Park	New Bern, NC	143	4
Jacksonville Commons Recreation Complex	Jacksonville, NC	148	8
North Myrtle Beach Park and Sports Complex	North Myrtle Beach, SC	195	6
Princess Anne Athletic Complex	Virginia Beach, VA	210	8

(1) Currently under initial development.
Note: Facilities sorted by distance to Chapel Hill.
Source: Facility Management, 2016

Comparable Market Facilities

Indoor Sports and Recreation Facilities Demographics Summary

	Comparable Markets				Chapel Hill, NC		
	Low	High	Average	Median	Estimate	% of Avg.	Rank (out of 14)
Population							
30-Minute Drive	36,100	2,587,800	820,600	662,600	526,400	64%	9
90-Minute Drive	642,600	10,645,600	4,612,000	2,738,800	3,820,100	83%	6
180-Minute Drive	3,221,900	19,557,000	11,004,800	6,216,500	11,682,900	106%	7
Average Household Income							
30-Minute Drive	\$55,600	\$134,300	\$86,300	\$82,300	\$85,400	99%	7
90-Minute Drive	\$57,100	\$109,900	\$78,600	\$74,800	\$71,000	90%	10
180-Minute Drive	\$57,800	\$93,200	\$74,500	\$77,300	\$67,200	90%	11
Median Age							
30-Minute Drive	32.5	43.0	36.7	36.5	34.7	95%	10
90-Minute Drive	34.0	43.7	37.2	36.8	37.2	100%	5
180-Minute Drive	34.2	41.8	37.3	37.3	38.1	102%	3
Corporate Base							
30-Minute Drive	3,900	117,400	35,200	23,200	21,800	62%	9
90-Minute Drive	31,100	413,900	178,600	113,400	148,400	83%	6
180-Minute Drive	144,300	754,900	418,900	393,100	442,700	106%	6

Source: ESRI, 2016.

Market Demand Analysis

Triangle Field Users

Facility Needs

- Wheel configuration for easy access
- Split between turf and natural grass fields
 - (turf is too hot in summer, grass is unplayable after rain)
- Portable fences and mounds
- Lights at least half of the fields
- Space for temporary and potentially permanent concessions
- An announcer's booth
- Netting from backstop fence to announcer booth to catch foul balls
- Permanent bathroom facilities
- Extensive parking for 500 or more vehicles, etc.
- Gated/ticketed entry



Market Demand Analysis

Gymnasium Space Users

Organizations Interviewed

- National Travel Basketball Association
- NC High School Athletic Association – Volleyball, Basketball, Cheerleading
- NC USA Gymnastics
- Mid America Youth Basketball
- USSSA Basketball – North Carolina
- NC AAU Volleyball
- NC AAU Gymnastics
- NC AAU Wrestling
- Carolina Region Volleyball

Participant Overview

Basketball

Teams average 10 to 14 players and coaches per team and approximately 2 people travel per 9- to 18-year old participant.

Volleyball

Teams average 10-12 players and coaches per team and approximately 2 people travel per 9- to 18 year old participants

Karate

Clubs average 20-30 participants per organization and approximately attend 4 to 6 100-300-participant tournaments years round/

Gymnastics

Clubs average around 25 participants per organization and approximately attend 6 to 10 700-participant meets each year.

Pickleball

Clubs average between 20 and 50 participants per organization, including a number of organizations with senior age groups (55 and older).



Market Demand Analysis

Gymnasium Space Users

Level and Source of Demand

Basketball

Overall moderate to high level of demand

Local (high), Regional (moderate), and National (moderate to high)

Volleyball

Overall moderate to high level of demand

Local (moderate), Regional (moderate), and National (low)

Other

Overall moderate level of demand

Gymnastics (moderate), Taekwondo (moderate), Pickleball (moderate)

Potential Use

Basketball:

- Potential for regional playoff tournaments on the state high school level.
- National Travel Basketball Association stated that Chapel Hill would be best suited by a 6-8 court facility. They expressed interest in hosting national level events and tournaments and suggested using the presence of UNC as a marketable leverage point.
- USSSA Basketball expressed interest in hosting an estimated 2 tournaments per month during the season, of approximately 60-80 teams (with a 6-8 court facility), user groups would be a mixture of local, non-local day-trippers, and non-local overnights.

Volleyball:

- NC High School Volleyball Association expressed interest in a new developed sports complex.
- Carolina Region Volleyball expressed interest in potentially hosting one in-season tournament with about 30-40 teams including local and regional participants. Most would be day-trippers.

Pickleball:

- Increasing in popularity nationally/regionally. Diverse age participation. Played outdoors (often on tennis courts) and indoors (often on basketball/volleyball courts).
- Pickleball courts are lined at 44' x 20'. Recommended court area is 60' x 30'. With a standard shoulder width between tennis courts, 4 pickleball courts per standard tennis court. More competitive games and/or tight tennis court configuration will configure 2 pickleball courts per tennis court. For basketball courts (indoor or outdoor), typically 3 pickleball courts per full size basketball court (arranged cross ways) is the configuration.



Feasibility Study of Potential New Visitor-Oriented
Facility Development in Orange County, North Carolina

MARKET DEMAND

Market Demand Analysis

Gymnasium Space Users

Facility Needs

- Wood flooring is preferred for regional and national basketball tournaments
- Circulation around the courts with full climate control
- Minimum of 7-10 feet between each court
- In-house concession stand
- 6 collegiate-grade, ceiling-mounted baskets per court
- Large wall and ceiling mount scoreboard on each court
- Adjustable baskets and nets for different age groups
- 20,000 square feet minimum to host gymnastics meets
- Painted lines that are able to support both youth and adult leagues
- Accessibility for folding chair to be placed in-between courts for spectators with the potential for bleachers for regional tournaments
- A minimum ceiling height of 20 feet
- Accessible access for semi-truck to unload tournament equipment for gymnastic meets

