



FEASIBILITY STUDY FOR A POTENTIAL NEW SPORTS COMPLEX IN GREENVILLE, NORTH CAROLINA

January 12, 2017



Study Background and Purpose

To analyze the feasibility of a new Sports Complex focused on youth/amateur sports for the purpose of driving new tourism and economic impact to Greenville/Pitt County, as well as enhancing rental, practice and other special event facility alternatives available for Greenville/Pitt County residents. Such a complex could offer one or more of the following programmatic components:

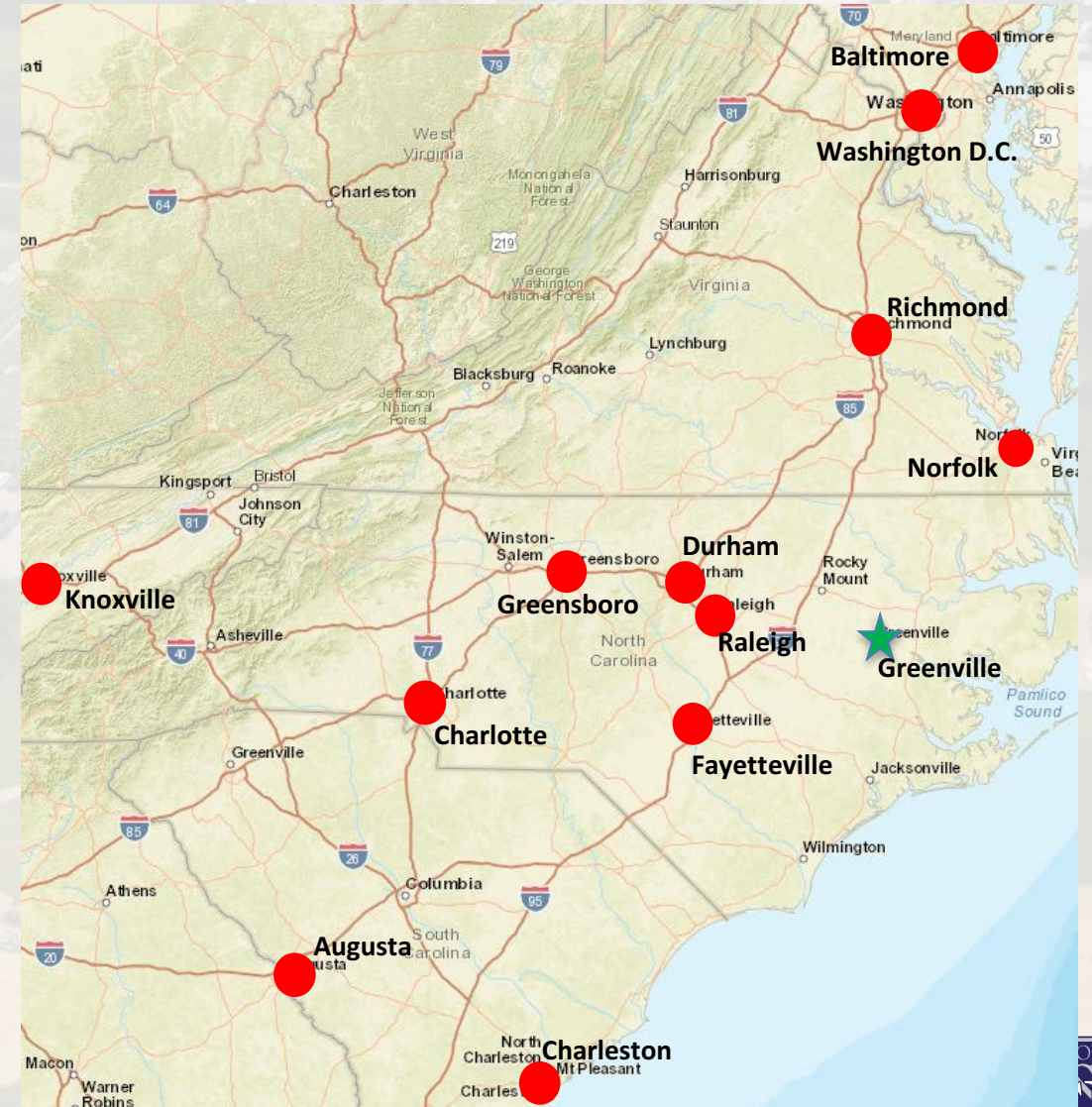
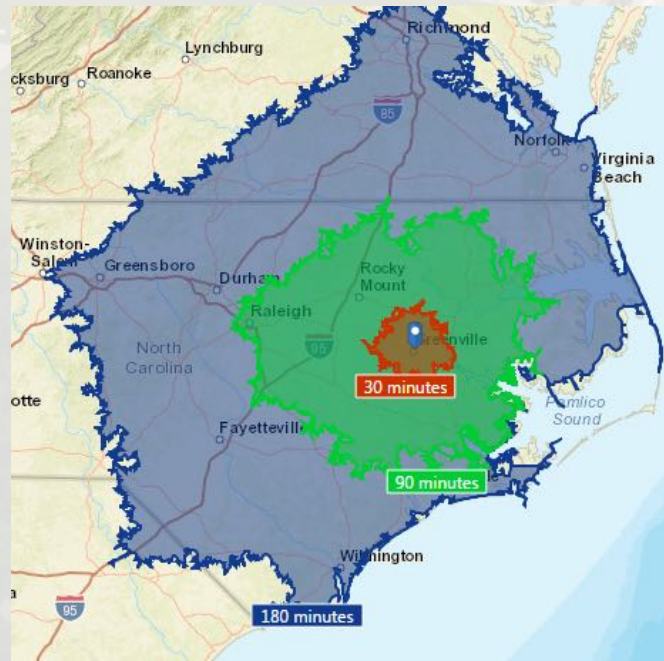
- Aquatic Center
- Triangle Fields
- Rectangle Fields
- Indoor Hardcourt Facility



Location and Accessibility

Driving Distance to Regional Cities

City, State	Distance From Greenville	Drive Time	Market Population
Raleigh, NC	85 mi.	1:24	1,275,000
Fayetteville, NC	107 mi.	1:40	391,000
Durham, NC	108 mi.	1:42	557,000
Norfolk, VA	122 mi.	2:14	1,747,000
Greensboro, NC	160 mi.	2:30	753,000
Richmond, VA	167 mi.	2:31	1,284,000
Charlotte, NC	250 mi.	3:47	2,443,000
Washington D.C.	275 mi.	4:18	6,066,000
Charleston, SC	327 mi.	5:01	739,000
Augusta, GA	345 mi.	5:18	601,000
Baltimore, MD	321 mi.	5:44	2,813,000
Knoxville, TN	443 mi.	6:41	875,000



Source: Google Maps, Esri MSA Data , 2016

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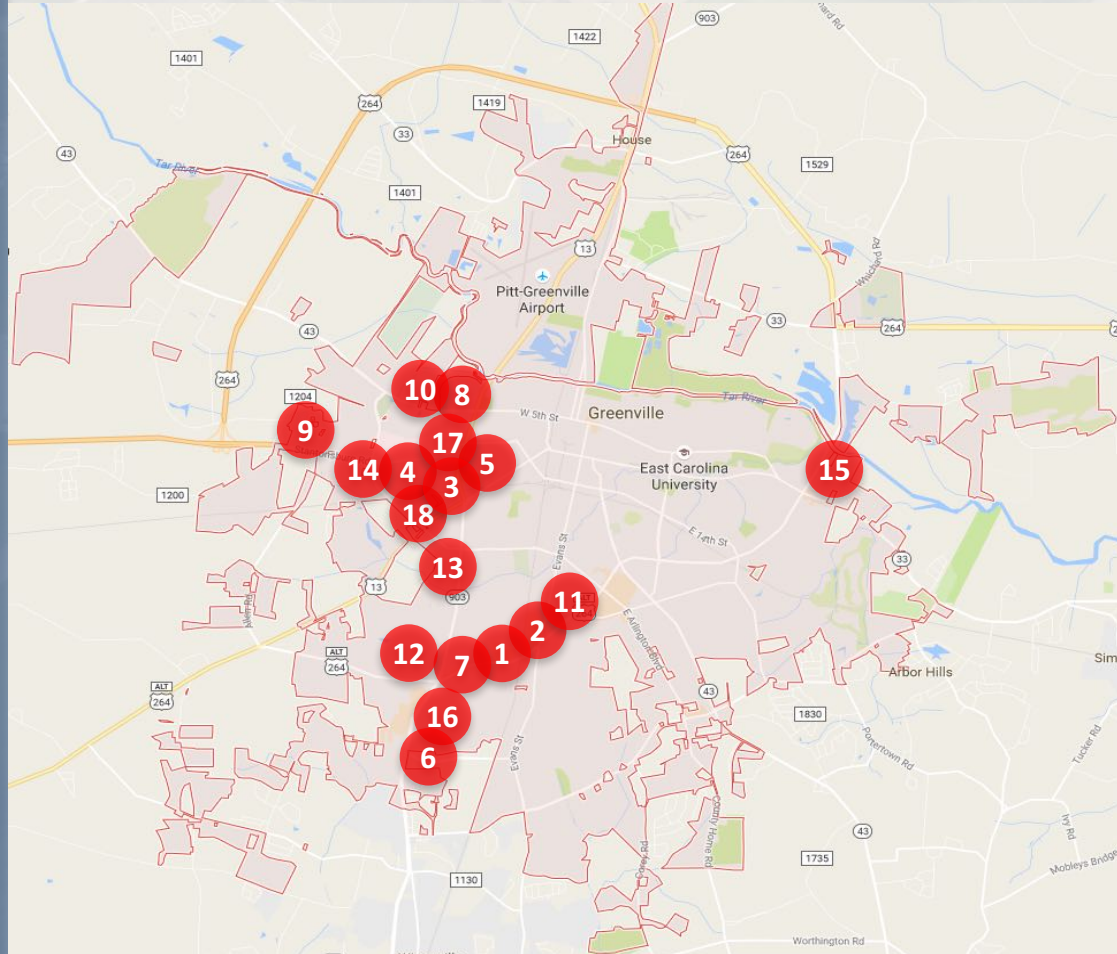
LOCAL MARKET

Local Market Conditions

Greenville Area Hotel Inventory

Feasibility Study for a Potential New Sports Complex in Greenville, North Carolina

LOCAL MARKET



Map Key	Hotel	# of Rooms
1	Holiday Inn Greenville	170
2	Hilton Greenville	142
3	Holiday Inn Express Greenville	124
4	Courtyard Greenville	115
5	Quality Inn Greenville	110
6	Baymont Inn & Suites Greenville	103
7	Hampton Inn Greenville	100
8	Residence Inn Greenville	97
9	Candlewood Suites Greenville	95
10	Microtel Inn & Suites by Wyndham Greenville	90
11	Rodeway Inn & Suites Greenville	90
12	Wingate By Wyndham Greenville	87
13	Camelot Inn	72
14	Home Towne Suites Greenville	70
15	Best Western Plus Suites Greenville	70
16	Knights Inn Greenville	58
17	East Carolina Inn	53
18	Super 8 Greenville	50

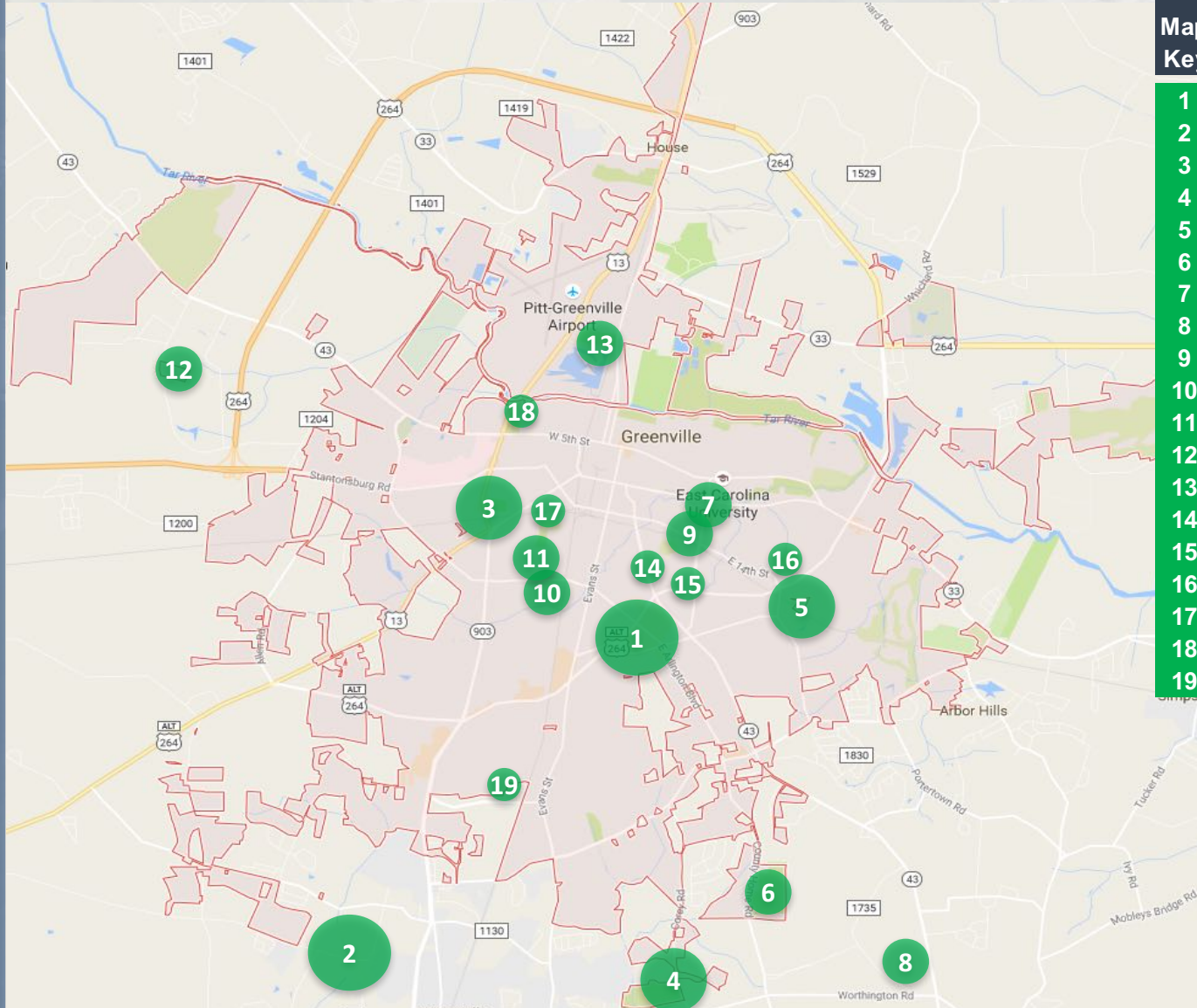
*only hotels with 50+ rooms represented

**Total Hotel Rooms in Pitt County =
Approximately 1,800**

Local Market Conditions

Triangle Field Complexes

Map Key Facility	# of triangle fields
1 CRW Blount Sports Complex	5
2 Sara A. Law Softball Complex (Pitt cty softball)	4
3 Guy Smith Park	3
4 H. Boyd Lee Park	3
5 Perkins Athletic Complex	3
6 Alice Keene Park	2
7 CM Epps Middle School	2
8 D.H. Conley High School	2
9 Elm Street Park	2
10 Evans Park	2
11 J.H. Rose High School	2
12 The Oakwood School	2
13 West Meadowbrook Park	2
14 Clark-LeClaire Stadium	1
15 ECU Softball Stadium	1
16 Jaycee Park	1
17 South Greenville Park & Recreation Center	1
18 Thomas Foreman Park/Eppes Recreation Center	1
19 Westhaven Park	1



Source: facility floor plans, management, and industry publications, 2016

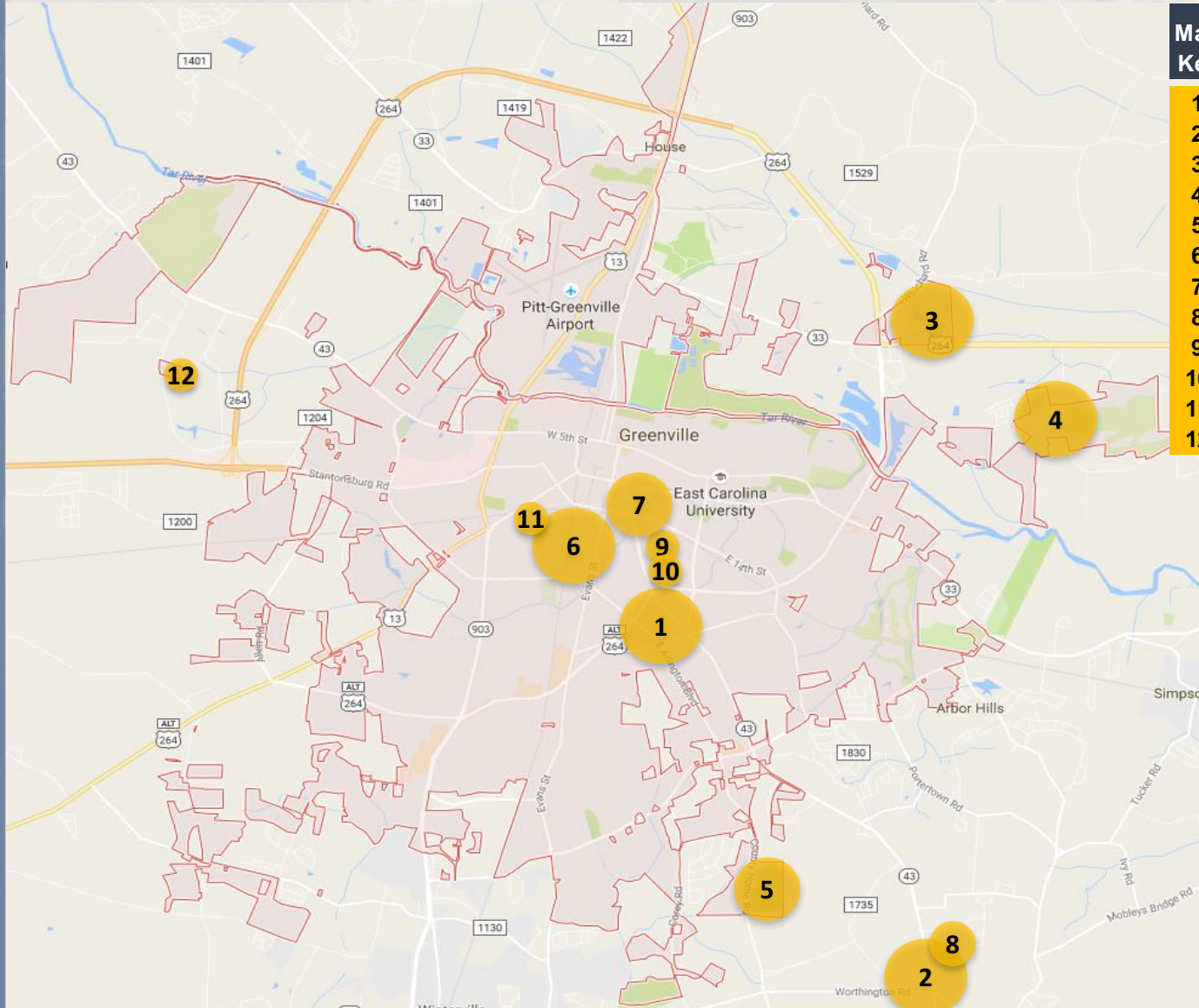
Feasibility Study for a Potential New Sports Complex in Greenville, North Carolina

LOCAL MARKET

Local Market Conditions

Rectangle Field Complexes

Map Key Facility	# of rectangle fields
1 CRW Blount Sports Complex	10
2 Pitt-Greenville Soccer Complex	10
3 North Recreational Complex	8
4 Bradford Creek Soccer Complex	5
5 Alice Keene Park	4
6 J.H. Rose High School	4
7 Cliff Moore Practice Facility	3
8 D.H. Conley High School	2
9 Dowdy-Ficklen Stadium	1
10 Johnson Stadium	1
11 South Greenville Park & Recreation Center	1
12 The Oakwood School	1



Source: facility floor plans, management, and industry publications, 2016

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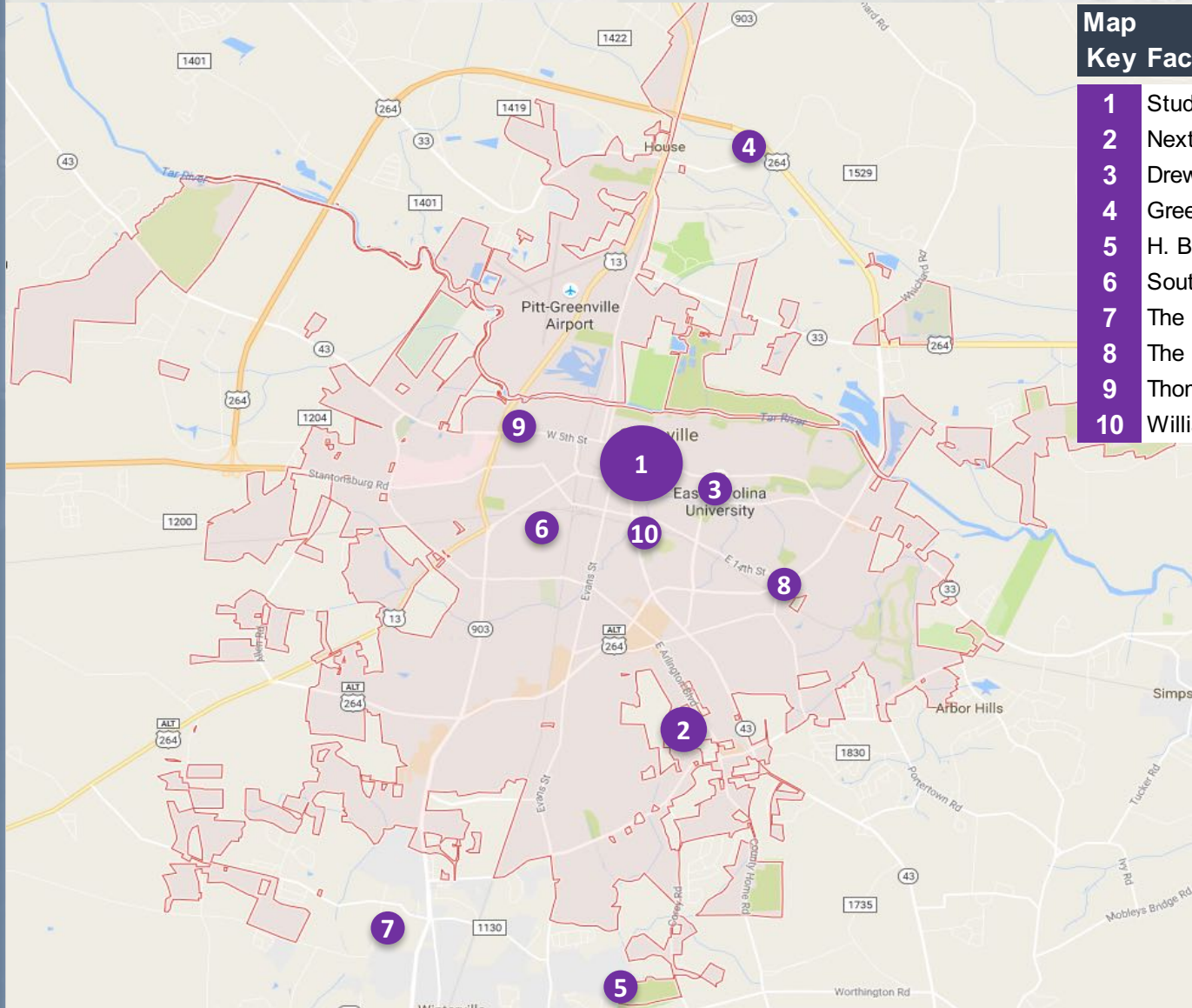
LOCAL MARKET

Local Market Conditions

Indoor Court Facility Complexes

Feasibility Study for a Potential New Sports Complex in Greenville, North Carolina

LOCAL MARKET



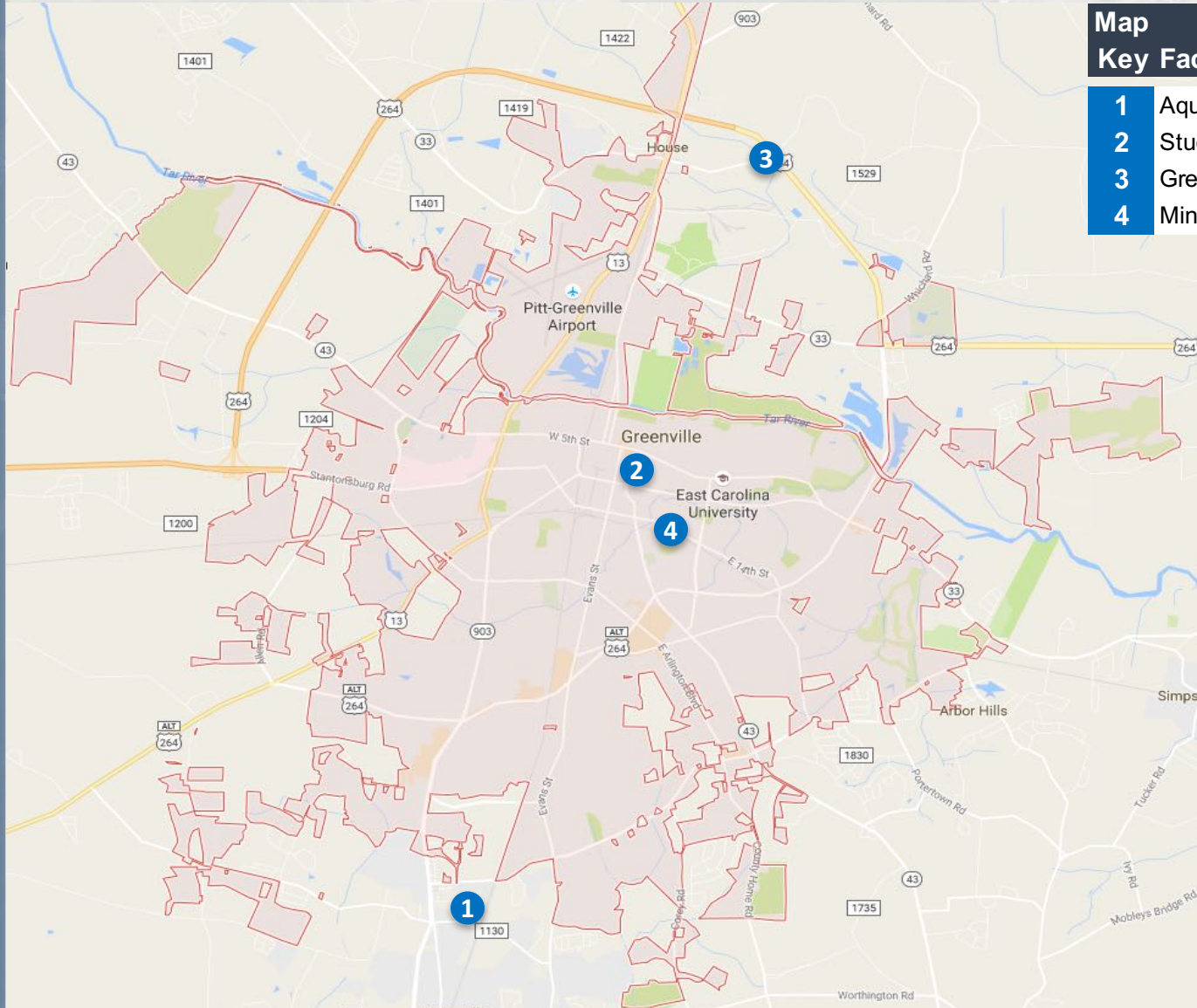
Map Key Facility	Indoor Courts
1 Student Rec Center	6
2 Next Level Training Center	2
3 Drew Steele Center	1
4 Greenville Aquatics and Fitness	1
5 H. Boyd Lee Park	1
6 South Greenville Park & Recreation Center	1
7 The Premier Sports Academy	1
8 The Sports Connection	1
9 Thomas Foreman Park/Eppes Recreation Center	1
10 Williams Arena	1

Local Market Conditions

Natatorium Complexes

Feasibility Study for a Potential New Sports Complex in Greenville, North Carolina

LOCAL MARKET



Map Key Facility	Pool
1 Aquaventure	1
2 Student Rec Center	1
3 Greenville Aquatics and Fitness	1
4 Minges Natatorium	1

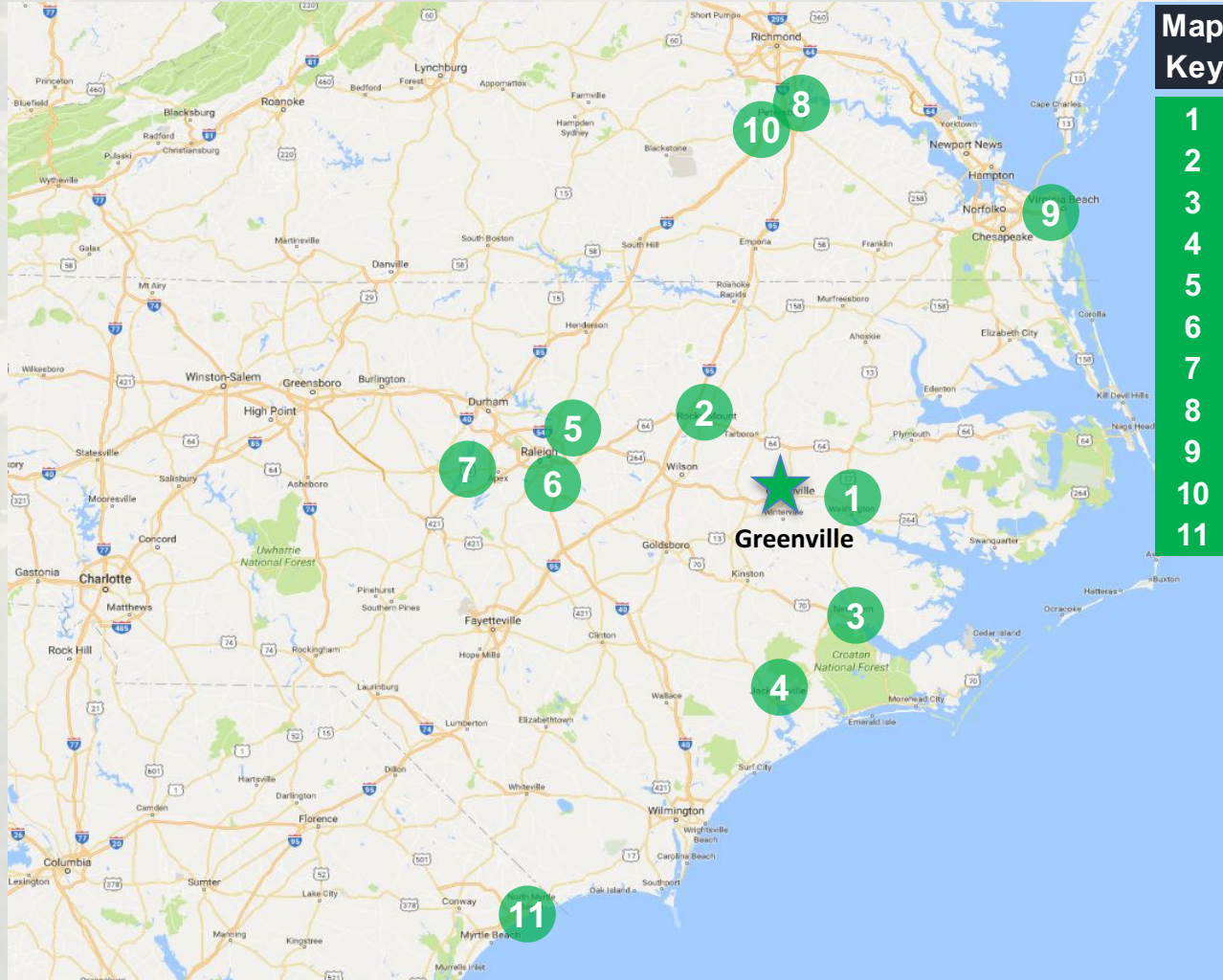
*Indoor aquatics only

Competitive Market Facilities

Triangle Field Facilities

Feasibility Study for a Potential New Sports Complex in Greenville, North Carolina

COMPETITIVE FACILITIES



Map Key	Facility	# of Triangles
1	Susiegray McConnell Sports Complex	6
2	Rocky Mount Sports Complex	11
3	Creekside Park	8
4	Jacksonville Commons Recreation Complex	8
5	The Factory	6
6	Walnut Creek Softball Complex	9
7	Thomas Brooks Park	8
8	Petersburg Sports Complex	4
9	Princess Anne Athletic Complex	8
10	Dinwiddie Sports Complex	4
11	North Myrtle Beach Sports Complex	8

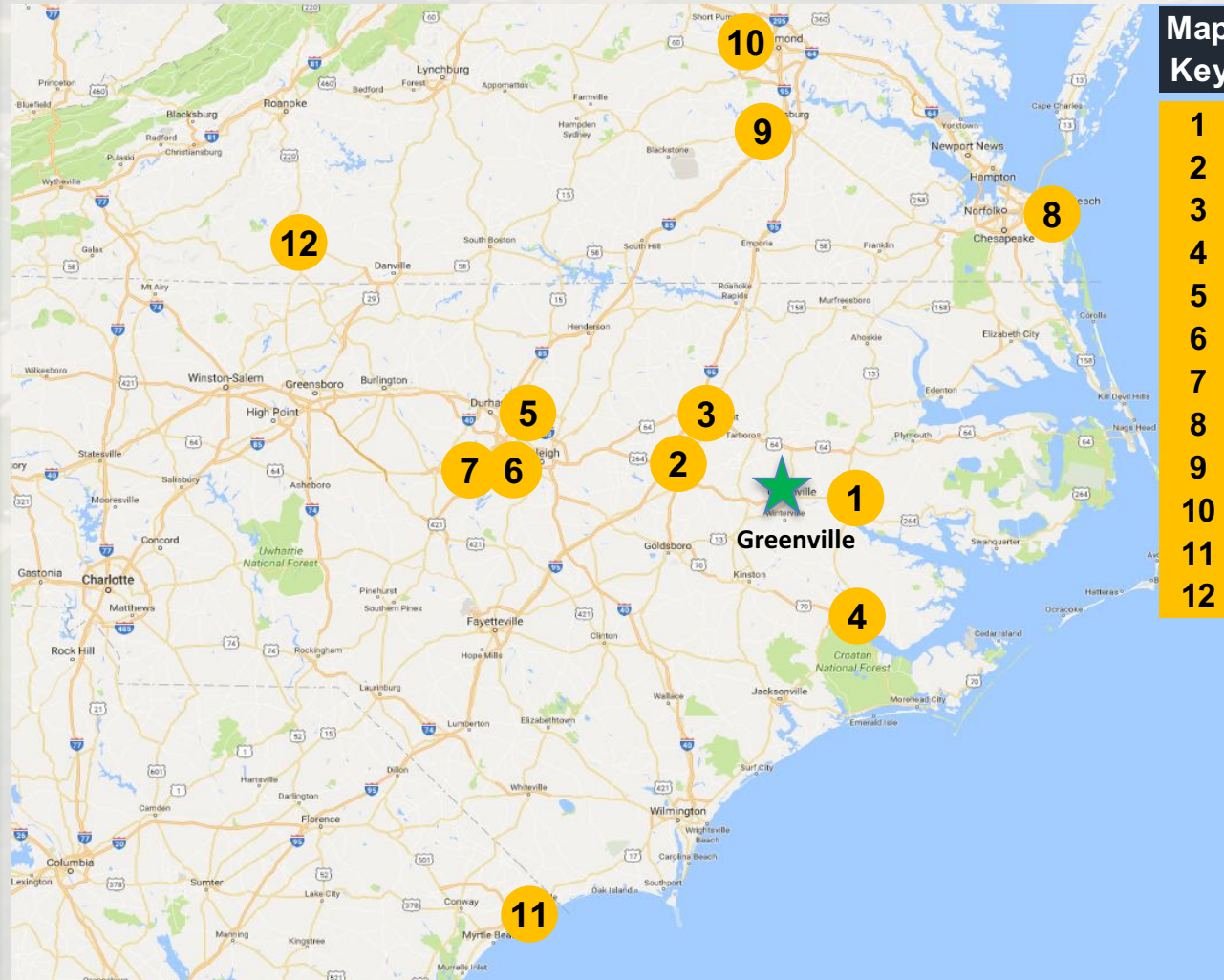
Note: Facilities sorted by distance from Greenville.

Competitive Market Facilities

Rectangle Field Complexes

Feasibility Study for a Potential New Sports Complex in Greenville, North Carolina

COMPETITIVE FACILITIES



Map Key	Facility	# of Rectangles
1	Susiegray McConnell Sports Complex	6
2	J. Burt Athletic Complex	8
3	Rocky Mount Sports Complex	8
4	Creekside Park	4
5	WRAL Soccer Park	22
6	WakeMed Soccer Park	8
7	Thomas Brooks Park	2
8	Princess Anne Athletic Complex	7
9	Dinwiddie Sports Complex	2
10	River City Sportsplex	12
11	North Myrtle Beach Sports Complex	6
12	Smith River Sports Complex	5

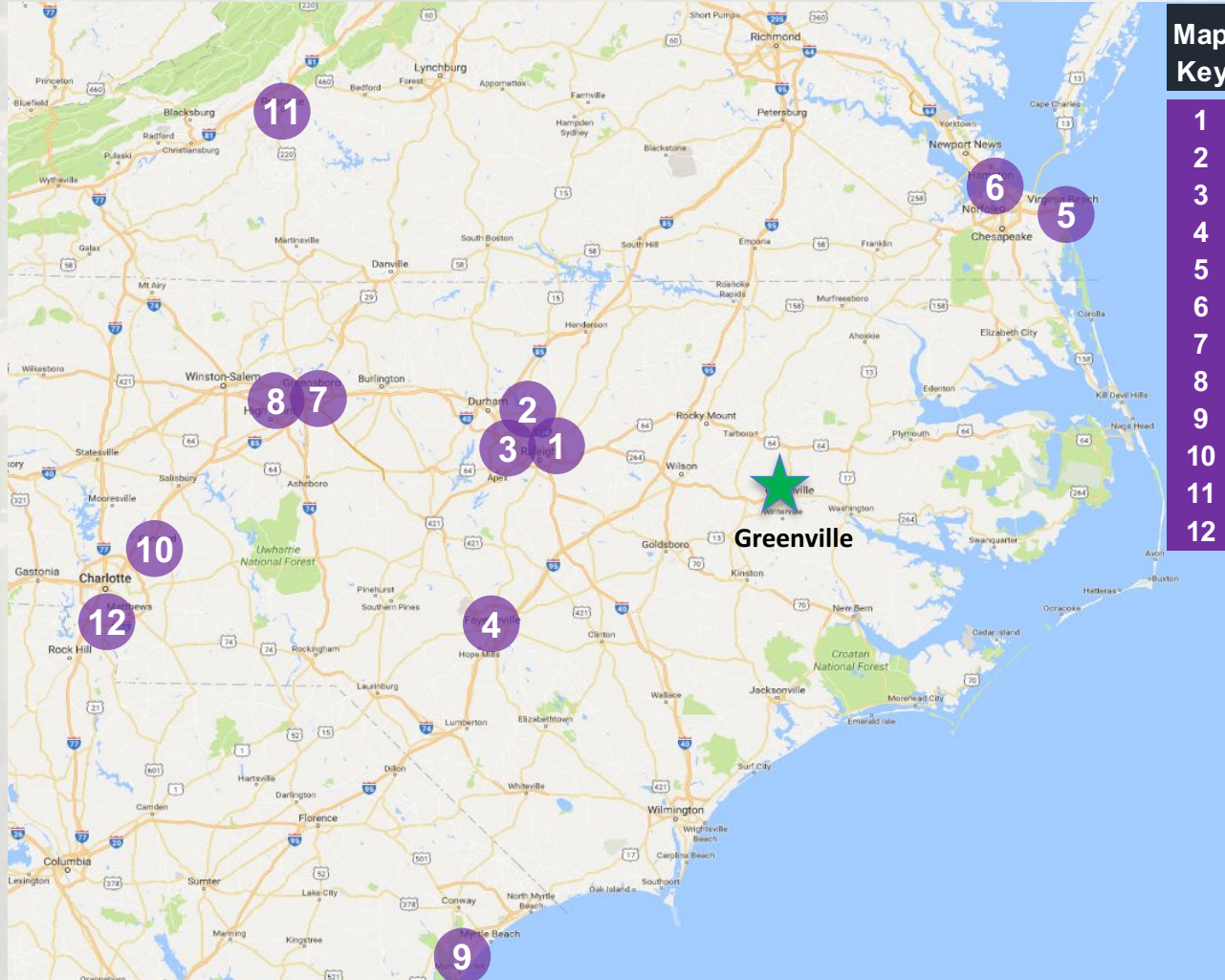
Note: Facilities sorted by distance from Greenville.

Competitive Market Facilities

Indoor Court Facilities

Feasibility Study for a Potential New Sports Complex in Greenville, North Carolina

COMPETITIVE FACILITIES



Map Key	Facility	# of courts BB/VB
1	Carmichael Gymnasium	11/22
2	Triangle Volleyball Club	0/7
3	North Carolina Volleyball Academy	0/5
4	Freedom Courts Sportsplex	4/10
5	Virginia Beach Fieldhouse	4/8
6	Boo Williams Sportsplex	8/16
7	Greensboro Sportsplex	8/16
8	Proehlfic Park	3/16
9	Myrtle Beach Sports Center	8/16
10	Carolina Courts	4/8
11	Spectrum Sports Academy	6/10
12	Carolina Courts	4/8

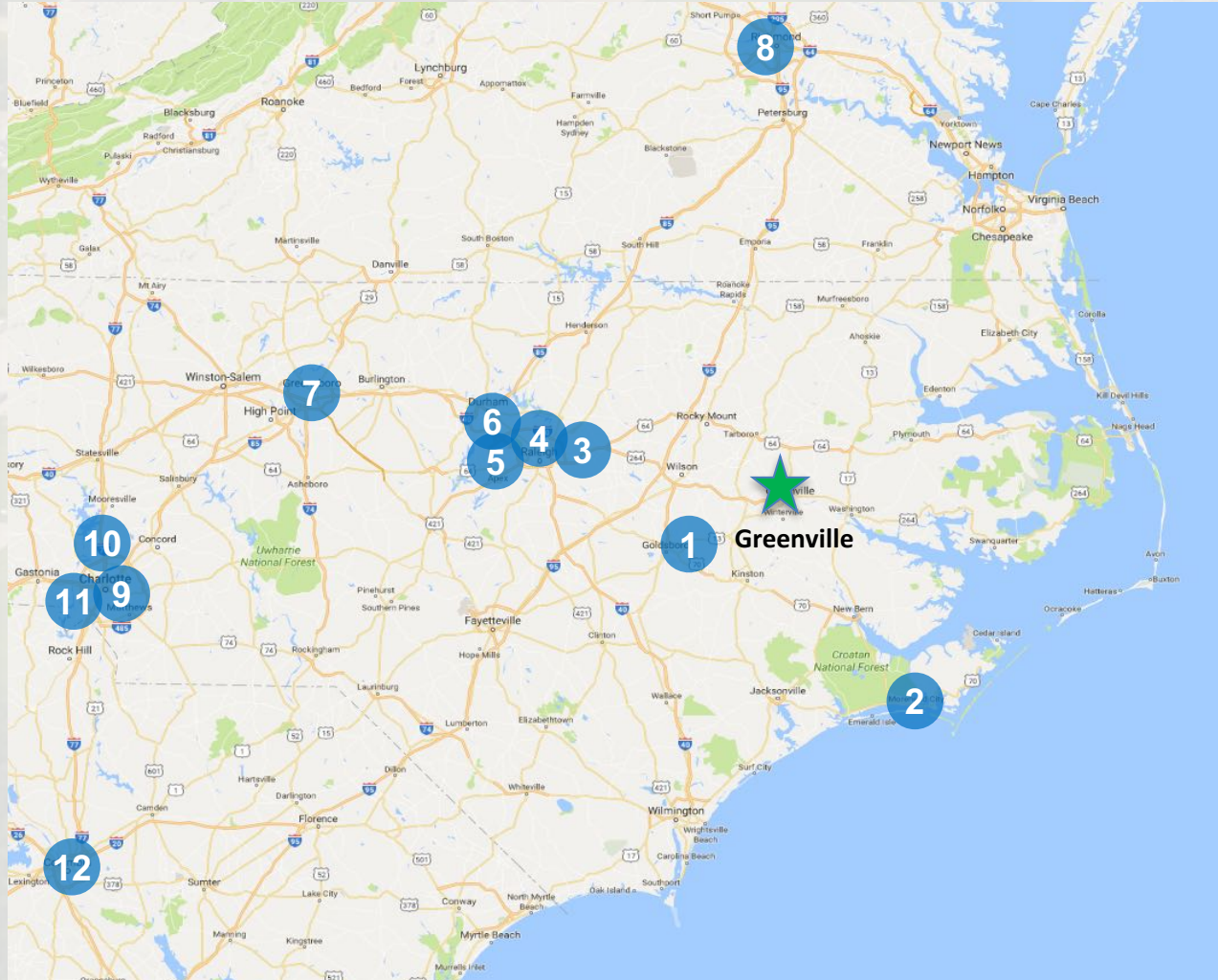
Note: Facilities sorted by distance from Greenville.

Competitive Market Facilities

Natatorium Facilities

Feasibility Study for a Potential New Sports Complex in Greenville, North Carolina

COMPETITIVE FACILITIES



Map Key Facility

- | | |
|----|--|
| 1 | Goldsboro YMCA |
| 2 | Sports Center - Morehead (1) |
| 3 | Optimist Pool |
| 4 | Pullen Aquatic Center |
| 5 | Triangle Aquatic Center |
| 6 | Koury Natatorium |
| 7 | Greensboro Aquatic Complex |
| 8 | Collegiate School Aquatics Center |
| 9 | Charlotte Latin - MAC Pool |
| 10 | Huntersville Family & Fitness Aquatics |
| 11 | Mecklenburg County Aquatic Center |
| 12 | Carolina Natatorium |

Note: Facilities sorted by distance from Greenville.
(1) Sport Center is an outdoor pool

MARKET DEMAND

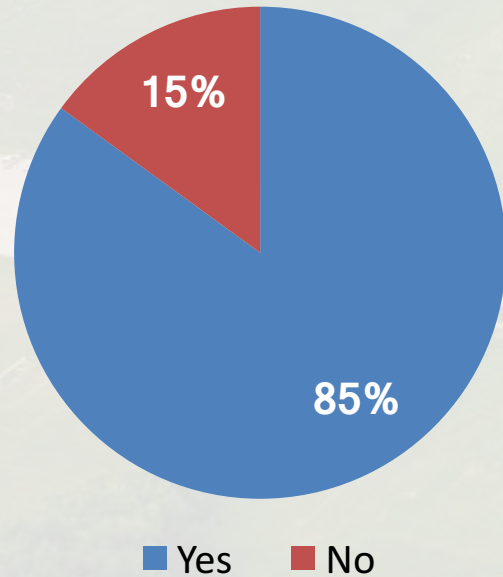
Market Surveys

- 1. Local Outreach (in-person)**
In-person interviews of more than 40 local individuals, representatives of sports organizations/clubs, government and academic institution officials, and local sports, tourism and business leaders.
- 2. Local Outreach (telephone)**
Follow-up telephone interviews with local individuals/groups.
- 3. Local Outreach (web-based)**
Conducted an online community survey to assess local opinions/interest/use potential. Over 500 completed surveys.
- 4. Local/Non-Local User Groups (telephone)**
Completed telephone interviews with nearly 30 representatives of organizations/associations that run leagues and/or produce tournaments, meets and other competitions throughout the region.

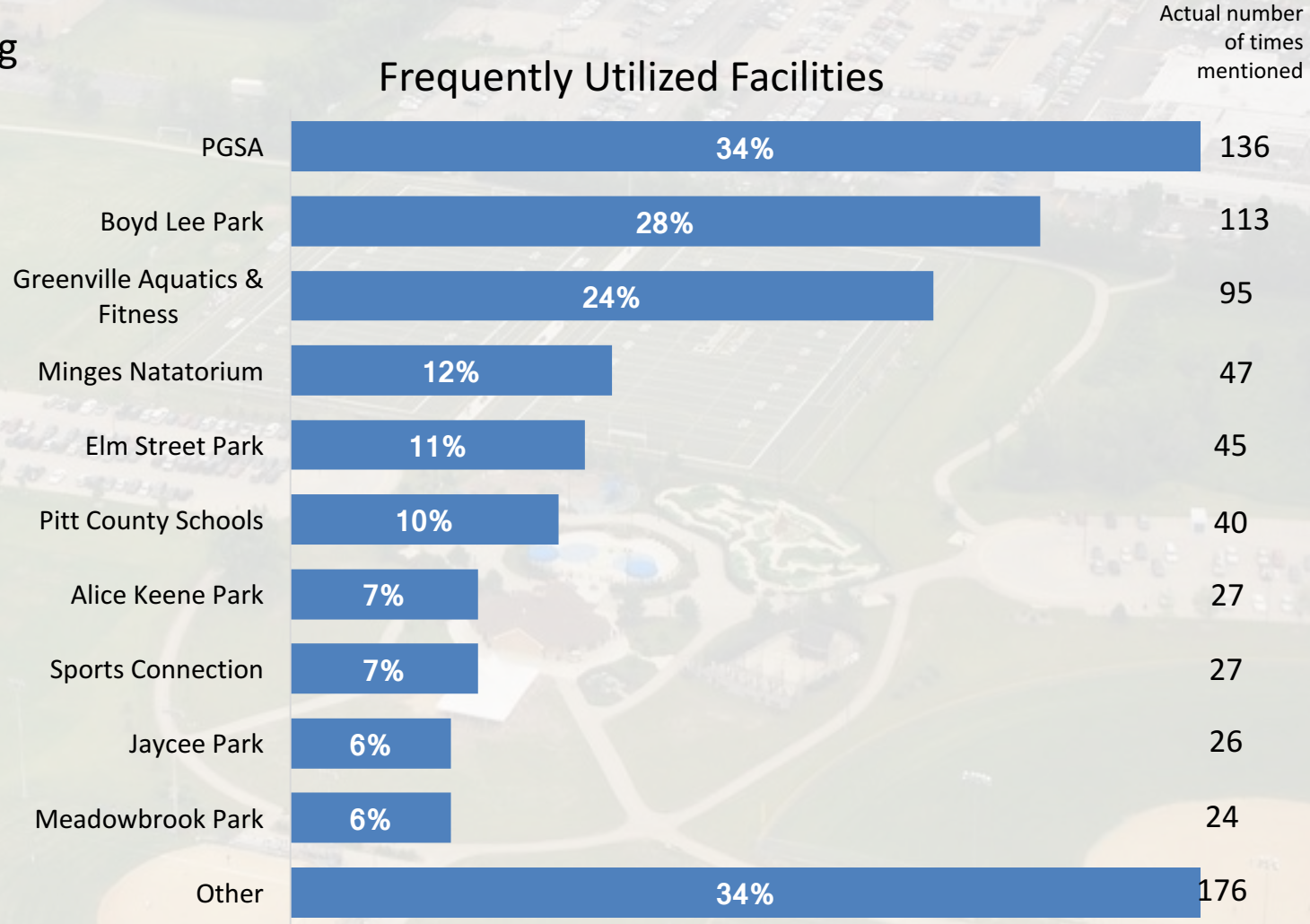
Community Survey Analysis

Frequently Used Facilities in Pitt County

Respondents Currently Using Facilities in Pitt County



Frequently Utilized Facilities



Note: Results shown representative of 514 survey respondents.
Source: CSL Community Survey, 2016

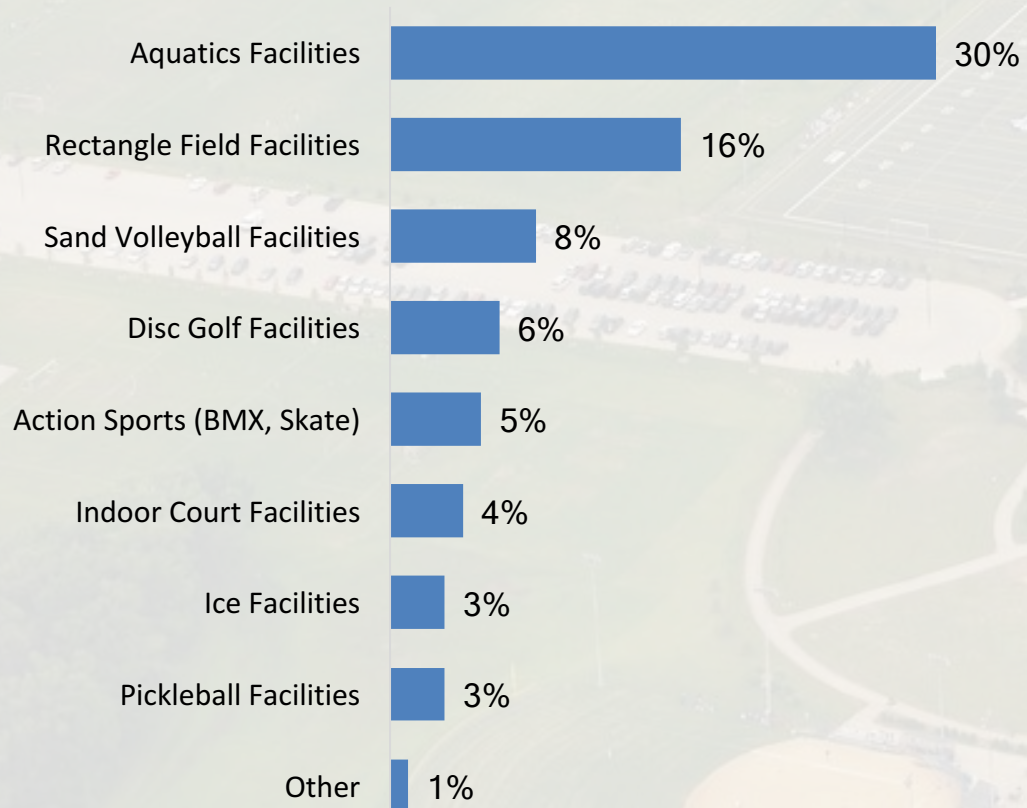
Note: Other section includes: Aquaventure, ECU North Rec, ECU Blount Complex, Drew Steele Center, Perkins Complex, Sara Law Softball Complex, Rose's Gymnastics.



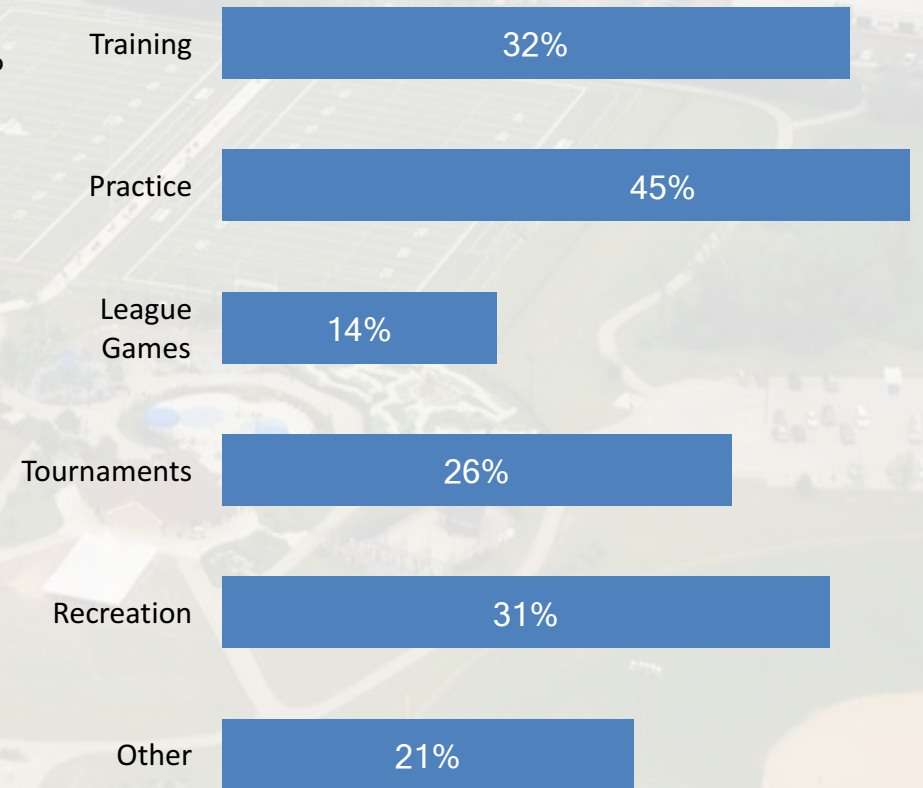
Community Survey Analysis

Frequency of Participation in Sports *Outside* of Greenville

Types of Facilities Utilized Outside of Greenville



Purpose for Outside Facility Use

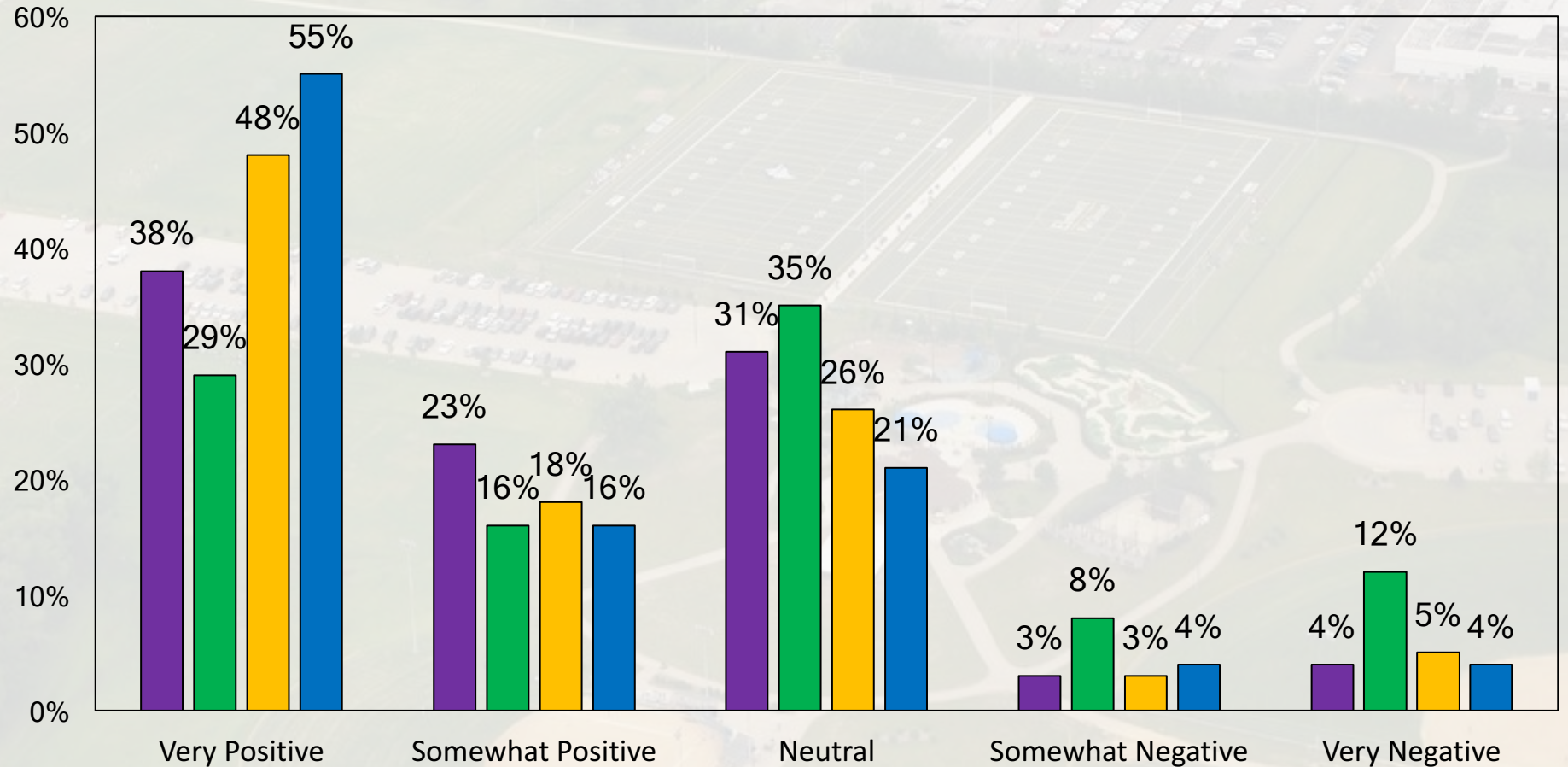


Note: Results shown representative of 514 survey respondents.
Source: CSL Community Survey, 2016

Community Survey Analysis

Interest in New Sports Facilities in Greenville/Pitt County

■ Gym ■ Triangle Fields ■ Rectangle Fields ■ Aquatics



Note: Results shown representative of 514 survey respondents. 197 respondents answered this question.
Source: CSL Community Survey, 2016

Feasibility Study for a Potential New Sports Complex in Greenville, North Carolina

MARKET DEMAND

Market Demand Analysis

Organizations Contacted

3d Lacrosse - Great State Showdown NC
American Legion Baseball - North Carolina

Aquaventure

Babe Ruth Tournaments

Capital Area Soccer League

Carolina Region Volleyball

East Carolina Aquatics

East Carolina Youth Lacrosse League

ECU Athletics Department

ECU Club Sports

Greenville Babe Ruth / Rose High School

Greenville Disc Golf

Greenville Little Leagues

Greenville Rec & Parks Department

J.H. Rose High School Swimming & Diving

MAYB - Mid America Youth Basketball

National Softball Association - North Carolina

National Travel Basketball Association

NC USA Gymnastics

NC High School Athletic Association - Swimming and Diving

NC High School Athletic Association - Cheerleading

NC High School Athletic Association - Volleyball

NC High School Athletic Association - Womens Basketball

North Carolina AAU Gymnastics

North Carolina AAU Soccer

North Carolina AAU Volleyball

North Carolina AAU Wrestling

North Carolina Adult Soccer Association

North Carolina Amateur Softball Association Fastpitch

North Carolina Swimming

North Carolina USSSA Fastpitch Softball

Pitt County Youth Lacrosse

Pitt Greenville Soccer Association

Super Series Baseball of America

Top Gun Sports

Tournament of State Champions

USA Diving

USSA Baseball

USSSA Basketball - North Carolina

Whitfield Baseball Association

MARKET DEMAND

Market Demand Conclusions

- **Swimming**
 - Strong local and non-local demand
 - Low competition
 - Partner opportunity with ECU
 - Significant opportunity to host local, regional, collegiate and other meets
- **Indoor court sports and recreation**
 - Moderate local and non-local demand
 - Nearest indoor court facility is in Raleigh
 - Could alleviate pressure on area school gyms with a centralized facility to accommodate community demand and nonlocal tournaments
- **Baseball and softball**
 - Moderate local and nonlocal demand
 - Greenville regionally recognized as a baseball/softball community
 - Established competition in state and region
- **Other sports and recreation**

Estimated Economic Impacts

Stabilized Year of Operations, in 2017\$

	Scenario 1 Aquatic Center	Scenario 2 Indoor Court Facility	Scenario 3 Triangle Field Complex
Total Attendee Days	199,140	160,040	175,875
Total Non-Local Visitor Days	104,695	91,078	36,750
Total Hotel Room Nights	15,631	13,264	7,425
Direct Spending			
Hotel	\$2,051,548	\$1,740,901	\$1,157,625
Restaurant/Meals	\$3,128,511	\$2,710,133	1,014,550
Entertainment/Leisure	\$592,456	\$511,690	220,500
Retail/Shopping	\$1,158,517	\$1,006,852	493,188
Other	<u>\$568,820</u>	<u>\$492,752</u>	<u>265,375</u>
Total	\$7,499,852	\$6,462,328	\$3,151,238
Indirect/Induced Spending	<u>\$4,658,763</u>	<u>\$4,013,078</u>	<u>\$1,953,767</u>
Total Economic Output	\$12,158,616	\$10,475,406	\$5,105,005
Personal Earnings	\$3,795,600	\$3,270,740	\$2,232,563
Employment (full & part-time jobs)	169	146	58

Estimated Costs

Stabilized Year of Operations, in 2017\$

	Scenario 1 Aquatic Center	Scenario 2 Indoor Court Facility	Scenario 3 Triangle Field Complex
Construction Costs			
Hard costs	\$19,200,000	\$20,800,000	\$10,400,000
Soft costs	5,760,000	6,240,000	3,120,000
Total Costs	\$24,960,000	\$27,040,000	\$13,520,000
Annual Financial Operations			
Operating Revenues	\$1,105,600	\$2,127,000	\$758,000
Operating Expenses	1,408,000	2,060,000	1,045,000
Net Operating Profit/(Loss)	(\$302,400)	\$67,000	(\$287,000)

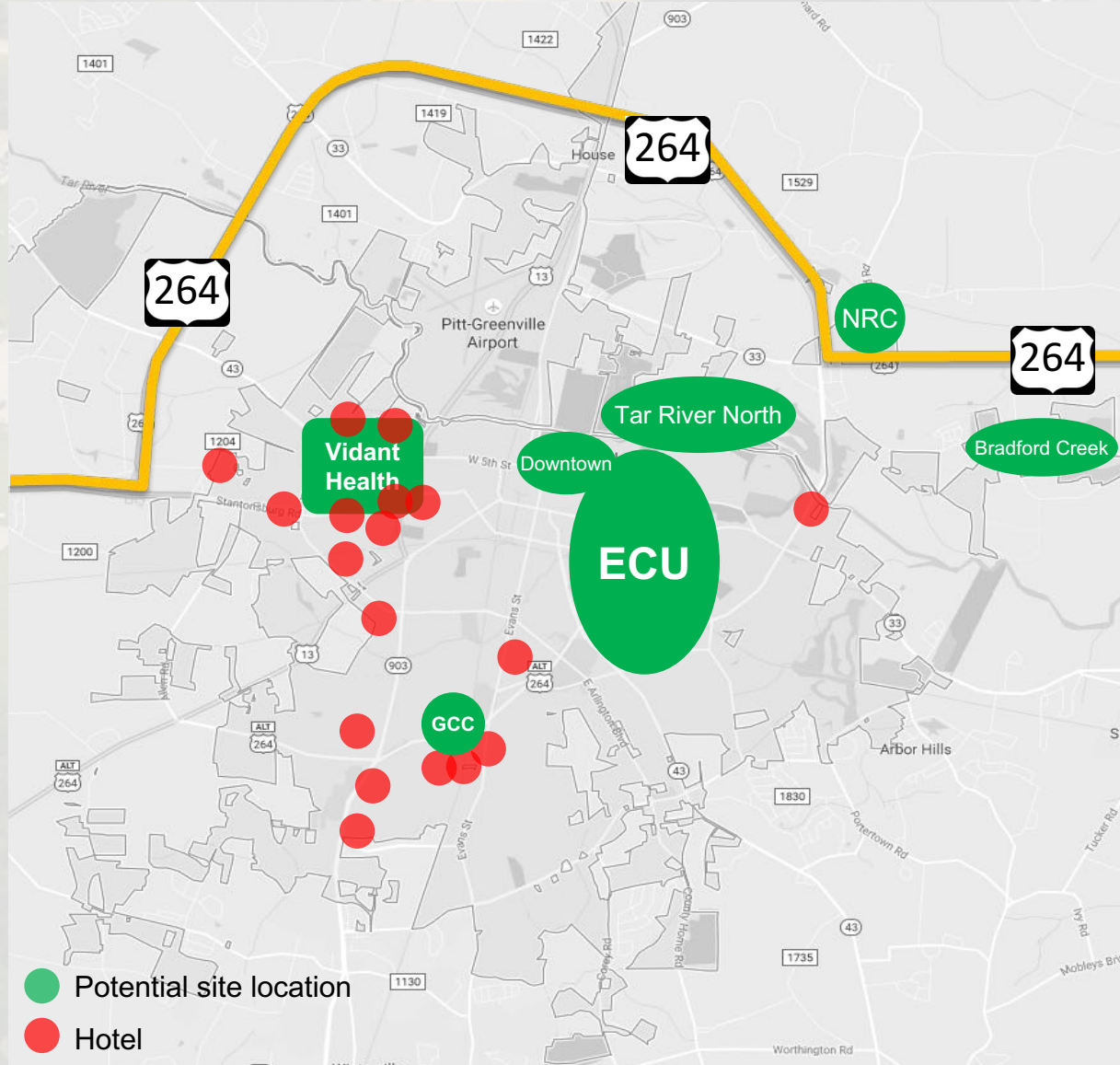
Preliminary Site/Location Areas

Site Size Requirements

- **Natatorium**
3.5-5.5 acres
- **Indoor Hardcourt Facility**
4.0-5.5 acres
- **Outdoor Triangle Fields**
50-60 acres

Potential Site Locations

- **Tar River North**
500+ acres
- **North Rec Complex**
60 acres
- **Bradford Creek Golf Course**
200 acres
- **ECU Campus**
limited
- **Imperial Site/Dwntn Greenville**
6 acres
- **Greenville Convention Center**
10 acres



Funding Options

Industry Typical Sources

- Public Sources
 - Sales taxes
 - Property taxes
 - TIF
 - Hotel/motel taxes
 - Restaurant/entertainment taxes
- Private Sources
 - Equity partner
 - Grants/donations
 - Naming rights/sponsorships
 - Vendor rights
 - Registration fee surcharge
 - Parking fee
 - Other sources

Greenville Opportunities

- GO Bonding
- Prepared Food Tax
 - Requires State Legislature approval
 - 1.0% tax could generate approximately \$4.0 to \$5.5 million annually
- Synthetic Tax Increment Financing (TIF)
- Hotel/motel tax
 - currently capped at 6.0 percent – Mecklenburg County only with higher tax
- Naming rights
 - \$50,000-\$175,000 annual potential
- Partnerships
 - Education (ECU)
 - Health (Vidant Health)