



A CONVENTION CENTER

for downtown Fayetteville?

A pre-feasibility briefing in seven parts.

Pre-feasibility research compiled in response to Mayor Colvin's May 4, 2026 Agenda Item Request. Contents include the publicly available data on a potential downtown convention center, a comparison to the ten largest cities in North Carolina, the procedural history of the Crown Event Center (2020–2025), and the cost, scope, and timeline information CSL International provided in a May 2026 conversation. CSL produced the original 2021 Cumberland County study.

KEY NUMBERS AT A GLANCE

<p>\$100K</p> <p>STATED COST</p> <p>CSL verbal estimate, May 2026</p>	<p>3–4 mo</p> <p>STATED TIMELINE</p> <p>Per CSL conversation</p>	<p>1.1M</p> <p>CATCHMENT</p> <p>60-minute drive</p>	<p>\$280M+</p> <p>ESTIMATED PROJECT</p> <p>Convention center + hotel</p>	<p>5–7 yrs</p> <p>BUILD HORIZON</p> <p>Per CSL guidance</p>
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Seven findings.

This briefing summarizes publicly available information assembled in response to Mayor Colvin's May 4, 2026 Agenda Item Request titled "Feasibility Study for Downtown Convention Center." Sources include the 2021 Cumberland County feasibility study, the 2024 REVPAR International hotel market study commissioned by the City, the Cumberland County Board of Commissioners' record from 2020 through 2025, a May 2026 conversation with CSL International, and public reporting on the ten largest cities in North Carolina. The findings below state what is documented. They do not constitute a feasibility study or a recommendation. The accompanying CAM states the options available to Council and staff's recommended next step.

THE SEVEN FINDINGS

01 - FOUNDATION

The 2021 CSL study commissioned by Cumberland County identified a 1.1M market catchment within 60 minutes, 80% stakeholder preference for downtown, a \$7.4M per year Food and Beverage tax base supporting approximately \$80.6M in bonded capacity, and a 20-criteria site-evaluation framework. The 2021 study evaluated a 2,500-seat performing arts hall. A convention center is a different facility type with different demand drivers and operating economics.

02 - MARKET

In March 2024, REVPAR International completed a hotel market study for the City. The study projected stabilized occupancy of 73%, an average daily rate of \$185, and EBITDA of \$2.0M for a 125-key upscale soft-branded hotel downtown, and stated this performance could be achieved without municipal subsidy. The existing six-hotel competitive set ran 76.3% occupancy at \$149 ADR in 2023. The study addressed a 125-key boutique-tier property and did not evaluate a larger headquarters hotel sized to support a convention center.

03 - DEMAND

Fayetteville does not appear on the recent annual-conference rotation of any major NC state association reviewed for this scan. The 82nd Airborne Division Association, headquartered in Fayetteville, holds its national convention in Orlando. Greenville NC, with approximately half Fayetteville's population and a recently opened convention center, hosts both the NC League of Municipalities and the NC Association of County Commissioners.

04 - PLAYBOOK

Of the ten largest cities in North Carolina, five operate purpose-built downtown convention centers (Charlotte, Raleigh, Greensboro, Winston-Salem, Wilmington), one (Durham) is advancing a \$540M project documented in a February 2025 Hunden Partners study, one (Cary) is part of the Raleigh meeting district, and one (Concord) operates a hotel-attached facility. Fayetteville is the only city in the top ten with a population exceeding 200,000 that has neither an existing downtown convention center nor an active project to build one.

05 - WARNING

The Crown Event Center project was cancelled in June 2025. Between the 2021 feasibility study (89,000 sf at \$77.5M) and the May 2023 concept design (131,500 sf at \$131.7M), the program grew by 47% in size and 70% in cost. No public re-validation checkpoint occurred between feasibility and concept design. Architectural fee amendments became the subject of federal litigation in October 2025.

06 - ACTION

CSL stated in May 2026 that a realistic build horizon from study authorization to opening is five to seven years, with identification of funding sources the primary gating factor. Durham's study was delivered February 2025; the Durham opening is projected for 2031–32. Section 06 of this briefing lists procurement and procedural steps that occur in the months between Council authorization and contract award.

07 - INVESTMENT

In a May 2026 conversation, CSL International stated they could deliver the feasibility study for approximately **\$100,000 in three to four months**. The stated scope includes market capacity and saturation analysis, demand modeling, trend analysis, and identification of two to three candidate sites with loose massing for each. CSL stated they could continue past feasibility into Phase II (blueprints, architecture, pre-design) for approximately \$500,000 if Council directs. The CSL information was provided verbally; no written quote has been issued.

HOW TO READ THIS DOCUMENT

For City Council	Sections 01, 02, 06, and 07 (foundation, market, action, investment) summarize the question in four pages.
For the City Manager	Sections 05, 06, and 07 (warning, action, investment) document the procedural history and the items for a feasibility RFP.
For Distinctly Fayetteville	Sections 02 and 03 (market, demand) cover the hotel and conference data.
For the County	Section 01 documents what was established in the 2021 study; sections 05 and 06 cover the Crown timeline and current city steps.

What the 2021 CSL study established.

Cumberland County's \$300K+ feasibility study by Conventions, Sports & Leisure International, dated September 13, 2021. 200+ pages. Commissioned by Spectra Venue Management on behalf of Cumberland County.

Findings depend on whether they describe the market or the building. The 2021 study evaluated a 2,500-seat downtown performing arts venue, not a convention center. The market data, demographic findings, funding mechanism analysis, and site-evaluation framework derived from that study describe Cumberland County itself and do not depend on which facility is ultimately built. The program-specific findings (building size, cost, demand profile, operating model) reflect the specific facility CSL was asked to evaluate.

✓ TRANSFERABLE FINDINGS

Independent of facility type

1.1M	Market catchment Residents within a 60-minute drive. Cumberland County itself is 336K. Per 2021 CSL analysis, 60% of Crown ticket buyers come from inside 25 miles.
80%	Stakeholder preference Of community leaders interviewed by CSL. Public forums also preferred downtown (48%) over the Crown Complex (23%) or other locations.
\$7.4M	F&B tax revenue Annual revenue from the 1% prepared food and beverage tax (county-wide since 1993). FY2025 projected at \$8.3M.
\$80.6M	Bondable capacity Per CSL analysis: at 30-year, 4.0% bonds with 1.5x debt service coverage, the existing F&B tax can carry approximately \$80M of new construction debt.
#1	Site analysis result Downtown scored 161 points vs. the Crown Complex area at 135 and the I-295 Outer Loop at 107, on a 20-criterion weighted framework. Framework itself is reusable.
33	Median age Cumberland County median age 33 vs. US median 38.5. Minority population 59% (US: 41%).

! PROGRAM-DEPENDENT FINDINGS

Reflect the 2,500-seat performing arts hall

BUILDING	Different program CSL evaluated a 2,500-seat performing arts hall. A convention center has no fixed-seat auditorium; the program is a divisible exhibit hall, ballroom, and breakout rooms.
COST	Different total CSL estimated \$77.5M for an 89,000 sf hall. A convention center plus 250-key headquarters hotel is in the \$280–400M total project range based on peer-city projects.
DEMAND	Different event mix 2021 model assumed 148 entertainment events / 129K attendees. Convention center demand is 50–80 multi-day events drawing corporate, association, and military groups.
SITE	Areas vs. parcels CSL compared three areas (downtown, Crown, Outer Loop). A convention center study requires evaluation of specific parcels.
HOTEL	Tandem planning The 2021 plan did not include a hotel. Successful convention centers are typically attached to a 200+ key full-service hotel. A convention center study would need to model hotel and convention center in tandem.
OPS	Different operating model CSL projected a small operating profit driven by concert revenue. Convention centers typically operate at a loss directly, repaid via incremental room nights and F&B tax lift in the destination.

Source. Conventions, Sports & Leisure International, Cumberland County Multi-Purpose Event Center Market and Financial Feasibility Study, September 13, 2021. Commissioned by Spectra Venue Management on behalf of Cumberland County. The 2021 study recommendations were later modified into the Crown Event Center concept, which broke ground in October 2024 and was cancelled by the Board of Commissioners in June 2025 after approximately \$36M had been spent. Compiled May 2026.

The 2024 REVPAR International hotel market study.

REVPAR International's letter report to City Manager Doug Hewett, dated March 18, 2024 (revised May 6, 2024).

REVPAR International, a hospitality consultancy with offices in Washington, Miami, and Denver, delivered a market study to the City Manager's office in March 2024. The study evaluated whether downtown Fayetteville could support a 125-key upscale soft-branded hotel (Tribute Portfolio by Marriott was the specific recommendation). REVPAR projected 73% stabilized occupancy, \$185 ADR, \$9.4M annual revenue, and \$2.0M EBITDA after reserve, with a \$26.8M stabilized valuation. The study concluded that, based on the discounted cash flow analysis, the project did not require municipal incentives or abatements.

76.3% MARKET OCCUPANCY Six-hotel competitive set, 2023	\$149 AVERAGE DAILY RATE Up from \$124 in 2019	\$114 REVPAR Revenue per available room	5.0% REVPAR CAGR Compound 2019–2023	746 COMP SET ROOMS Six hotels near Fort Liberty
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SITE A	SITE B	SITE C
Public Parking Garage <i>466 Hay Street, adjacent to Segra Stadium</i> Parking garage built 2021 as podium for hotel above. Already moving forward as a 125-key project. Tallest building in Fayetteville if built. REVPAR notes acquisition difficulty was flagged by city representatives.	Unimproved Parking Lot <i>301 Maiden Lane, city-owned</i> Central downtown location, city ownership, near demand generators. Detractors per REVPAR: small site, lack of parking, used regularly by adjacent church, limited visibility.	Old Courthouse + Adjacent Parcels <i>Franklin/Gillespie, eastern downtown</i> Adjacent to the former Crown Event Center site. Could potentially incorporate the historic Cumberland County Courthouse. The parcel constraints applicable to the Crown Event Center site apply here.

"We have assumed no municipal incentives or abatements in this analysis as the discounted cash flow valuation analysis yields a value that indicates financial support for the project."

— REVPAR International to the City of Fayetteville, March 18, 2024

WHAT THE STUDY ADDRESSED

Findings stated by REVPAR in the March 2024 report

Hotel market support for a 125-key downtown hotel

REVPAR projected 76% occupancy, \$149 ADR, 5% RevPAR growth. Stated downtown can clear the market on day one without subsidy.

Fort Liberty demand component

52,000 active military, 12,000 DoD civilians, 5,000 contractors, plus 125,000 retirees in metro. REVPAR stated 60% of hotel demand is corporate-government.

Public funding need at 125-key scale

REVPAR's DCF analysis indicated financial support without municipal incentives. The Hay Street project is proceeding on this basis.

Site availability downtown

Three sites were studied. The Hay Street site is already in motion. The other two remain in inventory.

WHAT THE STUDY DID NOT ADDRESS

Items outside the scope of the 125-key hotel study

Would a 125-key boutique serve as a convention HQ hotel?

A 125-key Tribute is positioned for transient and small-group business. Convention centers typically need 250–300 key full-service flags to absorb a room block of 400+ for multi-day events.

Could a 250+ key full-service hotel be built without subsidy?

Not addressed. The 125-key economics differ from the 250+ key full-service economics. Durham's Hunden study documents a \$101M / 45% public participation gap for a 500-key hotel.

Does the new Hay Street hotel obviate need for a CC HQ hotel?

REVPAR characterized the Hay Street property as a boutique-lifestyle hotel without convention block capacity. A convention center HQ hotel is a distinct product type.

How does Site C change post-cancellation?

REVPAR evaluated Site C as a hotel site in March 2024 when the County was building a convention center on the same parcel. With the convention center cancelled, the site is available for other uses.

Primary source. REVPAR International, Inc., "Proposed Hotel, Fayetteville, NC," letter report to Mr. Doug Hewett, City Manager, City of Fayetteville. Revised May 6, 2024 (original March 18, 2024). The recommended 125-key Tribute Portfolio by Marriott property is projected to stabilize at 73% occupancy, \$185 ADR, \$9.4M total revenue, \$2.0M EBITDA after reserve, \$26.8M stabilized valuation. **Backdrop data.** 2024 Profile of NC Occupancy Taxes and Their Investment (NCRLA / Magellan Strategy Group). Cumberland County ranked 9th of 100 NC counties in occupancy tax collections, \$8.15M per year on \$135.9M in hotel revenue.

Where the 82nd Airborne Division Association holds its national convention.

A preliminary scan of where North Carolina's largest member organizations send their annual conferences.

The 82nd Airborne Division Association is, by charter and by mailbox, a Fayetteville organization. The mailing address of record is P.O. Box 87482, Fayetteville, NC 28304. The organization represents past and present paratroopers of the 82nd Airborne Division. Its members hold “All-American Week” at Fort Liberty every May. The Association's formal National Convention is held annually at the Rosen Centre Hotel on International Drive in Orlando, Florida.

Fayetteville does not appear on the recent annual-conference rotation of any major North Carolina state-level association reviewed for this preliminary scan. The cities that do appear, repeatedly, are Charlotte, Raleigh, Greensboro, Wilmington, Asheville, Cherokee, and Greenville NC. Greenville NC has approximately half Fayetteville's population and recently opened a convention center; it hosted the NC League of Municipalities (2025) and the NC Association of County Commissioners (2025).

ASSOCIATION	2023	2024	2025	FAY?
NC League of Municipalities CityVision (largest municipal conf.)	Concord	Winston-Salem	Greenville NC	X
NC Assoc. of County Commissioners 118th Annual Conference	Raleigh	Winston-Salem	Greenville NC	X
NC Bar Association Annual Meeting	—	Charlotte	Asheville	X
NC REALTORS Convention & Expo	—	Wilmington	Cherokee (Harrah's)	X
NC Neurological Society Annual Meeting	—	Greensboro (Grandover)	Durham (Washington Duke)	X
NC Society of Pathologists Annual Meeting	—	—	Beaufort	X
NC American College of Physicians Annual Meeting	—	—	Charlotte (Ballantyne)	X
82nd Airborne Division Assoc. National Convention (HQ: Fayetteville)	—	Orlando, FL	Orlando, FL*	X
NC School Boards Association Summer Leadership Conference	—	—	Wrightsville Beach	X
NC Sheriffs Association Annual Business Conference	—	Sunset Beach area	—	X

* 82nd Airborne Division Association: National Convention has rotated through Orlando (2022, 2024), Washington DC (2023), and other cities. The Association's headquarters address is in Fayetteville. All-American Week is held at Fort Liberty annually.

Common structural requirements for state-association host cities. Based on the venues selected by the associations reviewed: function space sufficient to seat the membership in plenary sessions or break into concurrent sessions; a single hotel (or directly adjacent cluster) able to absorb a room block of approximately 300–500 rooms; and walkable evening amenities for 600–1,200 attendees. Per the inventory of existing Fayetteville facilities, the Crown Expo Center has the function space; the recently opened 120-key hotel near Segra Stadium has an urban location with a limited room count; and downtown has restaurants and walkable amenities. These attributes are not currently co-located in a single Fayetteville site.

Methodology and sources. Conference locations compiled from each association's public website, press releases, and convention announcements. Sources include nclm.org (NC League of Municipalities), ncacc.org (NC Assoc. of County Commissioners), ncbar.org (NC Bar Association), ncrealtors.org (NC REALTORS), ncmedsoc.org (NC Medical Society), ncsba.org (NC School Boards Association), 82ndairborneassociation.org. **Limitations.** A preliminary scan, not a comprehensive study. Real feasibility-grade gap analysis would survey 50–100 associations directly, collect 5–10 years of historical location data, ask each association whether Fayetteville has ever been considered, and cross-reference with the convention industry meetings database that Hunden Partners used for Durham. Compiled May 2026.

Of NC's 10 largest cities, only Fayetteville has neither a convention center nor a project to build one.

Where Fayetteville stands among the ten largest North Carolina cities by population. Comparison requested by Mayor Colvin in the May 4, 2026 Agenda Item Request.

#	CITY (2024 POP.)	CONVENTION FACILITY	SIZE	INVESTMENT STATUS
1	Charlotte pop. 903,844	Charlotte Convention Center, downtown Uptown. Connected to NASCAR Hall of Fame and 700-key Westin.	600,000 sf	Active. \$126.9M expansion completed October 2021. 280K sf exhibit + 154K sf breakout.
2	Raleigh pop. 481,031	Raleigh Convention Center, downtown. Connected to 400-key Marriott City Center.	500,000 sf	Expanding. 298,100 sf addition underway, total 798,100 sf by 2029. Original build \$225M (2008).
3	Greensboro pop. 301,198	Special Events Center at Greensboro Coliseum Complex + Joseph S. Koury Convention Center at adjacent 985-key Sheraton.	167K + 250K sf	Active. Two facilities serving conventions and trade shows.
4	Durham pop. 291,467	Current 35K sf downtown center (1989). New project: 186,000 sf convention center + 500-key hotel.	35K → 186K	Advancing. \$540M total project (Hunden Feb 2025). City and County approvals secured 2024–25.
5	Winston-Salem pop. 252,037	Benton Convention Center, downtown. Connected to Marriott + Embassy Suites via climate-controlled corridors.	150,000 sf	Active. \$20M reinvention completed 2017, adding 43K sf.
6	Fayetteville pop. 210,815	None. Crown Coliseum complex is arena/event, not convention. Crown Event Center cancelled June 2025.	0	No active project.
7	Cary pop. 179,306	No major convention center. Largest event space ~20K sf at Embassy Suites Cary. Part of Raleigh meeting district.	n/a	Anchored by Raleigh facilities 10 miles away.
8	Wilmington pop. 120,805	Wilmington Convention Center, downtown riverfront. LEED-certified. Adjacent 186-key Embassy Suites (2018).	107,000 sf	Active. Opened 2011, \$59M build funded by Room Occupancy Tax. Only convention center on NC coast.
9	High Point pop. 116,245	No purpose-built convention center. Furniture market venues serve similar role twice yearly.	n/a	No active project. Smaller member of Piedmont Triad.
10	Concord pop. 108,719	Concord Convention Center at Embassy Suites by Hilton (private, hotel-attached). Cabarrus Arena & Events Center (140K sf, county-owned).	42K + 140K sf	Active. Hotel-attached, not purpose-built municipal center.

Among NC's ten largest cities, Fayetteville is the only one whose population exceeds 200,000 and lacks both an existing downtown convention center and an active project to build one. The five cities above Fayetteville in population all operate purpose-built downtown convention centers. Durham, immediately below in population, is advancing a \$540M project. Wilmington and Concord (smaller cities) both have built convention facilities. The two top-10 cities without convention centers (Cary and High Point) are special cases: Cary is part of the Raleigh meeting district, and High Point's twice-yearly furniture market provides a substitute function. Fayetteville fits neither pattern. The Crown Coliseum complex is an arena, not a convention facility, and is not located downtown.

Sources. Population figures: U.S. Census Bureau 2024 American Community Survey, via northcarolina-demographics.com. Facility data: Charlotte CRVA, Visit Raleigh, Greensboro Coliseum Complex, Discover Durham + Durham Next, Visit Winston-Salem, Wilmington and Beaches CVB, Explore Cabarrus, public press coverage. Durham financial figures: Hunden Partners Feb 2025 study + city and county public reporting. Compiled May 2026.

Procedural timeline of the Crown Event Center, 2020–2025.

How Cumberland County's Crown Event Center moved from a 2021 feasibility study recommendation to a June 2025 cancellation, and the procedural steps along the way.

The 2021 feasibility study compared three areas of the county and recommended downtown as the preferred location for an 89,000 sf, 2,500-seat performing arts venue at \$77.5 million. The study did not select a specific parcel. The County subsequently engaged an owner's representative in April 2022, before a parcel was identified. The courthouse parking lot was selected as the site in November 2022. The program subsequently grew to 131,500 sf at \$144.4 million before the project was cancelled in June 2025.

Jan 2020	Spectra Venue Management hires CSL International Spectra is the for-profit company that operated the Crown Complex for the County. CSL is the feasibility consultant.
Sept 2021	CSL delivers feasibility study: 89,000 sf, \$77.5M, 2,500 seats Recommends downtown as a zone, not a specific parcel. Three areas of the county compared.
Apr 2022	County hires MBP Carolinas as owner's representative, \$2.2M contract Contract executed before a specific parcel was identified. Based on a \$82.5M project budget.
Nov 2022	MBP / Timmons Group select the courthouse parking lot as the site Selection criteria: ownership, environmental status, parking, displaced parking spaces. The demand model from the 2021 study was not re-run against the new site.
May 2023	Concept design approved: 131,500 sf, \$131.7M, 3,000 seats 47% larger than the 2021 CSL recommendation; 70% higher in cost. No public re-validation step preceded the concept design approval.
Feb 2024	Budget amended to \$144.4M Owner's rep and architect contracts amended upward. Construction documents underway.
Oct 2024	Groundbreaking ceremony; demolition contract executed By this date, approximately \$36M in commitments are in motion.
Jun 2025	Board of Commissioners cancels the project After a 30-day pause and review. Approximately \$36M is unrecoverable. The site is currently temporary green space.

89K → 131.5K sf

BUILDING SIZE

+47% vs. CSL recommendation

\$77.5M → \$144.4M

TOTAL PROJECT COST

+86% vs. CSL recommendation

\$36M

UNRECOVERABLE SPEND

Committed before cancellation

PROCESS GAPS DOCUMENTED

Three items observable in the record

- 1 Scope inflation without re-validation**
The 2021 program was 89,000 sf at \$77.5M. By May 2023 it was 131,500 sf at \$131.7M. The public was not asked to re-validate.
- 2 Owner's rep hired before a site existed**
\$2.2M was committed in April 2022 to manage a project with no parcel yet selected.
- 3 Site selection decoupled from demand model**
Timmons selected the parcel on real-estate criteria. The demand model was not re-run against the 131,500 sf program.

ITEMS A FUTURE RFP COULD INCLUDE

Structural mitigations for each gap above

- 1 Parcel-level evaluation**
Specific sites scored against each other, each with a parcel-appropriate program and pro forma. Not zones or areas.
- 2 Public re-validation before owner's rep**
Council and stakeholders sign off on program and site together before any project-management contract is executed.
- 3 Re-validation triggers in every contract**
Owner's rep and architect contracts could include automatic stop-and-re-validate clauses if program changes by more than a defined threshold (e.g., 10%).
- 4 Second public re-validation at 100% design**
Before construction starts, public confirmation that the final design still matches what was approved at concept stage.

Phases between study authorization and opening.

Estimated timeline informed by CSL's May 2026 conversation and comparison with the Durham project. CSL stated a realistic build horizon of five to seven years from study authorization to opening, with funding source identification the primary gating factor.

The timeline begins when the City formally commissions a feasibility study, not on the date of opening. CSL estimated three to four months for the feasibility study itself. CSL stated the subsequent stages include funding identification, site finalization, pre-design, bond issuance, construction, and pre-opening. If the City were to authorize a study in late 2026, the resulting opening date would fall in 2031–32 on the fast end and 2033 on the slower end, per CSL's stated build horizon.

PHASE	2026	2027	2028	2029	2030	2031	2032	2033
Pre-feasibility alignment								
Feasibility study (CSL: ~\$100K, 3–4 mo)								
Funding identification + validation								
Site finalization + pre-design (~\$500K)								
Design + bond issuance								
Convention sales team in place								
Construction (CC + hotel)								
Pre-opening + commissioning								
OPENING								

■ Study + funding identification ■ Site selection + design ■ Construction ★ Opens

STEPS PRECEDING CONSULTANT AWARD

Procurement and procedural items that occur between Council authorization and contract execution

1 Council resolution and study appropriation

Formal authorization of an appropriation in the range of \$100,000 (per the CSL verbal estimate) to \$200,000 (a not-to-exceed ceiling appropriate for formal RFP). RFP issuance follows.

2 Stakeholder steering committee

Committee membership typically includes City staff, County liaison, Distinctly Fayetteville, Cool Spring Downtown District, FCEDC, Fort Liberty MWR liaison, Greater Fayetteville Chamber, and one or two hotel operators. Role is to scope the RFP.

3 RFP development

Items the RFP would specify based on the Crown Event Center procedural record: parcel-level evaluation, program and site re-validation triggers, hotel program modeled in tandem, and treatment of operator perspective and federal funding.

4 Governance vehicle

Durham established Durham Next, a 501(c)(3) that advances the Durham project. Distinctly Fayetteville is one entity that could host a similar structure; a new entity is another option. The structure decision is separable from the feasibility study itself.

5 NC General Assembly engagement

Cumberland County's delegation includes Sens. Applewhite and McInnis and Reps. Wheatley, Jackson, Smith, and Lucas. Any new funding mechanism (such as occupancy tax expansion or TIF authority) requires state enabling legislation.

6 Parallel research

Distinctly Fayetteville can develop the lost-business dataset (state association survey, Fort Liberty market sizing, RFP-declined log) independent of consultant engagement. Peer-city facility visits (Durham, Wilmington, Greenville) can also proceed.

Timeline contingencies. November 2026 Council elections (all seats up) · federal interest rate environment at the point of bond issuance · hotel financing market for full-service flags in the 250-key range · construction cost escalation · relationship with Cumberland County and the future of the Crown Complex · competing projects in eastern North Carolina.

Timeline derived from CSL International's direct guidance (May 2026), Durham's project pace, Wilmington Convention Center experience (2007 study → 2010 opening), and the Crown Event Center process (2020–2025). Compiled May 2026.

What CSL stated the study would cost.

Cost, scope, and timeline based on a May 2026 conversation with CSL International, the firm that produced the 2021 Cumberland County study. CSL provided this information verbally; no written quote has been issued.

FROM A MAY 2026 CONVERSATION WITH CSL INTERNATIONAL

What CSL stated

Conventions, Sports & Leisure International - the firm that produced the 2021 Cumberland County feasibility study. Information provided verbally; written proposal has been issued.

\$100K

STATED COST

Verbal estimate, May 2026

3–4 mo

STATED DELIVERY

From contract execution

2–3

SITES IDENTIFIED

With loose massing for each

\$500K

PHASE II

Blueprints / pre-design

5–7 yr

BUILD HORIZON

Per CSL guidance

SCOPE STATED BY CSL Market capacity analysis covering occupancy patterns, frequency, market trends, and saturation in the broader region.

SITE IDENTIFICATION CSL stated they would identify two to three candidate sites and provide loose massing for each. Council would then select one to move forward, or elect not to proceed.

PHASE II CONTINUATION CSL stated they could continue past feasibility into Phase II (blueprints, architecture, pre-design) for approximately \$500,000, authorized separately by Council.

BUILD HORIZON CSL stated a realistic build horizon from study authorization to opening is five to seven years, with identification of funding sources the primary gating factor.

Three structures Council could authorize. Option 1 reflects the cost CSL stated for the feasibility study alone. Option 2 reflects the cost CSL stated for combining feasibility and Phase II pre-design. Option 3 phases the two with a Council decision gate between them.

OPTION 1

Feasibility only

Phase I as stated by CSL

\$100K

Per CSL verbal estimate

TIMELINE

3–4 months

ANSWERS

Market, program, and 2–3 candidate sites.

Includes

- Market capacity & saturation analysis
- Demand modeling, frequency, trends
- Building program recommendation
- Operating pro forma
- **2–3 candidate sites with loose massing**
- 30-year economic impact projection

CSL inheritance: 2021 catchment, demographics, and F&B tax modeling already on file with CSL.

Best for: Council retains decision on whether to proceed after Phase I.

OPTION 2

Full pre-design path

Phase I + Phase II up front

\$100K + \$500K

\$600K total if authorized at once

TIMELINE

3–4 mo + 6–9 mo

ANSWERS

Site selected, program designed, cost estimate from actual blueprints.

Includes

- Everything in Option 1
- Architectural blueprints & concept
- Capital cost estimate from actual program
- Bond capacity + financing structure
- Parcel-level site analysis & specific pick
- Public engagement workshops

CSL inheritance: 2021 inheritance applies to Phase I. Phase II is largely net-new work.

Best for: Council commits to both phases at the outset.

OPTION 3

Phase-gated

Phase I authorized; Phase II requires separate Council vote

\$100K + gate

NTE \$600K with Council approval

TIMELINE

3–4 mo + 6–9 mo if proceeding

ANSWERS

Same as Option 1 first; Phase II only on Council vote.

Includes

- Phase I: full Option 1 scope, \$100K
- Council decision gate at Phase I delivery
- Phase II authorized only if Council so directs
- Same firm (CSL) continues both phases if authorized
- No upfront commitment beyond \$100K

CSL inheritance: 2021 inheritance applies to Phase I.

Best for: Council commits to Phase I; retains decision on Phase II.

Notes for comparison. Engaging CSL would carry forward 2021 work (catchment, demographics, F&B tax modeling) already on file with the firm. CSL also stated the firm would identify two to three candidate sites with loose massing, addressing the comparison question in Mayor Colvin's May 4, 2026 request. Final pricing for any path would be set by a formal RFP. Funding source is a separate Council decision addressed in the accompanying CAM.

Sources. CSL International, May 2026 conversation (verbal estimate; no written quote issued). Comparable contracts at peer cities: Springfield MO/Hunden \$88K (2024–25); Macon-Bibb GA/Johnson Consulting \$68K (2023); South St. Paul/JLG \$89,674 (2024).