

# Asset Assessment

Based on the analysis in this report, Hunden Partners presents the following details that support the opportunity to grow tourism assets in Durham.

## SUMMARY MATRIX: OPPORTUNITIES

	Convention, Conference	Entertainment	Hotel Supply	Sports	Retail & Dining Nodes	Winery, Brewery, Distillery & Food Hall	Parks, Trails & Outdoor Space	Major Attractions & Events
Opportunity	Strong	Good	Moderate	Strong	Moderate	Moderate	Moderate	Strong
Priority Level								
1	Convention Center expansion	Flexible flat-floor venue / amphitheater	HQ Hotel	Indoor / Outdoor youth sports complex	Expanded / connected retail & dining nodes	Public gathering spaces	Major annual event(s)	
2		Arena	Add'l diverse hotel supply at multiple chain scales to support tourism assets	Arena	F&B and district build-out for youth sports complex and major family entertainment attraction	Existing / new downtown asset / node connectivity	Major family entertainment attraction	

## SUMMARY MATRIX: WHERE YOU ARE NOW

	Convention, Conference	Entertainment	Hotel Supply	Sports	Retail & Dining Nodes	Winery, Brewery, Distillery & Food Hall	Parks, Trails & Outdoor Space	Major Attractions & Events
Supply Durham, NC	Limited	Good	Good	Limited	Strong	Good	Good	Limited
Top Assets Durham, NC	Durham Convention Center Sheraton Imperial Duke conference hotels	DPAC Carolina Theatre	Downtown / Duke hotels	Durham Bulls Duke / NCCU facilities	The Streets at Southpoint Downtown restaurants	Durham Food Hall Breweries Boxyard RTP Bullpen Social District	American Tobacco Trail Sarah P. Duke Gardens Durham Central Park Falls Lake	American Tobacco Campus Duke University
Hotel Room Night Generation	Limited	Moderate	Strong	Good	Limited	Limited	Limited	Limited



## STRATEGIC GOAL #1:

# ENHANCE TOURISM INFRASTRUCTURE

**Durham has a strong base of venues and mobility options that support tourism; however, more can be done to drive new and repeat business to the city.**

Expanding or redeveloping the Durham Convention Center (DCC) with an adjacent headquarter hotel is a critical element of this mix. Meetings and events are great ways to induce travel during the weekdays that are typically slower; however, the DCC will require a great deal of public investment and involvement to achieve success at an expanded size in a more competitive marketplace. The DCC is not a true convention center given that it does not have any exhibit space. It also has limited smaller breakout spaces. Other comparable destinations have exhibit space and/or larger singular ballroom spaces, and additional meeting rooms. This inhibits its ability to compete with other larger in-state convention centers. Instead, the DCC mostly competes with area conference hotels, especially those in the Raleigh area. As a DCC expansion on the current site would take up plaza and public gathering space, would not have ideal circulation and pre-function spaces, and does not achieve optimal sizing, an entirely new build is recommended. Feasibility and funding studies exploring the potential of this project are underway.

Making the facility larger and more technologically advanced will increase the DCC's competitiveness in the market, particularly in generating midweek business; however, a new headquarters hotel must be included to complete the package so it is an attractive and viable option to win future business.

Downtown Durham has strong performing arts venues such as DPAC and Carolina Theatre, with a few other smaller spaces nearby to complement them. However, Durham does not have sufficient large capacity flat floor venues or multi-purpose black box theater space. This is a need in Durham as is an amphitheater, which would provide additional outdoor public gathering space and recreational opportunities for residents and guests.

In addition to the need for enhanced convention and hosting facilities, there are very few dedicated sports facilities to accommodate tournament hosting capabilities in Durham. Many of Durham's facilities are purposed for schools and universities (e.g., Duke, NCCU, and Durham Public Schools) or specific teams (e.g., Durham Bulls Athletic Park, Durham Bulls Miracle League Park, and Triangle Curling Club). Although there are additional fields and facilities available for rental (e.g., Durham County Memorial Stadium, Historic Durham Athletic Park, and facilities owned and operated by Durham Parks and Recreation), there aren't nearly enough to accommodate the huge demand.

There is growing demand for sports such as baseball, softball, and soccer within the Durham area. Current facilities are not able to accommodate the demand with limited field availability. Within the Research Triangle region, sports facilities catering to youth sports specifically is limited. However, within the state and greater regional area there are many tournament facilities that a new development would compete with.

With a strong demand base for various sports, Durham has ample opportunities to induce sports tourism with new sports facility development. Ideally, a new sports complex would include both indoor and outdoor components in one central location that is surrounded by commercial assets such as hotels, restaurants, and shops to increase visitor spending.

Finally, by enhancing transportation connectivity in Durham, visitors and residents will have more opportunity to move around the city with ease, and in their mode of choice. Many participants noted that it's difficult to get around Durham if you don't have a car. A university administrator interviewed for this plan commented, "Transportation will be the key to keeping college students here after graduation," but it's equally important to visitors. In a survey of more than 2,000 residents, having adequate public infrastructure, including transportation options, was the top priority in a survey question about how to achieve the greatest benefits of tourism.

A 20-year transit plan was approved in Durham in the spring of 2023. Along with plans underway and recently completed to identify Freeway and Street-based Transit (FAST) corridors and Bus Rapid Transit (BRT) speed and reliability studies, much attention is being given to this item. Still, it will be years — or even decades — before much of this infrastructure gets built.

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# Recommended Initiatives

### CONVENTION CENTER EXPANSION / REDEVELOPMENT

- 1.1 Develop an awareness campaign to help residents and stakeholders understand the benefits and possibilities of a larger convention center in Durham.
- 1.2 Expand / redevelop the Durham Convention Center with a high-tech, innovative focus and determine appropriate group sales structure.
- 1.3 Develop adjacent headquarter hotel.
- 1.4 Expand adjacent dining and vibrancy options.

### EVENT VENUES

- 1.5 Build an outdoor amphitheater.
- 1.6 Build smaller, flexible hosting facilities for 100 to 500 people.
- 1.7 Enhance existing indoor venues, including the Carolina Theatre.
- 1.8 Upgrade Durham Athletic Park to be a multi-use facility. Consider including amphitheater development in these upgrades.

### SPORT TOURISM

- 1.9 Pursue indoor sport hosting arena / multi-purpose venue for tournament hosting with adjacent amenities (accommodations, dining, retail and experiences).
- 1.10 Pursue outdoor athletic park for tournament hosting.
- 1.11 Upgrade Durham County Memorial Stadium.

### TRANSPORTATION CONNECTIVITY

- 1.12 Support a two-way loop around downtown to allow for easier flow of traffic and pedestrian mobility.
- 1.13 Advocate to GoDurham, GoTriangle and other entities for user-friendly public transportation routes and increased connectivity within Durham and regionally.
- 1.14 Collaborate with GoDurham Transit and the arts community to make public transportation more experiential (pop-up performances, artistic elements, etc.).
- 1.15 Develop opportunities for entrepreneurs and youth to innovate Durham-specific opportunities to increase ridership.
- 1.16 Support funding a pilot for connection shuttles between districts, particularly on weekends.
- 1.17 Collaborate with NCDOT and others to make rail crossings more accessible and safer for pedestrians and cyclists.

