

Comprehensive Regional Growth Plan for the Fort Bragg Region

Assessment and Recommendations



Chapter 9 Hospitality & Cultural Resources

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DISCLAIMER

This report is intended as an aid to planners, managers, elected officials, and other decision makers in the Fort Bragg region. Our aim is not to dictate what should be done, but to assist in ongoing efforts to achieve goals and objectives identified and valued by the residents of the region. The recommendations presented in this report are suggestions for how the region could work towards those goals and objectives, based on best available information and current understandings.

The information, projections and estimates in this report are based upon publicly available data and have been prepared using generally accepted methodologies and formulas. The projections and needs presented in this report are based upon best estimates using the available data. It is important to note that currently available information and understandings are incomplete and cannot account for the inevitable, but unpredictable, impacts of unexpected global, national, state, and/or local events. Actual results and needs may differ significantly from the projections of this report due to such unforeseen factors and conditions, as well as inaccuracy of available data, and/or factors and conditions not within the scope of this project. Persons using this information to make business and financial decisions are cautioned to examine the available data for themselves and not to rely solely on this report.

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Chapter 9: Hospitality and Cultural Resources

I. Hospitality

Cumberland County remains the leading provider of lodging, meeting space, parks, recreation, and cultural resource facilities and programs to Fort Bragg and the surrounding region. Other counties, such as Moore County, Robeson County, Lee County, and Harnett County, provide additional supply availability in all categories that is essential to meeting the needs of Fort Bragg during peak periods. Remaining counties within the region, while not likely to be impacted appreciably in this area by the growth at Fort Bragg, remain important providers of a venue for future growth.

A. Current Conditions

1. On-Post Facilities

a. Lodging

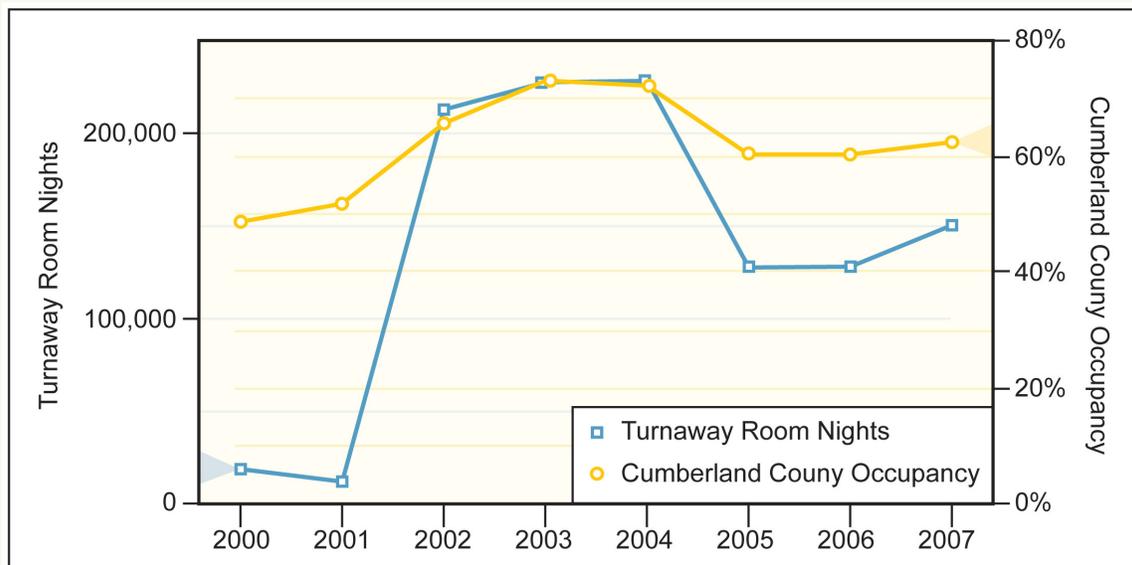
Department of Defense travel regulations generally require military travelers to seek out lodging on a military installation before obtaining accommodations off post. Accordingly, assessment of the region's

lodging needs requires an understanding of the utilization and inventory of on-post lodging facilities, with a particular focus on demand that has not been accommodated on post.

The lodging inventory on Fort Bragg and Pope Air Force Base totals 869 rooms. Fort Bragg has 683 traditional hotel rooms, with one “distinguished visitor’s quarters” house. Pope Air Force Base has 164 transient rooms and 21 extended-stay rooms. For the purposes of this section, “on-post lodging” will refer to the total inventory of government-managed accommodations on Fort Bragg and Pope Air Force Base.

Over the last six years, on-post lodging demand has been very strong. Occupancy grew from 85.4 percent in Fiscal Year (FY) 2002 to a peak of 92.3 percent in FY 2004. Occupancy slipped in FY 2005 to 79.4 percent, before rebounding in FY 2006 to 85.2 percent. Occupancy in FY 2007 fell slightly to 84.4 percent. In comparison, occupancy in Cumberland County averaged 20.6 percentage points lower over roughly the same time period. However, it should be noted that high on-post occupancy rates have led

Figure 1. Turnaway room nights (number of room nights in excess of availability) on Fort Bragg compared to lodging occupancy in Cumberland County



to diversion of a significant amount of demand to hotels in the surrounding area. This turnaway (or unaccommodated) demand has primarily impacted Cumberland County.

As indicated in **Figure 1**, demand that is turned away from Fort Bragg due to lack of availability has a direct impact on occupancy in Cumberland County. The increases in on-post demand that were diverted into the county as a result of an elevated operations-tempo in FY 2002-4 and 2007 contributed to a growth in Cumberland County occupancy. It is important to recognize for future planning that since much of this demand appears related to the current level of overseas operations, turnaway demand could return to the levels seen prior to 2002.

Additional on-post lodging is available at the 200-room Landmark Inn. The Landmark Inn is a limited-service property with no appreciable meeting space. While this facility is located on the installation, it is operated by a private entity and works under the same rules as off-post hotels. Presently, the facility is being utilized primarily to house soldiers receiving medical attention as part of the Wounded Warrior Program. For the purpose of future planning, this hotel should be considered part of the non-military, off-post hotel inventory.

b. Meeting Space

Meeting space is available on the installation to accommodate both group meetings sponsored by on-post organizations attended by base personnel and/or official visitors to the installation. Generally speaking, space with on-post club facilities on both installations is most commonly used. Other meeting venues include small meeting rooms located in office buildings throughout the installation, as well as, on occasion, the base theaters. Meeting space is not available in lodging establishments at Fort Bragg, with the exception of a 150-person meeting room recently developed within Moon Hall. Secure facilities are available in the post headquarters and are expected to be provided in the new FORSCOM headquarters building proposed for construction as part of BRAC. Cost of facility space relative to the meeting planner’s budget is a significant driver which limits the use of meeting space off post.

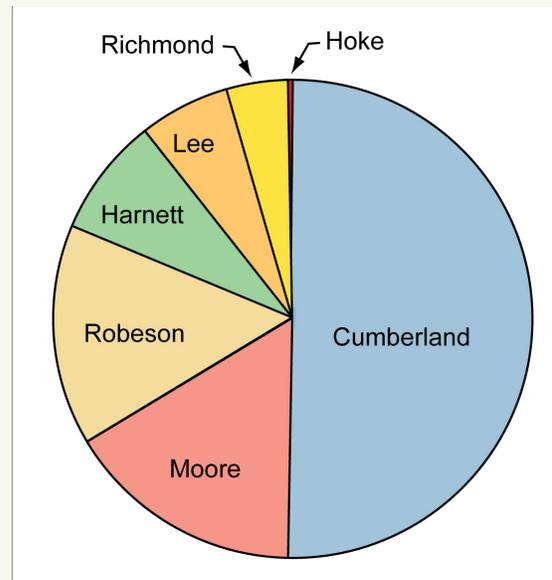
2. Off-Post Facilities

a. Lodging

The available lodging supply in the counties surrounding Fort Bragg is generally concentrated within metropolitan areas in three counties: Cumberland County, Moore County, and Robeson County. As depicted in **Figure 2**, these three counties comprise approximately 82% of the 10,868 lodging accommodations within the seven-county Tier 1 region.

Each of these three counties, however, focuses on different primary market segments. Cumberland County, the largest of the three in terms of hotel rooms, primarily caters to Fort Bragg, Pope

Figure 2. Distribution of the Total Available Lodging Supply (10,868) among Tier I Counties



AFB, and businesses located within the City of Fayetteville. Moore County caters to a more upscale destination leisure segment and to a lesser extent to Fort Bragg and the businesses located in Pinehurst, Southern Pines and Aberdeen. Robeson County is the least impacted of the three by Fort Bragg, as it predominantly supports the through-traveler on Interstate 95 who is travelling from the Northeastern United States and Canada to Florida and back.

The vast majority of hotels and motels within the Tier 1 counties are small, independent, or economy

branded limited service hotels. Exceptions exist in Cumberland County and Moore County where full service hotels with meeting space (Cumberland County) and resort hotels (Moore County) help to diversify the available supply. Accordingly, the average daily price per room in most areas is at or below the prevailing government lodging per diem rate, which in 2007 was \$60 in all surrounding counties as none were considered high-cost areas by the General Services Administration, the government agency that sets per diem rates. By 2008, the per diem rate for all counties around Fort Bragg was raised to \$70 per night, though still no county was listed as a high cost area. It is likely that the predominance of lower-priced limited service hotels in Cumberland County has resulted in insufficient support for higher per diem rates.

b. Meeting Space

In general, an ample supply of small to mid-sized meeting space venues exists in the Tier 1 counties surrounding Fort Bragg, though most facilities are located within Cumberland County. The facilities range from small meeting rooms in community buildings, restaurants, and churches, to larger venues collocated with lodging that can cater to multiple small groups at one time. In addition, large meeting space exists in several facilities dispersed throughout Cumberland County (Crown Center and Snyder Memorial Baptist Church), Moore County (Pinehurst Resort), and Robeson County (Southeastern North Carolina Agricultural Center and the Givens Performing Arts Center).

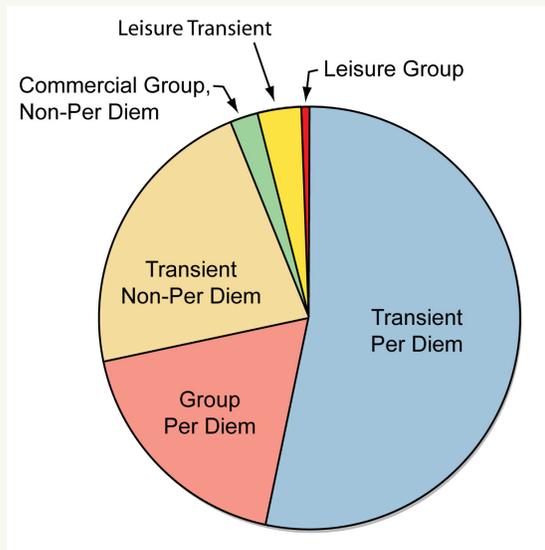
B. Future Needs

The expansion of Fort Bragg will result in increased demand for hotel rooms and meeting space in the Tier I counties. Cumberland County will accommodate the vast majority of the new demand, while Moore County, Harnett County and Lee County are expected to accommodate an increased amount of overflow demand. The increased demand will require new hotel development, ideally collocated with substantial meeting space.

1. Future Lodging Demand

To determine the amount of future lodging demand expected in the region surrounding Fort Bragg, a survey was conducted to determine the amount of Fort McPherson-related lodging demand that has historically accrued to the Atlanta Airport market. According to our survey results, the hotels within the Atlanta Airport market accommodated an estimated 120,000 room nights associated in some way with Fort McPherson. **Figure 3** depicts the breakdown of these room nights by category of traveler.

Figure 3. Historical Room Night Demand within the Atlanta Airport Market associated with Fort McPherson



As seen in the chart, the dominant user category is the official traveler, or Transient Per Diem guest, with nearly 65,000 room nights generated in 2007. Of lesser but similar significance are the Transient Non-Per Diem segment and the Group Per Diem segment with approximately 26,800 and 21,700 occupied rooms, respectively. Of much smaller significance were the Leisure Transient, Commercial Group Non-Per Diem and Leisure Group who, combined, generated less than 7,400 room nights. It is highly likely that this level and type of demand will now accrue to Fort Bragg with the relocation of Fort McPherson.

Unlike the region around Fort Bragg, the prevailing government lodging per diem rate paid by Fort McPherson-related travelers was \$124 in 2007, where the average price paid by all travelers staying in the Atlanta Airport Market was \$86.88 in 2007. This means that government travelers were able to pay rates substantially above what hotels were getting from their typical customer. This made the government traveler a welcome guest at hotels in the Atlanta Airport market.

Conversely, government travelers to Fort Bragg in 2007 were only able to pay \$60 per night, while local hotels were commanding average prices of \$65 per night in Cumberland County and over \$90 per night in Moore County. This means that government travelers to Fort Bragg would generally be accommodated at lower priced limited service hotels, while travelers to Fort McPherson were staying at upscale full service properties in Atlanta. If per diem rates around Fort Bragg do not increase appreciably, it is unlikely that the new demand arriving from Fort McPherson will be able to utilize accommodations comparable to what was used in Atlanta.

2. Meeting Space

Information gathered from officials at Fort McPherson, as well as through the survey of Atlanta Airport hotels, yielded valuable insight into the potential additional requirements for meeting space in and around Fort Bragg. The two main headquarters units at Fort McPherson, FORSCOM and USARCOM, generate a significant amount of group meetings business, with meetings generally held on the installation while attendees are lodged off the installation. While meetings are not always held on post, it is the preference of most military meeting planners due to budget constraints.

According to headquarters officials, FORSCOM typically hosts forty-five conferences per year with an average attendance of 130 people. Out-of-town attendees at these conferences generate approximately 18,000 room nights of demand accommodated at local area hotels. USARCOM reports an average of fifty conferences per year with an average attendance of 140 people. These conferences typically require

21,000 room nights of off-post lodging for attendees from outside the area. Most conferences are held during the spring and fall, with fewer held during the summer and a very limited number during the winter months. Only a very small number of official conferences held off base reportedly required any unique security measures.

For conferences that are held off post, Atlanta Airport hotel operators report an average of seven groups per year with an average attendance of 82 people. Groups typically use between one and four meeting rooms per conference, with the larger meetings requiring up to 14,000 square feet of space. The average length of stay for group meeting attendees is 2.3 nights.

In terms of non-per diem (unofficial) Fort McPherson-related group events, Atlanta Airport hotel operators reported accommodating relatively few. Most properties reported zero-to-two group meetings per year, with one property reporting an average of 10. These groups typically require less than 3,000 square feet of meeting space, and range in attendance from 35 to 300.

C. Recommended Actions

Important Action 1 - Conduct a detailed feasibility study for a new full-service hotel with meeting space

Description: Demand for lodging related to the Fort Bragg mission will increase due to active duty and reserve requirements (adding demand for approximately 120,000 room nights). Lodging demand is anticipated to increase by 500 rooms per night, though up to one half likely already exist in the market area surrounding Fort Bragg. Explore the possibility of developing a hotel in close proximity with under-utilized, already existing large meeting spaces.

Responsible Party: County Conventions and Visitors Bureaus, Economic Development Councils and other municipal officials, should initiate a more detailed study to determine an appropriate location, the scope, and the financial feasibility of the recommended hotel.

Important Action 2 - Discourage the development of additional economy hotel properties

Description: Presently, the lodging market's average daily rate in Cumberland County as a whole is well below the established lodging per diem rate for government travelers. This is due to the abundance of economy, limited-service properties located throughout the county, facilities whose low prices serve to depress the county's average lodging rate and thus the government lodging per diem rate. In order to attract additional full-service hotel brands to the county, as well as ensure that existing higher quality lodging facilities continue to offer rooms to government travelers, the lodging per diem rate needs to increase. Discourage the further proliferation of economy brand and low-price independent motels that serve to depress average lodging prices in the region.

Responsible Party: County Conventions and Visitors Bureaus in conjunction with area Economic Development Councils.

II. Cultural Resources

The Tier 1 counties, to varying degrees, all have an active parks, recreation, and cultural resources programs. Some counties (Cumberland County, Moore County and Robeson County) support not only their own residents, but also the residents of surrounding counties. Future requirements linked to the growth anticipated at Fort Bragg will largely fall on the counties where the new population will reside. In general, adequate facilities exist across all program types to accommodate the future residents, though funding for programs remains problematic.

A. Current Conditions

1. On-Post Facilities & Programs

a. Parks and Recreation

Fort Bragg and Pope AFB offer a comprehensive array of parks and recreation facilities and programs that are generally oriented heavily toward youth, but available to all. Several military operated recreation centers and parks exist on or near both installations offering outdoor recreation opportunities. One noteworthy example is the Smith Lake Recreation Park operated by Fort Bragg. Located one mile from the installation near Simmons Army Airfield, the park is open to all, with military receiving a discounted entrance fee. Activities include recreation lodging in cabins, camping, mountain biking, fishing, horseback riding and paintball. In general, on-post parks and recreation facilities are geared toward those living on the installation, but facilities and programs are available to all.

Competitive sports programs, both adult intramural and youth athletics, are also offered on the installation. Adult intramural sports programs are offered throughout the year by installation Morale, Welfare and Recreation (MWR) staff in sports such as softball, basketball, track & field, football, wiffleball, tennis, and dodgeball, among many others. Youth sports programs include not only organized scheduled games for all major sports, but also specialty training camps during the summer for skills development. Again, while programs are typically used by on-post residents, they are available to all military personnel

and their families throughout the region.

b. Cultural Resources

Selected cultural resource facilities and programs exist on the installation. Several museums, including the 82nd War Memorial Museum and the JFK Special Warfare Museum, provide residents and visitors alike the opportunity to learn more about the history of the units stationed at Fort Bragg. Arts and crafts and skills development programs are also offered by the military in areas such as pottery, auto craft, framing and woodworking. These programs typically support on-post residents, but are available to all.

2. Off-Post Facilities & Programs

a. Parks and Recreation

The region surrounding Fort Bragg offers a wide variety of parks and recreation facilities and programs, with most counties focused on sports and outdoor recreation. Each of the major Tier 1 counties offers a baseball/softball tournament complex for use by county sports programs and regional tournaments alike. Public water access is available for area residents on the region's several rivers, such as the Cape Fear River in Harnett County and the Deep River in Lee County. There is an active movement throughout the region to expand public access to waterways, as well as provide additional adjacent recreation space. The region also offers a large number of community, county, and state parks providing exceptional outdoor recreation opportunities to area residents and visitors alike. Facilities range from a number of small neighborhood parks with community buildings in Cumberland County, to Raven Rock State Park in Harnett County and the Lumber River State Park in Robeson County. Equestrian activities are also a growing source of recreation in Moore County and Hoke County.

b. Cultural Resources

The Tier 1 region is replete with history, arts, and cultural programs, though most activities are focused in selected counties. Cumberland County has a thriving arts and cultural activities program lead by such organizations as the Arts Council of Fayetteville/Cumberland County. Lee County and Moore County

also offer extensive annual festivals and programming for county residents and visitors from around the state and nation. Several major event venues exist in the area, including Festival Park and the Crown Center in Fayetteville and the Givens Performing Arts Center at UNC-Pembroke in Robeson County, attracting thousands of visitors to the region each year. The region’s history is on display in every county with many museums, historical monuments and locales offering an educational perspective of the past.

B. Future Needs

There appear to be sufficient parks, recreation, and cultural activities facilities and programs within the Tier I counties to accommodate the population increase expected as a result of military-related growth. Counties that have historically provided for their residents as well as others (Cumberland County, Moore County and Lee County) will continue to do so. A continuing problem that will be exacerbated by this population increase is the lack of sufficient operating funds.

1. Parks and Recreation

To determine the future requirements for parks and recreational activities, a survey was conducted to determine the importance of certain activities to Fort McPherson active duty, civilian employees and their family members. Two survey questions asked the respondents’ preference or desire to have access to each activity off the installation for themselves and their spouse, and for their children. The following two tables provide the results of these questions.

Cultural Resources

As is depicted in **Tables 1 and 2**, respondents appeared to care most about fitness and outdoor recreation for themselves and their children, more than athletics. Access to walking/running trails was the only selection of a majority of respondents who were answering for themselves and their spouse. For their children, community parks and playgrounds were the most important followed by bowling centers. Respondents indicated that organized athletics was

Table 1

Preference for Off-Post Recreational Facilities and Programs for Use by Respondent and./or Spouse	
Walking/Running Trails (Off-Post)	57%
Fitness Center - Workout (Off-Post)	46%
Community Park/Playground (Off-Post)	45%
Biking Trails (Off-Post)	43%
Community Pool (Off-Post)	27%
Bowling Center (Off-Post)	25%
Golf Course (Off-Post)	25%
Fitness Center - Lap Swim (Off-Post)	17%
Athletics - Baseball(Off-Post)	14%
Athletics - Basketball(Off-Post)	14%
Athletics - Softball(Off-Post)	13%
Athletics - Football(Off-Post)	13%
Athletics - Soccer(Off-Post)	9%
Athletics - Volleyball(Off-Post)	7%
Athletics - Hockey(Off-Post)	4%
Athletics - Lacrosse(Off-Post)	2%

Table 2

Preference for Off-Post Recreational Facilities and Programs for Use by Respondent’s Children	
Community Park/Playground (Off-Post)	54%
Bowling Center (Off-Post)	51%
Walking/Running Trails(Off-Post)	46%
Fitness Center/YMCA (Off-Post)	45%
Community Swimming Pool(Off-Post)	37%
Biking Trails(Off-Post)	36%
Athletics - Soccer (Off-Post)	23%
Athletics - Softball (Off-Post)	22%
Athletics - Football (Off-Post)	21%
Athletics – Basketball (Off-Post)	19%
Golf Course (Off-Post)	18%
Athletics - Baseball (Off-Post)	18%
Athletics - Volleyball (Off-Post)	15%
Athletics - Hockey (Off-Post)	4%
Athletics - Lacrosse (Off-Post)	4%

twice as important for children as for adults. As indicated earlier, all of these activities are found in ample quantities throughout the Tier 1 counties.

Similar questions were asked in the survey about the desire for access to certain cultural activities. **Tables**

3 and 4 provide the results in these areas.

In both questions, access to a movie theater was deemed the most important among the cultural activities mentioned. Library access was slightly more important for children than adults, while availability of a performing arts theater was more important for adults. Scouting organizations were ranked as distinctly less important than other programs. Again, each of these activities appears to exist in adequate quantity through the Tier 1 region.

Table 3

Preference for Off-Post Cultural Activities Facilities and Programs for Use by Respondent and/or Spouse	
Movie Theater(Off-Post)	81%
Library (Off-Post)	60%
Performing Arts Theater (Off-Post)	56%
Museum – Art (Off-Post)	46%
Museum - History (Off-Post)	45%
Museum - Science (Off-Post)	43%

Table 4

Preference for Off-Post Cultural Activities Facilities and Programs for Use by Respondent's Children	
Movie Theater (Off-Post)	74%
Library (Off-Post)	64%
Museum – Art (Off-Post)	41%
Museum - Science (Off-Post)	37%
Performing Arts Theater (Off-Post)	36%
Museum - History (Off-Post)	36%
Scouting Organizations (Off-Post)	17%

C. Recommended Actions

Important Action I: Solicit additional operational funds for county parks, recreation, and cultural resources organizations

Description: While the analysis of the current situation within county Parks, Recreation, and Cultural Resources organizations did not reveal any need for additional facilities, it was recognized that funding for operations continues to be a pressing problem that will be increased, however minimally, by the incoming population associated with the military-related growth. Explore additional funding sources available from the entities established to assist BRAC-impacted communities.

Responsible Party: County parks, recreation and cultural resource agencies.

III. Appendix A—Regional Tourism Initiative

Regional Tourism Initiative

Tourism is one of North Carolina’s largest industries, and one of the fastest-growing. Despite this fact, the state’s promotional efforts¹ focus on broad geographic regions (Mountains-Piedmont-Coast), and southeastern (non-coastal) North Carolina is largely ignored. Southeastern NC has tremendous tourism assets, from the stunning vistas of the Uwharries (Montgomery) to the ancient bottomland forests of the Black River (Bladen). The Fort Bragg Region is well-positioned to benefit from the burgeoning eco-tourism industry, but there is no concerted state or regional emphasis on it. Examples of local successes abound, however, and the Partnership for the Sounds² provides an excellent model for building a regional ecotourism base.

North Carolina’s Heritage Tourism program has twelve Heritage Tourism Development Officers throughout the state, but none are located in the Fort Bragg region. While some BRAC Regional Task Force counties have sophisticated tourism programs (notably Moore County and the Fayetteville Area Convention and Visitors Bureau), other counties have minimal efforts – most are encompassed within Chambers of Commerce. Compared to other counties in the state, the region is also under-represented in the agritourism sector, which is an important program within the North Carolina Department of Agriculture.³

There are several tourism-related efforts underway in the region, but most are at the grassroots level and could benefit from greater networking. The most promising of these emanate from the North Carolina Rural Center’s STEP (Small Towns Economic Prosperity) program.⁴ Presently, there are four North Carolina STEP Demonstration Sites in the region. Two are in Montgomery County (Candor and Mt. Gilead), and one is in Moore County (Robbins). Bladen County has a ‘cluster’ demonstration site of four towns: Elizabethtown, Bladenboro, Clarkton, and White Lake. Tourism development is cited as a goal for three of these four sites.

Sustainable Sandhills has recently established an Ecotourism Program.⁵ This regional focus on tourism could combine the ongoing efforts of the economic development commissions, the North Carolina Rural Center, and conservation groups toward development of a sustainable industry that will create business opportunities and add to the ‘Quality of Life’ factor. The organization is pursuing funding from Golden LEAF to further implement the program.

In addition, the NC Division of Tourism has several grant programs for tourism development.

1. See “Explore North Carolina” at <http://www.visitnc.com/>

2. See Partnership for the Sounds, <http://www.partnershipforthesounds.org/>

3. See <http://www.agr.state.nc.us/markets/agritourism/index.htm>

4. NC Rural Center Small Towns Initiative: http://www.ncruralcenter.org/smalltowns/nc_step_index.htm

5. See: <http://www.sustainablesandhills.org/Eco-Tourism.html>