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Phase One Feasibility Analysis of Potential Convention/Expo Center Development in Norman, Oklahoma

SUMMARY OF FINDINGS

March 31, 2015

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Study Components

PHASE 1: Market Demand Analysis

1. Local market conditions
2. Industry trends and characteristics
3. Competitive & comparable facilities
4. Market surveys
5. Market demand
6. Supportable building program
7. Development Options

PHASE 2: Site & Cost/Benefit Analysis

1. Site analysis
2. Event/utilization analysis
3. Construction cost estimates
4. Financial operating estimates
5. Economic impacts
6. Cost/benefit conclusions
7. Funding/ownership/management

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Location & Accessibility

Driving Distance to Regional Cities

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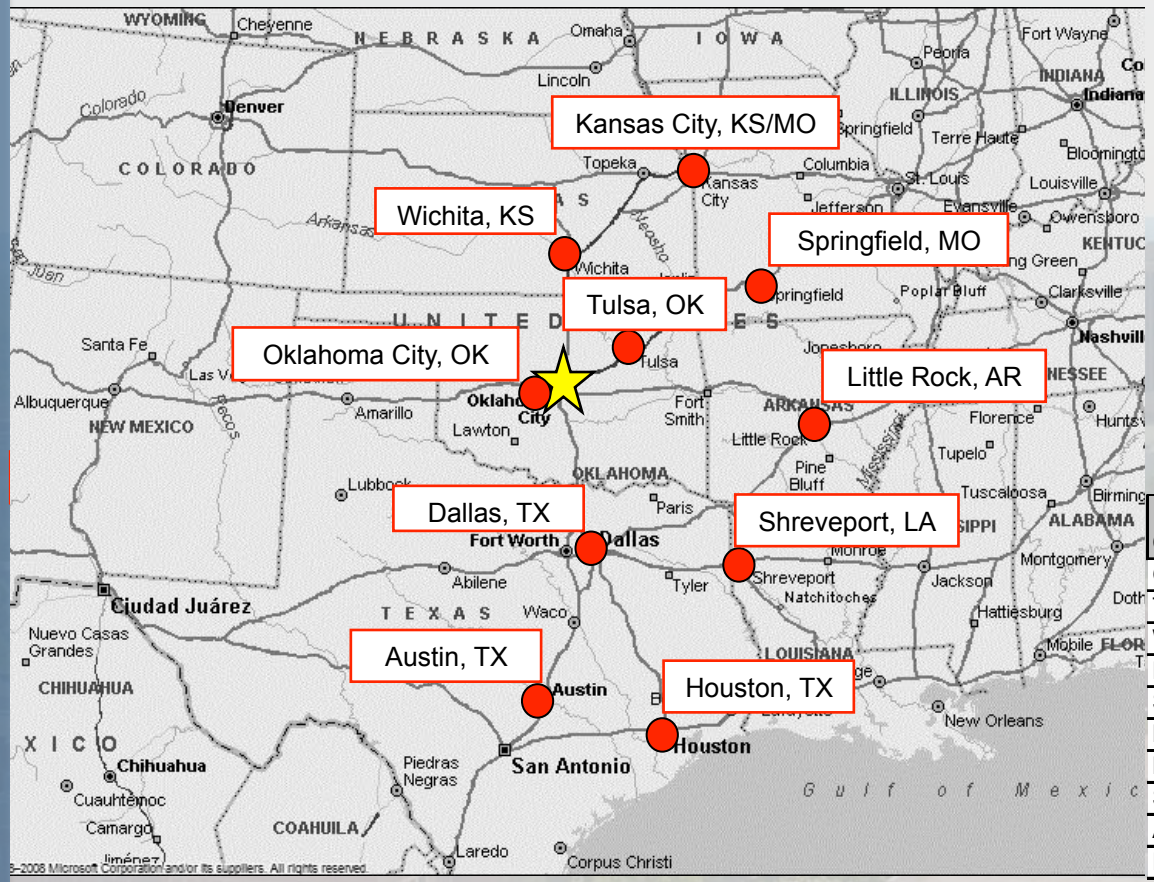

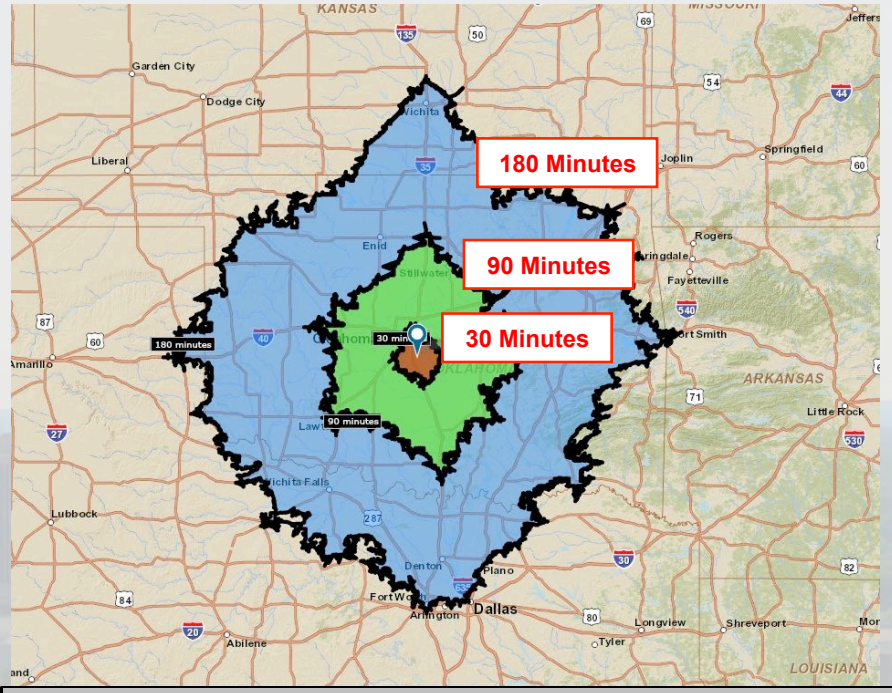

City	State	Miles from Norman, OK	Approximate Drive Time	Market Population
Oklahoma City	OK	20	0:25	1,306,800
Tulsa	OK	120	1:55	957,400
Wichita	KS	180	2:45	628,200
Dallas	TX	190	3:00	6,709,200
Springfield	MO	300	4:35	444,100
Little Rock	AR	345	5:10	721,700
Kansas City	MO	365	5:15	2,072,500
Shreveport	LA	375	5:40	409,400
Austin	TX	370	5:55	1,863,300
Houston	TX	430	6:35	6,251,200

Source: Google Maps, ESRI, 2014

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Demographics

Key Norman, Oklahoma Area Metrics

Demographic Variable	City of Norman	Cleveland County	30-minute	90-minute	180-minute	State of Oklahoma	U.S.
Population (2000)	96,772	208,016	552,348	1,571,542	6,912,950	3,450,654	281,421,906
Population (2010)	110,925	255,755	614,638	1,757,082	7,978,335	3,751,351	308,745,538
Population (2014 est.)	117,524	267,829	641,280	1,837,472	8,347,786	3,880,520	316,296,988
% Change (2000-2014)	*21.4%*	*28.8%*	*16.1%*	*16.9%*	*20.8%*	*12.5%*	*12.4%*
Population (2019 est.)	124,705	286,028	685,027	1,957,053	8,891,301	4,068,711	327,981,317
% Change (2014-2019)	*6.1%*	*6.8%*	*6.8%*	*6.5%*	*6.5%*	*4.8%*	*3.7%*
Avg. Household Inc. (2014 est.)	$ 66,237	$ 70,157	$ 57,821	$ 64,218	$ 73,653	$ 61,712	$ 72,809
Avg. Household Inc. (2019 est.)	$ 76,410	$ 79,961	$ 66,267	$ 74,247	$ 86,173	$ 71,107	$ 83,937
% Change (2014-2019)	*15.4%*	*14.0%*	*14.6%*	*15.6%*	*17.0%*	*15.2%*	*15.3%*
Median Age (2014, in years)	30.5	33.8	33.6	35.1	35.5	36.8	37.7
Businesses (2014 est.)	7,954	16,642	48,010	133,007	700,023	282,956	24,262,035
Employees (2014 est.)	46,269	81,183	418,081	856,882	4,142,054	1,661,649	141,523,742
Employee/Residential Population Ratio	0.39:1	0.3:1	0.65:1	0.47:1	0.5:1	0.43:1	0.45:1

Source: ESRI, 2015

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Norman Hotels and Meeting Facilities

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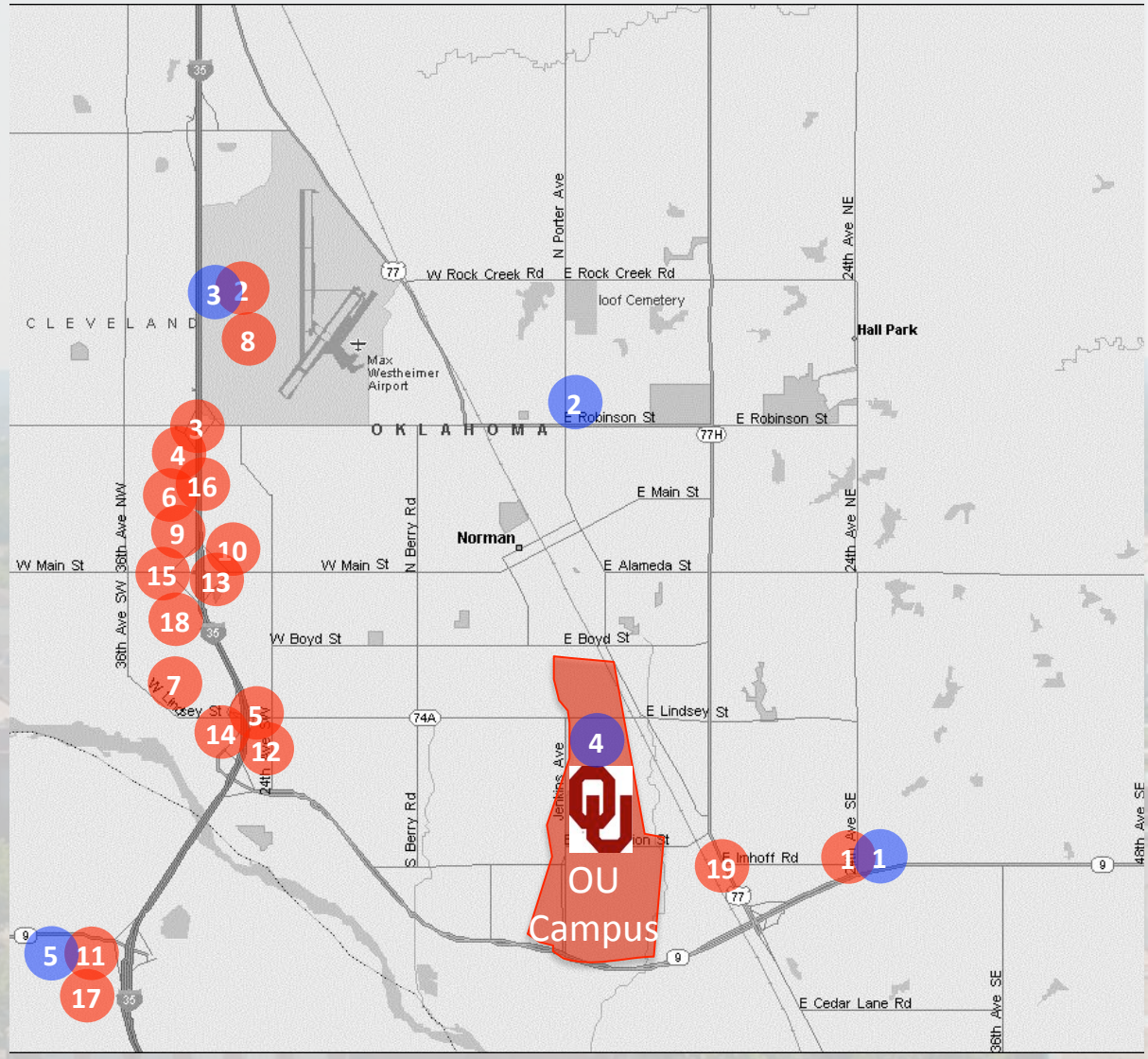
Hotels

Key	Facility	Rooms
1	Marriott Conference Center at NCED	964
2	Embassy Suites Norman	283
3	The Norman Hotel	150
4	Hilton Garden Inn and Suites Norman	140
5	Sooner Legends Inns and Suites	136
6	Value Place Norman	121
7	La Quinta Inn and Suites Norman	117
8	Holiday Inn Norman	116
9	Courtyard by Marriott Norman	113
10	Days Inn Norman	107
11	Riverwind Hotel	100
12	Thunderbird Lodge	91
13	Super 8 Norman	90
14	Country Inn and Suites Norman	77
15	Fairfield Inn Norman	74
16	Comfort Inn and Suites Norman	73
17	Sleep Inn and Suites Norman	73
18	Hampton Inn Norman	61
19	Quality Inn and Suites	52

Meeting Facilities

Key	Facility
1	Marriott Conference Center at NCED
2	Cleveland County Fairgrounds
3	Embassy Suites Norman
4	OU OK Memorial Union
5	Riverwind Casino



Source: Norman Visitors Guide, MapPoint, 2015

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Primary Norman Meeting Facilities

Summary of Primary Flat Floor Event Facility Spaces

		Exhibit Space		Ballroom Space		Meeting Space				
	Facility	Prime SF	Other SF	Grand SF	Other SF	Total SF	# of Rooms	Sellable Space	Largest Contiguous Space	HQ Hotel Rooms
1	Marriot Conference Center at NCED	0	0	9,450	15,050	40,500	26	65,000	9,450	964
2	Cleveland County Fairgrounds	0	46,200	0	0	7,200	3	53,400	36,000	0
3	Embassy Suites Norman	0	0	28,800	7,200	6,900	8	42,900	28,800	283
4	OU OK Memorial Union	0	0	6,100	0	27,300	21	33,400	6,100	0
5	Riverwind Casino	0	0	14,000	0	2,000	4	16,000	14,000	100

Source: Norman Visitors Guide, MapPoint, 2015

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Key Local Conference Facilities

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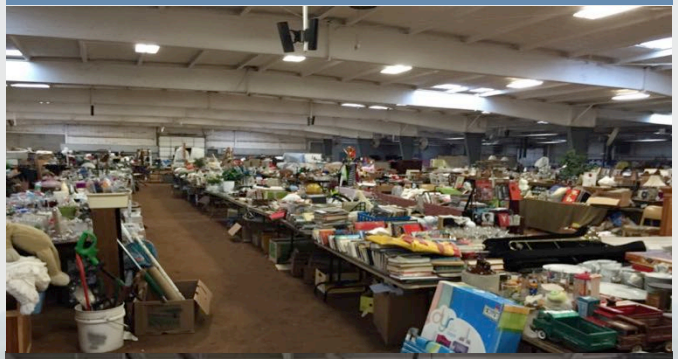
CLEVELAND COUNTY FAIRGROUNDS



Hotel Guestrooms:	N/A
Convention Space (square feet):	
Exhibit - Prime	0
Exhibit - Other	46,200
Meeting Space	7,200
Ballroom - Grand	0
Ballroom - Other	0
Total Sellable Space	53,400
Largest Contiguous	36,000

EMBASSY SUITES NORMAN

Hotel Guestrooms:	283
Convention Space (square feet):	
Exhibit - Prime	0
Exhibit - Other	0
Meeting Space	6,900
Ballroom - Grand	28,800
Ballroom - Other	7,200
Total Sellable Space	42,900
Largest Contiguous	28,800

MARRIOT CONFERENCE CENTER AT NCED

Hotel Guestrooms:	964
Convention Space (square feet):	
Exhibit - Prime	0
Exhibit - Other	0
Meeting Space	40,500
Ballroom - Grand	9,450
Ballroom - Other	15,050
Total Sellable Space	65,000
Largest Contiguous	9,450

Selected Competitive State Facilities

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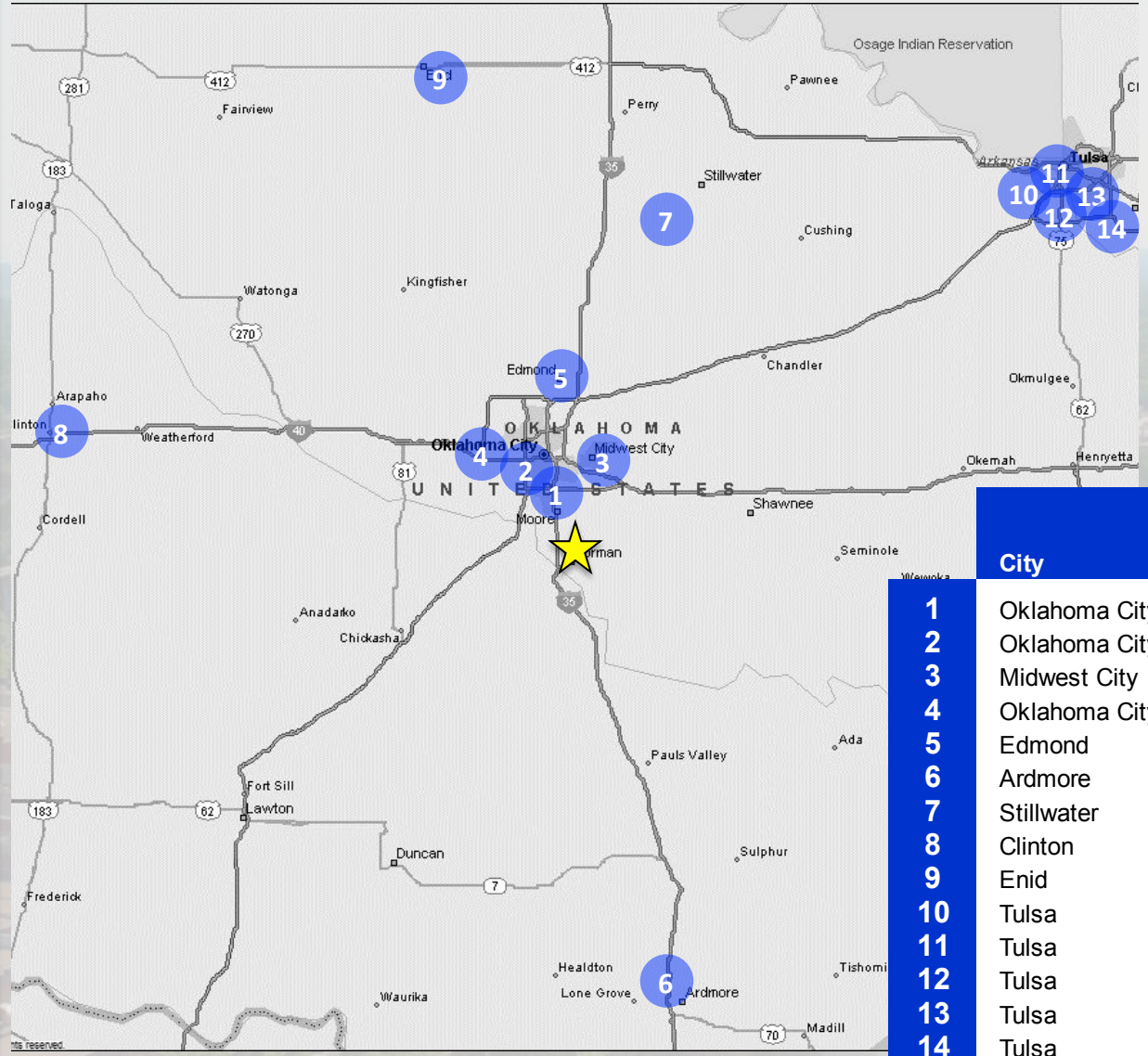

	City	Facility	Distance to Norman (in miles)
1	Oklahoma City	Cox Business Services Convention Center	18
2	Oklahoma City	Sheraton Oklahoma City Hotel	18
3	Midwest City	Reed Conference Center	21
4	Oklahoma City	Biltmore Hotel	22
5	Edmond	Nigh University Center	31
6	Ardmore	Ardmore Convention Center	79
7	Stillwater	Wes Watkins Center	81
8	Clinton	Frisco Conference Center	101
9	Enid	Enid Event and Convention Center	114
10	Tulsa	Cox Business Center	120
11	Tulsa	Tulsa Doubletree Downtown	120
12	Tulsa	Tulsa Marriott Southern Hills	120
13	Tulsa	DoubleTree by Hilton Hotel Tulsa - Warren Place	123
14	Tulsa	Tulsa Renaissance Hotel	126

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Selected Competitive Facilities

Summary of Available Event Space (SF)

Facility	Market	Exhibit Space	Meeting Space	Ballroom Space	Total Sellable Space	Largest Contiguous Space	Meeting Rooms	HQ Hotel Rooms
Cox Business Center	Tulsa, OK	122,600	22,800	37,800	183,200	102,600	25	417
Cox Business Services Convention Center	Oklahoma City, OK	99,400	28,400	26,000	153,800	99,400	21	311
Enid Event and Convention Center	Enid, OK	31,500	6,800	11,300	49,600	31,500	11	n/a
Tulsa Renaissance Hotel and Convention Center	Tulsa, OK	0	2,400	39,900	42,300	28,800	5	300
Tulsa Marriott Southern Hills	Tulsa, OK	0	12,800	20,300	33,100	10,200	13	383
Nigh University Center	Edmond, OK	0	21,100	9,200	30,300	9,200	22	n/a
Ardmore Convention Center	Ardmore, OK	0	4,900	24,300	29,200	24,300	7	80
Wes Watkins Center	Stillwater, OK	0	11,100	8,400	19,500	8,400	13	n/a
Reed Conference Center	Midwest City, OK	6,000	3,300	9,000	18,300	9,000	6	151
Tulsa Doubletree Downtown	Tulsa, OK	0	8,300	9,500	17,800	9,500	10	450
Biltmore Hotel	Oklahoma City, OK	0	4,100	12,200	16,300	7,200	8	509
Sheraton Oklahoma City Hotel	Oklahoma City, OK	0	5,600	9,400	15,000	5,600	6	396
DoubleTree by Hilton Hotel Tulsa - Warren Place	Tulsa, OK	0	2,200	12,000	14,200	8,100	3	370
Frisco Conference Center	Clinton, OK	7,500	4,000	0	11,500	7,500	6	n/a
AVERAGE		**19,100**	**9,800**	**16,400**	**45,300**	**25,800**	**11**	**337**
Embassy Suites Norman	Norman, OK	0	6,900	34,100	41,000	27,200	8	283
NCED Conference Center and Hotel	Norman, OK	0	40,500	24,500	65,000	9,450	26	964

Source: facility floor plans, management, and industry publications, 2015.

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Selected Comparable Facilities

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Conference/Convention Centers

City, State	Facility
Arlington, TX	Arlington Convention Center
Athens, GA	The Classic Center
Austin, TX	AT & T Executive Education and Conference Center
Bay City, MI	DoubleTree Hotel and Conference Center
Bellevue, WA	Meydenbauer Center
Coralville, IA	Coralville Marriott Hotel and Conference Center
Council Bluffs, IA	Mid-America Center
Dubuque, IA	Dubuque Grand River Center
Duluth, GA	Gwinnett Center
El Paso, TX	Judson F. Williams Convention Center
Enid, OK	Enid Event and Convention Center
Huntsville, AL	Von Braun Center
Laramie, WY	University of Wyoming Conference Center
Layton, UT	Davis Conference Center
Overland Park, KS	Overland Park Convention Center
Port Huron, MI	Blue Water Convention Center
Provo, UT	Utah Valley Convention Center
Pueblo, CO	Pueblo Convention Center
Salem, OR	Salem Conference Center
San Marcos, TX	San Marcos Conference Center
South Bend, IN	Century Center
St. Charles, MO	St. Charles Convention Center
Tuscaloosa, AL	Bryant Conference Center
Vancouver, WA	Vancouver Conference Center

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Comparable Convention Centers

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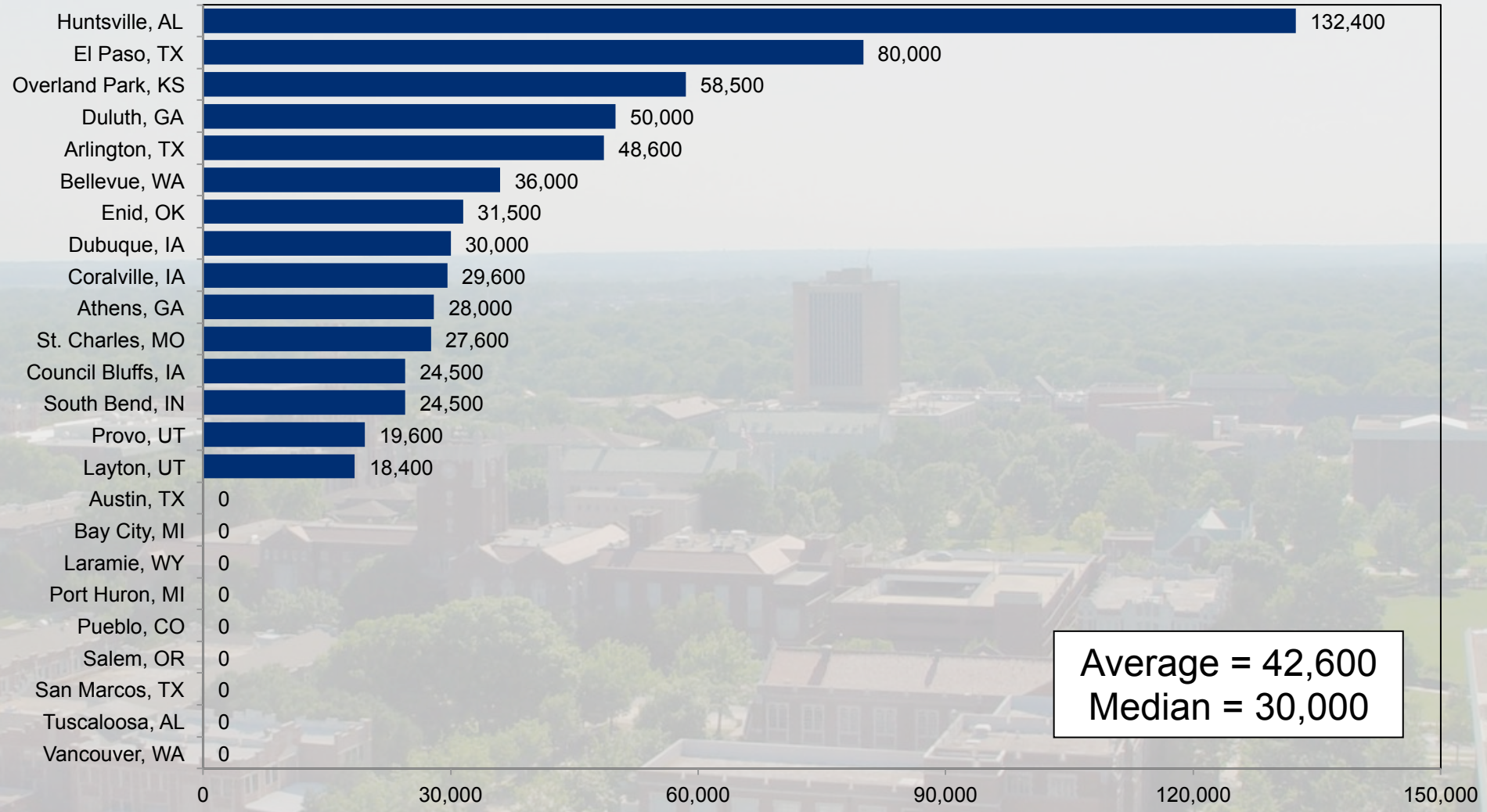
Prime Exhibit Space (SF)



Average = 42,600
Median = 30,000

Note: Average and Median figures only include facilities with exhibit space.
Source: facility floor plans, management, and industry publications, 2015.

Comparable Convention Centers

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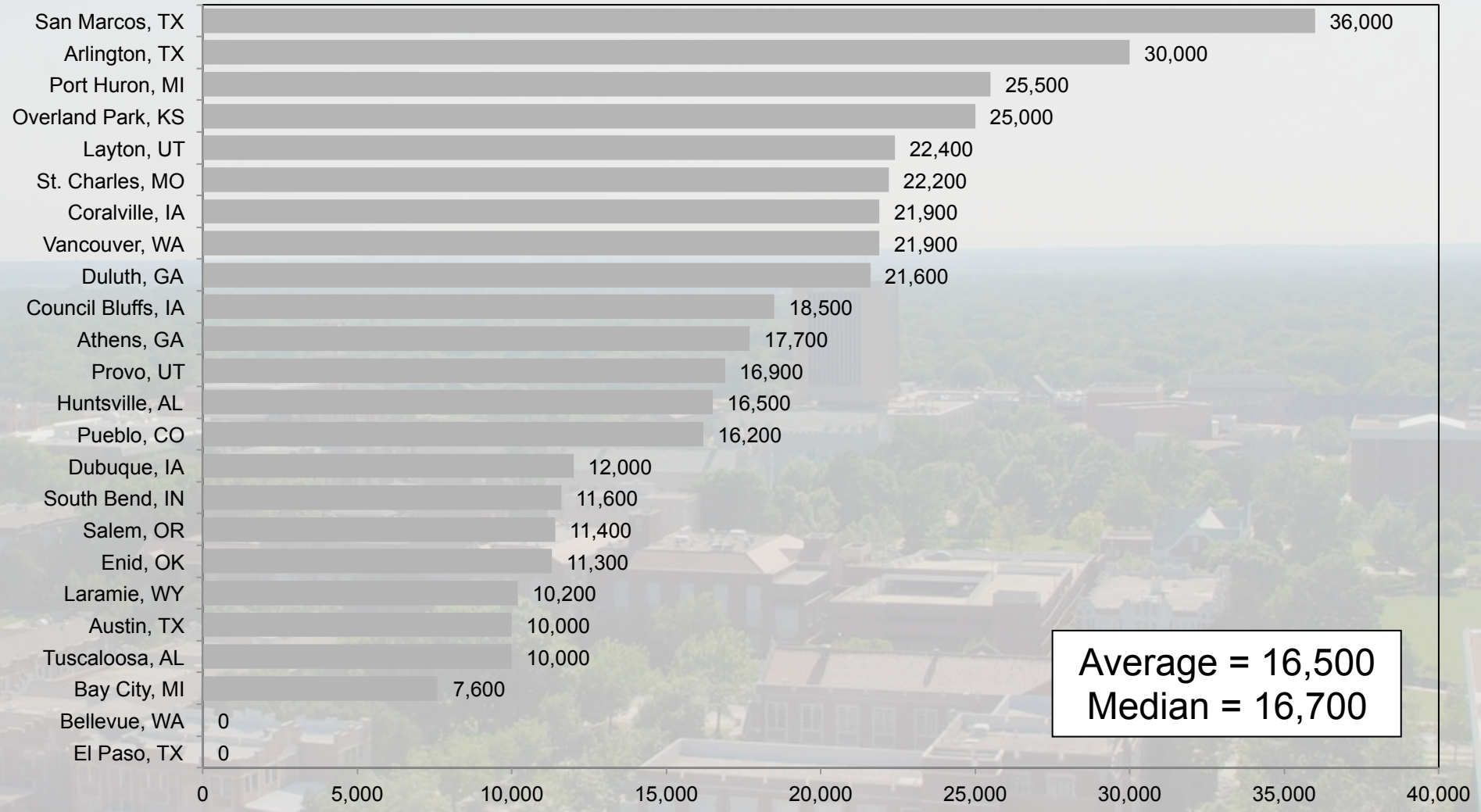
Ballroom Space (SF)



Average = 16,500
Median = 16,700

Note: Average and Median figures only include facilities with ballroom space.
Source: facility floor plans, management, and industry publications, 2015.

Comparable Convention Centers

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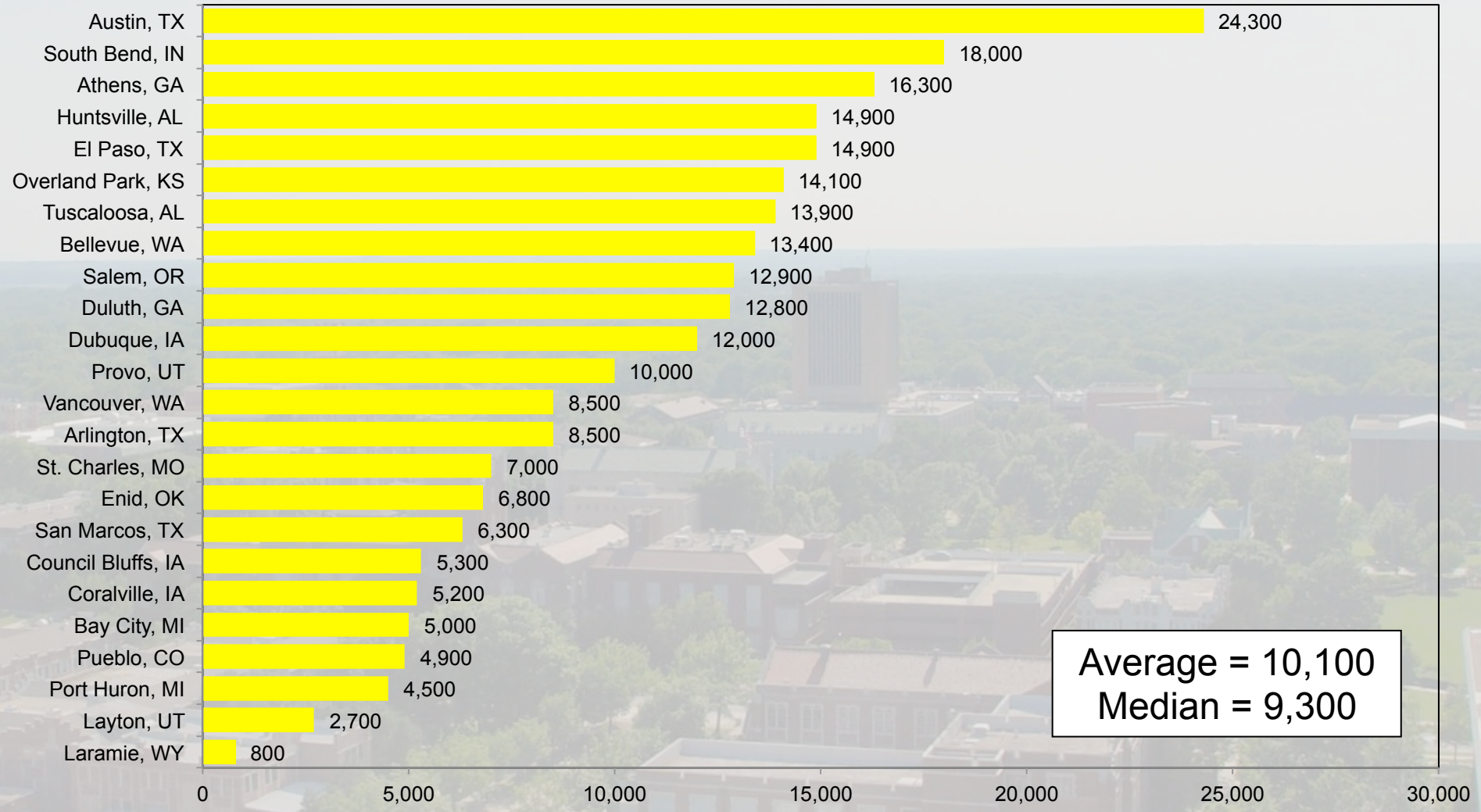
Breakout Meeting Space (SF)



Average = 10,100
Median = 9,300

Source: facility floor plans, management, and industry publications, 2015.

Comparable Convention Centers

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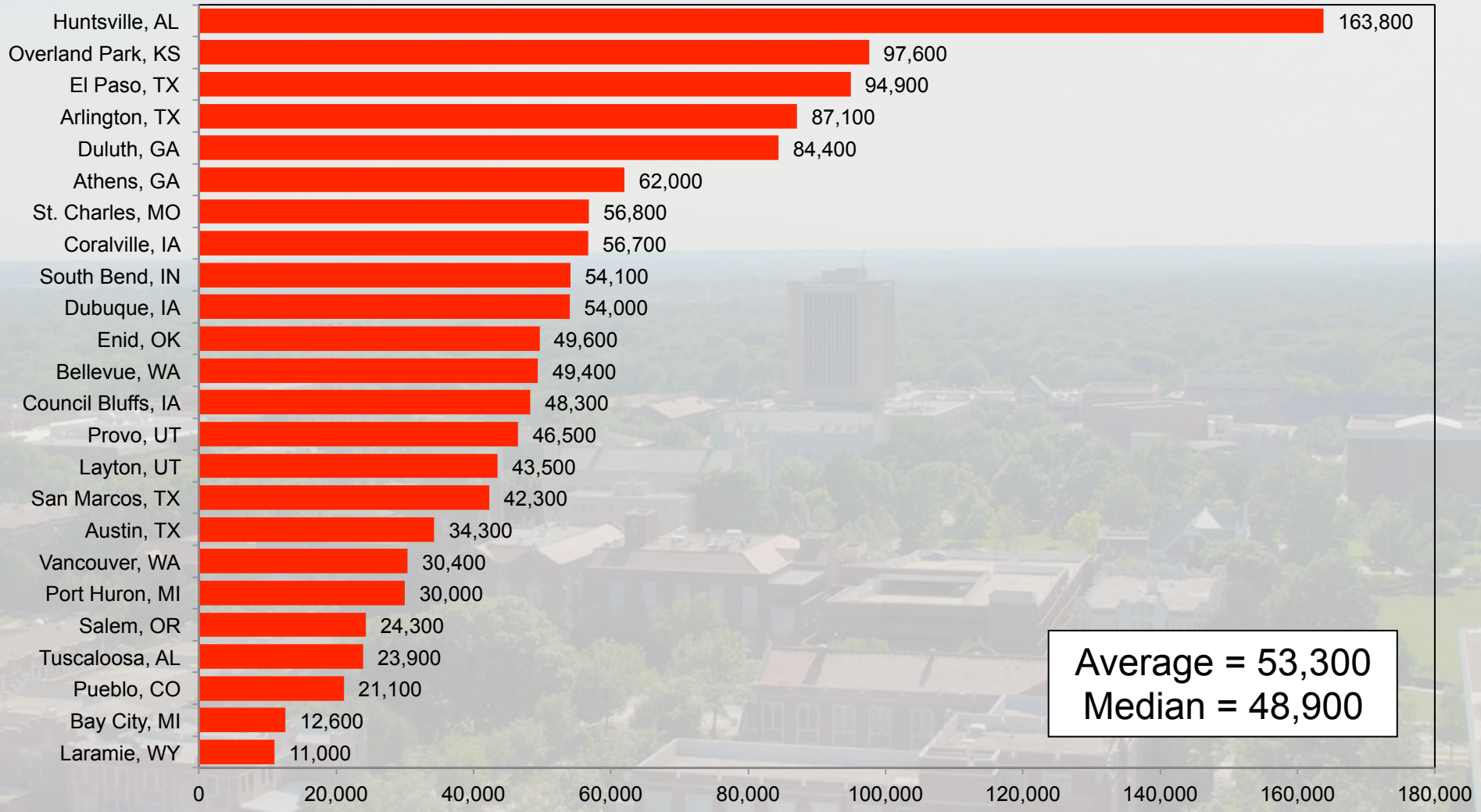
Total Sellable Space (SF)



Average = 53,300
Median = 48,900

Source: facility floor plans, management, and industry publications, 2015.

Comparable Convention Centers

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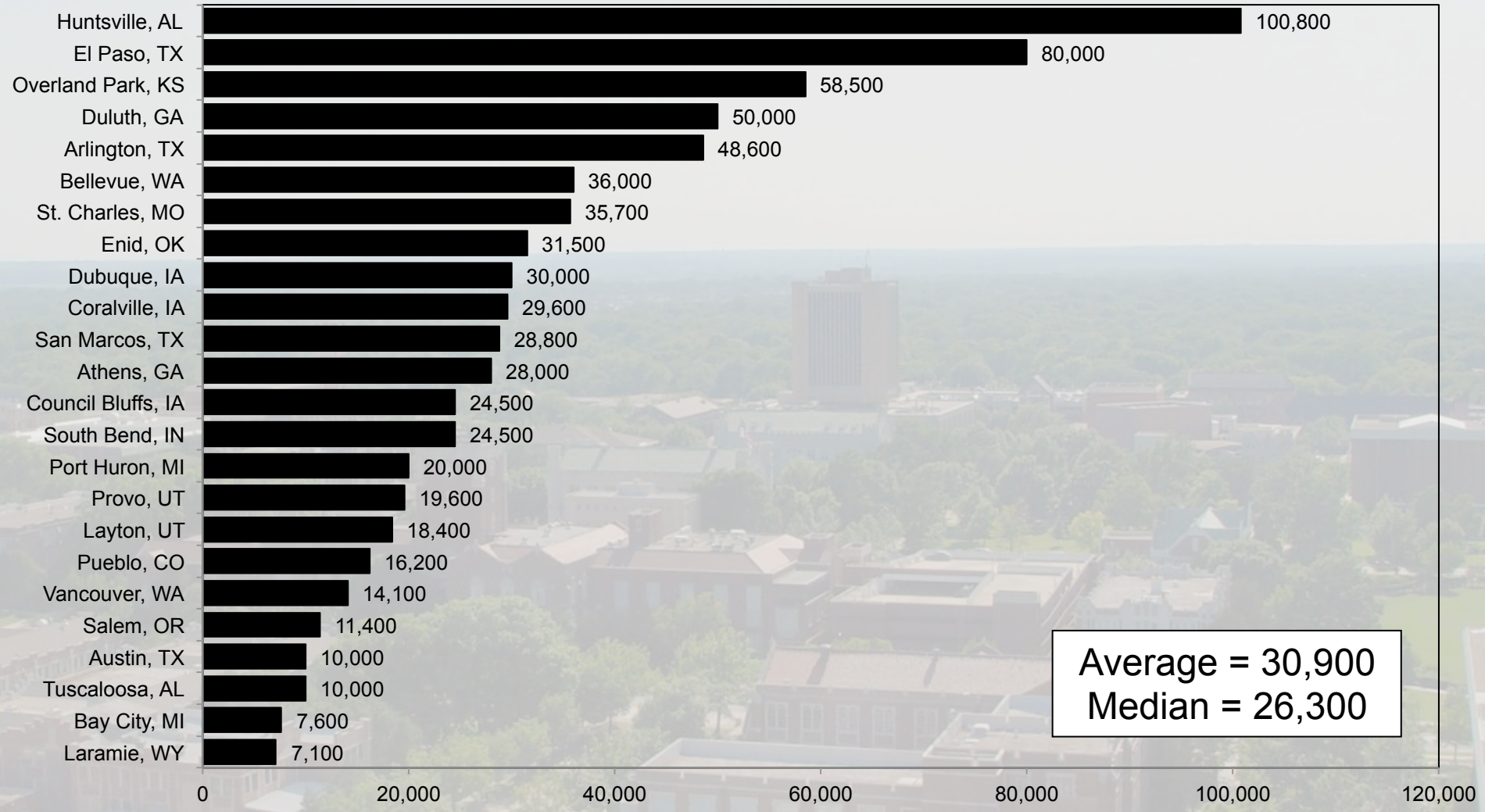
Largest Contiguous Space (SF)



Average = 30,900
Median = 26,300

Source: facility floor plans, management, and industry publications, 2015.

Comparable Convention Centers

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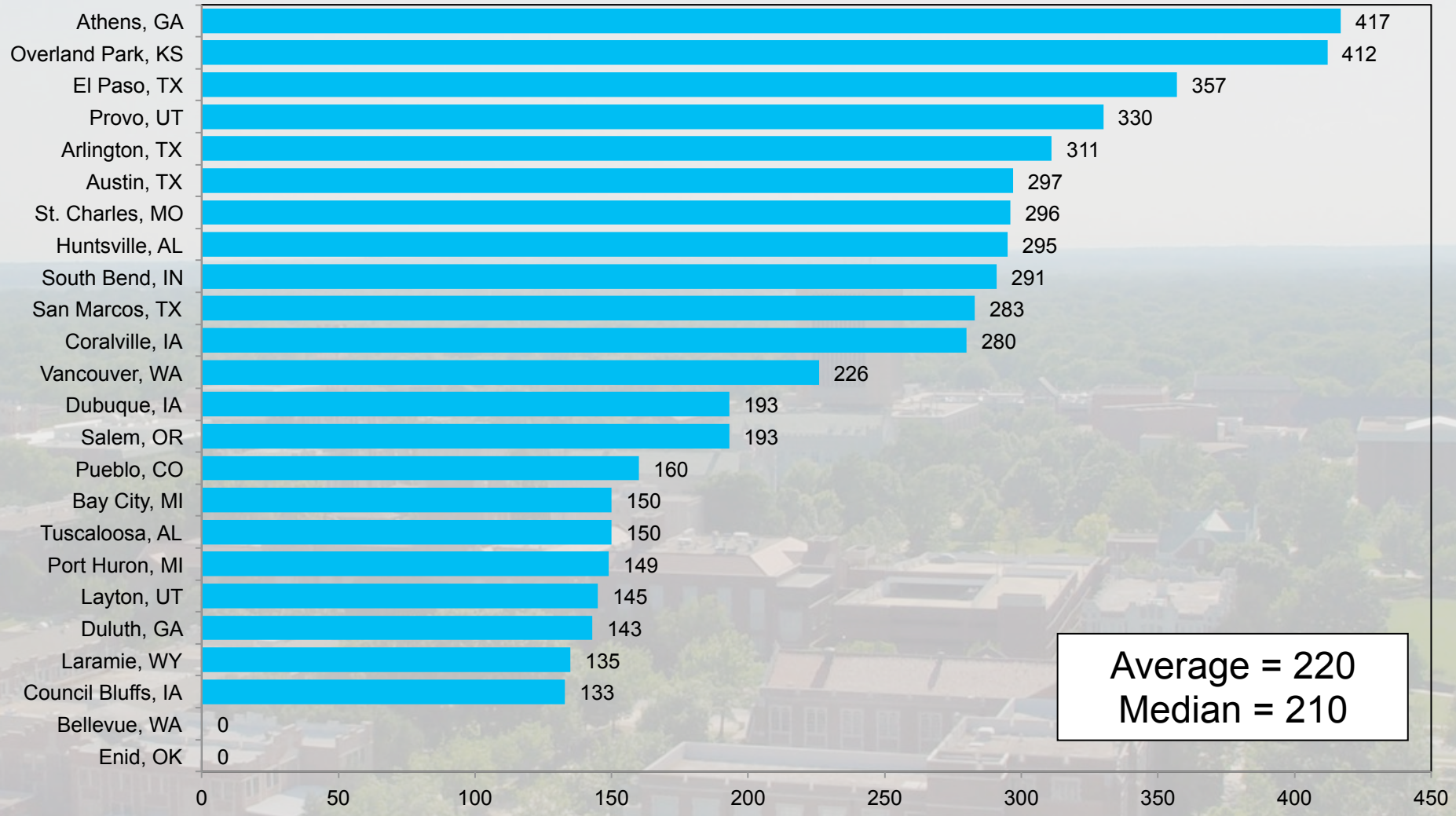
Rooms at Headquarter Hotel



Source: CVB's and industry publications, 2015.

Comparable Convention Centers

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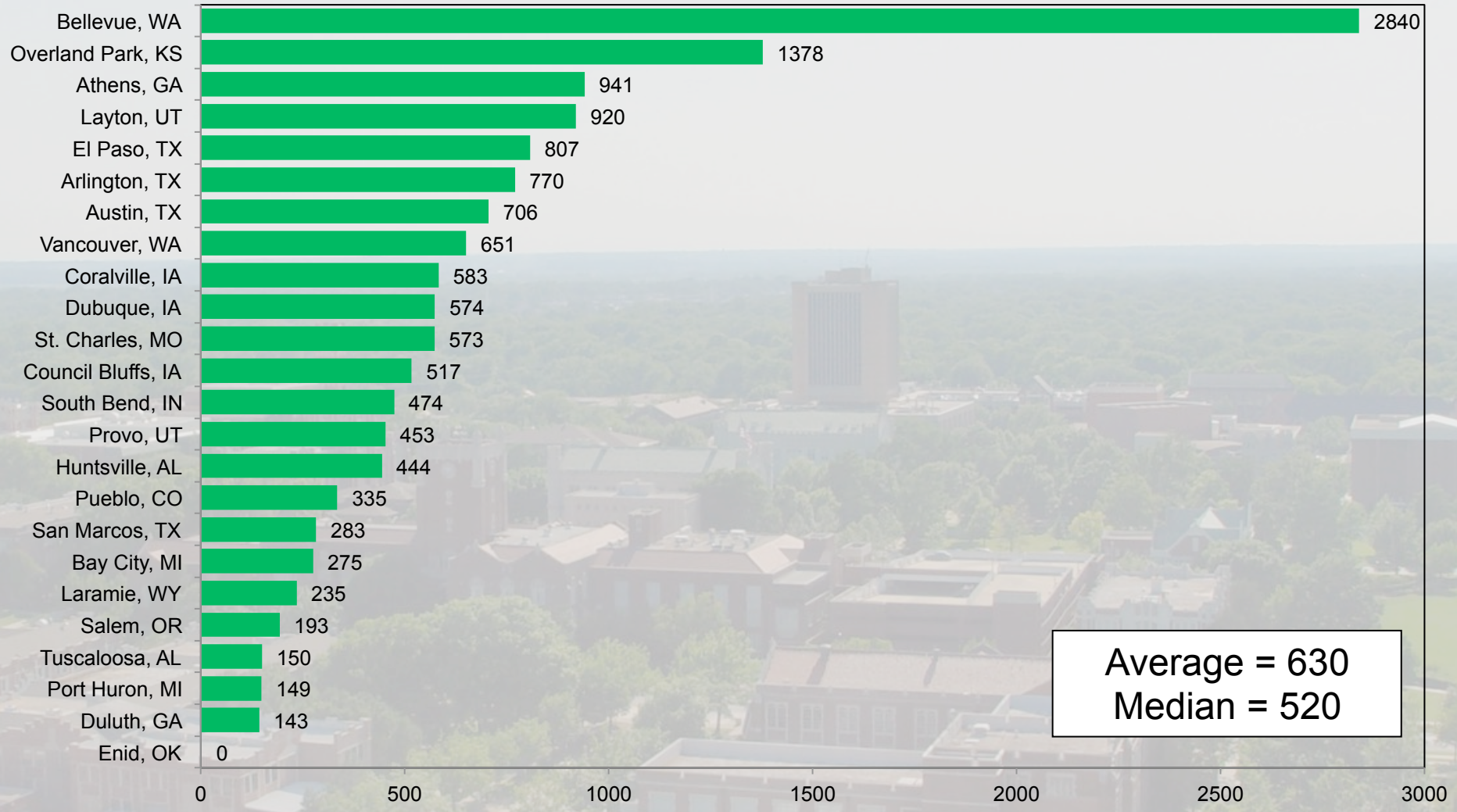
Hotels within Walking Distance (one-half mile)



Average = 630
Median = 520

Source: CVB's and industry publications, 2015.

Comparable Convention Centers

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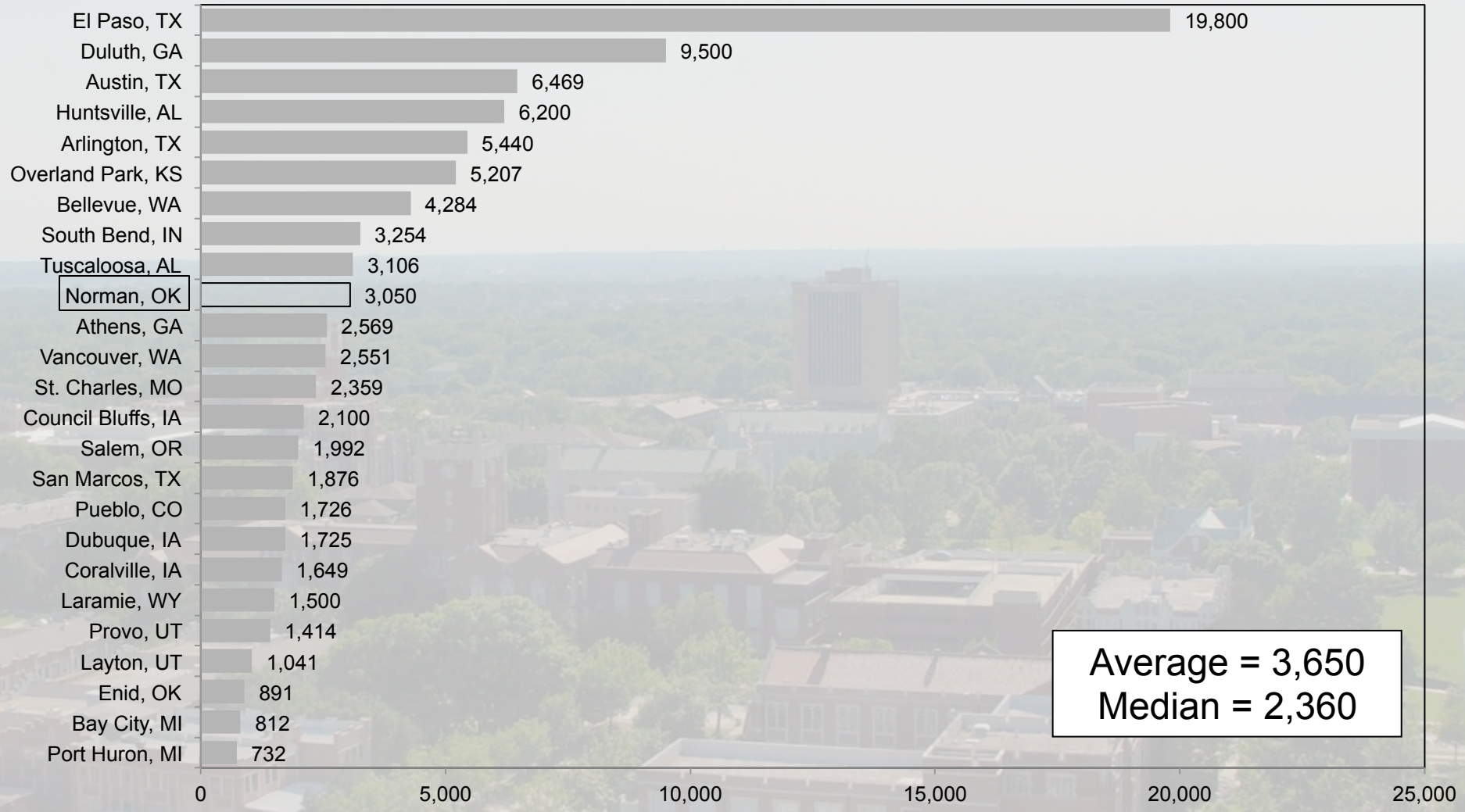
Total Hotel Rooms in Market



Average = 3,650
Median = 2,360

Source: CVB's and industry publications, 2015.

Comparable Facilities

Demographics Comparison

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	Comparable Markets				Norman, OK		
	Low	High	Average	Median	Estimate	% of Avg.	Rank (out of 25)
Population							
City	19,200	843,100	156,700	97,500	117,524	75%	10
County	37,500	2,017,000	469,600	294,700	267,829	57%	13
30-Minute Drive	36,500	2,960,900	779,900	469,400	641,280	82%	11
90-Minute Drive	411,800	7,131,200	2,820,800	2,695,500	1,837,472	65%	16
180-Minute Drive	1,276,000	18,747,200	7,326,800	6,057,600	8,347,786	114%	9
Average Household Income							
City	$40,500	$114,800	$62,500	$58,100	$66,237	106%	10
County	$49,000	$100,600	$70,000	$69,900	$70,157	100%	13
30-Minute Drive	$52,600	$94,100	$68,400	$69,200	$57,821	85%	20
90-Minute Drive	$51,400	$86,300	$70,800	$72,000	$64,218	91%	21
180-Minute Drive	$51,000	$81,700	$69,200	$68,900	$73,653	106%	9
Median Age							
City	23.5	38.9	33.5	35.8	30.5	91%	7
County	24.9	42.4	34.8	36.3	33.8	97%	10
30-Minute Drive	25.2	41.8	34.9	35.4	33.6	96%	11
90-Minute Drive	29.6	40.2	36.3	36.9	35.1	97%	8
180-Minute Drive	29.7	39.4	36.4	37.2	35.5	97%	7
Corporate Base							
City	1,610	84,730	12,550	5,990	7,954	63%	10
County	2,610	208,410	39,950	20,060	16,642	42%	14
30-Minute Drive	2,490	286,500	67,800	31,490	48,010	71%	9
90-Minute Drive	40,670	617,260	226,640	197,380	133,007	59%	16
180-Minute Drive	64,770	1,184,260	549,740	481,840	700,023	127%	7

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Market Surveys

1. In-person interviews of local groups and individuals.
2. Meeting with Norman leadership and event facility representatives.
3. Follow-up telephone interviews.
4. Completed telephone interviews with state and regional convention planners representing more than 100 potential rotating events.
5. Completed telephone interviews with national convention event planners of more than 90 potential rotating events.
6. Potential convention/conference center events include:
    1. Conventions
    2. Conferences
    3. Tradeshows
    4. Public/consumer shows
    5. Meetings, banquets and receptions
    6. Civic events and uses
    7. Special events and other

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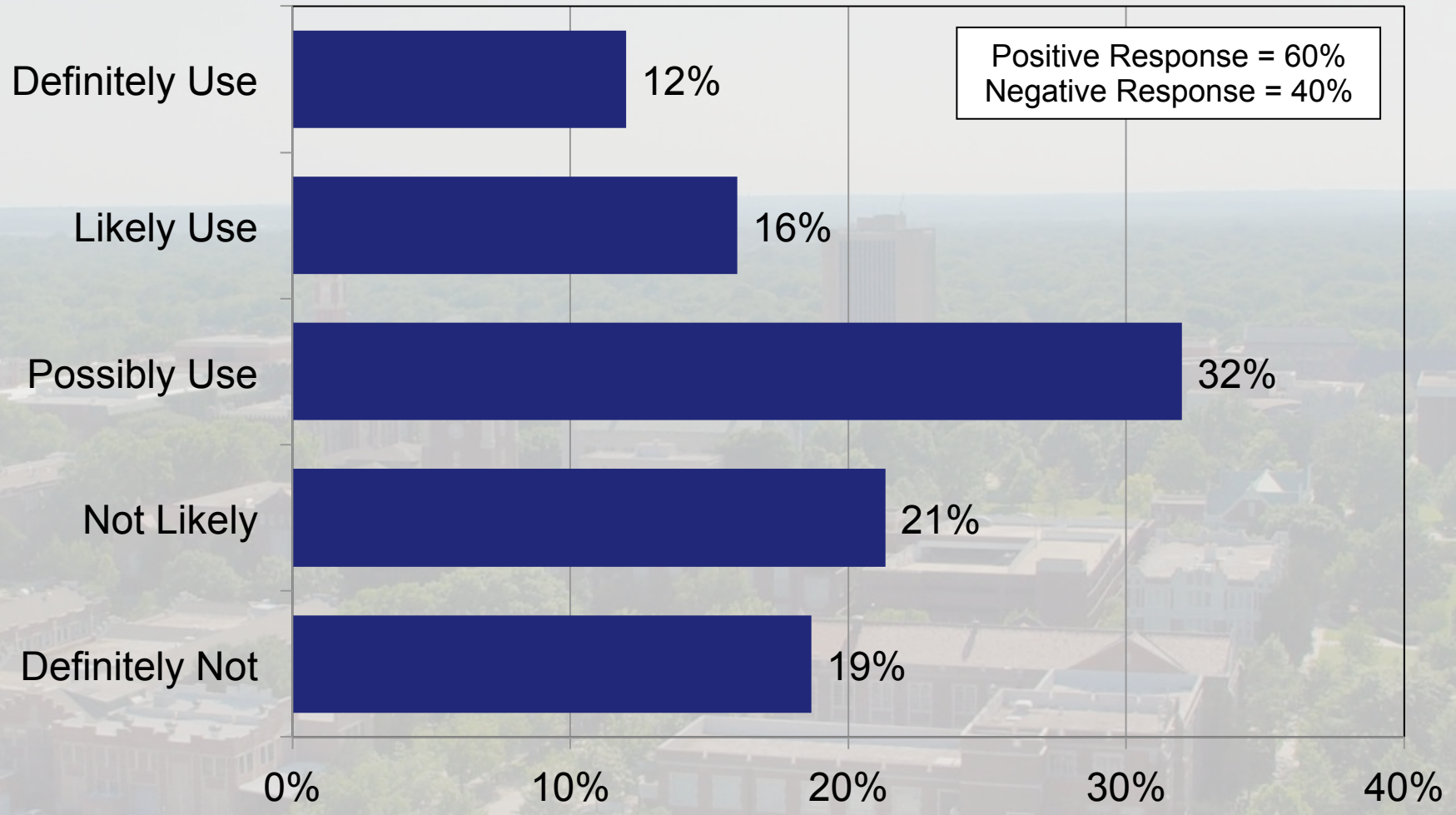
State/Regional Organization Survey

Likelihood of Utilizing Norman



Note: Data represented includes all organizations interviewed.
Source: CSL State/Regional Organization Survey 2015.

State/Regional Organization Survey

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Likelihood of Utilizing Norman Convention Space

	Norman, OK	Past CSL State/Reg. Telephone Surveys 60 Comparable Markets: AVERAGE	MEDIAN	Low metric	High metric
Interest Levels:					
Definitely Use	12%	10%	8%	0%	33%
Likely Use	16%	13%	12%	3%	29%
Possibly Use	32%	28%	28%	9%	44%
Not Likely Use	21%	25%	25%	7%	48%
Definitely Not Use	19%	23%	23%	0%	48%
Positive Response	**60%**	**51%**	**49%**	**21%**	**86%**
Strength of Interest	**2.64**	**2.21**	**1.91**	**0.54**	**4.50**
Population Basis	0.61	1.16	1.10	0.38	3.25
Demand Index	**1.61**	**2.43**	**2.13**	**0.54**	**7.82**

Ames, IA
Appleton, WI
Arlington, VA
Bellevue, WA
Bemidji, MN
Boise, ID
Boulder, CO
Branson, MO
Carbon County, UT
Charleston, WV
Covington, KY
Cullman, AL
Davis County, UT
Fairbanks, AK
Franklin, KY
Grand Junction, CO
Hammond, LA
Havre, MT
Henderson, NV
Hendersonville, NC
Hendricks Cty., IN
Homer, AK
Hoover, AL
Jackson, MI
Jacksonville, FL
Lansing, MI
Laredo, TX
Lewistown, MT
McAllen, TX
Midland, TX
Moore County, NC
Muskegon, MI
New Braunfels, TX
New Haven, CT
New Iberia, LA
Oklahoma City, OK
Owatonna, MN
Palmer, AK
Park City, UT
Pinehurst, NC
Plainfield, IN
Port Huron, MI
Provo, UT
Richmond, IN
Roseville, CA
Salisbury, NC
Sarasota, FL
Sioux Falls, SD
Slidell, LA
St. Charles, MO
St. Cloud, MN
St. Paul, MN
Stillwater, OK
Temple, TX
Waterbury, CT
Watertown, SD
Wichita, KS
Vermillion, SD

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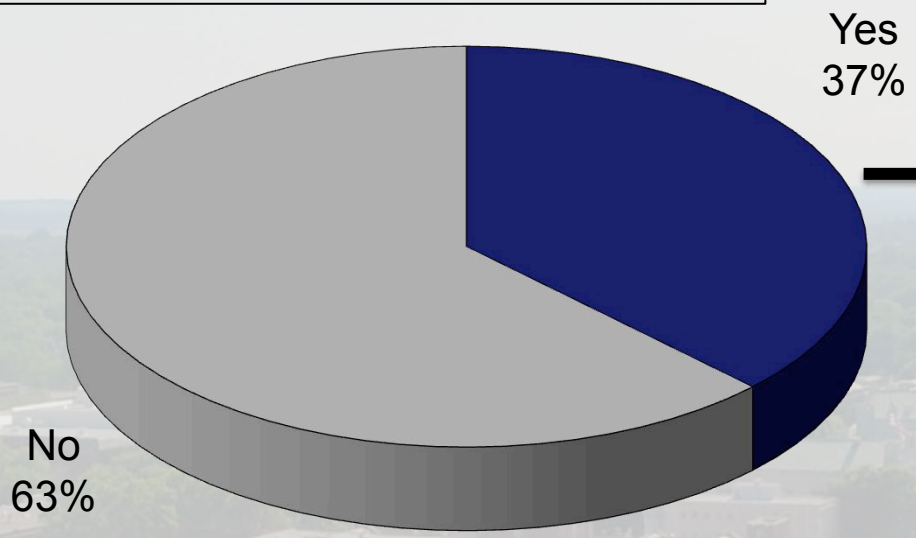
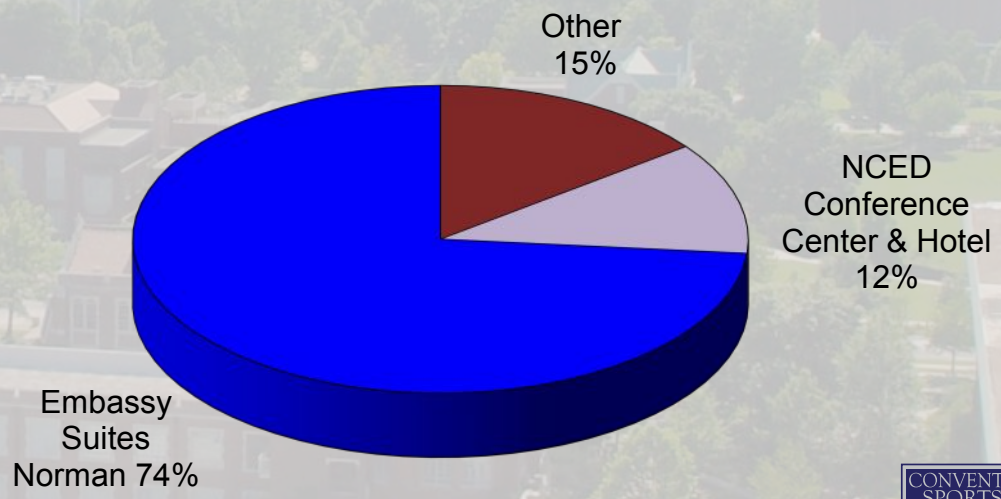
State/Regional Organization Survey

Past Events In Norman

Previously Held an Event in Norman



Location of Past Event



Note: Data represented includes all organizations interviewed.
Source: CSL State/Regional Organization Survey 2015.

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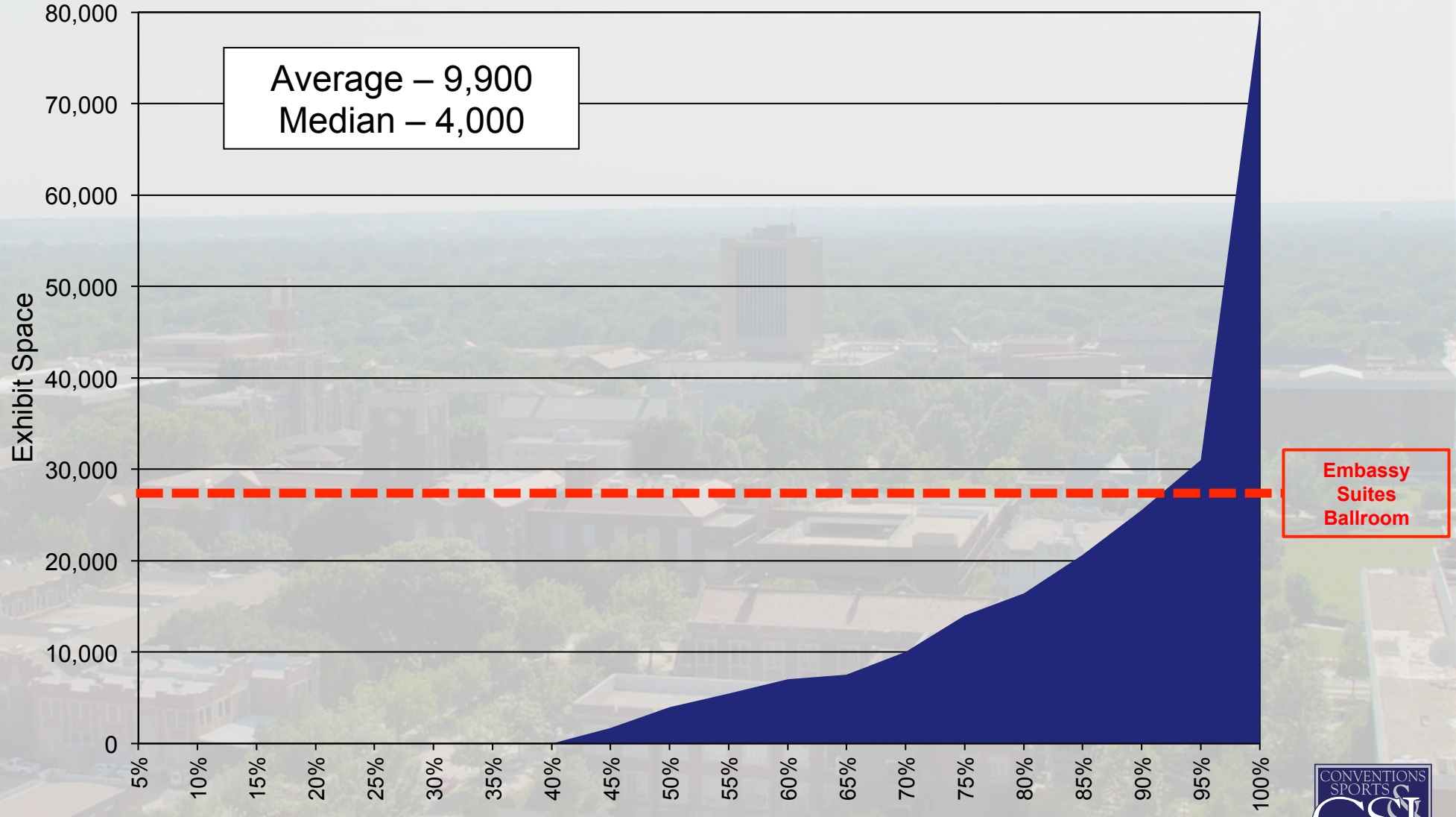
State/Regional Organization Survey

Total Exhibit Space Required



Note: Of those respondents with a positive interest in Norman.
Source: CSL State/Regional Organization Survey 2015.

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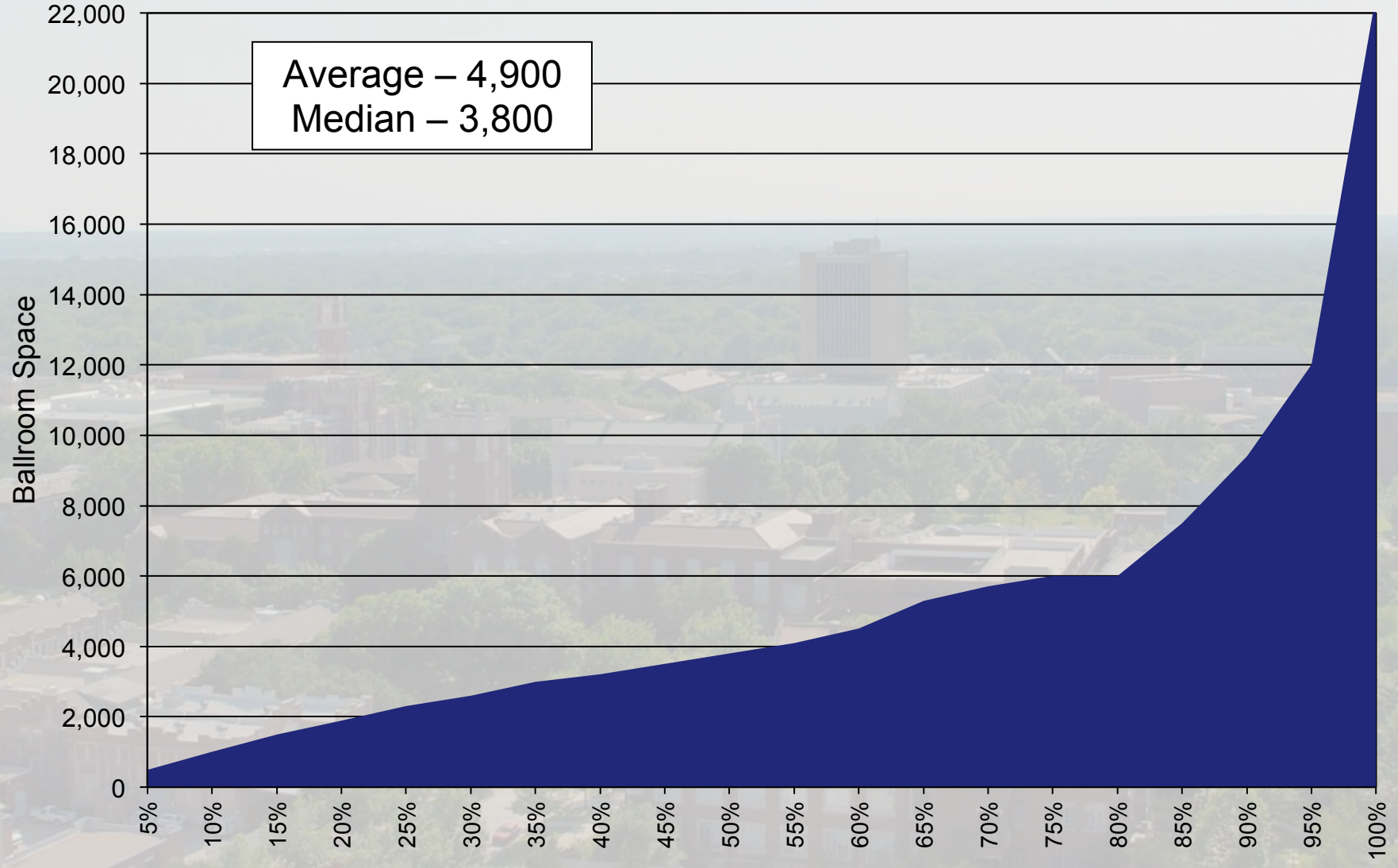
State/Regional Organization Survey

Total Ballroom Space Required



Note: Of those respondents with a positive interest in Norman.
Source: CSL State/Regional Organization Survey 2015.

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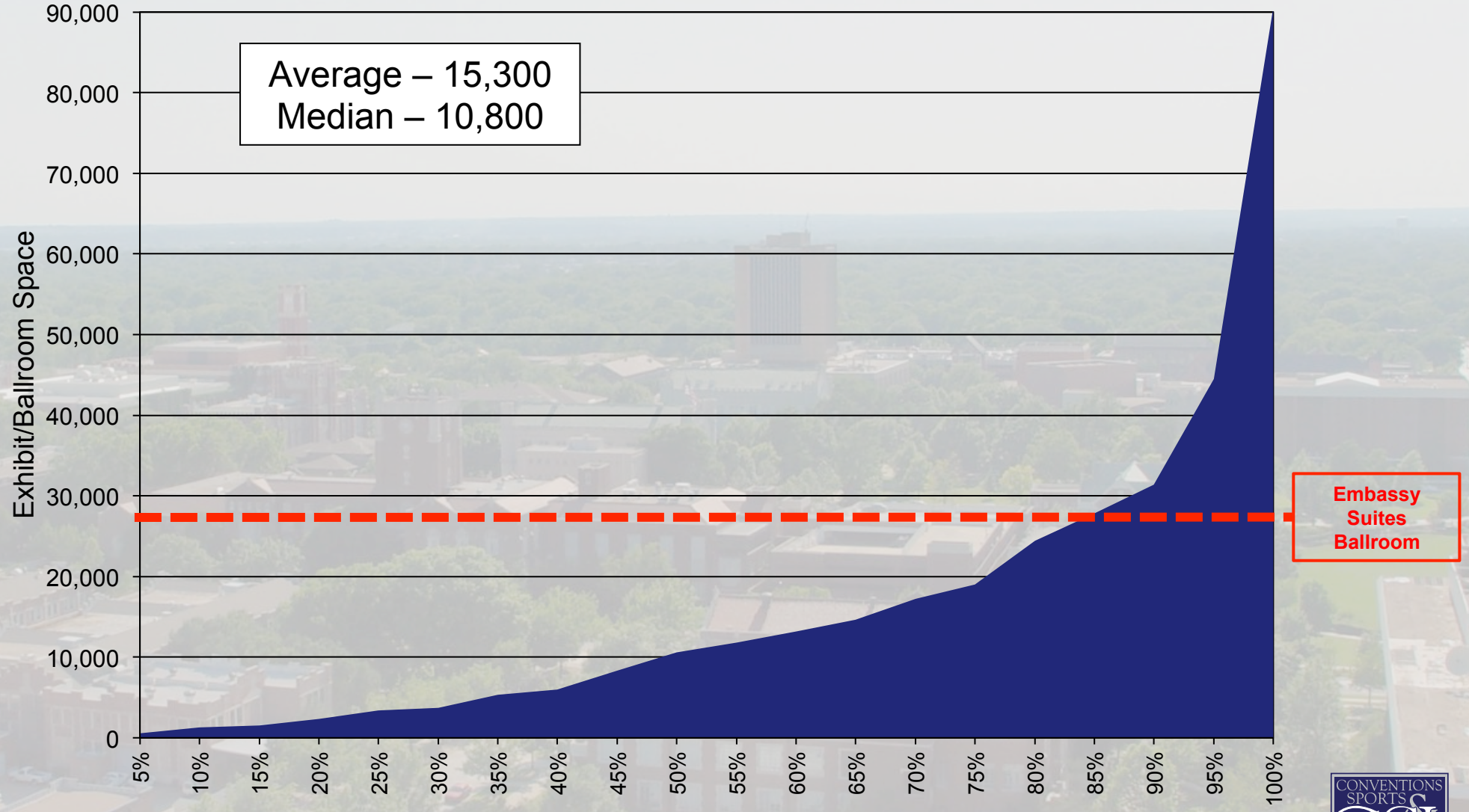
State/Regional Organization Survey

Total Combined Exhibit/Ballroom Space Required



Note: Of those respondents with a positive interest in Norman.
Source: CSL State/Regional Organization Survey 2015.

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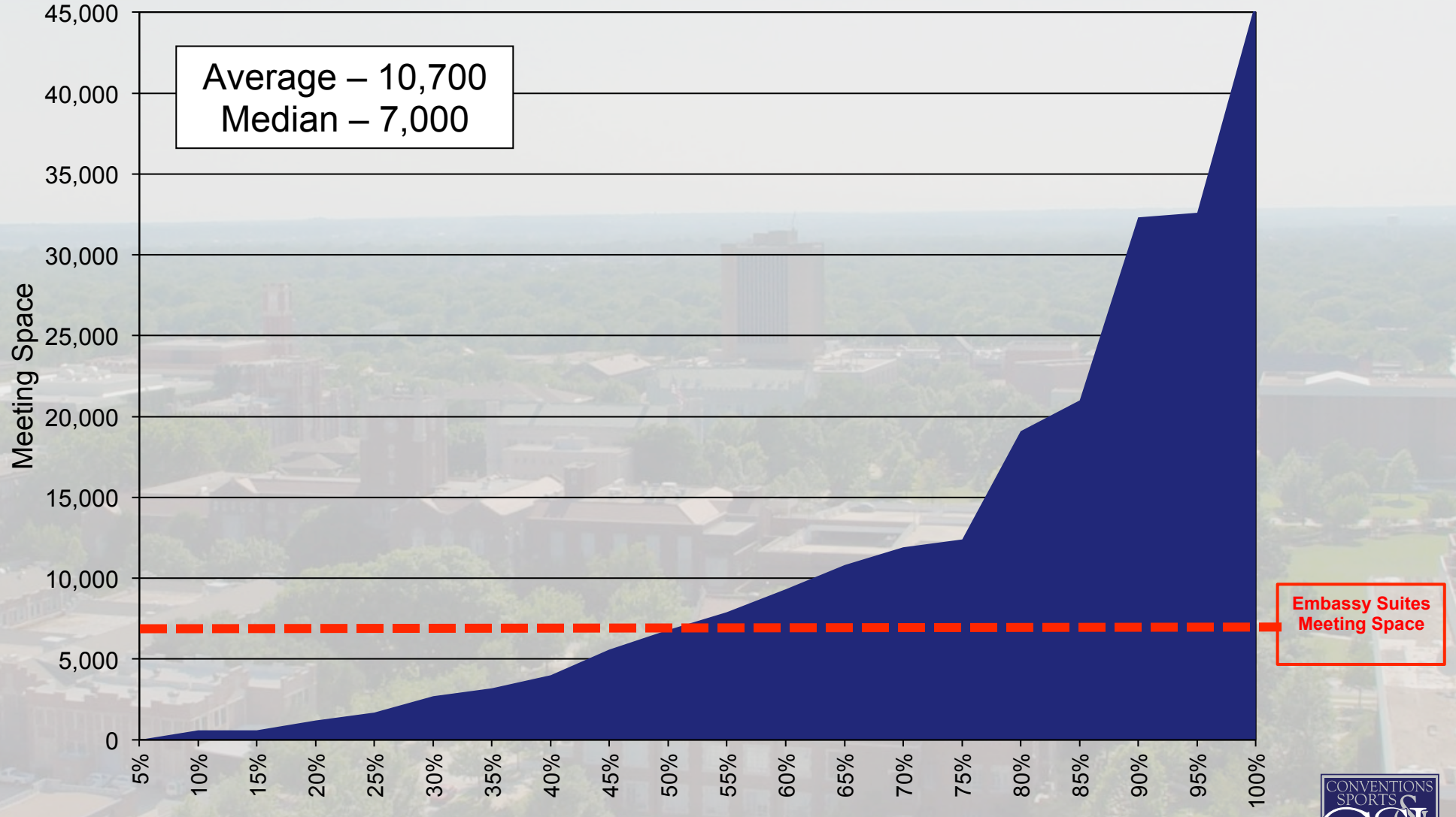
State/Regional Organization Survey

Total Breakout Meeting Space Required



Note: Of those respondents with a positive interest in Norman.
Source: CSL State/Regional Organization Survey 2015.

State/Regional Organization Survey

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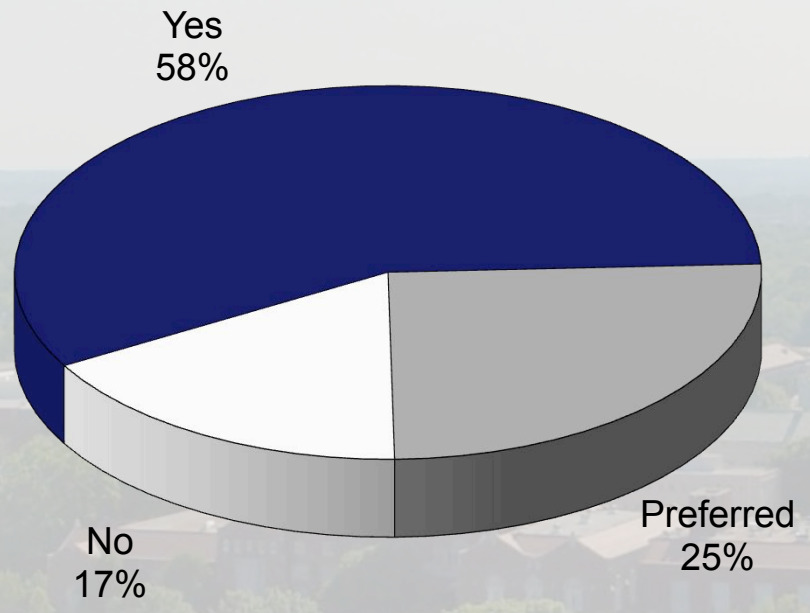
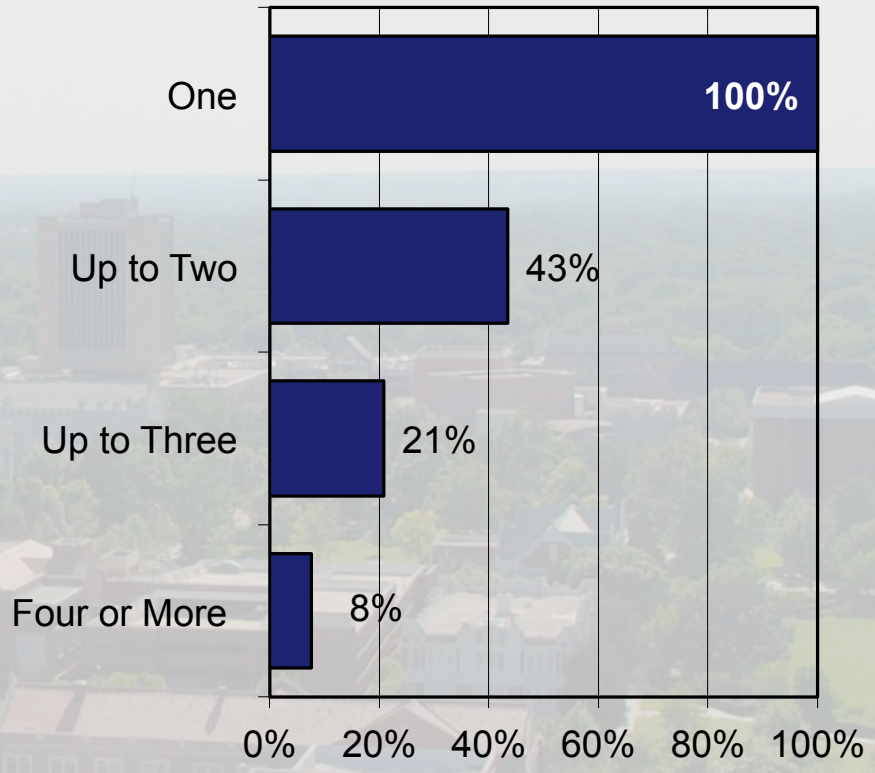
Hotel Requirements

Headquarter Hotel Requirement



Number of Properties Willing to Use



Note: Of those respondents with a positive interest in Norman.
Source: CSL State/Regional Organization Survey 2015.

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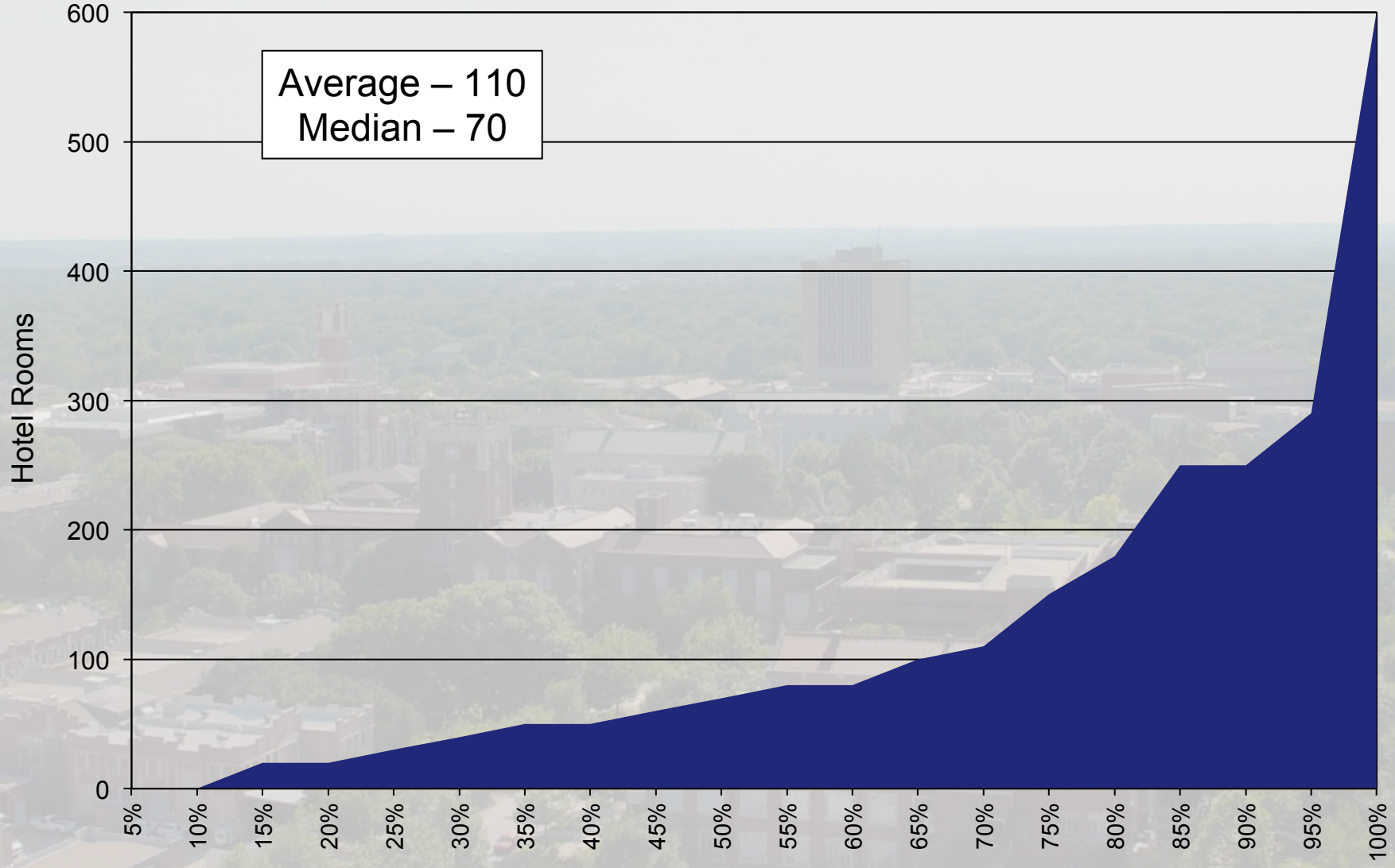
State/Regional Organization Survey

Peak Hotel Rooms Required



Note: Of those respondents with a positive interest in Norman.
Source: CSL State/Regional Organization Survey 2015.

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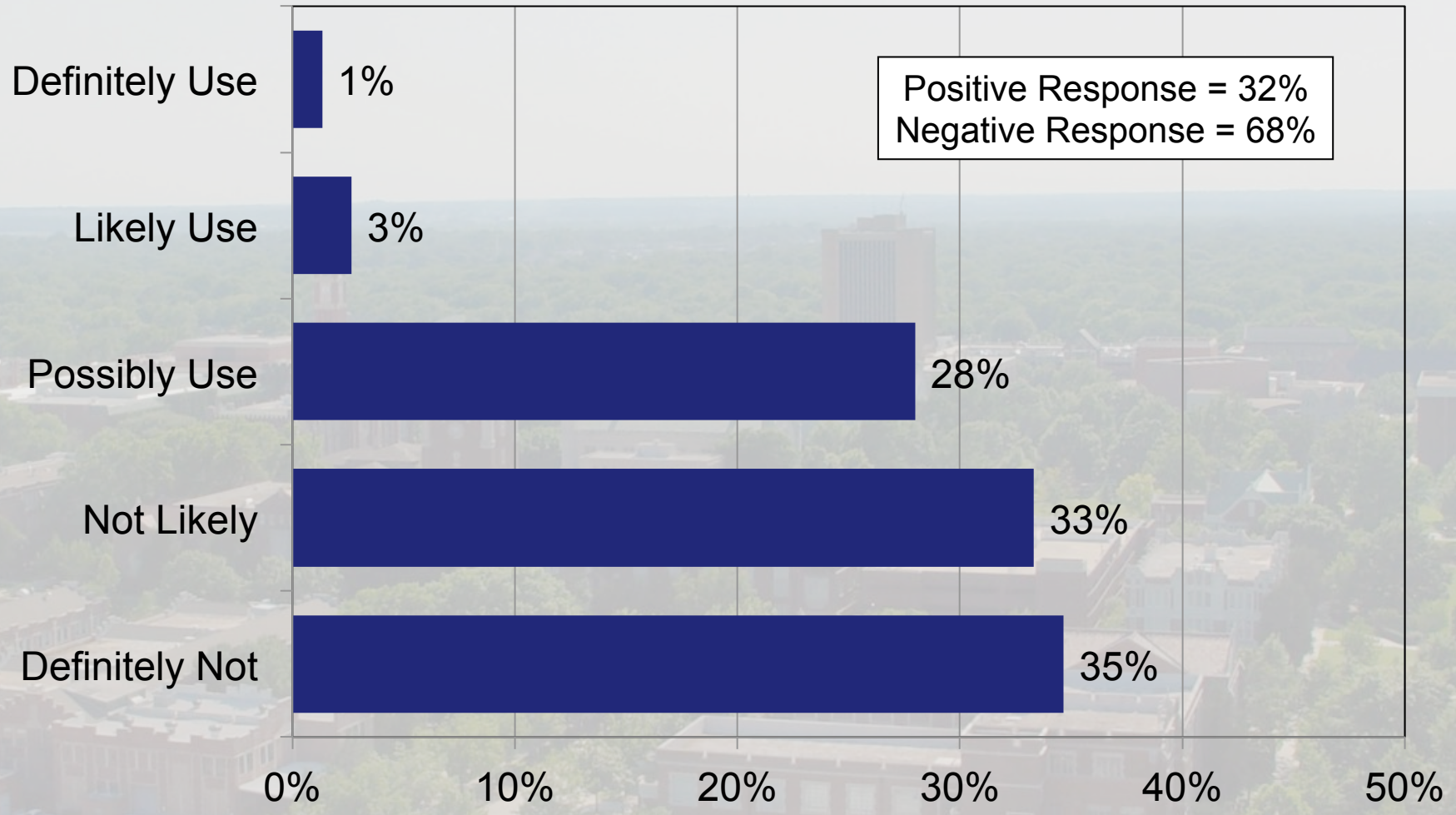
National Organization Survey

Likelihood of Utilizing Norman



Note: Data represented includes all organizations interviewed.
Source: CSL National Organization Survey, 2015

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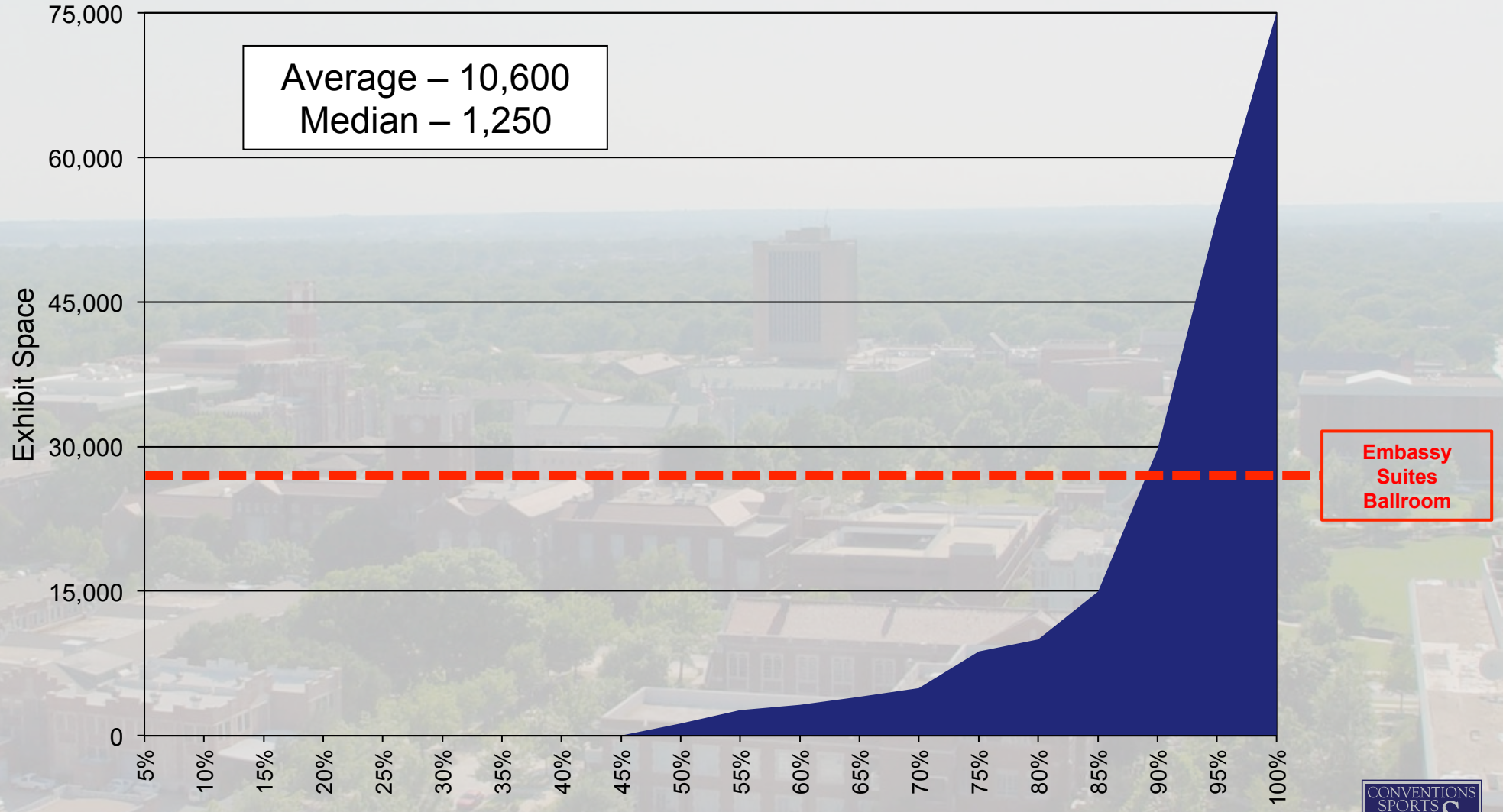
National Organization Survey

Total Exhibit Space Required – Qualified Events



Note: Of those respondents with a positive interest in Norman.
Source: CSL National Organization Survey 2015.

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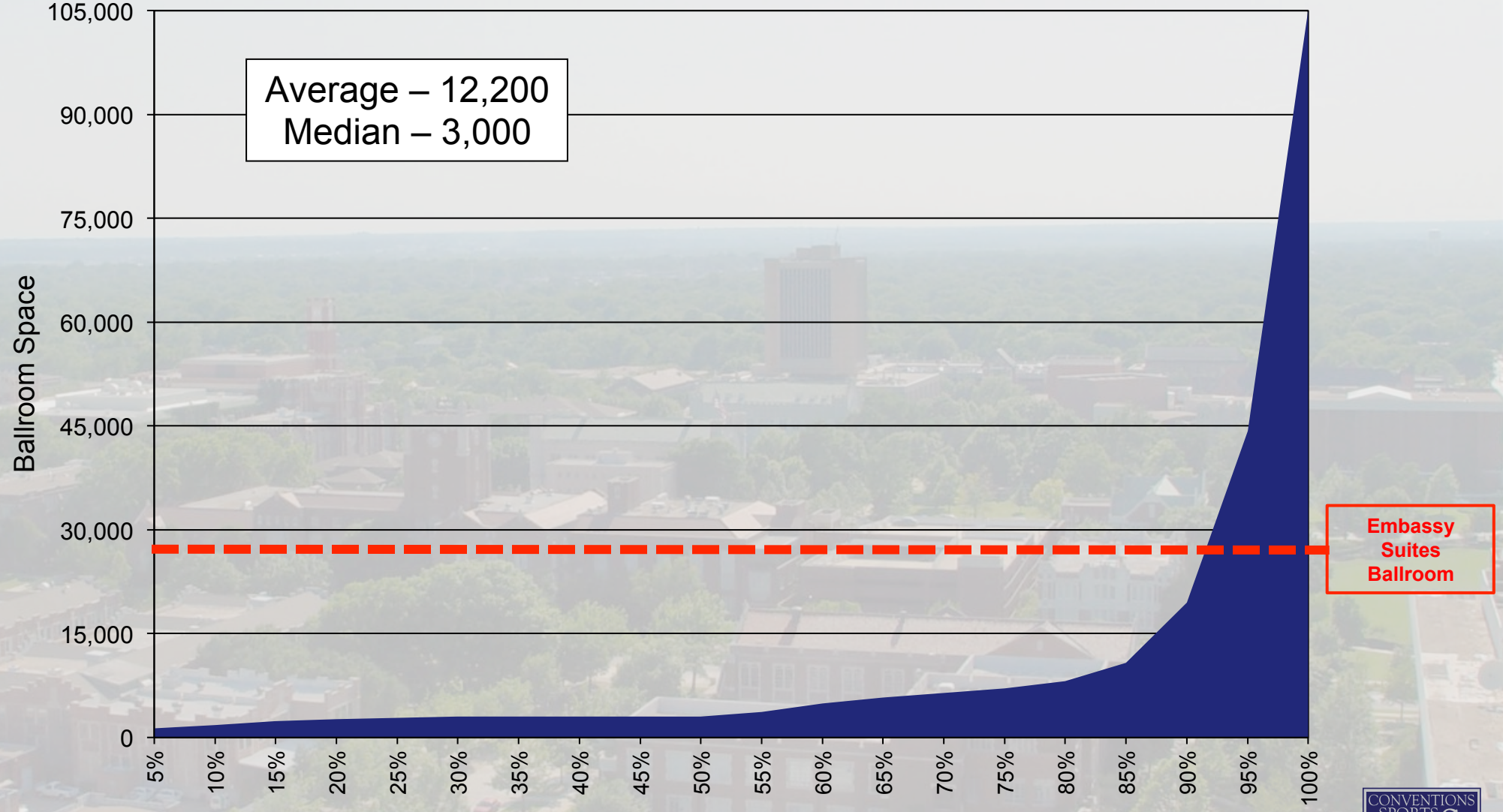
National Organization Survey

Total Ballroom Space Required – Qualified Events



Note: Of those respondents with a positive interest in Norman.
Source: CSL National Organization Survey 2015.

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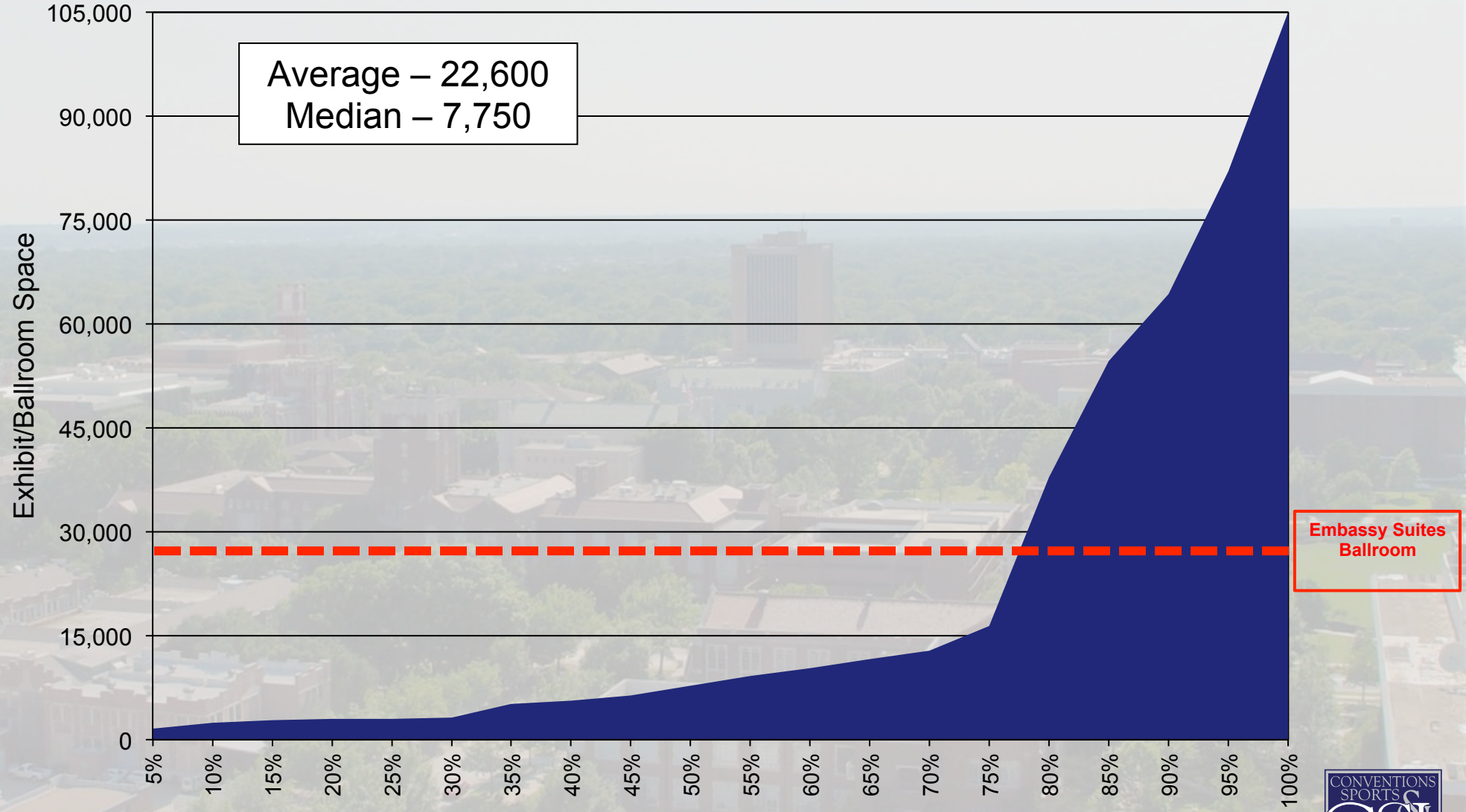
National Organization Survey

Total Combined Exhibit/Ballroom Space Required – Qualified Events



Note: Of those respondents with a positive interest in Norman.
Source: CSL National Organization Survey, 2015.

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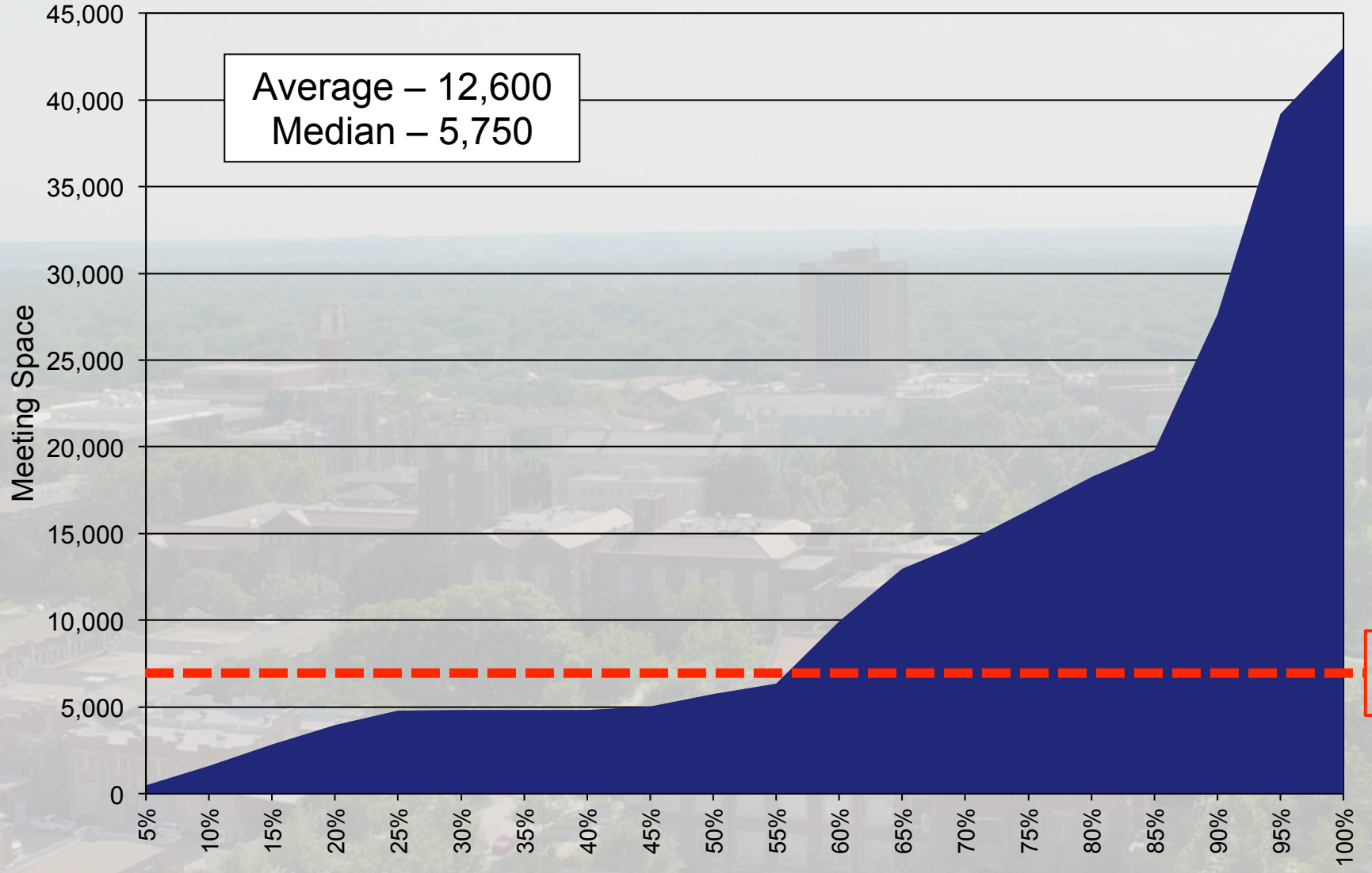
National Organization Survey

Total Breakout Meeting Space Required – Qualified Events



Note: Of those respondents with a positive interest in Norman. Data does not include respondents who do not require meeting space
Source: CSL National Organization Survey, 2015.

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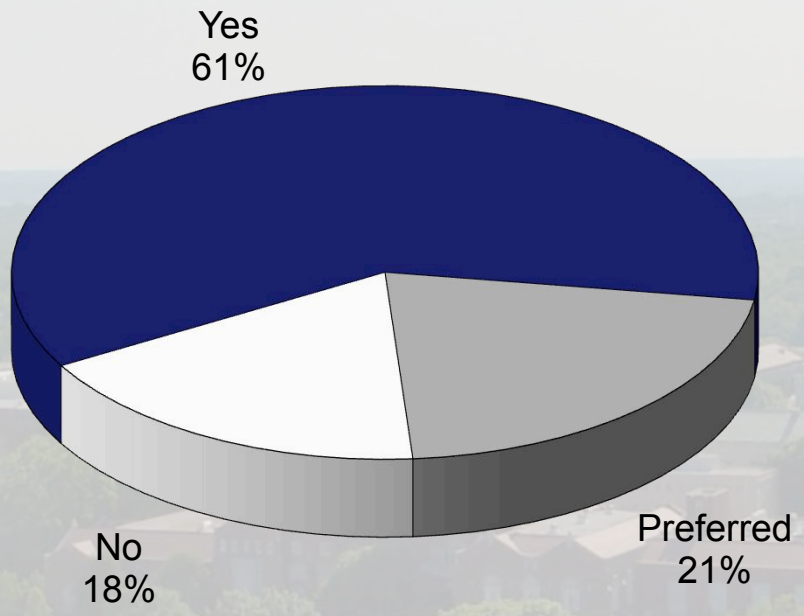
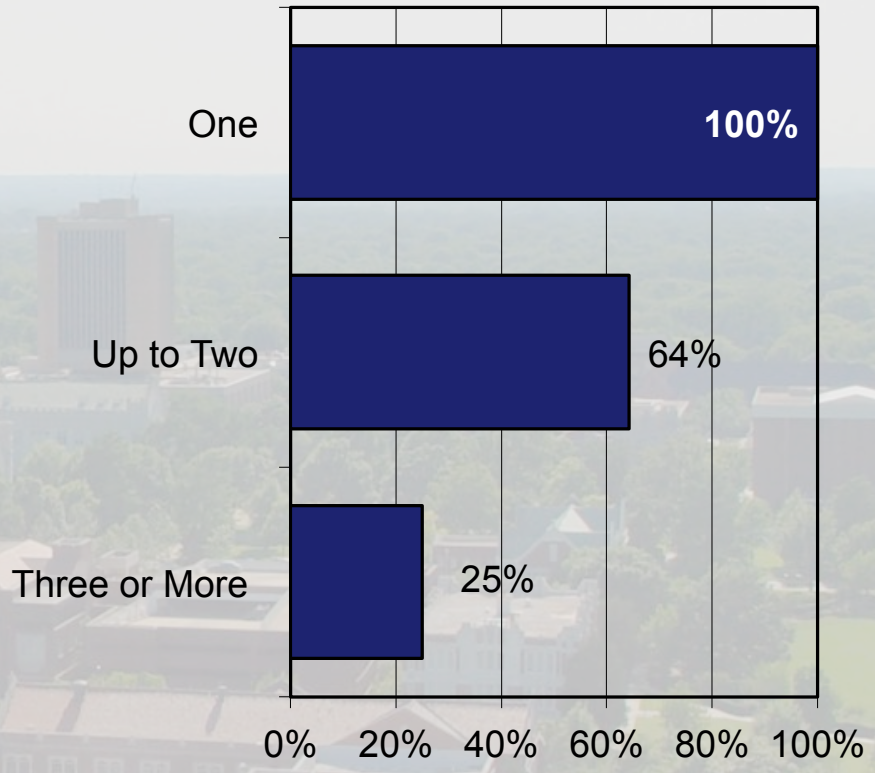
National Organization Survey

Hotel Requirements

Headquarter Hotel Requirement



Number of Properties Willing to Use



Note: Of those respondents with a positive interest in Norman.
Source: CSL National Organization Survey, 2015.

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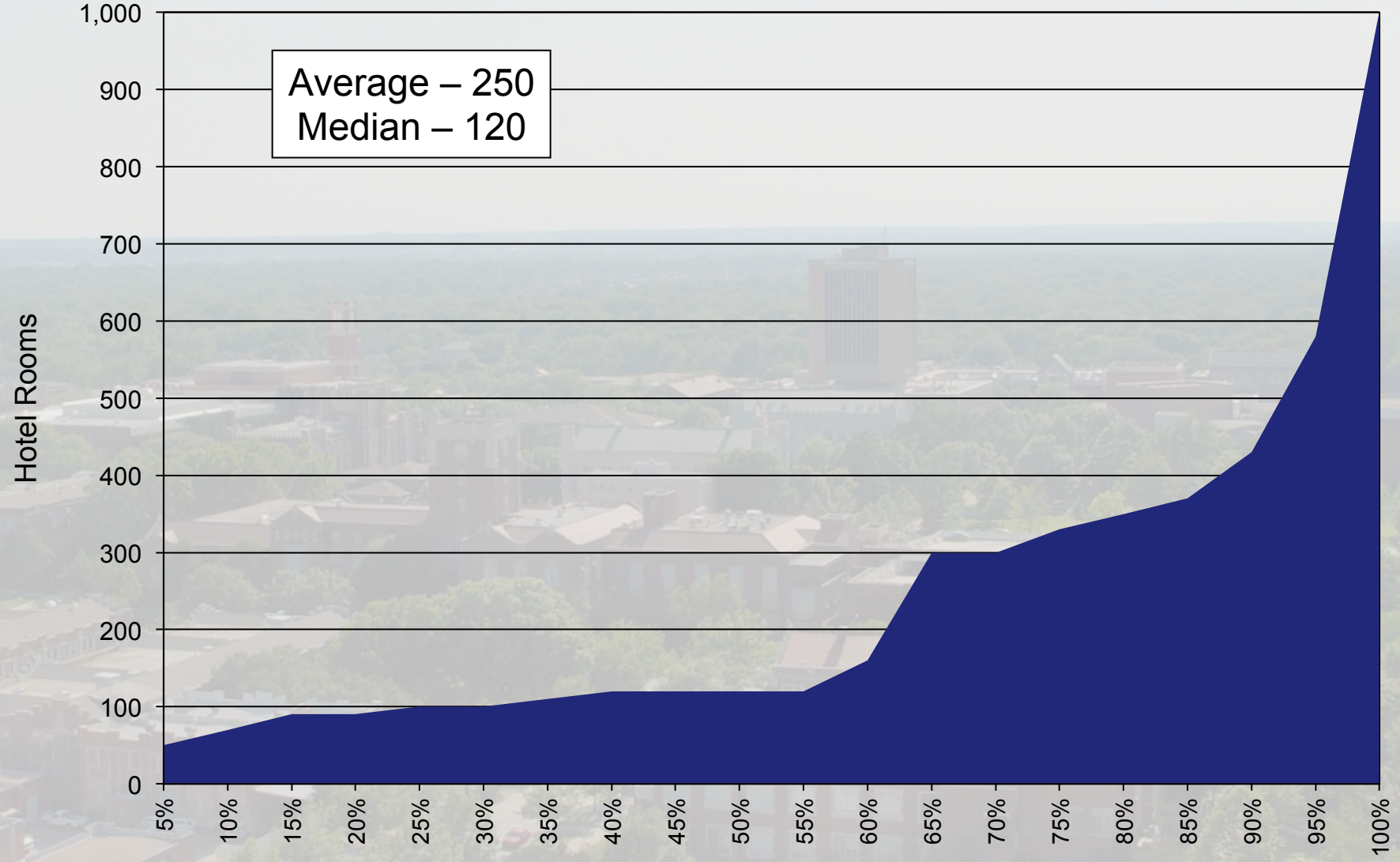
National Organization Survey

Peak Hotel Rooms Required – Qualified Events



Note: Of those respondents with a positive interest in Norman.
Source: CSL National Organization Survey, 2015.

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Market Demand Conclusions

1. Unmet market demand exists to support new convention/expo product development in Norman.
2. Market demand is characterized as moderate-high; measured survey interest in Norman was higher than the average and median measured through more than 60 comparable surveys conducted.
3. There are important limitations in the mix and quality of existing Norman convention facility product.
4. Significant new visitation (including new midweek, shoulder season and off-peak season) and hotel room nights would be generated.
5. Appropriate attached headquarters hotel and proximate ancillary hotel support will be critical, along with sufficient adjacent/proximate parking.
6. OU could be involved in several levels, particularly in terms sponsorship/ recruitment, satellite presence, having expanded/improved local venue to host OU-affiliated or academic events.
7. A site that is proximate to existing convention and hotel infrastructure that leverages private sector investment could create substantial synergy and cost efficiency.

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Market Supportable Program

- Exhibit Hall:
  - 35,000 SF subdividable, column-free, concrete floor space
  - 30-foot or higher ceiling height
  - Utility floor grids, independent loading/public access, climate control
- Ballroom:
  - 20,000 SF subdividable, column-free, carpeted, upscale space
  - 25-foot or higher ceiling height
  - Utility floor grids, independent loading/public access, climate control
- Breakout Meeting Rooms:
  - 15,000 SF of breakout meeting space
  - Subdividable, upscale
- Sufficient parking, pre-function, support and storage space
- 250-room or larger full-service hotel attached, adjacent or closely proximate
- 400 or more total hotel rooms in immediate area
- Full-service HQ hotel will also require its own controlled meeting space

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Comparison with Industry Typical Private Sector Projects

				Norman Embassy Suites	Market Supportable Norman	Difference
Hotel Chain Scale:	Upper-Midscale	Upscale	Upper-Upscale	**Upper-Upscale**	**Upper-Upscale**	
Brand Examples:	Holiday Inn Express, Comfort, Hampton Fairfield, Best Western	Holiday Inn, Springhill Suites, Courtyard Marriott, Hilton Garden Inn	Embassy Suites, Hilton, Marriott, Renassiance, Westin, Hyatt			
Number of Guestrooms:	125	150	250	**283**	**250**	**33**
Food and Beverage:	Limited to None	Limited to Full Restaurant	Full Rest/ Room Service	**Full Rest/ Room Service**	**Full Rest/ Room Service**	
Convention Space (SF):						
Exhibit (prime, contiguous)	0	0	0	**0**	**35,000**	**-35,000**
Ballroom (grand / largest)	0	3,000	10,000	**28,800**	**20,000**	**8,800**
Meeting (junior ballroom + breakouts)	1,500	2,000	12,000	**14,100**	**15,000**	**-900**
Sellable Space	1,500	5,000	22,000	**42,900**	**70,000**	**-27,100**

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Development Scenarios

Scenario 1: Stand-Alone Convention Center

- Public sector builds and owns convention center
- Private sector manages via contract
- Public sector funds operating shortfall

Scenario 2: Public/Private Convention Center

- Public sector builds and owns new convention/expo product attached to hotel
- Hotel partner operates via lease agreement
- No ongoing public sector operating subsidy

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Important Site Characteristics

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

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Next Steps

PHASE 2:
Site & Cost/Benefit Analysis

1. Site analysis
2. Event/utilization analysis
3. Construction cost estimates
4. Financial operating estimates
5. Economic impacts
6. Cost/benefit conclusions
7. Funding/ownership/management

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