



Leisure and Meeting Conclusions and Implications

Presentation to Positively Cleveland Board Marketing Committee

Supplemental Report

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Supplemental Report Objective

Report Objective

- Assist in developing a marketing plan for Cleveland as a leisure and meeting/conventions destination by summarizing:
 - National and Ohio travel and tourism trends and forecasts
 - Convention and meeting industry conditions and trends
 - Competitive strengths and weaknesses of several midwest markets

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 - Climate: National and Ohio Travel/Tourism Trends
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Conclusions Summary

1. **FORECAST:** US Travel Assoc. forecasts travel spending to increase by 3% to 4% annually in 2012 & 2013, but travel trips will grow by only 2% annually because of increasing energy and hotel costs. Travel businesses, especially hotels, expect good profitability. Rebound in travel/tourism employment is uncertain.
2. **LEISURE TRAVEL:** Leisure travel demand is increasing slowly as travelers are cautious about the economic recovery. Increases in hotel rates and higher energy costs may reduce impact of improving economic conditions.
3. **BUSINESS TRAVEL:** Overall, business travel is continuing to fall due to lean workforces, tight corporate budgets and use of technologies to replace travel. Businesses serving corporate travel see increasing activity and expect modest increases in 2012-13.
4. **OHIO OVERNIGHT TRAVELERS:** Overnight travel is about 20% of all Ohio trips. Only 1/3 of overnight trips are regarded as “marketable”. 40% use Internet or online sources to plan their trips. Two-thirds of overnight visitors come from under 300 miles, and two-thirds come from April to Sept. Special events are important draws.
5. **OHIO’S DAY-TRIPPERS:** The daytrip sector (about 80% of trips) has grown more than overnight trips. About ½ of day-trips are regarded as “marketable” Special events & shopping are important draws for Ohio day-trippers.
6. **OHIO’S TRAVELERS:** Compared to US travelers, Ohio’s travelers are younger and less affluent.
7. **TOTAL MEETINGS AND CONVENTIONS:** The medical/health care sector has 1,550 (17%) of the US’s annual total of 9,000 business-to-business meetings. (Based on its size, Cleveland would host 45-50 exhibitions and 8 medical exhibitions per year.) Top cities for conventions are Las Vegas, NYC, Chicago, Orlando, Atlanta, Washington DC and San Diego.
8. **MEETING TRENDS:** Meeting planners expect slowly increasing (2% annual) meeting demand but not necessarily more attendees. Affordability has always been a factor, but planners report even more emphasis on controlling costs. Budget limitations and desire for less glamorous venues are expected to be an opportunity for midwest cities.
9. **INDUSTRY SECTOR GROWTH RATES:** Above average convention/meeting growth rates are expected in the following industries: communications/IT, machinery/finished busi. output, raw materials/sciences, discretionary consumer services & financial/legal/real estate. Medical/health care is projected as a low growth industry.

Conclusions Summary (Continued)

10. **TARGET INDUSTRY MATRIX:** When growth rates, industry size and Cleveland's economic strengths are used as criteria, the preliminary targeted industries include: Medical and health care, raw materials/science, machinery/finished business output and discretionary consumer services.
11. **COMPETITIVE FACTORS- MARKET SIZE:** Cleveland's midwest competitors (Cincinnati, Columbus, Kansas City, Milwaukee, and Pittsburgh) are comparable metropolitan markets (1.5-2.4 million) and DMA 16+ markets (1.5-2 million)
12. **COMPETITIVE FACTORS- ACCESSIBILITY:** Over 80% of US business travelers use personal vehicles to travel up to 500 miles to meetings and conventions. Cleveland's accessibility by car is comparable to Cincinnati, Columbus and Pittsburgh, and better than Kansas City and Milwaukee. Cleveland's air service is better than most midwest competitors in terms of passenger volumes and number of operations.
13. **COMPETITIVE FACTORS- HOTEL MARKETS:** Cleveland's hotel market is smaller than most of its midwest competitors. Hotel rates are below national averages and mostly comparable across the midwest markets. The cost advantage positions the region favorably against larger and more expensive national convention cities.
14. **COMPARISON TO CLEVELAND**
 - Cincinnati- comparable in regional market size; less air service. Advantage over Cleveland in hotel market size and hotel cost. Comparable convention center size, older than Cleveland.
 - Columbus- smaller regional market, less air service. Strengths are hotel market, size of its convention center.
 - Milwaukee- Metro/DMA markets and hotel market are substantially smaller; hotel costs and air service about the same; convention facility is smaller and older than Cleveland's facility.
 - Kansas City- comparable regional market and air service, larger hotel market with similar availability and costs for visitors, larger but older convention center.
 - Pittsburgh -larger MSA and DMA markets, but a smaller airport. Slightly larger hotel market with higher occupancy and rates: larger convention center that is about 10 years older.

Implications Summary

1. **ECONOMIC RECOVERY:** Increasing economic recovery is forecast to lead to slightly increased travel/tourism volumes despite higher prices. Travel/tourism growth may not immediately lead to strong employment growth .
2. **LEISURE:** Modest leisure travel growth is expected until leisure travelers become more confident. Leisure travelers are likely to be looking for affordable or good-value locations, an opportunity for Cleveland.
3. **BUSINESS:** Business travel has been falling over several years due to the recession, tight budgets and the leaning out of the workforce. Another factor is computer and other technologies that reduce the need for business travel. Based on signs of economic recovery and corporate activity, business travel observers are optimistic for 2012-13.
4. **OHIO TRAVEL:** Ohio travel/tourism research suggests targeting both overnight and daytrip “marketable” travelers. Strategies might include: increasing day trips, broadening activities of business and other visitors, and lengthening seasonal travel patterns. Special events are especially important in attracting overnight visitors and generating day travel. Shopping opportunities are important for day trip travelers.
5. **MARKETING:** Effective use of Internet/online information is key because so much travel/tourism planning is online. Marketing should appeal to younger adults and emphasize the affordability or good value of Ohio’s destinations. It is important to build good personal experiences and word-of-mouth referrals by ensuring that visitors, their relatives and friends enjoy visits.
6. **MEETINGS:** Exhibition industry is expected to grow, but not enough to make Cleveland’s entry easy. Cleveland will have to out-compete existing cities to gain exhibitions. Companies are emphasizing less luxurious venues closer to home to meet tight budget constraints, so Cleveland could capture market share if it can provide good value for meetings and conventions.
7. **TARGETED INDUSTRIES:** Cleveland may also have an opportunity to capture conventions and meetings in industries projected to have above-average meeting growth if the industry fits Cleveland’s economic strengths. Higher-growth industry targets include: machinery, science and energy, and legal services. Moderate growth targets might include transportation and food processing. Despite below average growth forecasts for the medical & health care industry, Cleveland may be attractive to medical industry sectors such as medical devices and medical software.

Implications Summary (Continued)

10. **MARKETING SIZE/ACCESS:** Cleveland's size does not appear to be a major competitive advantage or disadvantage against its midwest competitors (Cincinnati, Columbus, Kansas City, Milwaukee, and Pittsburgh) Cleveland accessibility by car is comparable to Cincinnati, Columbus and Pittsburgh, and probably better than Kansas City and Milwaukee. Cleveland's air service is better than most midwest competitors in terms of passenger volumes and number of operations.
11. **MARKETING HOTEL MARKET:** Cleveland's hotel market is smaller than most of its midwest competitors. Hotel rates are mostly comparable across the midwest markets, favorably positioning the region against larger, more expensive national convention cities.
12. **MARKETING COMPARISONS TO CLEVELAND**
 - Cincinnati- Weaknesses include less air service, older convention center. Advantage over Cleveland in hotel market size and hotel cost.
 - Columbus- Weaknesses include smaller regional market, less air service. Strengths are hotel market, size of its convention center.
 - Milwaukee- Weaknesses include smaller Metro/DMA markets and hotel markets. Convention facility is smaller and older than Cleveland's facility.
 - Kansas City- Strengths include larger hotel market. Larger but older convention center than Cleveland.
 - Pittsburgh – Strengths include larger MSA and DMA markets. Weakness: smaller airport. Mixed: Slightly larger hotel market with higher rates: larger but older convention center.

Climate: National and Ohio Travel/Tourism Trends

Climate: Travel/tourism and the economy

Conclusions

- Travel/tourism Definition: Travel 50 miles or more one-way or stay overnight.
- Travel/tourism Industries: Traveler accommodations, transportation, food and drinking, recreation, entertainment, shopping and other goods and services supplying these industries.
- Importance of Travel/tourism: Travel/tourism represents about 5% of national output according to government data. About 7.6 million persons are employed in travel/tourism and related industries.(1)
- Impact of the current recession:
 - Annual travel/tourism output fell by about 8% in the recession, but has recovered about two-thirds of the loss in output.
 - Travel/tourism employment fell by 11% in the recession and has shown only a slight improvement in employment.(1)

Implications

- Like other areas of the economy, travel/tourism was severely impacted by the recession.
- Growth in travel/tourism business activity will not necessarily result in immediate growth in employment levels.

Climate: US Travel Assoc. forecasts travel spending to increase by 3% to 4% annually in 2012 & 2013

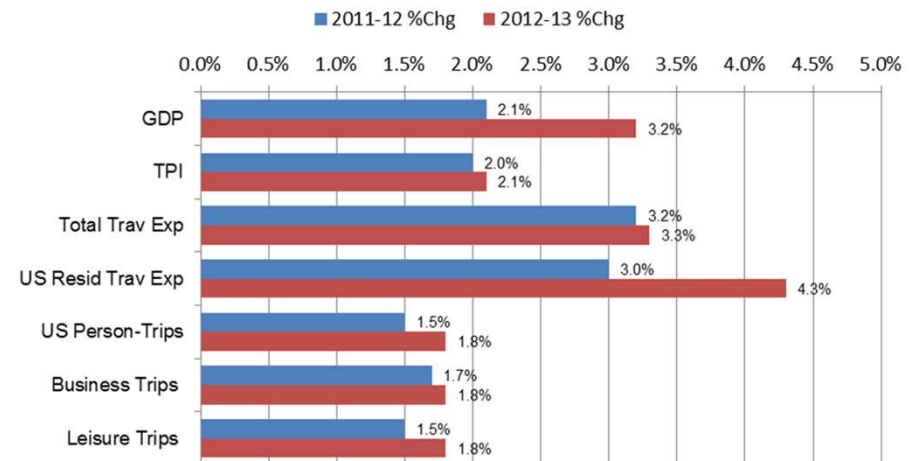
Conclusions

- US Travel Association's economic models forecast travel spending to be about 1% above GDP growth forecast of 2% to 3%. (1)
- Travel spending is increasing faster than GDP primarily due to increased transportation costs and higher hotel rates.
- Travel trips are only expected to grow by 2% per year.
- Other observers, like American Express, are more optimistic about personal and corporate income growth and see slightly more travel growth. (2)

Implications

- Economic forecasts for real GDP growth are critical to travel forecasts.
- Most observers see increasing economic recovery and therefore see slightly increasing travel/tourism volumes despite higher prices.

2012 US Travel Assoc Forecast: 2011-2013 %Change



Leisure Travel Climate: Slight increase expected as economic confidence increases

Conclusions

- Adults are planning about the same amount of leisure travel as last year and the previous year. (1)
 - 69% took leisure travel trips over 50 miles one-way in the past 12 months, about same as last year (68%) and about 10 percentage points below peak (78%) in Feb 2009.
 - Average number of leisure trips about 4 per year.
 - 56% of adults expect to take leisure travel during next six months, down a little since last year (59%).
 - Traveler sentiment (perceptions about interest in traveling, time, finances, affordability, services and safety) is about the same as last year at this time.
- Travel & Leisure Magazine foresees little growth in leisure travel demand. (2)
 - Increased costs for hotel rooms & airline tickets
 - Some improvements in travel convenience.
- Leisure travel represents about three-fourths of trips (over 50 miles one-way) according to government travel data.(3)

Implications

- Leisure travel will grow modestly until leisure travelers become more confident about the economic recovery.
- Higher hotel room costs and higher energy costs for air travel and vehicle trips will partially offset stronger consumer confidence and income growth.
- Leisure travelers are likely to be looking for good leisure travel value opportunities.
- Cleveland may have opportunities as a moderately priced leisure destination.

Sources: (1) US Travel Association, travelhorizons, Feb 2012

(2) Travel & Leisure Magazine, "Most Important Travel Trends of 2012

(3) US Dept of Commerce, OTTI, Analysis of Travel and Tourism Satellite Accounts.

Business Climate: Business traveler surveys show continued drop in travel plans

Conclusions

- Business travel surveys suggest a continuation of a six-year decline in business travel. (1)
 - 22% of adults traveled for business in the past 12 months, down from 24% previous year. The peak business travel was 39% reported in Feb 08.
 - 41% of business travelers took trips for client sales or service calls.
 - About 31% of business travelers went to conferences/ conventions.
 - The average number of trips dropped to 4.8 per year, down from 6.3 last year and from 2009 peak of 7.6.
 - Average client sales/service calls and conference/ convention trips both dropped by more than 40%
 - Only 15% of adults plan to travel for business in next 6 months, about same as since 2009.
- Business travel is about a quarter of overnight trips or trips over 50 miles one-way, according to government data. (2)

Implications

- Some observers think that computer and other technologies are reducing the need for business travel.
- Others attribute the drop in business travel to the recession and tighter budgets.
- The leaning out of the executive workforce has also made it more difficult for executives to take time for travel.

Business travel observers are more optimistic than business travelers about travel plans in 2012-13.

Conclusions

- In November 2011, AMEX said that meeting demand was increasing, despite business concerns about economic uncertainties. Many planners reported increased client activity and expected more meeting activity in 2012. (1)
- Global Business Travel Association reported that business travel was stronger than expected in 2011. The organization forecasts a steady growth in business travel spending in 2012, especially in the US as the recovery accelerates. The organization's November 2011 forecast projected business travel to hit pre-recession high by 2012Q2.(2)
- Major hotel consultant PKF projected strong growth in hotel profits, due to greater traveler income and confidence, international demand in the US and the low increase in supply of hotel rooms due to recession.(3)

Implications

- Travel/tourism executives may offer higher travel market growth projections than business travelers.
- Travel/tourism executives may be focusing on profits rather than travel volume or just providing industry spin.

Ohio's Travel: About 35 million (19%) of Ohio's 180 million annual trips are overnight trips

Conclusions

- Day trips account for 81% (144 million) trips.
- Ohio's 35 million overnight trips can be divided into business trips (17%), vacation with friends or relatives (50%) and marketable trips (33%)
- Northeast Ohio has over 11 million overnight trips annually, about 30% of Ohio's total.
- Two-thirds of Ohio's overnight trips occur from April to September.
- Overnight travelers stay about 3 nights in Ohio, less than the national average. (1)

Implications

- A relatively small number (11.6 million) of Ohio's 180 million trips are "overnight marketable". Strategies must consider increasing day trips and broadening activities of business and other visitors.
- Seasonal factors play an important role in visitor patterns.

Ohio 2010 Travel Market		
	Trips (Mil)	%of Total
Day Trips	143.9	81%
Overnight	34.8	19%
Business	5.7	17%
Vaca-Friends/Relatives	17.5	50%
Marketable	11.6	33%
Total Trips (Millions)	178.7	100%

Source: Longwood International, Travel and Tourism in Ohio: 2010 Travel Year

Overnight Trips By Region		
	Trips (Mil)	%of Total
Northeast Region	11.6	30%
Central Region	9.9	25%
Southwest Region	9.5	24%
Northwest Region	5.6	14%
Southeast Region	2.7	7%
Total Overnight Trips*	39.3	100%

*Note: Regional totals do not reconcile to statewide total of 34.8 million trips

Source: Longwood International, Travel and Tourism in Ohio: 2010 Travel Year

Overnight Marketable Trips Seasonal Patterns		
Jan-Mar	19%	
Apr-Jun	29%	
July-Sep	37%	
Oct-Dec	15%	

Source: Longwood International, Travel and Tourism in Ohio: 2010 Travel Year

Overnight Marketable Trips: Total Nights Away			
	Ohio	US	OH Index
Avg No of Nights	2.9	3.5	83
1 night	33%	26%	127
2 nights	37%	28%	132
3-6 nights	23%	32%	72
7+ nights	7%	14%	50

Source: Longwood International, Travel and Tourism in Ohio: 2010 Travel Year

Ohio's Travel: Two-thirds of overnight visitors come from under 300 miles

Conclusions

- Special events are the most important attractions for overnight (31%) and daytrip (23%) visitors.
- Outdoors, theme parks and tours are about equal attractions for overnight travelers. Shopping is the second most important attraction for day visitors.
- 66% of overnight visitors come from under 300 miles and 87% come from under 500. Three-quarters come from adjacent states.

Implications

- Special events stand out as a significant factor in attracting overnight visitors to Ohio.
- Most Ohio visitors come from regional centers and nearby states.

Attractions for Marketable Trips		
	Overnight	Daytrip
Special Event	31%	22%
Outdoors	14%	10%
Theme Park	14%	12%
Touring	13%	18%
City	9%	8%
Business/pleasure	8%	NA
Shopping	7%	23%
Data NA	2%	6%
Resort	2%	1%

Note: Daytrip Business/pleasure data not available; data does not add to 100%

Totals did not add to 100%

Source: Longwood International, Travel and Tourism in Ohio: 2010 Travel Year

Distance & Origin for Overnight Marketable Trips		
Distance Traveled to Ohio for Overnight Trips		
	%	Cum%
Under 50 miles	10%	10%
50-99 miles	17%	27%
100-299 miles	39%	66%
300-499 miles	21%	87%
500-1,000 miles	7%	94%
Over 1,000 miles	6%	100%

Source: Longwood International, Travel and Tourism in Ohio: 2010 Travel Year

State of Origin for Overnight Marketable Trips		
State	%	Cum%
Ohio	45%	45%
Michigan	10%	55%
Pennsylvania	8%	63%
Indiana	5%	68%
Kentucky	5%	73%
W. Virginia	4%	77%
New York	3%	
Illinois	3%	
Florida	2%	
California	1%	
Other	14%	

Source: Longwood International, Travel and Tourism in Ohio: 2010 Travel Year

2005-10 Ohio Travel: Day travel grew more than overnight travel

Conclusions

- Ohio generates nearly 180 million trips annually; about 80% of the total are daytrips.
- In 2010, Ohio's travel market grew about 5%, the first significant growth since 2005. The cause was a 5% increase in daytrips.
- There are 80 million "marketable" trips annually.
- About 1/3rd of overnight trips and 1/2 of daytrip are "marketable" (not taken to visit family or relatives or for business purposes).
- Marketable overnight trips showed growth from 2007-10.
- Among daytrips, business and VFR trips grew more rapidly marketable trips.

Implications

- Marketing strategies should consider both "marketable" day and overnight trips.
- Daytrips represent over 85% of all marketable trips and faster growing than overnight trips.

Ohio Day and Overnight Travel Market							Snapshot
	2005	2006	2007	2008	2009	2010	
Total (Mil Trips)	172.2	173.8	172.4	172.2	171.2	178.7	
Overnight (Mil)	34.7	34.6	35.8	34.6	33.4	34.8	
Day (Mil)	137.5	139.2	136.6	137.6	137.8	143.9	
Ohio Day and Overnight Travel Market (2005 Index = 100)							
Total	100	101	100	100	99	104	
Overnight	100	100	103	100	96	100	
Day	100	101	99	100	100	105	
Source: Longwood International, Travel and Tourism in Ohio: 2010 Travel Year							
Ohio Overnight Travel Market By Segment							
	2005	2006	2007	2008	2009	2010	
VFR	18.4	17.8	18.1	17.4	16.2	17.5	
Business	6.2	6.6	6.3	6.0	5.3	5.7	
Marketable	10.1	10.2	11.4	11.2	11.9	11.6	
Overnt Total Trips	34.7	34.6	35.8	34.6	33.4	34.8	
Ohio Overnight Travel Market (2005 Index = 100)							
VFR	100	97	98	95	88	95	
Business	100	106	102	97	85	92	
Marketable	100	101	113	111	118	115	
Overnt Total Trips	100	100	103	100	96	100	
Source: Longwood International, Travel and Tourism in Ohio: 2010 Travel Year							
Note: VFR is vacationing with friends or relatives							
Ohio Day Travel Market By Segment (Mil of trips)							
	2005	2006	2007	2008	2009	2010	
Day	137.5	139.2	136.6	137.6	137.8	143.9	
VFR	47.7	48.7	54.3	56.4	55.1	53.9	
Business	18.6	19.6	23.5	20.6	17.9	20.3	
Marketable	71.2	71.0	58.8	60.5	64.8	69.8	
Ohio Day Travel Market (2005 Index = 100)							
VFR	100	102	114	118	116	113	
Business	100	105	126	111	96	109	
Marketable	100	100	83	85	91	98	
Source: Longwood International, Travel and Tourism in Ohio: 2010 Travel Year							
Note: VFR is vacationing with friends or relatives							

Ohio's Travel: 40% of persons planning an overnight trip use the internet or online sources

Conclusions

- Over 40% plan an overnight trips in a month or less.
- Internet/online sources are now used by 40% of persons who took a marketable overnight trip.
- Personal Sources are important: 20% of Ohioans use Personal experience and 11% use advice from family or friends in planning their trip.
- Although Ohio does not have a reputation for online usage, Ohio was slightly above the national average in persons using the Internet to plan an overnight trip from 2005 to 2010.

Implications

- A strong Internet/online presence is needed to service the large number of potential visitors who look at online sources.
- It is also important to make sure that visitors and their relatives and friends enjoy their visits.

Planning Cycle (Overnight Marketable Trips)

1 month or less	41%
2 months	22%
3-5 months	21%
6 months or more	16%

Information Sources Used

Internet/online	40%
Personal Exp/past visit	19%
Hotel or resort	15%
Advice from relatives/friends	11%
Books	9%
Auto club	8%
Toll-free number	5%
Local Visitor Bureau/C of C	4%
Association/Club	4%
Magazine	4%
Travel agent	3%
Newspaper	3%
Airline	2%
Social Networking site	2%
Radio	1%
Company w/group tours	1%
Television	1%

Use Internet for Overnight Trip Planning

	Ohio	US	Oh Index
2005	44%	42%	105
2006	46%	45%	102
2007	50%	50%	100
2008	55%	53%	104
2009	53%	52%	102
2010	57%	53%	108

Ohio's Travelers: Compared to US travelers, Ohio's travelers appear to be younger and less affluent

Conclusions

- Ohio is not known as a destination for younger adults, but Ohio tourism surveys show that Ohio's overnight visitors are younger than the US average.
- Partly as a result of their youth, Ohio's overnight visitors are less likely to have full-time jobs or to be married.
- Ohio's visitors have lower incomes than the US average.

Implications

- Based on Ohio tourism surveys, marketing efforts should include strong appeals to younger adults and should also emphasize the affordability or good value of Ohio's destinations.

Demographic Profile of Ohio Overnight Travelers			
	Ohio	US	OH Index
Male	46%	47%	98
Female	54%	53%	102
Age			
Avg Age	43.4	46.0	94
18-24	15%	11%	136
25-34	18%	18%	100
35-44	23%	20%	115
45-54	19%	20%	95
55-64	13%	16%	81
65+	12%	16%	75
Marital Status			
Married/with partner	69%	72%	96
Never Married	23%	21%	110
Divorce,Widow,Separated	8%	7%	114
Household Size			
1 member	18%	16%	113
2 members	27%	35%	77
3 members	19%	18%	106
4 members	36%	31%	116
Education			
Post-grad	14%	19%	74
College Grad	39%	40%	98
Some College	29%	26%	112
HS or less	17%	14%	121
Other	1%	1%	100
Employment			
Full-time/self empl	48%	49%	98
Part-time	13%	11%	118
Not empl/retired/other	39%	40%	98
Income			
\$100k+	23%	31%	74
\$75k-99k	17%	16%	106
\$50k-74k	25%	21%	119
\$25k-49k	22%	22%	100
Under \$25k	13%	10%	130

Source: Longwood International, Travel & Tourism in Ohio: 2010 Travel Year

Climate: Convention and Meeting Trends

Conventions/meetings: US has about 9,000 business-to-business exhibitions annually

Conclusions

- Positively Cleveland is competing to improve Cleveland's share of 9,000 business exhibitions. (1)
- Largest category is medical & health care with about 1,550 exhibitions.
- Raw materials/science and business services have about 900 exhibitions.

Implications

- Based on its size alone, Cleveland would be expected to have about 45-50 exhibitions per year.
- Cleveland would be expected to host about 8 major medical exhibitions per year.

2009 Business to Business Exhibitions		
Industry/Sector	No of Events	% of Total B-to-B
Medical & Health Care (MD)	1,549	17.3%
Raw Materials & Science (RM)	930	10.4%
Professional Business Services (BZ)	893	10.0%
Communications & Info Technology (IT)	784	8.8%
Education (ED)	672	7.5%
Financial, Legal & Real Estate (FN)	658	7.3%
Consumer Goods & Retail Trade (CG)	649	7.2%
Sporting Goods, Travel & Amusement (ST)	491	5.5%
Discretionary Consumer Services (CS)	472	5.3%
Machinery & Finished Busi Outputs (ID)	435	4.8%
Transportation (TX)	413	4.6%
Building, Construction, Home & Repair (HM)	386	4.3%
Government (GV)	352	3.9%
Food (FD)	278	3.1%
Total Business-to-Business Events	8,962	100.0%

Source: 2012 CEIR Index Report, Table 1-1, based on CEIR Exhibition Industry Census 2010

Note: Approximately 3,000 Business-to-Consumer Shows are not included in totals.

Note: Approximately 500 small shows <3,000 SF or < 10 exhibitors are not included in totals.

Conventions/Meetings: What cities are top locations for conventions, meetings and trade shows?

Conclusions

- Top 5 US cities for Trade and Consumer Shows were Las Vegas, New York City, Chicago, Orlando and Atlanta.
- Top 5 US cities for Health Care Meetings were Orlando, Washington DC, San Diego, Las Vegas and Chicago.

Top 10 Cities for Trade and Consumer Shows (2008)

Rank	City	Total No of Shows
1	Las Vegas	252
2	New York City	127
3	Chicago	122
4	Toronto	120
5	Orlando	100
6	Atlanta	97
7	San Diego	83
T8	Boston	72
T8	Dallas	72
10	Denver	71
	Other locations	3851

Source: Tradeshow Week Data Book 2008, based on 4967 shows

Implications

- Top cities for conventions and meetings have many competitive advantages.
- However, with the exception of Chicago, few competitors are in the midwest.

Top Healthcare Meeting Locations (2010)

Rank	Location
1	Orlando
2	Washington, D.C.
3	San Diego
4	Las Vegas
5	Chicago
6	Boston
7	San Francisco
8	New Orleans
9	Atlanta
9	San Antonio
11	Phoenix
11	Baltimore
13	New York
14	Miami
14	Anaheim
16	Tampa-St. Pete
17	Philadelphia
17	Seattle
19	St. Louis
20	Denver
20	Scottsdale

Source: Health Care Exhibitors Association

Conventions/meetings: Industry studies project 2%-3% growth in overall meeting metrics

Conclusions

- 9,000 exhibitions is opportunity to reach over 2.1 million exhibitors and 60 million attendees.
- Attendance is projected to grow over 3%.
- Even with strong growth exceeding GDP, 2013 exhibition year will be below 2008 figures. (1)

Implications

- Cleveland will have to out-compete existing cities to gain exhibitions.
- Exhibition industry is expected to grow, but growth rate is not high enough to make Cleveland's entry easy.

Current and Forecast Exhibition Industry Growth						
INDUSTRY METRICS	2008	2009	2010	2011^{2/}	2012^{2/}	2013^{2/}
Net Square Feet (Mil SF)	563	498	490	505	520	537
Exhibitors (Mil)	2.20	1.97	1.95	1.99	2.04	2.10
Attendees (Mil)	65.7	61.1	62.6	64.9	67.0	69.3
Real Revenues 1/ (Mil, 2009\$)	12,410	10,999	10,278	10,502	10,809	11,207
ANNUAL % CHANGE	2008	2009	2010	2011	2012^{2/}	2013^{2/}
Real GDP Growth	-0.3%	-3.5%	3.0%	1.7%	2.3%	2.6%
Net Square Feet	-1.4%	-10.9%	-2.1%	2.7%	3.0%	3.3%
Exhibitors	-2.0%	-10.7%	-1.1%	2.3%	2.7%	2.9%
Attendees	-3.2%	-7.5%	2.4%	3.4%	3.1%	3.3%
Real Revenues 1/	-3.6%	-9.6%	-8.4%	2.3%	2.7%	3.3%
Total	-2.6%	-9.7%	-2.4%	2.7%	2.9%	3.2%
INDEX (2009=100)	2008	2009	2010	2011^{2/}	2012^{2/}	2013^{2/}
Net Square Feet	112.3	100.0	97.9	100.5	103.5	107.0
Exhibitors	112.0	100.0	98.9	101.2	104.0	107.0
Attendees	108.1	100.0	102.4	105.9	109.2	112.8
Real Revenues 1/	110.6	100.0	91.6	93.7	96.3	99.4
Total	110.8	100.0	97.6	100.2	103.1	106.4
Source: 2012 CEIR Index Report, Table 2-2						
Note: 1/ Inflation Adjusted Revenues, adjusted by CPI for all urban consumers (CPI-U). 2/ Forecast						

Conventions/Meetings: Consensus is modest increase in number of meetings and more pressure to control costs

Conclusions

- Meeting planners are more optimistic than last year, but remain concerned that a weak economy will affect attendance. (1)
 - Overall, private meeting planners expect a little growth in number of meetings, but expectations are limited because they expect higher costs and lower budgets.
 - One-third of planners are planning virtual or green meetings.
 - Planners reported rising hotel occupancy and reduced event discounting. Most important criteria for planners are location, convenience and rates.
 - Government meeting planners are pessimistic because of budget constraints.
- AMEX Global Travel forecasts an increased number of smaller, shorter meetings with fuller agendas tied to business affairs. (2)
- Meetings and Conventions Magazine: Consensus forecast for 2012 sees increase in hotel rates and lead times because of slightly increased business travel and flat hotel room supply. (3)
 - Market growth will be moderate, about like 2005-06 (not 2007) with companies focused on business growth, keeping employees, development.

Implications

- Meeting observers expect increased business activity and rising costs.
- Companies will be watching costs and budgets very closely.

Sources: (1) Meeting Focus Magazine, "2012 Meetings Market Trends Survey" (Feb 2012)
(2) American Express Meetings and Events, "AMEX Global Travel Forecast 2012" (Nov 2011)
(3) Meetings and Conventions Magazine, Forecast 2012: Are We Ready for Optimism" (Dec 2011)

Conventions/Meetings: Cost concerns mean more opportunities for second-tier cities like Cleveland

Conclusions

- Meeting Focus Magazine indicated that cost pressures may lead some planners to look at other sites and second-tier markets.(1)
 - Many facilities are used but 40% are convention/ conference centers. Restaurants are popular off-site meeting places.
 - Over 40% of meetings offer golf and spousal programs as activities.
- AMEX expects companies to prefer less-luxurious venues that are closer to home to keep costs down. The number of attendees & length of stay will decrease because of company pressures. (2)
- Meeting and Convention Center Magazine: Trade shows will increase a little (3%). Conference centers will continue a strong rebound with focus on mid-American bargains.(3)
- Meeting Market Report: Affordability of Destination has historically been a top criteria in choosing sites for meetings and conventions. (4)

Implications

- Affordability has historically been a top factor in selecting meeting & convention sites.
- With the current economy, Cleveland, like other second-tier cities, could capture market share if it can provide good value for meetings and conventions.

FACTORS IN CHOOSING AN ASSOCIATION MEETING LOCATION			
Top Factors When Choosing Location	Association Meeting	Conventions	Average
Affordability of Destination	77%	79%	78%
Availability of Suitable Hotels	68%	84%	76%
Safety and Security of Destination	62%	65%	64%
Distance Traveled by Attendees	53%	50%	52%
Ease of Transportation	45%	50%	48%
Transportation Costs	40%	35%	38%
Clean and Unspoiled Environment	26%	29%	28%
Mandated by By-Laws	22%	24%	23%
Climate	17%	19%	18%
Sightseeing, Cultural Events, Attractions	10%	16%	13%
Availability of Recreational Facilities	10%	10%	10%
Glamorous/Popular Image of Location	10%	10%	10%

Source: 2006 Meetings Market Report, Meetings & Conventions Magazine

Sources: (1) Meeting Focus Magazine, "2012 Meetings Market Trends Survey" (Feb 2012)
 (2) American Express Meetings and Events, "AMEX Global Travel Forecast 2012" (Nov 2011)
 (3) Meetings and Conventions Magazine, Forecast 2012: Are We Ready for Optimism" (Dec 2011)
 (4) Meetings and Conventions Magazine, 2006 Meetings Market Report.

Conventions/meetings: Varying industrial sector growth rates offer opportunities for Cleveland

Conclusions

- Communications & IT, Machinery & Finished Business Outputs, and Financial/Legal/Real Estate are projected to have good growth through 2013.⁽¹⁾
- Medical/health care and Raw materials/sciences are projected to grow a little less than average. ⁽¹⁾

Implications

- When combined with industry size and fit for Cleveland, strong growth projections provide additional support for targeted industry approaches.

CEIR Exhibition Industry Composite Index by Sector						
CEIR INDEX, 2009=100	2008	2009	2010	2011 ^{1/}	2012 ^{1/}	2013 ^{1/}
Communications & Info Technology (IT)	112.8	100.0	94.3	101.9	109.9	118.8
Machinery & Finished Business Outputs (ID)	103.8	100.0	91.1	101.3	109.4	116.7
Government (GV)	99.2	100.0	103.1	110.3	113.1	116.3
Financial, Legal, & Real Estate (FN)	126.6	100.0	101.1	104.7	109.9	116.2
Consumer Goods & Retail Trade (CG)	114.5	100.0	106.2	109.0	110.7	113.4
Food (FD)	115.6	100.0	104.5	106.0	108.7	111.3
Transportation (TX)	115.3	100.0	97.7	103.2	106.8	110.7
Discretionary Consumer Services (CS)	105.4	100.0	101.5	103.9	106.3	109.0
Overall Exhibition Industry	110.8	100.0	97.6	100.2	103.1	106.4
Raw Materials & Science (RM)	105.6	100.0	94.8	97.9	100.7	104.0
Business Services (BZ)	109.6	100.0	94.5	95.9	98.3	101.1
Medical & Health Care (MD)	108.5	100.0	98.7	98.9	99.7	101.1
Education (ED)	107.2	100.0	96.3	97.3	98.4	99.5
Sporting Goods, Travel, & Amusement (ST)	115.8	100.0	97.0	96.3	97.5	99.0
Building, Construction, Home & Repair (HM)	117.6	100.0	91.3	86.5	87.2	89.0
Source: 2012 CEIR Index Report, Table 2-3						
Note: ^{1/} Forecasts						

Conventions/meetings: Above Average Exhibition Growth

Conclusions

ABOVE AVERAGE EXHIBITION GROWTH FORECAST

- **Communications and Information Technology**- Strong IT exhibition growth from 2003 to 2008. Drop in 2009-10 before good 2011 rebound. Growth in electronics and communications services will result in strong IT exhibition growth far above the overall exhibition industry average.
- **Machinery & Finished Business Outputs**- Rapid growth in exhibitions in machinery and business output from 2000 to 2008, before fall in 2009 and 2010. Projected growth in construction, automotive, equipment, and other manufacturing sectors should sustain strong 2012-14 exhibition growth substantially above overall exhibition growth rate.
- **Raw Materials and Sciences**- Exhibition performance grew substantially from 2000 to 2008. Fell in 2009-10 before rebounding in 2011. Strong recovery of the science, manufacturing and agricultural sectors and progress toward new energy technologies for energy supply will lead to above-average exhibition growth through 2014.
- **Discretionary Consumer Services**- Average exhibition performance for past decade; less than average decline during recession. Relatively steady growth expected to be a little above overall exhibition performance.
- **Financial, Legal & Real Estate**- Volatile exhibition industry performance from 2000 to 2008. Severe contraction due to financial crisis, but a slight recovery in 2010-11. Above average growth expected from 2012 to 2014 as economy strengthens and industry conditions normalize.

Implications

- Cleveland has a strong industrial base in parts of several industries with good growth forecasts.
- Several industries have also been targeted by state economic development officials as priorities for development.
- Industry components with good potential for Cleveland include machinery, science and energy, and legal services.

Conventions/meetings: Moderate Exhibition Growth

Conclusions

MODERATE EXHIBITION GROWTH FORECAST

- **Consumer Goods & Retail Trade**- Significant decline from 2006 to 2009 but some recovery in 2010 & 2011. Moderate growth expected.
- **Transportation**- Transportation exhibitions declined faster than overall exhibition decline from 2000 to 2011. Transportation sector exhibition performance expected to surpass the average gain for exhibition industry. Projected exhibitions in 2014 likely to be well below levels of last decade
- **Food**- Gradual decline from 2000 to 2007 with sharp recession drop and recovery from 2008 to 2011. Moderate exhibition growth expected with restaurant industries stronger than food manufacturing.
- **Building, Construction, Home and Repair**- Mirroring the housing boom, exhibitions grew substantially from 2000 to 2007 and then dropped sharply from 2008 to 2011. Improved in construction activity and employment should result in moderate increase in exhibitions, but not full recovery to 2007 level.
- **Sporting Goods, Travel and Amusement**- Exhibition performance continued decline began in 2008. Only sector declining despite improving macroeconomic drivers. Exhibitions should rebound at a modest rate from 2012 to 2014.
- **Professional Business Services**- Contracting for a decade, but modest recovery is expected.

Implications

- Cleveland may have potential in industry sectors with strong regional presence, such as transportation.
- Food processing, an industry targeted for state level economic development efforts, may also be a target.

Conventions/meetings: Below Average Exhibition Growth

Conclusions

BELOW AVERAGE EXHIBITION GROWTH FORECAST

- **Medical & Health Care-**
 - Exhibitions performed well from 2000 to 2007 supported by rising expenditures and employment in health care. Dropped off like other exhibition categories from 2008 to 2010 and recovered modestly in 2011.
 - Major changes in the health care expenditures, reimbursements and regulation could stimulate interest in meetings. Cost-cutting among medical institutions is also expected.
 - Medical and health care exhibitions growth expected to be one-half of exhibition industry growth rate.
- **Education-** Volatile but generally contracting exhibition performance over past decade. Contraction of government funding may be a threat.
- **Government-** Significantly out-performed overall exhibition industry from 2000 to 2010 with expansion of government. Slight decline in 2011 and no growth expected from 2012 to 2014.

Implications

- Despite below average growth forecasts, medical & health care industry is a good target because of Cleveland's medical industry strength and the opening of Medical Mart/ Convention Center.
- Cleveland may be attractive as a location for medical industry sectors like medical devices and medical software.

Conventions/meetings: Data suggests exhibition industry targets

Conclusions

- Industry size and growth, Cleveland's economic strengths, and the industry's fit within Cleveland's economic development strategies all are factors in selecting preliminary industry targets.

Implications

- Preliminary targets include medical and health care, raw material/science, machinery/finished business outputs and discretionary consumer targets.
- Having targets doesn't mean ignoring other industries ignored as potential targets for meetings and conventions.

Preliminary 2012 Target Industry Matrix						
Industry/Sector	Size = No of Events	% of Total	Growth= 2013 Index	Econ Dev Priority	Comment	Potential Strategic Fit for Positively Cleveland
Medical & Health Care (MD)	1,500	17%	101	High	Large industry size, but uncertain growth. Very competitive, long-time horizon. Very good fit for Cle, especially with CC/MM.	1-High
Raw Materials & Science (RM)	900	10%	104	High	Large industry, ok growth. Very good fit with potential of Utica Shale & other energy. Science is also good fit.	1-High
Discretionary Consumer Services	500	5%	109	High	Medium industry, ok growth Arts & religion may be fit for Cle.	1-High
Machinery & Finished Busi Outputs (ID)	400	5%	117	High	Small industry, but very good growth potential. Very good fit for Cleveland.	1-High
	3,300	38%				
Business Services (BZ)	900	10%	101		Big industry, but weak growth. May have components that fit Cleveland.	2-Medium
Communications & Info Technology (IT)	800	9%	119	High	Large, high growth. High potential, but does Cleveland have sufficient strength.	2-Medium
Financial, Legal & Real Estate (FN)	700	7%	116		Medium industry, strong growth No obvious fit for Cle.	2-Medium
Sporting Goods, Travel & Amusement (ST)	500	6%	99		Medium industry, weak growth Sports & gaming may be fit for Cle.	2-Medium
Transportation (TX)	400	5%	111	High	Small industry, but good growth potential. Good fit for Cleveland.	2-Medium
Food (FD)	300	3%	111	High	Small industry, but good growth potential. Moderate fit for Cleveland. Possible growth target for economic development partners.	2-Medium
	3,600	39%				
Education (ED)	700	8%	100		Medium industry, weak growth No obvious fit for Cle.	3-Low
Consumer Goods & Retail Trade (CG)	600	7%	113		Medium industry, strong growth No obvious fit for Cle.	3-Low
Building, Construction, Home & Government (GV)	400	4%	89		Small industry, weak growth potential. No obvious fit for Cleveland.	3-Low
	400	4%	116		Small industry, growth potential seems unrealistic. No obvious fit for Cleveland.	3-Low
	2,100	23%				
Total B-to-B Events	9,000	100%	106			

Source: Data 2012 CEIR Index Report

Competition: Midwest Market Analysis

Competitors for Conventions, Meetings, Leisure Travel: Cincinnati, Columbus, Pittsburgh, Milwaukee & Kansas City

Conclusions

- Columbus and Cincinnati are natural competitors for in-state conventions, meetings and leisure travel.
- Two of Cleveland's four main competitive DMA's (Milwaukee and Pittsburgh) formed a cross-promotional alliance for meetings/conventions.
 - Milwaukee, Portland and Pittsburgh formed an alliance to attract more meetings/conventions to their cities and co-promote each destination on one another's websites.
- Kansas City may be a top destination competitor for Cleveland's Meeting/Convention efforts that has not previously been examined in detail.
 - Kansas City is consistently ranked as one of the best cities for healthcare. Monster.com named it as the 13th best city to find healthcare related jobs.
 - Kansas City was identified by the Corporate Meeting Planners focus group as their favorite alternative to hosting a meeting in Cleveland.
 - Kansas City is considered to be comparable in size and available meetings/conventions facilities to Cleveland

Implications

- Competitive strengths and weaknesses of alternative sites for conventions, businesses and leisure travel should be evaluated.
- Because of its similarity to Cleveland and its favorable reputation, Kansas City is a potential direct competitor for meetings/ conventions and other travel.
- The value of partnering with mid-sized destinations as Milwaukee, Portland, and Pittsburgh should be explored.

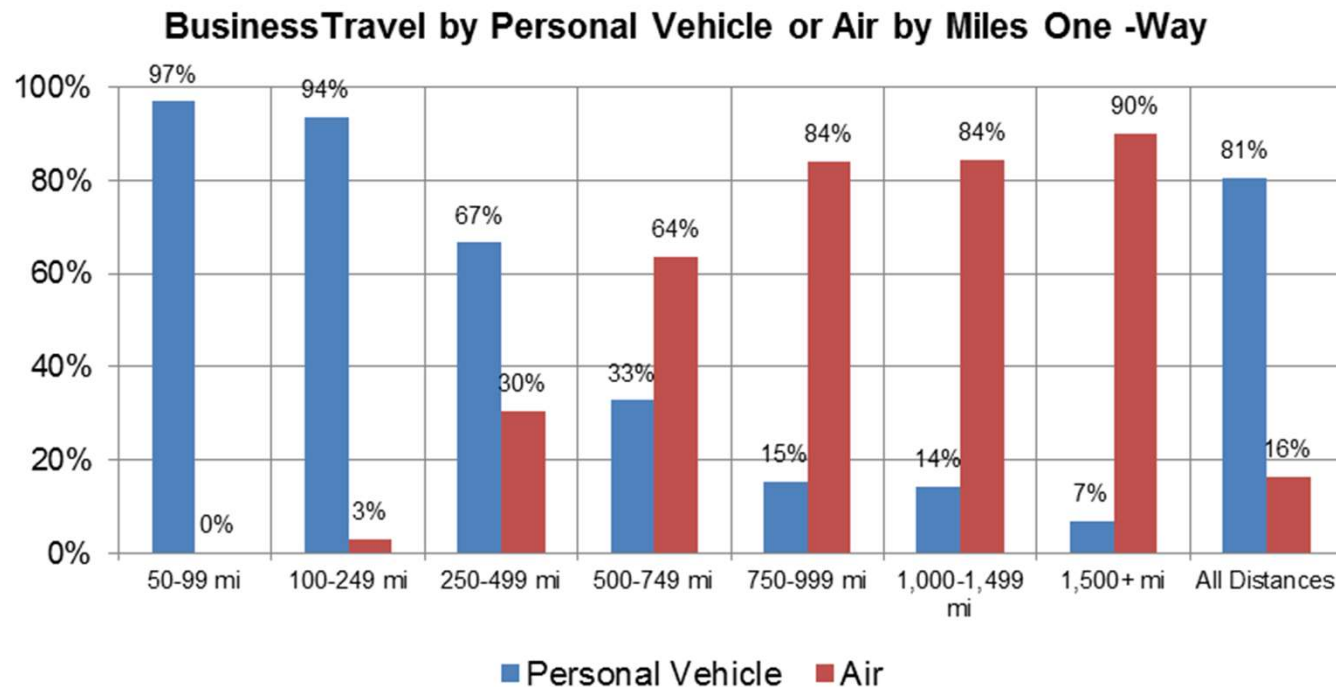
Overall, over 80% of business travelers use personal vehicles to travel to meetings and conventions

Conclusions

- Up to 250 miles, over 90% of business travelers use personal vehicles rather than air.
- For distances of 250-499, about two-thirds use personal vehicles and 30% travel by air.
- Over 500 miles, increasingly large majorities travel by air.

Implications

- Cleveland's regional "driving" market extends up to 250 miles, but begins to shift toward air at 250 miles.
- Air service cost and quality will be important for all meeting & conventions drawing significant number of attendees over 500 miles.



Cleveland's Midwest Competitors: Cincinnati, Columbus, Milwaukee, Pittsburgh, Kansas City

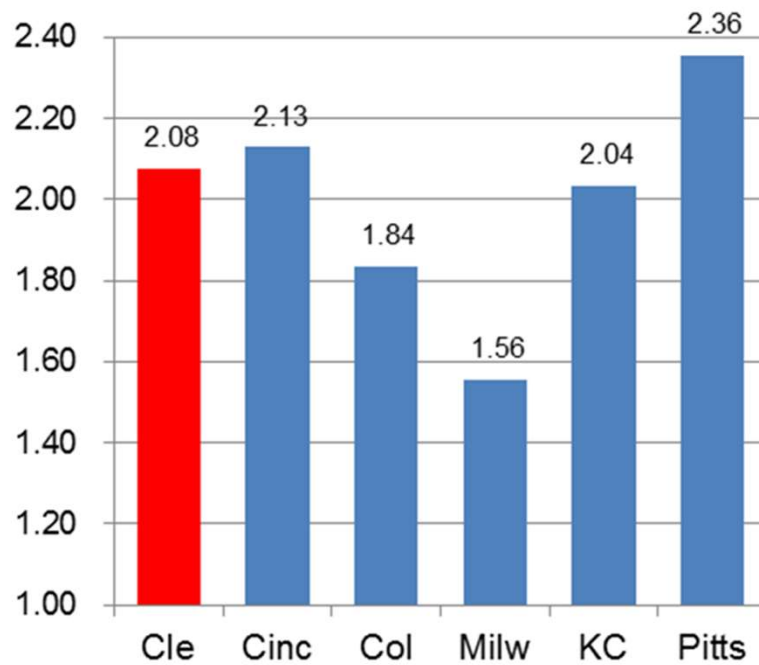
Conclusions

- Cleveland's competitors are comparable second-tier cities: MSA populations of 1.5 to 2.4 million. (1)
- Cleveland's competitors are comparable medium size media markets: DMA populations (12 & older) of 1.5 to 2.0 Million. (2)

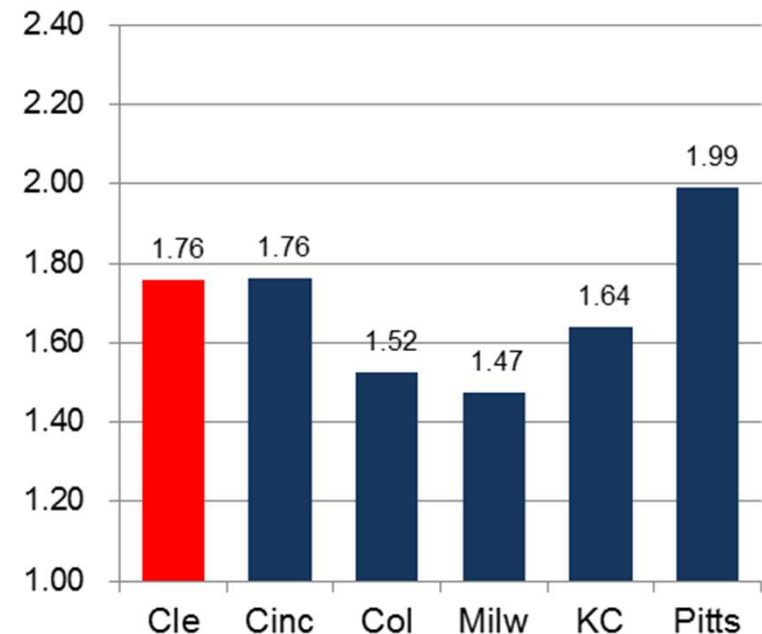
Implications

- The Cleveland market doesn't appear to be larger in a straight-forward comparison.
- Adding the Akron and Canton MSA's to Cleveland's MSA improves Cleveland's competitive position as a DMA.

2010 MSA Population (Million)



2010 DMA Pop 12+ (Million)



Cleveland's air service is as good, or better than its midwest competitors

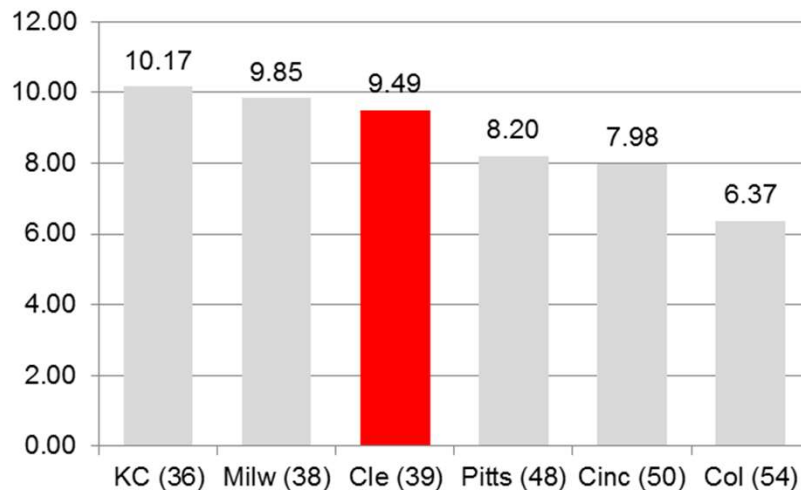
Conclusions

- KC, Milwaukee and Cleveland all serve 9.5 to 10 million passengers per year. Pittsburgh and Cincinnati serve about 8 million passengers, and Columbus 6.4 million passengers. (1)
- Cleveland & Milwaukee both have 190,000 operations per year, more than the other competitors. (1)

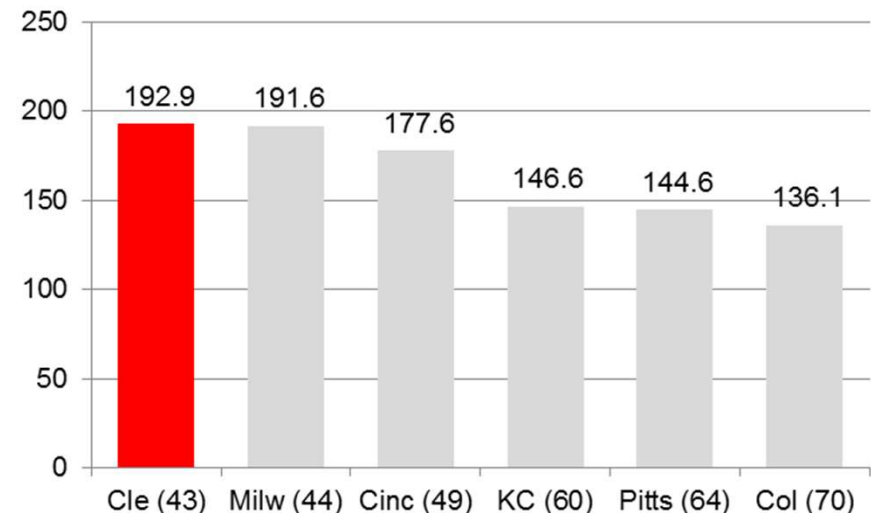
Implications

- Based on 2010 data, Cleveland's air service appears to be as good or better than most competitive midwest cities.

Airline Passengers (Mil)



Airport Operations- Landings & Take-offs (000)



Sources: (1) Airports Council International (2010)

Note: Total passengers includes arriving and departing passengers, and direct passengers counted once.

Note: Total movements include landings and take-offs of an aircraft.

Hotel Market: Cleveland Compared to Midwest Competitors

Conclusions

- Cleveland's hotel market had a supply of 21,500 rooms and demand of 11,200 rooms in 2011q4, about 0.5% of the US. Both were slightly smaller than the other competitive midwest markets. (1)
- Cleveland's occupancy rate was 52%, compared to US rate of 55%. Average daily rates were about 80% of the US, comparable to other markets (except for Pittsburgh). (1)
- Cleveland's forecast growth in supply and demand was lower than other markets, which strengthened projected occupancy and average daily rate. (1)

Implications

- Based on PKF 2011q4 research, Cleveland's hotel market was smaller than its competitors.
- Cleveland's lower occupancy and rates were a competitive visitor advantage shared by Kansas City and Cincinnati.

HOTEL MARKET COMPARISON- CLEVELAND VS 4 MARKETS & US						
2011Q4 Hotel Market Comparison						
Year	Quarter	Occ	ADR	RevPAR	Supply	Demand
Pittsburgh	2011q4	66.3%	\$ 107.87	\$ 71.55	23,923	15,868
Columbus	2011q4	55.4%	\$ 81.07	\$ 44.92	25,914	14,359
Kansas City	2011q4	52.9%	\$ 82.18	\$ 43.47	32,096	16,978
<u>Cleveland</u>	<u>2011q4</u>	<u>52.1%</u>	<u>\$ 84.41</u>	<u>\$ 43.95</u>	<u>21,581</u>	<u>11,236</u>
Cincinnati	2011q4	50.0%	\$ 84.61	\$ 42.31	27,902	13,953
US	2011q4	55.1%	\$ 102.87	\$ 56.66	4,820,532	2,654,978
2011Q4 Hotel Market Index Comparison (US= 100)						
Year	Quarter	Occ Index	ADR Index	RevPAR Index	% of US Supply	% of US Demand
Pittsburgh	2011q4	120	105	126	0.50%	0.60%
Columbus	2011q4	101	79	79	0.54%	0.54%
Kansas City	2011q4	96	80	77	0.67%	0.64%
<u>Cleveland</u>	<u>2011q4</u>	<u>94</u>	<u>82</u>	<u>78</u>	<u>0.45%</u>	<u>0.42%</u>
Cincinnati	2011q4	91	82	75	0.58%	0.53%
US	2011q4	100	100	100	100.00%	100.00%
2008-11Q4 Hotel Market Growth Comparison						
Year	Quarter	ΔOcc	ΔADR	ΔRevPAR	ΔSupply	ΔDemand
Pittsburgh	08-11q4	10.1%	5.6%	16.5%	10.6%	22.0%
<u>Cleveland</u>	<u>08-11q4</u>	<u>8.7%</u>	<u>-5.5%</u>	<u>2.8%</u>	<u>1.6%</u>	<u>10.5%</u>
Columbus	08-11q4	5.7%	-5.1%	0.5%	5.8%	12.0%
Cincinnati	08-11q4	4.0%	-0.3%	3.7%	5.0%	9.1%
Kansas City	08-11q4	3.7%	-3.9%	-0.3%	5.2%	9.2%
US	08-11q4	5.0%	-1.3%	3.6%	4.1%	9.3%
2011-14Q4 Hotel Market Projection						
Year	Quarter	ΔOcc	ΔADR	ΔRevPAR	ΔSupply	ΔDemand
Cincinnati	11-14q4	8.6%	17.8%	27.9%	3.5%	12.4%
Columbus	11-14q4	7.2%	14.3%	22.6%	6.3%	14.1%
<u>Cleveland</u>	<u>11-14q4</u>	<u>6.6%</u>	<u>18.3%</u>	<u>26.1%</u>	<u>1.9%</u>	<u>8.6%</u>
Kansas City	11-14q4	6.4%	15.0%	22.5%	2.7%	9.4%
Pittsburgh	11-14q4	3.9%	11.4%	15.8%	5.5%	9.6%
US	11-14q4	5.8%	15.2%	21.9%	4.2%	10.3%
Source: PKF Hospitality Research, Historic Hotel Data - Smith Travel Research, Dec 2011						
Note: Data for Milwaukee is not available.						

Cleveland Hotel Market vs. Midwest Competitors (March 2012)

Conclusions

- Cleveland's 2012q1 occupancy was 50%, about 5% points below the national rate but similar to KC, Milwaukee and Cincinnati. Cleveland's occupancy improved since 2011q1. (1)
- Cleveland and other midwest markets (except for Pittsburgh) had ADR's of \$82-\$86, 20% below the US average of \$104.
- Cleveland's hotel market was smaller than other competitors (except for Milwaukee).(1)

Implications

- Cleveland's hotel market is smaller than its competitors.
- Cleveland's lower occupancy rate and rates are a competitive visitor advantage shared by midwest competitors.

STR- Cleveland Year to Date - March 2012 vs March 2011									
	Occ %			ADR			RevPAR		
	2012q1	2011q1	% Chg	2012q1	2011q1	% Chg	2012q1	2011q1	% Chg
United States	56.8%	54.7%	3.8%	\$ 103.54	\$ 99.60	4.0%	\$ 58.78	\$ 54.46	7.9%
East North Central	49.8%	47.0%	6.1%	\$ 85.05	\$ 80.53	5.6%	\$ 42.38	\$ 37.84	12.0%
Pittsburgh, PA	58.2%	57.3%	1.6%	\$ 103.16	\$ 99.40	3.8%	\$ 60.06	\$ 56.94	5.5%
Columbus, OH	56.2%	53.1%	6.0%	\$ 84.66	\$ 80.19	5.6%	\$ 47.61	\$ 42.56	11.9%
Milwaukee, WI	50.8%	50.1%	1.2%	\$ 86.57	\$ 83.25	4.0%	\$ 43.93	\$ 41.74	5.3%
Cleveland, OH	50.4%	47.2%	6.7%	\$ 85.49	\$ 84.33	1.4%	\$ 43.05	\$ 39.81	8.2%
Kansas City, MO-KS	49.8%	47.7%	4.4%	\$ 82.52	\$ 78.96	4.5%	\$ 41.07	\$ 37.65	9.1%
Cincinnati, OH-KY-IN	48.3%	47.7%	1.3%	\$ 82.03	\$ 81.10	1.2%	\$ 39.65	\$ 38.69	2.5%
	Supply (Mil)			Demand (Mil)			Revenue (\$Mil)		
	2012q1	2011q1	% Chg	2012q1	2011q1	% Chg	2012q1	2011q1	% Chg
United States	431.63	430.29	0.3%	245.04	235.31	4.1%	25,371.02	23,435.71	8.3%
East North Central	48.86	48.98	-0.3%	24.35	23.01	5.8%	2,070.62	1,853.29	11.7%
Pittsburgh, PA	2.14	2.10	2.0%	1.24	1.20	3.7%	128.41	119.32	7.6%
Kansas City, MO-KS	2.87	2.85	0.8%	1.43	1.36	5.2%	117.94	107.22	10.0%
Columbus, OH	2.30	2.31	-0.4%	1.29	1.23	5.5%	109.49	98.28	11.4%
Cincinnati, OH-KY-IN	2.51	2.51	0.2%	1.22	1.20	1.5%	99.68	97.10	2.7%
Cleveland, OH	1.89	1.92	-1.4%	0.95	0.90	5.2%	81.33	76.25	6.7%
Milwaukee, WI	1.45	1.43	1.6%	0.74	0.72	2.8%	63.69	59.57	6.9%
Cleveland-% of US	0.44%	0.45%		0.39%	0.38%		0.32%	0.33%	

Source: Smith Travel Research, Cleveland OH CVB data (March 2012)

(1) Source: Smith Travel Research, Cleveland CVB data, March 2012

Cleveland's total per diem costs vs midwest competitors

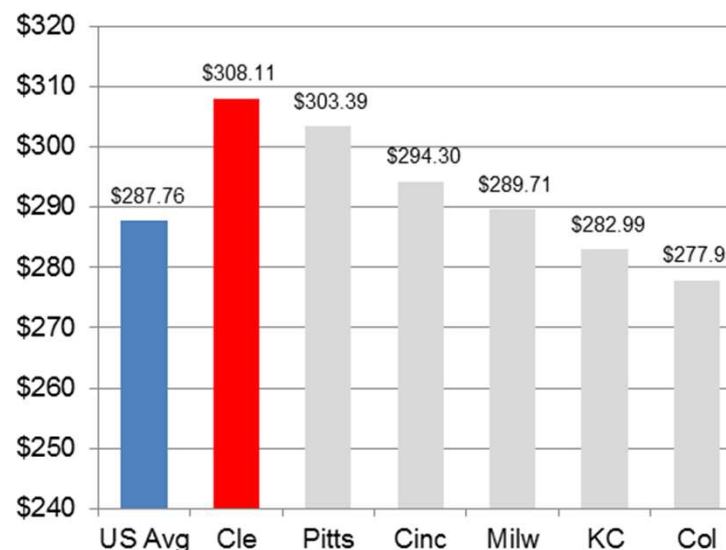
Conclusions

- Cleveland's 2012 corporate per diem is \$308, about 7% higher than the US average. (1)
 - Cleveland (\$308.11) is about \$5 higher than Pittsburgh (\$303.39).
 - Cleveland is about 5%-10% higher than other midwest competitors.

Implications

- Compared to the average US market, Cleveland has diem cost disadvantage. However, it maintains a cost advantage over major US cities.
- As meeting planners and visitors look at Cleveland's per diem costs, it has a slight disadvantage against its midwest competitors. (However, hotel data on costs appears to be inconsistent with other hotel data sources.)

2012 Corporate Travel Per Diem Costs



Business Traveler News: 2012 Corporate Traveler Per Diems						
2012 Rank	City	Hotel	Car	Food	Total 2012 Cost	Index (Cle=100)
	US Average	\$149.16	\$ 50.96	\$ 87.64	\$ 287.76	93.4
22	Cleveland	\$161.94	\$ 51.15	\$ 95.02	\$ 308.11	100.0
26	Pittsburgh	\$151.50	\$ 52.53	\$ 99.36	\$ 303.39	98.5
32	Cincinnati	\$146.14	\$ 48.60	\$ 99.56	\$ 294.30	95.5
38	Milwaukee	\$151.02	\$ 50.22	\$ 88.47	\$ 289.71	94.0
40	Kansas City	\$144.36	\$ 56.82	\$ 81.81	\$ 282.99	91.8
46	Columbus	\$129.08	\$ 50.40	\$ 98.47	\$ 277.95	90.2

Source: Business Travel News, "2012 Corporate Travel Index" (Mar 2012)

Competitive Convention Centers



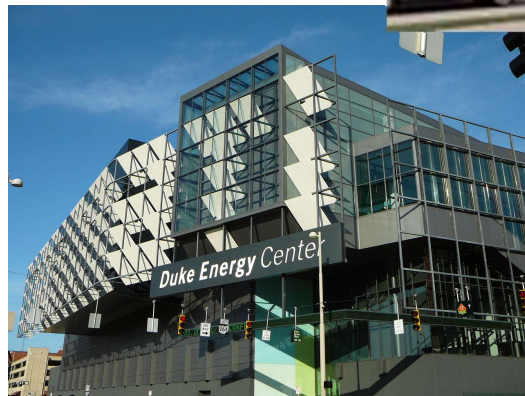
Cleveland Medical Mart-
Convention Center



Columbus



Kansas City



Cincinnati



Milwaukee



Pittsburgh

Comparison of Competitive Convention Centers

Conclusions

- When completed, Cleveland Medical Mart/CC will have 225,000 sf of contiguous exhibition space connected to the 235,000 Medical Mart. It will have a 32,000 sf grand ballroom, and 35 or more flexible meeting rooms.
- Cincinnati's Duke Energy CC offers 200,000 sf of contiguous exhibition space, 40,000 sf grand ballroom and 31 meeting rooms in a facility renovated in 2006.
- Greater Columbus CC has 336,000 sf of contiguous exhibition space, 25,000 SF grand ballroom and 61 meeting rooms in a facility renovated in 2009.
- Milwaukee's Frontier Airlines Center has 189,000 sf of contiguous exhibition space, 37,500 SF grand ballroom and 28 meeting rooms in a 1998 facility.
- Kansas City has 388,800 sf of contiguous exhibition space, 40,600 sf grand ballroom and 48 meeting rooms in a facility originally built in 1994.
- Pittsburgh has 313,400 sf of contiguous exhibition space, 31,600 sf grand ballroom and 51 meeting rooms in a facility built in 2003.

Implications

- Although some competitive midwest convention centers are larger, the Cleveland Medical Mart/Convention Center will provide a state-of-the-art facility that is competitive in facility design, amenities, ballroom and meeting rooms.

Comparison of Selected Midwest Convention Centers

Facility/City	Source	Cleveland Medical Mart & Conv Ctr	Duke Energy Conv Ctr (Cincinnati)	Greater Columbus Conv Ctr	Frontier Airlines Center (Milwaukee)	Bartle Hall (Kansas City Mo) Conv Ctr	David L. Lawrence Conv Ctr (Pittsburgh)
Distance from Airport	www.cvent.com	11	13	8.8	8.3	19.4	18
Year Built/Renovated	www.cvent.com	2013	1967/2006	1993/2009	1998/NA	1994/NA	2003
Website www.xxx.com	Conv Ctr Website	clevelandmedicalmart	cincyusa	experiencecolumbus	visitmilwaukee.org	visitkc.com	pittsburghhcc
Total Gross SF	Conv Ctr Website	NA	750,000	1,700,000	300,000	NA	1,500,000
Medical Mart (Cleveland)	Conv Ctr Website	235,000	NA	NA	NA	NA	NA
Exhibition Space (Contiguous)	Conv Ctr Website	225,000	200,000	336,000	188,695	388,800	313,400
Grand Ballroom	Conv Ctr Website	32,000	40,000	25,000	37,506	40,595	31,610
Addl Ballroom	Conv Ctr Website	11,000	17,400	14,729	NA	23,910	NA
Meeting Rooms	Conv Ctr Website	Flexible	31	61	28	48	51
Number of Meeting Rooms	www.cvent.com	35	31	76	28	48	51
Meeting Room Space (SF)	www.cvent.com	90,000	90,000	>100,000	>100,000	>100,000	>100,000
Largest Meeting Room	www.cvent.com	Flexible	39,468	118,910	37,506	388,800	236,900
2nd Largest Meeting Room	www.cvent.com	Flexible	17,472	118,000	NA	26,200	76,500
Sources: Convention Center Websites and www.cvent.com							

Competitive Analysis: Cincinnati

Conclusions

- Compared to Cleveland, Cincinnati has about the same size MSA and DMA population.
- Cincinnati's airport is about 10%-15% smaller than Cleveland in passengers and operations.
- Cincinnati's hotel market is 30% larger than Cleveland but occupancy is a little less. Cincinnati's costs are about 5% lower.
- Cincinnati's convention facility is comparable to Cleveland's in size and meeting space.

Implications

- Cincinnati is comparable to Cleveland in regional market size and convention center size. Cleveland's convention advantage is a new facility.
- Cleveland has an advantage in airline service.
- Cincinnati has an advantage in hotel market size and hotel cost.

MARKET SIZE	Data Source	Year	Cleveland	Cincinnati
Core County	Census		Cuyahoga	Hamilton
Core Co Pop	Census	2010	1,280,100	802,400
MSA Pop	Census	2010	2,077,200	2,130,100
DMA Pop 12+	Arbitron	2012	1,758,800	1,760,700
Cleveland's Position	MSA Pop Index	2012	100	103
Cleveland's Position	DMA Pop Index	2012	100	100
AIRPORT	Data Source	Year	Cleveland Hopkins (CLE)	Cinc/No Kentucky (CVG)
Air Passengers (Mil)	Airports Council Intl	2010	9.49	7.98
Air Ops (TO/Land) (000)	Airports Council Intl	2010	192.9	177.6
On-Time Pass Oper %	Air Traffic Activity System	2011	78.58%	80.12%
Cleveland's Position	Airpt Passenger Index	2010	100	84
Cleveland's Position	Total Operations Index	2011	100	92
Cleveland's Position	On-Time Oper Index	2012	100	102
HOTELS	Data Source	Year	Cleveland	Cincinnati
Rooms-Dntr (Est)			3,449	NA
Room Supply-Mkt (MilRmNts)	Smith Travel Research	2012q1	1.89	2.51
Room Demand-Mkt (MilRmNts)	Smith Travel Research	2012q1	0.95	1.22
Occupancy %	Smith Travel Research	2012q1	50.4%	48.3%
Hotel Avg Daily Rate	Smith Travel Research	2012q1	\$85	\$82
Total Per Diem	Business Trav News	2012	\$308	\$294
Cleveland's Position	Room Supply-Mkt (MilRmNts)		100	133
Cleveland's Position	Room Demand-Mkt (MilRmNts)		100	128
Cleveland's Position	Occupancy %		100	96
Cleveland's Position	Hotel Avg Daily Rate		100	96
Cleveland's Position	Total Per Diem		100	96
CONVENTION CENTER	Data Source	Year	Cleveland Medical Mart Conv Ctr	Duke Energy Conv Ctr
Distance from Airport	www.cvent.com	2012	11	13
Year Built/Renovated	www.cvent.com	2012	2013	1967/2006
Website www.xxx.com	Conv Ctr Website	2012	clevelandmedicalmart	cincyusa
Total Gross SF	Conv Ctr Website	2012	NA	750,000
Medical Mart (Cleveland)	Conv Ctr Website	2012	235,000	NA
Exhibition Space (Contiguous)	Conv Ctr Website	2012	225,000	200,000
Grand Ballroom	Conv Ctr Website	2012	32,000	40,000
Addl Ballroom	Conv Ctr Website	2012	11,000	17,400
Meeting Rooms	Conv Ctr Website	2012	Flexible	31
Number of Meeting Rooms	www.cvent.com	2012	35	31
Meeting Room Space (SF)	www.cvent.com	2012	90,000	90,000
Largest Meeting Room	www.cvent.com	2012	Flexible	39,468
2nd Largest Meeting Room	www.cvent.com	2012	Flexible	17,472
Cleveland's Position	Exhibition Space (Contig)		100	89
Cleveland's Position	Grand Ballroom		100	125
Cleveland's Position	No of Meeting Rooms		100	89

Competitive Analysis: Columbus

Conclusions

- Compared to Cleveland, Columbus is more than 10% smaller in its MSA and DMA markets.
- Columbus's airport is 30% to 35% smaller than Cleveland's in passengers and operations.
- Columbus's hotel market is stronger than Cleveland's with substantially greater hotel supply, demand and occupancy. Its hotel costs are comparable, but per diem costs are projected as 10% lower in Columbus.
- Columbus's convention center is much larger than Cleveland's in exhibition space and meeting space. Cleveland's convention center is tied to the Medical Mart, while Columbus's has adjacent arenas and other facilities.

Implications

- Relative to Cleveland, Columbus's disadvantages are a smaller regional market and air service.
- Columbus's strengths are its hotel market and the size of its convention center and adjacent facilities.

MARKET SIZE	Data Source	Year	Cleveland	Columbus
Core County	Census		Cuyahoga	Franklin
Core Co Pop	Census	2010	1,280,100	1,163,400
MSA Pop	Census	2010	2,077,200	1,836,500
DMA Pop 12+	Arbitron	2012	1,758,800	1,523,900
Cleveland's Position	MSA Pop Index	2012	100	88
Cleveland's Position	DMA Pop Index	2012	100	87
AIRPORT	Data Source	Year	Cleveland Hopkins (CLE)	Port Columbus (CMH)
Air Passengers (Mil)	Airports Council Intl	2010	9.49	6.37
Air Ops (TO/Land) (000)	Airports Council Intl	2010	192.9	136.1
On-Time Pass Oper %	Air Traffic Activity System	2011	78.58%	78.01%
Cleveland's Position	Airpt Passenger Index	2010	100	67
Cleveland's Position	Total Operations Index	2011	100	71
Cleveland's Position	On-Time Oper Index	2012	100	99
HOTELS	Data Source	Year	Cleveland	Columbus
Rooms-Dntrn (Est)			3,449	NA
Room Supply-Mkt (MilRmNts)	Smith Travel Research	2012q1	1.89	2.3
Room Demand-Mkt (MilRmNts)	Smith Travel Research	2012q1	0.95	1.29
Occupancy %	Smith Travel Research	2012q1	50.4%	56.2%
Hotel Avg Daily Rate	Smith Travel Research	2012q1	\$85	\$85
Total Per Diem	Business Trav News	2012	\$308	\$278
Cleveland's Position	Room Supply-Mkt (MilRmNts)		100	122
Cleveland's Position	Room Demand-Mkt (MilRmNts)		100	136
Cleveland's Position	Occupancy %		100	112
Cleveland's Position	Hotel Avg Daily Rate		100	99
Cleveland's Position	Total Per Diem		100	90
CONVENTION CENTER	Data Source	Year	Cleveland Medical Mart Conv Ctr	Gr Columbus Conv Ctr
Distance from Airport	www.cvent.com	2012	11	8.8
Year Built/Renovated	www.cvent.com	2012	2013	1993/2009
Website www.xxx.com	Conv Ctr Website	2012	clevelandmedicalmart	experiencecolumbus
Total Gross SF	Conv Ctr Website	2012	NA	1,700,000
Medical Mart (Cleveland)	Conv Ctr Website	2012	235,000	NA
Exhibition Space (Contiguous)	Conv Ctr Website	2012	225,000	336,000
Grand Ballroom	Conv Ctr Website	2012	32,000	25,000
Addl Ballroom	Conv Ctr Website	2012	11,000	14,729
Meeting Rooms	Conv Ctr Website	2012	Flexible	61
Number of Meeting Rooms	www.cvent.com	2012	35	76
Meeting Room Space (SF)	www.cvent.com	2012	90,000	>100,000
Largest Meeting Room	www.cvent.com	2012	Flexible	118,910
2nd Largest Meeting Room	www.cvent.com	2012	Flexible	118,000
Cleveland's Position	Exhibition Space (Contig)		100	149
Cleveland's Position	Grand Ballroom		100	78
Cleveland's Position	No of Meeting Rooms		100	217

Competitive Analysis: Pittsburgh

Conclusions

- Compared to Cleveland, Pittsburgh's MSA and DMA population are 13% larger.
- Pittsburgh's airport is about 15% to 25% smaller in passengers and operations.
- Pittsburgh's hotel market is only 13% larger than Cleveland, but much healthier (for owners) in terms of demand, occupancy, and rates.
- Data is somewhat inconsistent on comparative cost with Pittsburgh having higher hotel rates, but lower per diem costs than Cleveland.

Implications

- Pittsburgh has a larger MSA and DMA market than Cleveland, but a smaller airport.
- Pittsburgh has a slightly larger hotel market. Visitors face higher occupancy and rates.
- Pittsburgh's convention center is larger than Cleveland's with more exhibition space and meeting rooms, but Cleveland's convention facility is about 10 years newer.

MARKET SIZE	Data Source	Year	Cleveland	Pittsburgh
Core County	Census		Cuyahoga	Allegheny
Core Co Pop	Census	2010	1,280,100	1,223,300
MSA Pop	Census	2010	2,077,200	2,356,300
DMA Pop 12+	Arbitron	2012	1,758,800	1,990,400
Cleveland's Position	MSA Pop Index	2012	100	113
Cleveland's Position	DMA Pop Index	2012	100	113
AIRPORT	Data Source	Year	Cleveland Hopkins (CLE)	Pittsburgh (PIT)
Air Passengers (Mil)	Airports Council Intl	2010	9.49	8.20
Air Ops (TO/Land) (000)	Airports Council Intl	2010	192.9	144.6
On-Time Pass Oper %	Air Traffic Activity System	2011	78.58%	79.02%
Cleveland's Position	Airpt Passenger Index	2010	100	86
Cleveland's Position	Total Operations Index	2011	100	75
Cleveland's Position	On-Time Oper Index	2012	100	101
HOTELS	Data Source	Year	Cleveland	Pittsburgh
Rooms-Dntr (Est)			3,449	NA
Room Supply-Mkt (MIRmNts)	Smith Travel Research	2012q1	1.89	2.14
Room Demand-Mkt (MIRmNts)	Smith Travel Research	2012q1	0.95	1.24
Occupancy %	Smith Travel Research	2012q1	50.4%	58.2%
Hotel Avg Daily Rate	Smith Travel Research	2012q1	\$85	\$103
Total Per Diem	Business Trav News	2012	\$308	\$303
Cleveland's Position	Room Supply-Mkt (MIRmNts)		100	113
Cleveland's Position	Room Demand-Mkt (MIRmNts)		100	131
Cleveland's Position	Occupancy %		100	115
Cleveland's Position	Hotel Avg Daily Rate		100	121
Cleveland's Position	Total Per Diem		100	98
CONVENTION CENTER	Data Source	Year	Cleveland Medical Mart Conv Ctr	David L. Lawrence Conv Ctr
Distance from Airport	www.cvent.com	2012	11	18
Year Built/Renovated	www.cvent.com	2012	2013	2003
Website www.xxx.com	Conv Ctr Website	2012	clevelandmedicalmart	pittsburghcc
Total Gross SF	Conv Ctr Website	2012	NA	1,500,000
Medical Mart (Cleveland)	Conv Ctr Website	2012	235,000	NA
Exhibition Space (Contiguous)	Conv Ctr Website	2012	225,000	313,400
Grand Ballroom	Conv Ctr Website	2012	32,000	31,610
Addl Ballroom	Conv Ctr Website	2012	11,000	NA
Meeting Rooms	Conv Ctr Website	2012	Flexible	51
Number of Meeting Rooms	www.cvent.com	2012	35	51
Meeting Room Space (SF)	www.cvent.com	2012	90,000	>100,000
Largest Meeting Room	www.cvent.com	2012	Flexible	236,900
2nd Largest Meeting Room	www.cvent.com	2012	Flexible	76,500
Cleveland's Position	Exhibition Space (Contig)		100	139
Cleveland's Position	Grand Ballroom		100	99
Cleveland's Position	No of Meeting Rooms		100	146

Competitive Analysis: Milwaukee

Conclusions

- Compared to Cleveland, Milwaukee's MSA and DMA regional markets are only about 75% to 85% as large as Cleveland.
- Milwaukee's airport is almost exactly the same size as Cleveland's in passengers and operations.
- Milwaukee's hotel market is 75% the size of Cleveland's with about the same occupancy and average daily rate. Milwaukee's per diem costs are about 5% lower.
- Milwaukee's older convention facility is 20% smaller than Cleveland's facility in exhibition space and meeting rooms.

Implications

- Milwaukee's MSA/DMA markets and hotel market are substantially smaller than Cleveland.
- Hotel costs and air service are roughly the same in both the Cleveland and Milwaukee markets.
- Milwaukee's convention facility is smaller and older than Cleveland's facility.

MARKET SIZE	Data Source	Year	Cleveland	Milwaukee
Core County	Census		Cuyahoga	Milwaukee
Core Co Pop	Census	2010	1,280,100	947,700
MSA Pop	Census	2010	2,077,200	1,555,900
DMA Pop 12+	Arbitron	2012	1,758,800	1,474,500
Cleveland's Position	MSA Pop Index	2012	100	75
Cleveland's Position	DMA Pop Index	2012	100	84
AIRPORT	Data Source	Year	Cleveland Hopkins (CLE)	General Mitchell (MKE)
Air Passengers (Mil)	Airports Council Inatl	2010	9.49	9.85
Air Ops (TO/Land) (000)	Airports Council Inatl	2010	192.9	191.6
On-Time Pass Oper %	Air Traffic Activity System	2011	78.58%	80.68%
Cleveland's Position	Airpt Passenger Index	2010	100	104
Cleveland's Position	Total Operations Index	2011	100	99
Cleveland's Position	On-Time Oper Index	2012	100	103
HOTELS	Data Source	Year	Cleveland	Milwaukee
Rooms-Dntn (Est)			3,449	NA
Room Supply-Mkt (MilRmNts)	Smith Travel Research	2012q1	1.89	1.45
Room Demand-Mkt (MilRmNts)	Smith Travel Research	2012q1	0.95	0.74
Occupancy %	Smith Travel Research	2012q1	50.4%	50.8%
Hotel Avg Daily Rate	Smith Travel Research	2012q1	\$85	\$87
Total Per Diem	Business Trav News	2012	\$308	\$290
Cleveland's Position	Room Supply-Mkt (MilRmNts)		100	77
Cleveland's Position	Room Demand-Mkt (MilRmNts)		100	78
Cleveland's Position	Occupancy %		100	101
Cleveland's Position	Hotel Avg Daily Rate		100	101
Cleveland's Position	Total Per Diem		100	94
CONVENTION CENTER	Data Source	Year	Cleveland Conv Ctr	Milwaukee Frontier Airline Ctr
Distance from Airport	www.cvent.com	2012	11	8.3
Year Built/Renovated	www.cvent.com	2012	2013	1998/NA
Website www.xx.com	Conv Ctr Website	2012	clevelandmedicalmart	visitmilwaukee.org
Total Gross SF	Conv Ctr Website	2012	NA	300,000
Medical Mart (Cleveland)	Conv Ctr Website	2012	235,000	NA
Exhibition Space (Contiguous)	Conv Ctr Website	2012	225,000	188,695
Grand Ballroom	Conv Ctr Website	2012	32,000	37,506
Addl Ballroom	Conv Ctr Website	2012	11,000	NA
Meeting Rooms	Conv Ctr Website	2012	Flexible	28
Number of Meeting Rooms	www.cvent.com	2012	35	28
Meeting Room Space (SF)	www.cvent.com	2012	90,000	>100,000
Largest Meeting Room	www.cvent.com	2012	Flexible	37,506
2nd Largest Meeting Room	www.cvent.com	2012	Flexible	NA
Cleveland's Position	Exhibition Space (Contig)		100	84
Cleveland's Position	Grand Ballroom		100	117
Cleveland's Position	No of Meeting Rooms		100	80

Competitive Analysis: Kansas City, Mo

Conclusions

- Compared to Cleveland, Kansas City has a slightly smaller (5%) population in the MSA and CSA regional markets.
- KC's airport is a little larger in passenger volume in passengers, but has only about 75% of the operations of Cleveland Hopkins.
- KC's hotel market is 50% larger than Cleveland's with about the same occupancy and average daily rate. However, Kansas City's per diem costs are about 8% lower.
- Kansas City's decade-old convention center is substantially larger in exhibition space, ballroom space and meeting rooms.

Implications

- Kansas City has a comparable regional market and air service.
- Kansas City has a larger hotel market with similar availability and costs for visitors.
- Kansas City's convention center is larger, but is about 10 years old.

MARKET SIZE	Data Source	Year	Cleveland	Kansas City
Core County	Census		Cuyahoga	Jackson
Core Co Pop	Census	2010	1,280,100	544,200
MSA Pop	Census	2010	2,077,200	2,035,300
DMA Pop 12+	Arbitron	2012	1,758,800	1,640,300
Cleveland's Position	MSA Pop Index	2012	100	98
Cleveland's Position	DMA Pop Index	2012	100	93
AIRPORT	Data Source	Year	Cleveland Hopkins (CLE)	Kansas City
Air Passengers (Mil)	Airports Council Intl	2010	9.49	10.17
Air Ops (TO/Land) (000)	Airports Council Intl	2010	192.9	146.6
On-Time Pass Oper %	Air Traffic Activity System	2011	78.58%	NA
Cleveland's Position	Airpt Passenger Index	2010	100	107
Cleveland's Position	Total Operations Index	2011	100	76
Cleveland's Position	On-Time Oper Index	2012	100	NA
HOTELS	Data Source	Year	Cleveland	Kansas City
Rooms-Dntn (Est)			3,449	NA
Room Supply-Mkt (MilRmNts)	Smith Travel Research	2012q1	1.89	2.87
Room Demand-Mkt (MilRmNts)	Smith Travel Research	2012q1	0.95	1.43
Occupancy %	Smith Travel Research	2012q1	50.4%	49.8%
Hotel Avg Daily Rate	Smith Travel Research	2012q1	\$85	\$83
Total Per Diem	Business Trav News	2012	\$308	\$283
Cleveland's Position	Room Supply-Mkt (MilRmNts)		100	152
Cleveland's Position	Room Demand-Mkt (MilRmNts)		100	151
Cleveland's Position	Occupancy %		100	99
Cleveland's Position	Hotel Avg Daily Rate		100	97
Cleveland's Position	Total Per Diem		100	92
CONVENTION CENTER	Data Source	Year	Cleveland Conv Ctr	Barlie Hall (Kansas City) Conv Ctr
Distance from Airport	www.cvent.com	2012	11	19.4
Year Built/Renovated	www.cvent.com	2012	2013	1994/NA
Website www.xxx.com	Conv Ctr Website	2012	clevelandmedicalmart	visitkc.com
Total Gross SF	Conv Ctr Website	2012	NA	NA
Medical Mart (Cleveland)	Conv Ctr Website	2012	235,000	NA
Exhibition Space (Contiguous)	Conv Ctr Website	2012	225,000	388,800
Grand Ballroom	Conv Ctr Website	2012	32,000	40,595
Addl Ballroom	Conv Ctr Website	2012	11,000	23,910
Meeting Rooms	Conv Ctr Website	2012	Flexible	48
Number of Meeting Rooms	www.cvent.com	2012	35	48
Meeting Room Space (SF)	www.cvent.com	2012	90,000	>100,000
Largest Meeting Room	www.cvent.com	2012	Flexible	388,800
2nd Largest Meeting Room	www.cvent.com	2012	Flexible	26,200
Cleveland's Position	Exhibition Space (Contig)		100	173
Cleveland's Position	Grand Ballroom		100	127
Cleveland's Position	No of Meeting Rooms		100	137

Competitive Convention Center Summary

Comparison of Selected Competitive Midwest Convention Centers								
Criteria	Data Source	Year	Cleveland	Cincinnati	Columbus	Pittsburgh	Milwaukee	Kansas City
MSA Pop	Census	2010	2,077,200	2,130,100	1,836,500	2,356,300	1,555,900	2,035,300
DMA Pop 12+	Arbitron	2012	1,758,800	1,760,700	1,523,900	1,990,400	1,474,500	1,640,300
Air Passengers (Mil)	Airports Council Inatl	2010	9.49	7.98	6.37	8.20	9.85	10.17
Air Ops (TO/Land) (000)	Airports Council Inatl	2010	192.9	177.6	136.1	144.6	191.6	146.6
Room Supply-Mkt (MilRmNts)	Smith Travel Research	2012q1	1.89	2.51	2.3	2.14	1.45	2.87
Room Demand-Mkt (MilRmNts)	Smith Travel Research	2012q1	0.95	1.22	1.29	1.24	0.74	1.43
Occupancy %	Smith Travel Research	2012q1	50.4%	48.3%	56.2%	58.2%	50.8%	49.8%
Hotel Avg Daily Rate	Smith Travel Research	2012q1	\$85	\$82	\$85	\$103	\$87	\$83
Total Per Diem	Business Trav News	2012	\$308	\$294	\$278	\$303	\$290	\$283
Exhibition Space (Contig SF)	Conv Ctr Website	2012	225,000	200,000	336,000	313,400	188,695	388,800
Grand Ballroom (SF)	Conv Ctr Website	2012	32,000	40,000	25,000	31,610	37,506	40,595
No of Meeting Rooms	www.cvent.com	2012	35	31	76	51	28	48
Index Summary	Data Summary	Year	Cleveland	Cincinnati	Columbus	Pittsburgh	Milwaukee	Kansas City
MSA Pop Index		2010	100	103	88	113	75	98
DMA Pop Index		2012	100	100	87	113	84	93
Airpt Passenger Index		2010	100	84	67	86	104	107
Air Operations Index		2010	100	92	71	75	99	76
Room Supply Index		2012q1	100	133	122	113	77	152
Room Demand Index		2012q1	100	128	136	131	78	151
Occupancy % Index		2012q1	100	96	112	116	101	99
Hotel Avg Daily Rate Index		2012q1	100	96	99	121	101	97
Total Per Diem Index		2012	100	96	90	99	94	92
Exhibition Space Index		2012	100	89	149	139	84	173
Grand Ballroom Index		2012	100	125	78	99	117	127
Meeting Room Index		2012	100	89	217	146	80	137