

DESTINATION
*Cleveland*SM

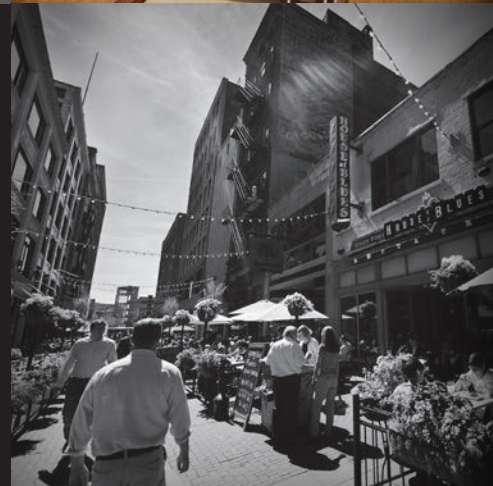


2014 CONVENTION & LEISURE TOURISM

METRICS REPORT



**16.9 M
VISITORS
V I S I T E D
CUYAHOGA COUNTY
IN 2014**



Tourism Industry Friends, Partners and Colleagues,

A few years back, our organization undertook a process to determine the best metrics and information that would demonstrate the performance of the region's travel and tourism industry and our role in its advancement. We are excited to share with you the results from the past year.

2014 was a year we got to truly see Cleveland in a new light. It was a year that all of us became a part of the city's collective momentum.

We can all look back at 2014 and recall the pride we felt when we learned the city landed the coveted **2016 Republican National Convention**, and those of us in the tourism industry won't soon forget earning the **2017 American Bus Association Conference**. Of course, the return of LeBron James significantly added to the interest in our city.

And, if you're anything like us, you probably shared at least one of the dozens of **must-visit lists** the city graced in publications like the *New York Times*, *Travel + Leisure* and *Thrillist*.

We have always been stewards of the region's travel and tourism industry, but we can only do our work with the help of our many incredible community partners. So many of you played a part in the success of 2014. We worked together to grow visitor numbers, and all of the benefits that entails. You all joined our efforts to increase the number of local residents who would recommend the city as a destination to an astounding 54 percent. For that, we thank you. In particular, the City of Cleveland and Cuyahoga County have been invaluable to our efforts.

Finally, I'd like to say a huge thank you to our board, who made the triumphs of this past year possible.

While we can take a moment to enjoy our achievements, it's critical that we understand that this is just the beginning. Cleveland is on the verge of turning this momentum into lasting vitality.

Thank you,

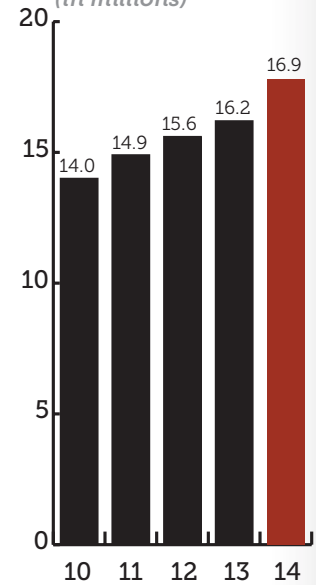
A handwritten signature in black ink that reads "David Gilbert". The signature is written in a cursive, flowing style.

David Gilbert
President & CEO
Destination Cleveland

CUYAHOGA COUNTY TOURISM + THE ECONOMY

The Cleveland area travel and tourism industry experienced a banner year in 2014 with visitor volume hitting 16.9 million, a +4.5% increase over 2013 and a five-year record increase.

2014 VISITOR VOLUME (in millions)



Source: 2014 Tourism Economic Report

HOTEL MARKET COMPARISON

Due to the opening of several hotels in 2014, hotel inventory rose by 2.7%. With supply outpacing demand, Cleveland delivered slightly lower hotel occupancy rates than in 2013.

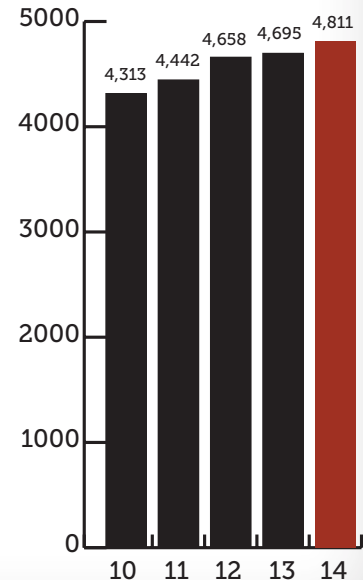
However, more importantly, the actual number of hotel rooms sold increased to 4,811, up 1.8% over 2013.

2014 HOTEL OCCUPANCY RATES

	2014 Occ %	2013 Occ %	% Change
U.S.	64.4%	62.3%	3.6%
Nashville	72.1%	68.8%	5.6%
Pittsburgh	68.0%	58.6%	2.9%
Detroit	65.1%	62.4%	4.0%
Indianapolis	64.6%	61.4%	4.5%
Columbus	62.8%	61.8%	1.4%
Kansas City	62.8%	58.6%	7.4%
Cleveland	61.2%	61.7%	-0.8%
Cincinnati	60.4%	58.0%	3.7%

CLEVELAND HOTEL ROOM DEMAND 2010-2014

000's rooms sold



% Growth vs. Prior Year
Source: STR Report, December 2014

CLEVELAND MAKES THE LIST

"10 BEST ART DISTRICTS" **FODOR'S TRAVEL**

"TOP 25 TRAVEL DESTINATIONS"

"50 BEST PLACES TO TRAVEL"

TRAVEL+LEISURE

USA TODAY

"52 PLACES TO GO IN 2015"

THE NEW YORK TIMES



MARKETING AND COMMUNICATIONS

One catalyst to Cleveland's increase in visitation was a new travel and tourism brand that Destination Cleveland launched in March 2014. The brand, which is intended to improve Cleveland's narrative, centers on the city's unique fusion of sophistication and grit, as well as its eclectic mix of people.

The brand launch integrated various marketing functions including national media outreach, a content-rich website, an extensive social media presence and a resident-directed outreach movement. Because of these efforts, the organization saw significant results.

Advertising

Campaign advertising generated 63 million impressions and included the first official television commercial in nearly a decade, which featured the Northeast Ohio band, the Black Keys.

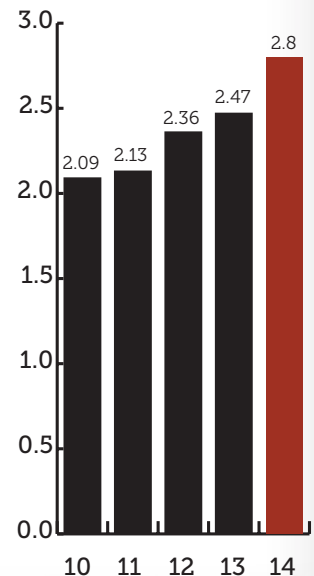
2014 Earned Media Results

	2014	2013	% Change
Hosted Writers:	151	90	+68%
Number of Articles:	1,055	1,123	-6.1%
Earned Media Publicity Value:	\$6.9 million	\$5.3 million	+32%

2014 DESTINATION CLEVELAND WEB PAGEVIEWS

(in millions)

The organization's website saw a 13% boost in pageviews over 2013 – the largest increase in five years. Adding to that growth, the number of unique visitors to the site rose by 21%.



THE CLEVELAND BRAND ANTHEM VIDEO
launched in 2014 AND generated 163K VIEWS.



#ThisisCLE

In March of 2014, Destination Cleveland launched a social media movement called #ThisisCLE. The goal of this effort was to empower residents who are already positive about Cleveland and build upon their enthusiasm. Residents were invited to share photos and favorable anecdotes. The results of a study conducted in early 2015 were more than impressive: local residents who would recommend our city as a destination rose from 34% to 54%.

2014 SOCIAL MEDIA METRICS

113,899

tweets

39,806

unique
contributors

270 MILLION

timeline deliveries

75,000

tagged
Instagram photos



Best in Show

The Hospitality Sales and Marketing Association International (HSMIA), a travel and tourism industry association that is committed to growing business for its 7,000 hotel and hospitality-related partners worldwide, awarded Destination Cleveland's new brand with "Best in Show" – the association's highest honor.

Mobile Tour

A grass roots mobile tour, intended to engage residents in positive conversations about Cleveland as a destination, launched in the summer of 2014. It traveled to 21 events in six months and interacted with 75,000 Clevelanders.

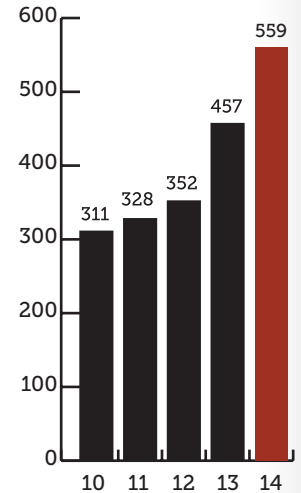
MEETINGS + CONVENTIONS

As tourism numbers in Cleveland trended upward, so did those within the meetings and conventions realm. These increases can be attributed in large part to the city's new convention center, the five hotels anticipated to open, and Destination Cleveland's partnerships with the Cleveland Convention Center, Public Auditorium, the I-X Center and area hotels.

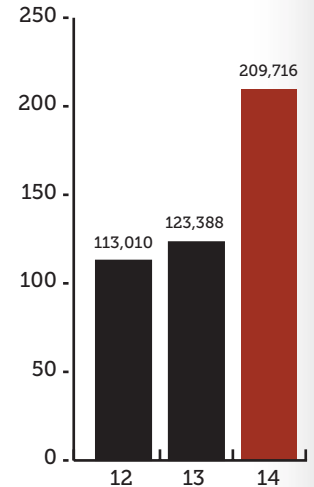
In 2014, Destination Cleveland generated 559 convention leads, a 22% increase over 2013 and the highest since 2009. The number of "definite" room nights grew by 70% since 2013.

Convention Name	Year(s)	# of Attendees	Requested Rooms	Estimated Economic Impact \$'s
Republican National Convention	2016	50,000	86,800	\$200,000,000
American Bus Association	2017	3,000	8,500	\$1,764,000
Shaklee Corporation	2015	5,000	6,304	\$3,600,000
Content Marketing World	2015	3,500	5,840	\$3,122,000
American Society of Colon and Rectal Surgeons	2019	3,000	3,842	\$1,966,860
National Contract Management Association	2018	1,500	3,570	\$1,482,950
Theatre Communications Group	2015	1,000	1,744	\$940,800

2014 MEETING + CONVENTIONS SALES LEADS



DEFINITE ROOM NIGHTS IN 2014



536
MEETINGS *and*
CONVENTIONS
serviced IN 2014

CLEVELAND TO HOST 2016 REPUBLICAN NATIONAL CONVENTION

Through the united efforts of the civic community, regional business leaders, local elected officials and supportive Clevelanders, the city was selected as the host of the coveted 2016 Republican National Convention.

The Republican National Convention provides Cleveland a monumental platform to showcase the city as a great place to live, work, play and visit. This is evidenced by the more than 12,000 positive online, print and broadcast news stories about Cleveland, which received 20 billion impressions in 2014.

THERE'S STRENGTH IN NUMBERS

One of the greatest advantages to Cleveland hosting the 2016 Republican National Convention is the boost it will bring to the Northeast Ohio economy.

\$200M*

DIRECT SPENDING

for the 2012 RNC
Convention in
Tampa

5K

HOTEL ROOMS

requested in
Downtown
Cleveland

150

UP TO 150 HOTELS

used in
Northeast
Ohio

50K

VISITORS

15K

CREDENTIALED
MEDIA

Cleveland 2016

START HERE.  FINISH HERE.

* Estimate: Based on the Tampa Bay 2012 Republican National Convention economic impact study. To confirm Cleveland's performance, an economic impact study will be commissioned after the Cleveland 2016 Republican National Convention.

DESTINATION DEVELOPMENT & COMMUNITY AFFAIRS

The Destination Development team focuses on the unique goal of enhancing the visitor experience. During 2014, the organization strategically collaborated with the community, industry and stakeholders on implementing several destination development projects aimed at improving how Cleveland looks, acts and feels as a visitor destination.



Wayfinding

- 4 prototype pedestrian wayfinding signs installed in Downtown Cleveland
- Research insights identified opportunities such as simplifying the maps and adding a light beacon to enhance the user experience
- 55 of these signs to be installed in 2015
- Partnering with University Circle, Greater Cleveland Regional Transit Authority, and Cleveland Airport Systems to integrate portions of their wayfinding systems



Curb Appeal

Well-traveled pedestrian walkways in Downtown Cleveland were enhanced as part of a demonstration project along Prospect Avenue.

- 11 colorful planters
- 2 public art murals
- 2 park mobiles



CLE Travelbackers Program

- Trained over 300 new front-line staff
- Hosted 10 Discovery Events
- To date, 1,200 participants have been trained to enhance visitor experience

CLE Ambassador Young Professionals Summit

- Brought together the expertise and fresh ideas of more than 150 local Millennials
- Goal to encourage more local Millennials to recommend their hometown as a place to visit
- Outcomes recommended providing opportunities for locals to experience Cleveland and share using technology
- Formed 3 YP Advisory Committees focused on each summit outcome



TRAVEL + TOURISM AS A DRIVER OF ECONOMIC DEVELOPMENT

Adding to the impact of Cleveland's visitor economy, Cleveland participated in research conducted by Oxford Economics, which concluded that destinations that attract more visitors also grow in population, jobs and economic vitality.

32%. 100

OF NEW RESIDENTS FIRST
VISITED THEIR COMMUNITY
AS TOURISTS

VISITOR-RELATED JOBS
CREATED = 15 NEW JOBS IN
NON-VISITOR BUSINESS SECTORS
WITHIN TWO YEARS

“IF YOU BUILD A PLACE PEOPLE WANT TO VISIT,

You build a place where people want to live.

IF YOU BUILD A PLACE WHERE PEOPLE WANT TO LIVE,

You'll build a place where people want to work.

IF YOU BUILD A PLACE WHERE PEOPLE WANT TO WORK,

You'll build a place where business needs to be.

AND IF YOU BUILD A PLACE WHERE BUSINESS HAS TO BE,

You'll build a place where people have to visit.”

- Maura Gast, former Chairperson for Destination Marketing Association International



DESTINATION CLEVELAND'S MISSION IS TO *drive economic impact*
AND *stimulate community vitality* FOR GREATER CLEVELAND
THROUGH *leisure and business travel.*