

HARNESSING THE POWER OF THE VISITOR

Community friends, partners and colleagues:

In 2018, Cuyahoga County's travel and tourism industry — in lockstep with countless partners, businesses and community organizations — attracted **19.2 million** visitors to the area, which is **720,000** more visits than in 2017.

This **3.9%** increase outpaces both U.S. and Ohio visitor growth, while showcasing steady, increased visitation numbers for the eighth year in a row. We remain committed to our goal of bringing 20 million visitors to Cuyahoga County by the end of 2020.

While this kind of growth is tremendous, it's still not enough. We are poised, as a community, to significantly advance our region's economic growth. And one way we'll do this is by harnessing the power of the visitor.

Part of this vision recognizes that the Cleveland brand not only successfully changes perceptions of our city as a place to visit but also as a great place to live, work, study and retire. By leveraging our expertise in attracting people to Cleveland while partnering with other public, private and civic organizations, we will develop strategic campaigns and collaborative initiatives that inspire short-term visitors to become long-term residents and business investors.

We're looking forward to unveiling many of these initiatives and collaborations over the coming months.

Thank you for your ongoing commitment to our community. Together, we are making Cleveland a destination city.

Sincerely,

David Gilbert
President + CEO
Destination Cleveland

Dan Walsh, Jr.
Chairman, Board of Directors
Destination Cleveland
CEO, Citymark Capital

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2018 CONVENTION + LEISURE TOURISM



METRICS REPORT

CLEVELAND TRAVEL + TOURISM: A DESTINATION CITY ON THE RISE

19.2

MILLION VISITORS

In 2018, Cleveland welcomed **19.2 MILLION** visitors — a **3.9%** increase over 2017 and an impressive growth of **28.9%** since 2011.



\$9.4

BILLION IN TOTAL ECONOMIC IMPACT

The economic impact of travel and tourism in 2018 grew **6.5%** over 2017. Meanwhile, Cuyahoga County visitors generated **\$6.2 BILLION** in direct business sales, an increase of **6.2%** during the same timeframe.



71.1

THOUSAND TRAVEL AND TOURISM JOBS

Cuyahoga County's travel and tourism industry employment increased by **2,780** jobs, which is a **4.1%** increase over 2017. Total employment income came out to **\$2.8 BILLION**, a **6.1%** increase over 2017.



\$1.2

BILLION TAXES GENERATED BY THE TRAVEL AND TOURISM INDUSTRY

In 2018, **\$1.2 BILLION** in taxes was generated by the travel and tourism industry, a **5.8%** increase over 2017. This means that the travel and tourism industry saved Cuyahoga County households an average of \$1,133 in yearly taxes.



Source: 2018 DK Shifflet Visitor Volume Study
Source: 2018 Tourism Economic Impact Study

HOTEL MARKET PERFORMANCE:

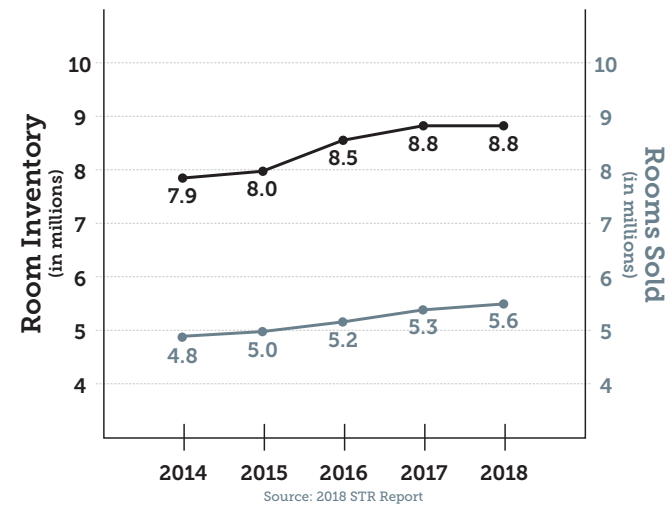
In 2018, Cleveland's hotel occupancy increased nearly three points versus 2017, second only to Pittsburgh with the highest growth among the peer set. This is because more people booked a hotel room in 2018, taking up more of the supply of the Cleveland area's nearly 24,000 hotel rooms.

OCCUPANCY RATES

| | 2017 | 2018 |
|------------|-------|-------|
| U.S. | 65.9% | 66.2% |
| Cleveland | 59.7 | 62.5 |
| Columbus | 65.8 | 65.0 |
| Cincinnati | 64.5 | 63.8 |
| Nashville | 74.1 | 73.3 |
| Detroit | 66.6 | 67.2 |
| Pittsburgh | 60.3 | 63.5 |



CLEVELAND HOTEL ROOMS SOLD



"This Rust Belt City (Cleveland) is the Coolest Place You Never Thought to Visit."

— *Travel & Leisure*, September 2018

MEETINGS + CONVENTIONS

Total room nights booked in Cleveland grew a substantial **18%** from 2017 to 2018.

In 2018, Destination Cleveland maintained its volume of **860 MEETINGS AND CONVENTIONS SALES LEADS** from 2017 and is poised for growth as a result of new leadership, a refined sales process, better communication and improved collaboration with the hospitality community.

Destination Cleveland provided meeting services to **319 MEETINGS AND CONVENTIONS** in 2018.

| Total Room Nights Booked | 2017 | 2018 | Comparison |
|--------------------------|---------|---------|------------|
| | 252,000 | 298,000 | +18% |

MARKETING + COMMUNICATIONS

Destination Cleveland's integrated marketing efforts, which include social media outreach, public relations and advertising, generated **1.4 BILLION** impressions in 2018 — an **8% INCREASE** over 2017.

The Destination Cleveland website, ThisisCleveland.com, was viewed **4.6 MILLION TIMES** in 2018. This slight decline in traffic over 2017 was due to a website redesign, which significantly improved the site's aesthetic and user experience, but necessitated search engine re-indexing.

However, the website saw a **28% INCREASE** in new users in 2018, indicating a strong, growing interest in the Cleveland brand.

The *#ThisisCLE* hashtag reached more than 91 million people through 478 million timeline deliveries.

DESTINATION DEVELOPMENT + COMMUNITY AFFAIRS

In 2018, Destination Cleveland hosted a Destination City Action Plan Listening & Learning Tour to identify, prioritize and implement collaborative initiatives to change perceptions of Cleveland, attract people and create memorable experiences.

Over six months, Destination Cleveland hosted 100 conversations with 350 individuals representing 250 organizations. Based on these insights, the team launched eleven pilot projects. Two of the pilot programs initiated the following destination development work:

- An off-road trails wayfinding and public art project on a portion of Cleveland's Lakefront Bikeway to enhance the user experience and connect destinations along Cleveland's growing trails system. Learn more at thisiscleveland.com/trails.
- A new CLE Experiences Workshop program for residents and businesses to learn about the experiential trend in travel and tourism in order to identify, develop and/or enhance their own authentic Cleveland experiences for visitors. Learn more at thisiscleveland.com/get-involved/cle-experiences-workshop.