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A Qualitative Assessment of the International Exposition Center to the Greater Cleveland Area

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ABSTRACT: *This report describes the outcomes of discussions with I-X Center customers and stakeholders as to how the I-X Center qualitatively impacts the greater Cleveland area. The results suggest that while the I-X Center is perceived to be an asset by customers and stakeholders, it's likely that the I-X Center will need to develop strategies to remain competitive with similar convention centers across the country.*

Key Words: ***I-X Center, community impact analysis, trade and exhibition industry, conventions and meetings, convention centers***

EXECUTIVE SUMMARY

Considered one of the nation's Top 10 convention and exhibition centers, the I-X Center has 2.2 million square feet of exhibition and conference space, including a 1,050,000-square-foot main exhibition area, 26 meeting rooms, and a Grand Ballroom that measures 16,000 square feet. The I-X Center also operates an indoor amusement park with performance stages, rides, and a 125-foot-tall Ferris wheel.

The I-X Center attracts both public entertainment and private business venues to the Greater Cleveland region. The I-X hosts, as well as owns and produces, several public consumer exhibitions such as the boat, RV, auto, motorcycle, home, and bridal shows. Various types of industries utilize the I-X Center for industry trade shows like the International Tire Exhibition and Conference, the Ohio Law Enforcement Expo, the Converting and Packaging Printing Expo, and the Northern Ohio Human Resources Conference.

The I-X Center is considered by its customers and stakeholders as a significant asset to the greater Cleveland region. Overall, interviews indicated that the I-X Center excels in its commitment to customer service and maintains an extraordinary level of service delivery. The management staff and employees were cited as trustworthy, friendly, accommodating, and flexible, and the facility's strongest competitive advantage. The physical aspects of the building – cleanliness, ample parking, high ceilings, large doors, unencumbered floor space for exhibitors, in/out access, and overall size – were also named as appealing to attract conventions and meetings to the area.

The I-X Center is viewed as being a critical asset to the greater Cleveland region in terms of helping to spotlight the city of Cleveland as a destination for events and helping to generate tax revenue from visitor spending. The I-X Center is seen as a hub for people and businesses to meet and display goods, attracting both local and outside visitors who generate tax revenue through use of local hotels, restaurants, transportation, entertainment vendors, dry cleaners, printing companies, and other businesses.

Events at the I-X Center keep area hotels occupied and surrounding businesses active during slow times of the year. The I-X Center means employment – the I-X Center keeps people working due to the influx of activity generated for businesses in the region due to shows and events held there. Events at the I-X Center also draw visitors to downtown Cleveland – not only to occupy hotels and dine at downtown restaurants, but to attractions such as the Rock and Roll Hall of Fame, the casino, sports venues, and Playhouse Square. The I-X Center is also viewed by those interviewed as a gathering place for friends and families.

While the I-X Center is perceived to be an asset by customers and stakeholders, it's likely that the I-X Center will need to think strategically to remain competitive with similar convention centers across the country. The I-X Center will need to become "state-of-the-art"; that state-of-the-art includes Wi-Fi and broadband capabilities and other physical improvements, such as adding first-floor meeting rooms, digital signage inside the facility, remodeling the lower-level restrooms, and overall technological upgrades.

The I-X Center should consider identifying a developer for an onsite hotel, either connected to the I-X Center or located across the street from the I-X Center on city-owned property. Being proximate to the I-X Center, an onsite hotel would offer attendees direct access, a larger portfolio of food and beverage options, and amenities such as workout facilities and a swimming pool, as well as additional opportunities for interaction and socialization. Discussions with the GCRTA may reveal improved transit opportunities for attendees from the I-X Center to downtown and local attractions that would further enhance its competitive position.

The strategy should include identifying ways of finding competitive cost structures and ways to better manage quality and pricing of union-supplied workers. The costs and policies of the "one-stop-shop" labor, rentals, and services provided by the I-X Center should be reviewed to determine if these are competitive with other convention centers across the country.

INTRODUCTION

The International Exposition Center (I-X Center) engaged The Center for Public Management of the Maxine Goodman Levin College of Urban Affairs at Cleveland State University to conduct a qualitative assessment of how the I-X Center impacts the Greater Cleveland area. The purpose of this analysis was to assess the significance and value of the I-X Center to its customers and stakeholders, and its importance to Greater Cleveland. This study also serves as a companion report to an economic impact study separately being conducted by a private firm.

This report includes an overview of the meetings and conventions industry, as well as the trends exhibited over the past decade and former and future challenges to the industry. A section of this report includes a brief profile of those convention centers within the United States considered by the I-X Center as competitors for various types of venues. The third and fourth sections of this report present the outcomes of the interviews with I-X customers and stakeholders. The report concludes with supporting appendices.

Research Methodology

Literature Review

A review of the literature surrounding the meetings and conventions industry was conducted to examine trends and challenges to the industry and to gain a sense of this industry within the United States. This research included an examination of professional trade journals, publications, studies, and books, as well as newspapers and other modes of media (online and print). The review presents an overview of the meetings and conventions industry, highlights trends seen within the industry, and discusses the past and future challenges of the industry.

Competitor Convention Center Profiles

The I-X Center has identified convention and exhibition centers within the greater Cleveland region, Ohio, and nationally with whom it competes for various types of shows and events. These facilities are profiled with regard to size, available space, some amenities, and types of events. The data were extracted primarily from websites and marketing information. Data on the types and frequencies of events were collected for events scheduled for the period July through December 2012, as reported by each of the convention centers.

Qualitative Assessment

Interviews were conducted with I-X Center customers (those who utilize the I-X Center for shows and events) and community leaders and stakeholders to gain their perceptions of how the I-X Center impacts and contributes to the greater Cleveland region. In-person and telephone interviews were used to collect this information. I-X Center management and staff were first interviewed to get a sense of the I-X Center's goals, objectives, and operations. Interviews ranged from 30 to 60 minutes, with protocol developed to guide each of the interviews. The protocol for these interviews is found in Appendices A, B, and C.

THE MEETINGS AND CONVENTIONS INDUSTRY

The meetings and exhibitions industry is a dynamic and growing sector that encompasses a broad range of economic activities. It includes industry trade shows, professional association meetings and conventions, and consumer exhibitions. Formerly industry professionals and academics used the term Meetings, Incentives (or Incentive Travel), Conventions, and Exhibitions (MICE) to capture this diversity of activity (McCabe et al, 2000, p. 2; Rogers, 2003, pp. 15-16). The term attempted to capture events ranging in size from a few dozen to several thousand, and held at privately-operated venues, publicly-operated or subsidized meeting centers, and temporary facilities. Today several terms are synonymously used to portray these diverse events – venues, expositions, conventions, meetings, exhibitions, events, trade shows, and consumer shows. The venues vary greatly in size, as well. A survey of North American convention centers (to the exclusion of other types of venues) shows that 124 (42%) have less than 100,000 square feet, 120 (40%) are between 100,000 and 350,000 square feet, 41 (14%) are between 350,000 and 1,000,000 square feet, and 12 (4%) are larger than 1,000,000 square feet (Jensen and Cain, 2012, p. 42). This industry is closely tied to several other areas of the economy, as well, including lodging, food service, transportation, and other support services.

The impact of the meetings and exhibitions industry is significant, as well. The industry generates over $900 billion in annual economic activity in the United States, according to one recent estimate (Convention Industry Council, 2011, p. 8). The industry is also very responsive to business cycles (Spiller, 2002, p. 7) and experienced significant declines during the economic recessions in 2001 and especially in 2009. This characteristic of the industry is evident from both quantitative studies and qualitative surveys of meeting and exhibition professionals conducted by industry trade groups.

For example, Convene, a magazine published by the Professional Convention Management Association, publishes an annual market survey of meeting managers and planners. Survey responses track the broader economy's movements closely, with qualitative responses (as summarized by the editors) expressing concern over industry performance in 2008 and 2009, with guarded optimism emerging in 2010 and since. The number of meeting professionals whose meeting budgets were cut in 2007 was 6%, while that figure increased to 15% in 2008, 33% in 2009, 22% in 2010, and 16% in 2011 (Russell, 2008, p. 6; Russell, 2009, p. 30; Russell, 2010, p. 38; Russell, 2011, p. 64; Russell, 2012, p. 48). Another survey of events organizers found that the number of respondents reporting year-over-year declines in revenues and exhibit space sales has fallen dramatically from the 2009 highs. Fifty-four percent of respondents reported declines in exhibit space sales in 2009, but only 11% in 2011 (International Association of Exhibitions and Events, 2012, p. 5).

The Center for Exhibition Industry Research (CEIR) produces an annual report that tracks industry performance. The report tracks four key metrics arising from a survey of meetings, conventions, and exhibitions: net square feet, attendance, number of exhibitors, and revenues. For each metric, the annual percent change is calculated and these percentages are averaged together to create the CEIR Index – a single figure intended to present trends in the meetings and exhibition industry. In 2008, the CEIR Index fell 3% and then another 12.5% in 2009, its worst year ever. Since then, however, the Index has consistently moved up, and this movement has led many industry observers to adopt a strong outlook moving forward (CEIR, 2012; CEIR, 2010; CEIR, 2009, CEIR, 2008; Kovaleski, 2010; Hacker, 2011; "Forecast 2012", 2011; Seli, 2012a). Interestingly, revenues lag the recovery of the other indicators because venue and event organizers will reduce charges to exhibitors to avoid an empty hall during downturns.

Despite the size and impact of the industry, the academic literature on the subject of exhibitions and meetings is not well developed. This field of research is relatively young compared to that of other industries, even within the study of tourism, and the key research questions and agendas are still being mapped out. It is also a fragmented industry, with participants representing many different sectors (lodging, food and beverage, transport, meeting planning, venues, etc.). According to Rogers (2003), this fragmentation produces difficulties gathering consistent data, developing reliable terminologies and categorizations, and representing the field (pp. 14-15). The field has also suffered from "an underdeveloped educational framework" that has inhibited the standardization of research questions, data collection, and methodology (p. 19). As Yoo and Weber (2005) note, the field only began to coalesce and support active scholarly conversations in the mid-1990s (p. 194). Lee and Back (2005) mark the 1998 establishment of the *Journal of Convention and Exhibition Management* (subsequently renamed to the *Journal of Convention and Event Tourism*) as a key moment in the development of the field and the establishment of its academic credibility (p. 2; see also Getz, 2008, p. 403; Getz, 2007, pp. 6-8; Dwyer, 2002; and Ladkin, 2002). The last decade, however, has seen a growth in both academic and industry-sponsored research activities.

The site selection process for this industry figures prominently in recent research. Fenich (2001), for example, lists 16 different traits of cities that impact site selection for conventions and exhibitions, and develops a scale for each to provide an empirical basis for evaluating a city's attractiveness to meeting planners. Based on a survey of attendees at conventions and trade shows, Boo, Koh, and Jones (2008) find that visitor behaviors (such as length of stay, transportation choice, and accommodation choice) can predict how visitors will perceive a destination city. Fawzy and Samra (2008) develop an "organizational buyer behavior" model to outline the site selection processes of associations and conveners. They also identify the critical environmental, organizational, individual, and interpersonal variables that influence the decision-making process (p. 128). Severt and Palakurthi (2008) adapt a "customer equity" approach to understand the perceived value that attendees gain from meetings and exhibitions. They identify the factors that increase or decrease consumer goodwill and willingness to pay for meeting venues and how those factors are implicated in the site selection process. All of these studies bear on the ways meeting venues are marketed to organizations and corporations.

Trends and Changes in the Exhibition Industry

Sustainable or green business practices have become more prominent in the meetings and conventions industry. Increasingly, meeting venues are emphasizing waste- or energy-reduction strategies in their marketing efforts. Many corporations and associations evaluate the commitment to sustainability of potential venues as part of the event planning process (Braley, 2011). Draper, Dawson, and Casey (2011) and Rogers (2003, pp. 264-266) note that sustainability has emerged as a key concern among professional event planners and organizations.

The meetings and conventions industry has experienced significant changes due to the impacts of globalization and technological advances. Kirchgeorg, Jung, and Klante (2010) stress the increasingly global nature of the industry, while also pointing to emerging new media as a potential source of competition. Within this context, they argue that companies in this market should "move away from selling space and instead become information brokers who facilitate the networking and interaction of market players" (p. 309). This transition would require developing knowledge of the industries that venues hope to attract or retain.

Earlier studies (Rogers, 2003, pp. 67, 249; Weber and Chon, 2002, p. 206; Go, Govers, and Vliegenthart, 2002, pp. 43-44) note a concern among industry practitioners that new web-enabled technologies would displace or cut into the market share of the physical meeting venue. But this shift has largely not materialized (although one national association has announced that it will provide content from its 2012 annual meeting online, Wimberly, 2012b). Later studies instead discuss the ways technologies affect or improve the business practices of meetings, conventions, and trade shows (Weber and Ladkin, 2005, p. 57). New technologies have shortened lead time for conference and meeting organizing (Weber and Ladkin, 2005, p. 53). Jones and Brewer (2001) note technological innovations have altered the relationship between hotel room sales staff and meeting planners, in some cases undermining established and crucial buyer-seller relationships. According to Ford and Peeper (2007), Internet hotel booking services enable meeting attendees to bypass convention and visitor bureaus (CVBs) when reserving rooms. This prevents the CVBs from demonstrating their importance to the local meetings sector and may be a forerunner of the further marginalization of the CVB in the meetings industry (p. 1112). Rogers (2003) also discusses "disintermediation" in venue bookings and meetings planning, how the internet is undercutting some of the traditional roles of the CVBs and forcing them to develop new ways of adding value to meeting planners and organizations (pp. 251-252).

New technologies, including web-based and social media applications, have been central in the efforts of event planners and venues to remain relevant and attractive to a new generation of professionals and event attendees with changing tastes and expectations. A recent survey by the International Association of Exhibitions and Events (IAEE) found that 24% of event organizers provide outreach or information to exhibitors on engaging with younger event attendees, with 21% more respondents indicating they have plans to do so. Asked if they design programming content and delivery with young professionals in mind, 68% responded affirmatively (Public Events Council, 2012, pp. 12-13).

From 2010 to 2012, the use of social media by exhibitors nearly doubled, according to a survey of exhibition marketers, reflecting the increasing integration of exhibition and online spaces (Stanton 2012). Seli (2012b), Buchanan (2012), and the Society of Independent Show Organizers (2008) discuss the ways social media and other web-enabled technologies are changing the ways exhibitors and attendees interact; all note that the Internet has become a nearly universal component of the trade show and exhibition experience. Wimberly (2012a) notes that the increasing demand for connectivity across all meeting types has raised concerns about bandwidth and the capacities of meeting sites' wireless systems.

Challenges Faced by the Meetings and Exhibitions Industry

Technology presents unique challenges for the meetings and exhibitions industry. Convention centers are under pressure from exhibitors and attendees to provide them with quality Internet access at reasonable rates during shows and events (IAEE, 2012 p. 10). The IAEE published a white paper in 2012 that describes the challenges of Wi-Fi and mobile bandwidth to the meetings and exhibitions industry. The white paper explains that, "attendees have a level of control over the quality of connectivity outside the trade show venue that is not available inside the facility. This disconnect can cause attendees to become dissatisfied with the overall show experience" (IAEE, 2012 p. 4). Not only do attendees expect high-quality Internet access during the shows, but they also expect the access to be available at no cost (IAEE, 2012 p. 4). Exhibitors, on the other hand, often need Internet access directly at their areas on the exhibition floor to be able to conduct business and interact with attendees. This also creates a challenge for convention centers, because exhibitors will often install their own wireless routers, which creates interference with the facility's Wi-Fi network (IAEE, 2012 p. 6). Convention centers must be able to overcome the challenges of providing quality Wi-Fi and mobile bandwidth to be able to retain and attract show attendees.

Attracting attendees is another challenge that the meetings and exhibition industry faces. CEIR President and Chief Executive Officer Douglas Ducate explains these challenges in his Forum magazine article. Ducate posits that attendees are beginning to leave the industry because of aging, and it is critical that new attendees are attracted by creating content and tools that appeal to a younger generation (Ducate, 2010, p.28). Further, individuals attend shows to find new products and vendors, so meeting planners need to seek out shows that people want to attend (Raphael, 2012). Ducate also explains that meeting planners need to enhance the attendee experience at the show (Ducate, 2010, p. 28). The attendee's time should be considered when planning a show, and they should be provided with information about exhibitors before and during the show to help maximize the time they spend there (Raphael, 2012).

Another challenge that Ducate covers in his article is the inconvenience of travel, stating, "people are reluctant to endure expense, hassle and delays associated with taking a trip" (Ducate, 2012 p. 28). Factors such as lean budgets and oil prices also impact whether and how far people are willing to travel for meetings and conventions. Many businesses and governments are discouraging travel for meetings because of tight budgets (Kovaleski, 2012). If the price of oil is high, then the costs of gas and air travel are high and businesses may choose other methods for conducting meetings (CEIR, 2012, p.12). Businesses might choose meeting sites closer to home to avoid costs (De Lollis, 2008) and high-tech (and low cost) alternatives to face-to-face meetings to avoid travel (Kovaleski, 2012). Ducate notes that the industry can combat this challenge by making sure the hassles of travel end upon the arrival of attendees and exhibitors (Ducate, 2010 p.28).

An oversupply of convention center space available to groups seeking locations for events poses another challenge for the industry. This oversupply of space creates tough competition between convention centers looking to generate business opportunities (McGee, 2012 p. 62). As noted by McGee: "The subsequent oversupply of convention space is a boon to many groups, giving them the leverage to negotiate big concessions from cities anxious to get business on the books that fills the area hotel rooms. These concessions can include free rental of the convention hall, food-and-beverage discounts, and complimentary shuttle buses" (McGee, 2012 p.62). Some convention centers offer discounts and coupons to exhibitors and attendees for local restaurants and attractions as incentives to businesses and organizations seeking meeting sites (McGee, 2012 p.66). Whether a convention center is flexible and able to accommodate last minute changes and reservations is also a strong incentive to groups seeking locations for their meetings and events (IMEX, 2011 p. 2).

Challenges on the Horizon

To gather a more indepth perspective on the trends and challenges facing the meetings and exhibitions industry, Douglas L. Ducate, president and chief executive officer of the Center for Exhibition Industry Research (CEIR), was interviewed for his expertise. Ducate has been in his current position for 14 years, and oversees the preparation of research and operations of CEIR. Before joining CEIR, he served as president and as vice president of PGI Exhibitions for three years, and was the deputy executive director of the Society of Petroleum Engineers (SPE) for 26 years. He has also served as chairman of the Convention Liaison Council, was president of the Trade Show Bureau (now CEIR), and was president of the International Association for Exhibition Management.

Ducate described some of the economic trends in the meetings and exhibitions industry, saying that there was a decline in the industry in 2001 and 2002 due to the attack on the World Trade Center and the stock market crash. By 2007, Ducate said the meetings and exhibitions industry had recovered to what it was in 2001, but then declined by nearly 15% during the recent recession. He noted that the industry has been flat over the last five years and hasn't experienced much growth. CEIR is forecasting a modest growth of about 5% over the next five years, he said, depending upon the recovery of the economy. "Expositions usually mirror the industries they serve," said Ducate, meaning that, for example, when the healthcare industry is doing well, it will typically conduct more meetings and events. Currently, events relative to the raw materials, manufacturing, and healthcare industries are thriving, but there is some uncertainty, he said, as to the healthcare industry. He noted that the predictability of the economy is a major factor of this uncertainty, but foresees the healthcare trade show industry as having a bright future in the long-term.

Ducate discussed some of the challenges faced by the meetings and exhibitions industry. Because the industry is over 40 years old, he said, some of the convention and exhibition centers are also over 40 years old. "When convention centers were first being built, the mix to space was 80% exhibition to 20% meetings," said Ducate. "Now the mix is 60% exhibition to 40% meetings." This means the older convention centers are at a disadvantage in the meetings and exhibitions industry, he said, because many of these older buildings don't have the larger space needed for an event. Older convention centers also lack the newer technology offered by new centers that event organizers seek, he said. To be able to compete with the newer convention centers, Ducate said the older convention centers would have to retrofit with newer technology. He stated that this could prove difficult because most convention centers are publically owned, and with today's local governments struggling to manage budgets, funds to further develop convention centers may not be available.

Another challenge, Ducate said, is that some cities are located in destinations that are uncompetitive and have convention centers that are uncompetitive; however, this is a challenge that cities can overcome. “The key to success,” he said, “is finding a market.” To do this, Ducate recommends successfully matching a show to a destination and a facility. Each convention center must realize where it is as a destination and figure out what it can attract, he said. Ducate suggests that show organizers not waste time on shows that will not do well in certain destinations. Convention centers should seek shows that will naturally be attractive to a region because of a local industry or resource located there.

Ducate indicated that the meetings and exhibition industry contributes to economic development both in the United States and around the globe. Visitors from other locations bring in new revenue to an area, he said. “Visitor dollars are important,” said Ducate, noting that there is tough competition among locations for this revenue. “You can sell a location with two things: features and values,” he said. A location can have features that are both natural and man-made, said Ducate, such as the Rocky Mountains or Las Vegas casinos. The values of a location are additional incentives for attracting show attendees.

Ducate offered suggestions as to how the meetings and exhibitions industry could enhance its value proposition. The meetings and exhibitions industry needs to focus on adding value to the show experience, said Ducate. “People are now making decisions on what the best use of their time and money is,” he said, “and need to feel that the show’s experience helped them to become a better person.” Ducate further suggested matching the economic status of the group to the economic status of the destination and facility. For example, he said, matching a show for lower-income school teachers to a destination that would be affordable to them when they are not attending the show. Ducate posited that the meetings and exhibition industry should also secure destinations that appeal to foreign travelers, and have direct international flights to the destination and open currency exchange upon the individual’s arrival. The industry can also build upon its local population and resources to draw audiences within its region or even neighboring regions, he said, citing the city of Chicago and manufacturing expositions as examples of destinations appealing to local audiences.

According to Ducate, the meetings and exhibitions industry is “the last bastion of face-to-face marketing.” He stated that expositions are the most efficient way to meet new and old customers. Expositions work best, he said, with small and medium-size exhibitors, and they provide an environment where customers can look at new products and have an exhibitor there to explain and demonstrate that product. These small to medium-size exhibitors are businesses who want to get out there and meet people to expand their customer base, said Ducate. “As long as there is a desire to do this,” he said, “there will be a meetings and exhibitions industry.”

COMPETING CONVENTION AND EXHIBITION CENTERS TO THE I-X CENTER

Convention and exposition centers profiled in this section are identified by the I-X Center as regional, state, and national competitors. These centers compete with the I-X Center as locations for hosting various type(s) of shows. The competitor convention centers are shown in Table 1 below. Data were collected for shows scheduled from July to December 2012. These profiles are not meant as an indepth study, rather as a “snapshot” of activities for these convention centers over this particular period of time. The frequency of activities scheduled for this time period is depicted in Figure 1, while the total number of scheduled events by category is shown in Figure 2. A description of the categories used in these figures is found in Appendix D. All data were retrieved from each of the convention centers’ individual websites and marketing materials. Data were collected on the size of the venue, access to the venue in terms of hotels, parking, and loading docks, the venue’s ownership, volume of events, and types of events.

Table 1: I-X Center Competitor Venues and Locations

Venue	Location
International Exposition Center (I-X Center)	Cleveland, OH
Cleveland Medical Mart & Convention Center	Cleveland, OH
The Greater Columbus Convention Center	Columbus, OH
Duke Energy Convention Center	Cincinnati, OH
Kentucky International Convention Center	Louisville, KY
Kentucky Exposition Center	Louisville, KY
Indiana Convention Center	Indianapolis, IN
Lucas Oil Stadium	Indianapolis, IN
The David L. Lawrence Convention Center	Pittsburgh, PA
Monroeville Convention Center	Monroeville, PA
McCormick Place Downtown	Chicago, IL
Donald E. Stephens Convention Center	Rosemont, IL
Georgia World Congress Center	Atlanta, GA
Suburban Collection Showplace	Novi, MI
Cobo Convention Center	Detroit, MI

Source: Extracted from websites and center marketing materials

International Exposition Center, Cleveland, OH

The International Exposition Center (I-X Center) is a 2.2 million-square-foot facility. The center has 1,050,000 contiguous square feet of exhibition space and 53,900 square feet of meeting space. In addition, the I-X Center has a 16,000 square foot ballroom and 77-foot ceilings. There are 30 truck docks with 7 oversized drive-in doors, and 7,200 onsite parking spaces. More than

30 hotels are located in close proximity to the I-X Center with more than 9,000 available rooms. The facility is publically owned but privately operated and is adjacent to the Cleveland Hopkins International Airport. Events that are business related are the types of event held most often during the July to December 2012 time period.

Cleveland Medical Mart and Convention Center, Cleveland, OH

The Cleveland Medical Mart and Convention Center (Medical Mart), which targets medical and healthcare venues, is 465,000 total square feet, with 230,000 square feet of exhibition space and 90,000 square feet of meeting space. The Medical Mart has a 32,000 square foot grand ballroom and an 11,000 square foot junior ballroom. The ceiling height of the Medical Mart is 30 feet, and it has 17 covered truck docks with 3 full-size drive-in doors. There is no parking available on site at the Medical Mart; however, there are eight hotels with more than 4,000 rooms within walking distance from the site. The Medical Mart is owned by a joint venture between Cuyahoga County (public) and Merchandise Mart Properties, Inc. (private). The Medical Mart also features 10 acres of outdoor roof space for attendees. The Medical Mart is scheduled to officially open in summer of 2013.

The Greater Columbus Convention Center, Columbus, OH

The Greater Columbus Convention Center is publically owned and has 1,700,000 total square feet of space. The center has 426,000 square feet of exhibition space with 96,422 square feet of meeting space. The center proclaims the largest ballroom in the state of Ohio with 50,000 square feet of space on the main floor and 24,000 square feet of space on the mezzanine level. The ceilings of the center are 33 feet high; it has 36 loading docks with 3 drive-in ramps and features 3,000 parking spaces. Accessible to attendees are the city of Columbus' 14 hotels with 2,600 rooms downtown and 22,000 rooms available beyond downtown. The types of events scheduled at the center for the July to December 2012 time period were shows related to business and education.

Duke Energy Convention Center, Cincinnati, OH

The Duke Energy Convention Center is a 750,000 square foot, publically-owned facility, with 200,000 square feet of contiguous exhibition space and 43,441 square feet of meeting space. The center has a 39,985 square foot grand ballroom and a 17,326 square foot junior ballroom. The ceilings of the center are 36 feet high; it has 17 dock spaces and 2,500 parking spaces surrounding the center. There are 8 hotels with 3,000 rooms located within 3 blocks of the center. The highest number of events scheduled from July through December 2012 were business related.

Kentucky International Convention Center, Louisville, KY

The Kentucky International Convention Center is a 300,000 square foot facility with 191,000 square feet of exhibition space and 98,604 square feet of meeting space. The center has a 30,000 square foot ballroom and 32-foot ceilings. The center has 12 dock spaces with 2 drive-through doors and is publically owned. There are 12,000 hotel rooms in Louisville, with 2,300 of those rooms located within the center's connected hotel and 3,800 additional rooms within walking distance of the facility. The most frequent types of events scheduled at this center during the time period were related to business and education.

Kentucky Exposition Center, Louisville, KY

The Kentucky Exposition Center is 1,300,000 square feet, and features 931,700 square feet of exhibition space and 202,800 square feet of meeting space. The center has a 25,000 square foot ballroom and 71-feet ceilings. The facility has 22 loading docks and 19,000 spaces for parking. There are 14,000 hotel rooms in the area and 2,000 rooms within walking distance of the center. The facility is publicly owned, has two arenas (Freedom Hall at 39,000 square feet and Broadbent at 39,000 square feet), and has 300 acres of outdoor area. The Kentucky State Fair is held here every year. The types of events most frequently scheduled between July and December 2012 were business and entertainment related.

Indiana Convention Center, Indianapolis, IN

The Indiana Convention Center is a 742,075 square foot, publically-owned facility with 566,600 square feet of exposition space and 113,302 square feet of meeting space. The facility has a grand ballroom that is 33,335 square feet and a junior ballroom that is 13,536 square feet. The center has ceilings 32 feet in height, and there are 49 loading docks with 7 drive-in ramps. Surrounding the facility are 12,000 parking spaces, with an additional 40,000 spaces located within 10 blocks of the center. There are 4,717 hotel rooms adjoining the center with another 6,685 rooms located within 6 blocks of the facility. Education and business were the top two types of events scheduled at the center between July and December 2012.

Lucas Oil Stadium, Indianapolis, IN

Lucas Oil Stadium is publically owned, and has 45,000 square feet of exhibition space and an additional 183,000 square feet of outdoor exhibition space. In addition to the exhibition space, the facility has 13,000 square feet of meeting space. The facility has 11 loading docks and

12,000 parking spaces onsite as well as 40,000 spaces within 10 blocks of the center. There are 7,100 hotel rooms located within 6 blocks of the center. Sports events were the top types of venues held at the facility between the July through December 2012 time period.

David L. Lawrence Convention Center, Pittsburgh, PA

The David L. Lawrence Convention Center is a 1,500,000 square foot facility, with 313,400 square feet of exhibition space and 77,952 square feet of meeting space. The center has a 41,610 square foot ballroom and 32-foot ceilings. The facility also has 37 loading docks and 700 parking spaces. The center is publically owned and has Gold LEED certification. There are 14 hotels in the area surrounding the facility. Events related to health were the types of events that were most frequently scheduled during this time period.

Monroeville Convention Center, Monroeville, PA

A publically-owned facility, the Monroeville Convention Center has 100,000 square feet of exhibition space and 54,825 square feet of meeting space (including the meeting space at the adjoined hotel). The center has a grand ballroom of 5,355 square feet, a junior ballroom of 3,969 square feet, and ceilings at 32 feet in height. The facility also has 8 loading docks with 2 drive-in ramps and 1,800 parking spaces. The center has a 191-room adjoined hotel, and there are 11 hotels in the area with 1,343 rooms. The types of events that most frequently occurred at the center during this time period were related to business.

McCormick Place Downtown, Chicago, IL

McCormick Place Downtown is a publically owned, 2,760,000 square foot facility, with 2,600,000 square feet of total exhibition space and 1,200,000 square feet on one level. The center has 600,000 square feet of meeting space and a 100,000 square foot ballroom. The ceilings of the facility are as high as 50 feet. The campus has 43 gates for loading and 5,800 easily accessible parking spaces. There is a hotel with 800 rooms connected to the facility and 15 more hotels in the area. Between July and December of 2012, events related to business and health were the types of events most often held there.

Donald E. Stephens Convention Center, Rosemont, IL

The Donald E. Stephens Convention Center is a 960,000 square foot facility, with 840,000 square feet of exhibition space and 92,000 square feet of meeting space. The center has a 30,000 square foot grand ballroom, a 17,360 square foot junior ballroom, and ceilings up to 30 feet in height. The venue also has 16 depressed docks with 7 drive-in freight doors and 8,000 parking spaces. There are 16 hotels in the area surrounding the convention center. The center is privately owned and is connected to the Allstate Arena and Akoo Theatre. The Allstate Arena has 12,500 square feet of meeting space in addition to the meeting space of the convention center. Entertainment and business types of events were the most frequently scheduled during the July to December 2012 time period.

Georgia World Congress Center, Atlanta, GA

The Georgia World Congress Center contains a total of 3,900,000 square feet, and has 1,400,000 square feet of exhibition space and 300,000 square feet of meeting space. The center has a 33,000 square foot grand ballroom, a 25,722 square foot junior ballroom, and 30-foot ceilings. There are 88 loading docks and 5,468 parking spaces for the facility. There are also 30 hotels with 13,000 rooms located within walking distance of the center. The center is publically owned and adjoins the Georgia Dome, which has 6,273 square feet of meeting space. The facility also adjoins a 21-acre park. The types of events most often scheduled at this center during the time period were related to entertainment and sports.

Suburban Collection Showplace, Novi, MI

The Suburban Collection Showplace is a 320,000 square foot facility, with 214,000 square feet of exhibition space and 37,691 square feet of meeting space. The center has a 20,460 square foot ballroom and ceilings as high as 28 feet. The center is privately owned and sits on 55 acres of land. There are 28 hotels in the area surrounding this facility. Business and arts were the two types of events most frequently scheduled during the time period.

Cobo Convention Center, Detroit, MI

The Cobo Convention Center is a 2,400,000 square foot facility, with 623,000 square feet of exhibition space and 178,446 square feet of meeting space. The center has a 27,200 square foot ballroom and 20-foot ceilings. The facility also has 27 loading docks with drive-in ramps and 1,700 parking spaces on site. The center is publically owned and is surrounded by 12 hotels with 1,850 rooms. Of all the events during the July to December 2012 time period, the types of events most frequently scheduled were related to health.

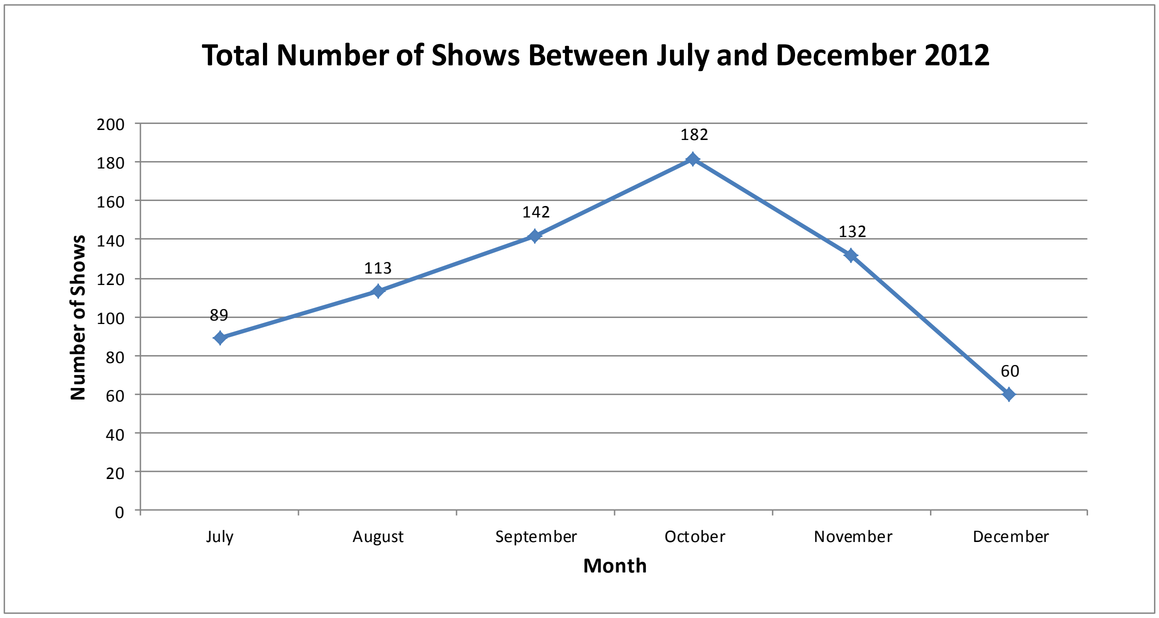

Figure 1

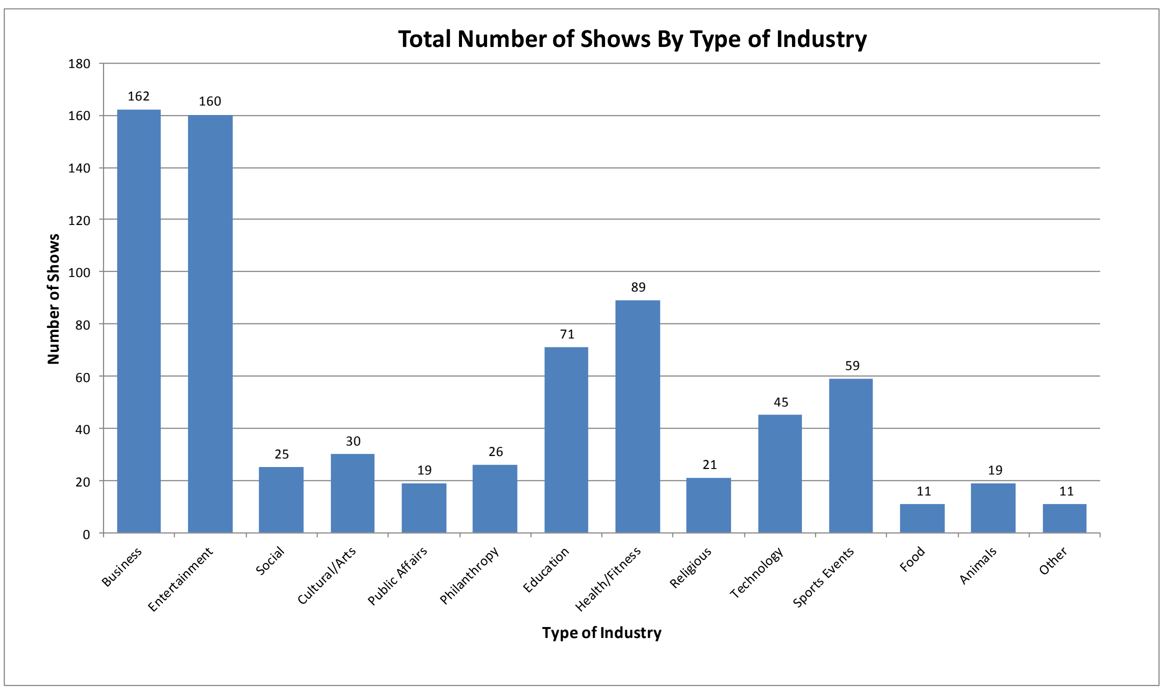

Figure 2

I-X Customer Observations

Interviews were conducted with I-X Center customers representing major trade and consumer shows to get a sense of their experiences with the I-X Center and vendors in the greater Cleveland Area. Appendix B contains the protocol used to guide these interviews. Interviews were conducted with the following I-X customers:

- Greater Cleveland Auto Dealers Association (The Cleveland Auto Show)
- Marketplace Events (Great Big Home & Garden Expo)
- American Chemical Society, Rubber Division (Rubber Expo)
- Crain Communications (International Tire Exhibition & Conference)
- Advanstar Communications (Progressive International Motorcycle Show)
- Great Lakes Recreational Vehicle Association (Ohio RV Supershow)
- Gordon Food Service (Gordon Food Service Show)
- Material Handling Industry Association (North American Material Handling Show)
- NARI-Greater Cleveland Chapter (Remodel Ohio Show)
- Famous Enterprises, Inc. (Tri-State Expo)

Introductory questions centered on the descriptions of current positions of the interviewees within their organizations and how long they have worked with the I-X Center. The majority of those interviewed have been employed with their organizations more than 10 years, 40% of them for more than 20 years. Of those interviewed, the majority have been working with or have a relationship with the I-X Center that spans beyond a decade, with 40% having worked with the I-X Center for more than 20 years.

When asked to describe their overall experiences in working with the I-X Center and services provided for shows and events, all stated that their overall experiences were positive and found the I-X to be flexible and accommodating to their needs. Particularly mentioned were box office services, concessions, parking, the handling of contracts, and internal staff (sales, marketing, operations, and security). All spoke highly of the I-X Center staff and employees, employee professionalism, and the efforts of the employees to help make each event a success. Many noted that working with the I-X Center staff was "like having an extension of our own staff leading up to and during the event." One interviewee stated that the "main reason we come back is because of the people and how they work with us."

Use of the I-X Center as reported by customers varied, depending upon the frequency of the show/event (see Table 2). The majority (6 of 10) of customers utilize the I-X Center for annual shows. Shows ranged from 1-day private events to 9-day public events. Most have staff in town

2 or 3 days prior to the event (setup) and 1 or 2 days following the event (breakdown). Attendees for these events ranged from an estimated 2,000 to 105,000, with the number of show exhibitors/vendors ranging from 12 to 600. These customers bring with them anywhere from 5 to 30 employees for their events.

Those attending these shows are primarily from the Greater Cleveland region and northern Ohio, however, some of the shows attract attendees from across the Midwestern states, Canada, Mexico, and the Middle East.

Comments were generally positive with regard to customer experiences with local suppliers (hotels, restaurants, airport, transportation). Most of the feedback focused on area hotels, with some comments on transportation. The hotels mentioned were the Airport Sheraton, Marriott Airport, Marriott Key Center, downtown Hyatt, the Renaissance, Crowne Plaza, Hampton Inn, and the Radisson. Comments on these hotels were mixed, but generally positive, with the exception of the Airport Sheraton – the Sheraton was highly noted among those interviewed as providing excellent service and being the most accommodating to show staff, exhibitors, and attendees. One person mentioned difficulty managing the blocks of rooms for show attendees due to the disparity of hotel locations (having to acquire lodging near the I-X Center and in downtown Cleveland), and would have preferred having attendees in lodgings onsite or closer to the I-X Center. Another person indicated that some of the hotels are becoming dated, but that there’s a good selection of accommodations in terms of levels of service and price. One individual also spoke of security concerns after hours in downtown Cleveland.

Most of the customers stated they had limited dealings with local restaurants or did not comment on their experiences with them. A few persons stated that they used the shuttle between the hotels and the I-X Center and that their experiences with these were positive. These customers do primarily utilize local suppliers for their shows/events, for services such as advertising, printing and design, website design and social media marketing, marketing and media promotion (ad agency, television, radio, print), food/beverages, transportation (taxis, buses), audio visual, security, ambulance/medical services, music and entertainment, dry cleaning, and gas stations.

Table 2: Use of I-X Center as taken from I-X Center Customer Interviews

Customer	Description of Use			Attendees		Exhibitors	
	Frequency of Use	Length of Event	Public/Private	Average Number of Attendees	Attend from?	Average Number of Exhibitors	Attend from?
Greater Cleveland Auto Dealers Association	Once per year	9 days-public, 1 day private	9 days-public, 1 day private	N/A	90% NEO, Some Pittsburgh and Toledo	100	National Companies
Marketplace Events, Great Big Home & Garden Expo	Once per year	9 days	Public	105,000	95-97% Cleveland	600	90% NE Ohio
American Chemical Society, Rubber Division	Once per year	4 days	Private	4,300-6,000	30% NEO, 40% U.S., 30% outside U.S.	240-300	35% NE Ohio, 50% U.S., 15% outside U.S.
Crain Communications (International Tire Exhibition & Conference	Once per year	3 days	Private	3,200	Canada, U.S., Mexico	230	Mostly U.S.
Advanstar Communications	Once per year	3 days	Public	60,000	Mostly NEO, within 200 miles of Cleveland	175	60% NE Ohio, 40% U.S.
Great Lakes Recreational Vehicle Association: Ohio RV Supershow	Twice per year	5 days in January, 2 days in September	Public	N/A	Pittsburgh, Michigan, Toledo, Columbus, Cincinnati, Dayton	40 with 12-14 dealers	Pittsburgh, Michigan, Toledo, Columbus, Cincinnati, Dayton
Gordon Food Service	Once per year	1 day	Private	4,500	Within 2 hours from Cleveland	400-600	Mostly Ohio
Material Handling Industry Association	Once every two years	4 days	Public	16,000	40% Ohio, 60% Midwest	4,000-4,500 staff	40% Ohio, 60% Midwest

NARI: Greater Cleveland Chapter	Once per year	4 days	Public	20,000	Mostly NEO	200	Mostly NE Ohio
Famous Enterprises Inc. (Tri-State Expo)	Once per year	2 days	Private	2,000-4,000	Ohio	225-260	Mostly Ohio

Customers were asked to discuss the advantages and disadvantages of their experiences in utilizing the I-X Center for their venues. Several advantages were cited – from a friendly and competent staff to the size of the facility. One person stated that the "I-X understands business; this is a significant advantage over municipally-operated centers that don't understand entrepreneurship." Advantages noted by customers were:

- I-X is the only large competitor in town
- Flexible and friendly staff/employees
- Great customer service
- Plenty of parking
- Easy access in/out of the facility to unload/load
- High ceilings, large doors, overall size, and floor space
- Clean facility
- Location of the I-X affords easy access to the airport and downtown
- Cost of doing business with the I-X is relatively reasonable
- Ease of union rules
- Seamless experience (everything you need is in one place)

While customers pointed out many advantages to their experiences with the I-X Center, they did indicate some disadvantages to using the facility for their events. Most frequently mentioned was the lack of an onsite hotel or adequate nearby hotel rooms. With the I-X Center not being centrally located, customers said there is limited access to public transit and to amenities such as bars, restaurants, entertainment, and attractions. Customers also stated high costs of the "one-stop-shop" labor, rentals, and services provided by the I-X Center as a disadvantage. The customers stated that union labor is costly and, in some instances, found that laborers were not qualified to handle some jobs. Some of the interviewees said that they would like to have the flexibility to bring in their own contractors and decorators. Prices for parking, food, and other building services were additionally mentioned as costly.

The customers indicated that the facility needs a "facelift," to be updated and modernized. Suggestions were made to renovate the lower-level restrooms, relocate the heating units away from exhibition floor space, and create additional conference room capabilities on the main floor.

Those interviewed were asked if there were events they produced for which they would not/have not considered the I-X Center as a possible location and why. The customers stated that there are some types of events, such as larger trade shows, and small meetings and seminars, for which they would not consider the I-X Center. The difficulty of getting people to/from hotels, the lack of onsite/nearby hotels, and lack of onsite/nearby after-hour amenities and entertainment were cited as primary reasons that make the I-X Center a “tough sell” to attendees as a large trade show location. They cited a need for clusters of hotels and restaurants onsite or easily accessible to the facility that would allow event attendees better interaction and socialization.

Customers also indicated that they do not consider the I-X facility for small meetings, seminars, and training events. They view hotels and restaurants as more appropriate for these types of venues because of onsite food, lounges, and meeting rooms. Interviewees suggested that the I-X Center create conference rooms on its main floor to accommodate smaller events.

When asked to name three things that they would NOT change about their experience in working with the I-X Center, the most resounding response was the I-X Center’s commitment to service and high level of service delivery. The management staff and employees were cited as trustworthy, friendly, accommodating, and flexible, and the facility’s strongest competitive advantage. Other noted assets were the physical aspects of the building – high ceilings, unencumbered floor space for exhibitors, in/out access, and overall size – as well as the management of ticketing and parking, and free hotel shuttle service.

In citing three things that they WOULD change about their experiences in working with the I-X Center for their events, costs for services and updating the facility were those most frequently mentioned. The customers indicated that rental costs, costs for labor, and costs of in-house graphic design services are expensive compared to other U.S. convention centers, and that they would like to better understand the fees charged by the I-X Center for these services. Also mentioned was to allow customers flexibility in obtaining contractors and competitive bidding for services to help reduce costs, as well as some displeasure with the quality of union labor contracted by the I-X Center. Customers would like to see the facility updated and modernized, with the lower-level restrooms remodeled and large heating units relocated away from exhibition space. They additionally said they would like to see the addition of main-floor conference rooms so attendees would not have to leave the trade show floor to attend seminar or workshop sessions. Customers stated that they would like to have onsite/nearby hotels, restaurants, entertainment, and amenities clustered around the I-X Center, easily accessible to their staff, exhibitors, and attendees. Also, one customer indicated that the I-X Center could better help to market shows and events to exhibitors and attendees.

Customers were asked if the I-X Center were to improve its facilities, what would they like to see added or changed. Suggestions specifically cited by customers were:

- Add digital signage (directional/informational signs) inside the facility
- Additional traffic lanes and fee collectors needed for parking when multiple venues are simultaneously occurring
- Update and modernize the building (interior and exterior) to a Tier 1 exhibition hall
- Wi-Fi access
- Remodel lower-level restrooms
- Add conference rooms on the main level
- Address ventilation problem on lower level
- Upgrade overall speaker system (difficult to hear when multiple shows occurring)
- Improve air conditioning system on the main floor

I-X STAKEHOLDER OBSERVATIONS

Leaders from various businesses and organizations and the City of Cleveland were interviewed to gain their perceptions on the impact and importance of the I-X Center to the greater Cleveland region. The protocol used to guide these interviews is found in Appendix C. Interviews were conducted with leaders from the following I-X Center stakeholders:

- City of Cleveland
- Cleveland Hopkins International Airport
- Cleveland Sports Commission
- FirstEnergy
- Marriott Airport Hotel
- Positively Cleveland
- Sheraton Airport Hotel

Initial questions focused on the current positions of the interviewees and tenure within their businesses and organizations and how long they have worked with the I-X Center. Most of those interviewed have been employed with their businesses/organizations for five years or more. These stakeholders have maintained a relationship with the I-X Center for five years or more, with three of the interviewees having worked with the I-X Center for more than a decade.

Interviewees view the principal role or purpose of the I-X Center within and outside of greater Cleveland as a venue for large trade shows and certain types of meetings, conventions, and events in need of large physical space. The I-X Center is seen as a tremendous asset to the Cleveland region, drawing various types of events that would not typically view Cleveland as a destination for their events. The size of the facility, its proximity to the interstate and airport, and ample parking were noted as assets that help to attract events to Cleveland because these assets aren't available in other markets. The I-X Center is seen as a hub for people and businesses to meet and display goods, attracting both local and outside visitors who generate tax revenue through use of local hotels, restaurants, transportation, entertainment vendors, dry cleaners, printing companies, and other businesses. One interviewee commented that the I-X Center is a facility where local residents can find entertainment and escape during Ohio's winter months.

The majority of those interviewed indicated that the greatest impact of the I-X Center to the greater Cleveland area is that it brings in outside visitors to the region, yielding new tax revenue for the city and suburbs. The interviewees also cited the fact that the I-X Center is unique in terms of size, offering "no limit" to the types of large-scale events that the facility can accommodate. One interviewee stated that the I-X Center is able to attract shows that wouldn't be able to go or "fit" anywhere else in the country.

When asked what the I-X Center means to the businesses of its surrounding communities, the majority of those interviewed stated that the I-X Center provides a significant economic impact through the attraction of outside visitor spending to the city and the county. Tax revenue is generated from outside visitor spending and supports the communities. A portion of revenue from the bed tax, for example, is distributed to the city of Cleveland (3%) and to Cuyahoga County (4.5%). Interviewees also noted that events at the I-X Center keep area hotels occupied and surrounding businesses active during slow times of the year. The interviewees stated that what the I-X Center means to surrounding residents is employment – the I-X Center keeps people working due to the influx of activity generated for businesses in the region due to shows and events held there. Events at the I-X Center also draw visitors to downtown Cleveland – not only to occupy hotels and dine at downtown restaurants, but to attractions such as the Rock and Roll Hall of Fame, the Horseshow Casino, sports venues, and Playhouse Square. Some of the types of businesses impacted by events to the I-X Center include hotels, restaurants, gas stations, convenience stores, shopping centers, dry cleaners, printing companies, entertainment venues, the airport, and all modes of transportation. The I-X Center is also viewed by its stakeholders interviewed as a gathering place for friends and families.

The major strength of the I-X Center, according to the interviewees, is the size of the facility. The more than two million square feet of space and its high ceilings afford the I-X Center the flexibility to host large-scale shows, drive 18-wheelers and large trucks directly into the facility to load and unload, and steer aircraft through its doors. A second strength of the I-X Center is its ease of accessibility. Its close proximity to Cleveland Hopkins International Airport, transit, and highways alleviates transportation issues for attendees. Another strength cited by interviewees is the staff of the I-X Center and its customer-service philosophy. Those interviewed also noted the ability of the I-X Center to handle all aspects of a show in-house as a strength (signage, marketing, setup, electrical, pipe and drape, catering, etc.).

There was a variety of challenges noted by the interviewees of the I-X Center in comparison to other convention centers. The most frequently cited challenge is that the I-X Center is not located within walking distance to downtown attractions. While the I-X Center is easily accessible to transportation that could transport visitors to downtown, the stakeholders interviewed indicated that visitors prefer amenities that are within walking distance of convention centers after a day of trade show activities. The interviewees also stated that there were, at times, not enough hotel room packages surrounding the I-X Center to accommodate visitors. Those interviewed also noted that the I-X Center is an older building in need of modernization with newer technology. Another challenge cited by interviewees is that it can be expensive for show organizers to do business with the I-X Center because the facility handles all aspects of managing an event. While this was seen also as an advantage, to some I-X Center customers this was also viewed as a disadvantage and could result in a loss of shows that use independent contractors. Some trade shows have long-time relationships with vendors and use these vendors for their events. Because the event coming to the I-X Center must only use the I-X Center and its portfolio of contractors, the event organizer may have to sever ties with a long-time vendor for an I-X event. This could result in resistance from an event organizer to host its show at the I-X Center.

To overcome these and other challenges, several suggestions were made by interviewees as to what could be done by the I-X Center to retain its competitive advantage:

- Incorporate some level of flexibility into its business model that would allow show organizers with long-standing contractor relationships to use their own vendors to provide services at the I-X Center
- Continue to update and modernize the facility, and consider improvements that would give the I-X Center greater ability to host more events
- Develop an on-site hotel
- Work with the Greater Cleveland Regional Transit Authority to extend a bus rapid transit line directly to the I-X Center
- Consider alternative energy and recycling solutions
- Work with Positively Cleveland to develop a marketing portfolio that would together market the I-X Center and the Cleveland Convention Center, focusing on Cleveland as a destination for various types of events

The interviewees cited opportunities for the I-X Center over the next five years. It was suggested that the center should seek to develop shows on manufacturing, shale gas, biomedical, and the region's growing industries. Those interviewed indicated that with Cleveland becoming a destination city for meetings and conventions, the I-X Center is poised to attract shows from larger, expensive cities and could partner with the downtown convention center to attract visitors to the region.

Priorities for the I-X Center over the next five years were suggested by the interviewees to enhance its value proposition. Suggestions were:

- Develop a focused sales strategy that includes:
    - Identifying a key prospect list of businesses that might utilize the I-X Center for events and work with Positively Cleveland to market to these businesses, including local businesses
    - Identifying a strategy to attract shows that utilize outdoor exhibit space, as the I-X Center has available outdoor acreage for events

    - Examine the events conducted at its competitor facilities and see which of these might be appropriate for the I-X Center
- Create a strategy to develop the unused space within the facility
- Develop an on-site hotel and restaurant
- Work with GCRTA to bring bus rapid transit directly on site to the I-X Center (similar to the Silver Line in Boston, MA)
- Work with Positively Cleveland on a marketing strategy to collectively market the I-X Center and the Cleveland Convention Center to bring outside visitors to Cleveland
- Consider investing in sustainability initiatives, such as solar or alternative energy, recycling (garbage, paper, etc.), and placing sheep, goats, and llama on the grounds (could also serve as a petting zoo)

APPENDICES

APPENDIX A: I-X Center Professional Staff Interviews
Qualitative Community Impact Analysis

Date/Time of Interview:	
Person Interviewed:	
Job Title:	

1. How long have you been employed in your current position with the I-X Center? What do you do here at the I-X Center?
2. What do you see as the principal role or purpose of the I-X Center within the greater Cleveland area? Outside of the greater Cleveland area?
3. In your opinion, how does the I-X Center serve the greater Cleveland area? What does the I-X Center offer or bring to the greater Cleveland area?
4. What do you think the I-X Center means to the businesses and residents of its surrounding communities?
5. What types of industries and businesses are affected by the I-X Center?
6. What are the strengths of the I-X Center relative to similar facilities of this nature inside and outside of the greater Cleveland area?
7. What do you see as opportunities for the I-X Center over the next five years?
8. Who are competitors to the I-X Center inside and outside of the greater Cleveland area? How do they compete with/differ from the I-X Center?
9. What do you think needs to be done or what changes need to occur to retain the competitive advantage and stature of the I-X Center? What can the I-X Center do to retain its competitive advantage?
10. What should the I-X Center focus on as priorities over the next five years that will enhance its value proposition to the greater Cleveland area?
11. What should we know about the I-X Center that we haven't asked?

APPENDIX B: I-X Center Customer Interviews
Qualitative Community Impact Analysis

Date of Interview:	
Person Interviewed:	
Job Title:	
Company:	

1. Please briefly describe your role with your company and how long you have been employed in your current position.
2. How long have you worked with or had a relationship with the I-X Center?
3. Please describe your experience in working with the I-X Center and the services provided to you by the I-X Center for your show/event.
4. How often do you use the I-X Center? What is the length of your show/event at the I-X Center?
5. How large is your show/event in terms of number of attendees, number of exhibitors and staff, and number of your staff?
6. Do you have a sense of where your attendees come from, local or otherwise (inside/outside of the region)? What about exhibitors?
7. Please describe your experience with local suppliers (hotels, restaurants, airport, transportation, etc.).
    a. Do you have a sense of what percentage of suppliers for the activity at the I-X center are local versus nonlocal?
    b. If you use local suppliers, what types of goods or services do they provide?
    c. Can you give us a sense of how much you spend with local suppliers for this event or what % is spent locally?
8. Why the I-X Center?
    a. What are the advantages to using the I-X Center over competing sites?
    b. What are the disadvantages to using the I-X Center over competing sites?
9. Are there events or shows you produce for which you would not/have not considered the I-X center as a possible location? If yes, why not?
10. What are the 3 things that you WOULD NOT change about your experience in working with the I-X Center for your show/event?
11. What are the 3 things that you WOULD change about your experience in working with the I-X Center for your show/event?
12. If the I-X Center were to improve its facilities, do you have any suggestions on what you'd like to see added/changed?

APPENDIX C: I-X Center Stakeholder Interviews
Qualitative Community Impact Analysis

Date of Interview:
Person Interviewed:
Title:
Company/Organization:

1. Please briefly describe your role with your company/organization and how long you've served in your current position.
2. How long have you worked with or had a relationship with the I-X Center?
3. What do you see as the principal role or purpose of the I-X Center within the greater Cleveland area? Outside of the greater Cleveland area?
4. In your opinion, how does the I-X Center serve/impact the greater Cleveland area? What does the I-X Center offer or bring to the greater Cleveland area?
    a. What do you think the I-X Center means to the businesses of its surrounding communities? To the residents?
    b. What types of industries and businesses are affected by the I-X Center?
5. What are the strengths of the I-X Center relative to similar facilities of this nature inside and outside of the greater Cleveland area?
6. What are the challenges of the I-X Center relative to similar facilities of this nature inside and outside of the greater Cleveland area?
7. What do you think needs to be done or what changes need to occur to retain the competitive advantage and stature of the I-X Center? What can the I-X Center do to retain its competitive advantage?
8. What do you see as opportunities for the I-X Center over the next five years?
9. What should the I-X Center focus on as priorities over the next five years that will enhance its value proposition to the greater Cleveland area?
10. What should we know about the I-X Center that we haven't asked?

APPENDIX D: TYPOLOGY FOR FIGURES 1 AND 2

Business: Shows include business conferences, meetings, and training seminars, public shows that involve sales transactions such as consumer shows, flea markets, and auctions, and also specific industry trade shows.

Entertainment: Includes primarily public shows that involve games, pop culture, comics, toys, hobbies, concerts, comedy performances, circuses, parades, fairs, festivals, amusement parks, and car shows.

Social: Shows are private and include balls, reunions, weddings, bat mitzvahs, banquets, anniversaries, company picnics, and dances.

Cultural/Arts: Shows have to do with art, crafts, sewing, quilts, keepsakes, scrapbooks, literature, books, consumer arts and crafts, cultural celebrations and meetings, as well as plays and theater.

Public Affairs: Shows that include all levels of government, political parties, federal agencies, law enforcement, fire rescue (EMS), state departments, security, and military.

Philanthropy: Shows include charities, foundations, and fundraisers such as balls, galas, events, runs, and walks.

Education: Includes shows that have to do with school boards, teachers' associations meetings, graduations, commencements, exams or testing, training, school dances, student parking, and classes.

Health/Fitness: Shows involve medicine, dentistry, nutrition, fitness, health training and education, surgical procedures, medical insurance, medical professional group meetings, martial arts, strength training, marathons, gymnastics, wrestling, fitness training, consumer health and fitness, and dance and cheer competitions.

Science: Includes shows for technology, science, mathematics, nature, energy, environment, plants, green industries, and experimentation and testing.

Sports Events: Include shows that involve collegiate and professional sports games, coach association meetings, professional wrestling, car races, and consumer sports and athletics.

Food: Is a category of shows that includes food shows and beer festivals.

Animals: Shows that have to do with animals, animal auctions, and animal associations.

Other: Shows that were not specifically identified or categorized on the competitor or trade show websites.

APPENDIX E: REFERENCES

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