## Scope and Process: Market and Revenue Study

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<th>Phase 1</th>
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<th>Phase 3</th>
<th>Phase 4</th>
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<tbody>
<tr>
<td><strong>Market Analysis &amp; Strategic Plan Alignment</strong></td>
<td><strong>Market Demand &amp; Overnight Visitor Analysis</strong></td>
<td><strong>Fiscal Impact Analysis</strong></td>
<td><strong>Presentation and Report</strong></td>
</tr>
<tr>
<td><strong>1 Month</strong></td>
<td><strong>1 Month</strong></td>
<td><strong>1 Month</strong></td>
<td><strong>2 Months</strong></td>
</tr>
<tr>
<td><strong>June:</strong></td>
<td><strong>July:</strong></td>
<td><strong>August:</strong></td>
<td><strong>September/October:</strong></td>
</tr>
<tr>
<td>• Kickoff and stakeholder interviews</td>
<td>• Market Demand and Overnight Visitor Analysis</td>
<td>• Fiscal impact</td>
<td>• Final Presentation and Conclusions</td>
</tr>
<tr>
<td>• Market Survey</td>
<td></td>
<td></td>
<td>• Draft Report</td>
</tr>
</tbody>
</table>

**Deliverables and Meetings:**

- Kickoff meeting with Commissioners and stakeholder interviews
- Presentation of findings
- Deliver draft report

### Scope

- Context Analysis
- Operations Review
- Fiscal Impact Analysis
- Stakeholder Interviews
- Competitive Market Survey
- Economic Impact Analysis
- Opportunity Alignment
- Visitor Spending Analysis
Scope and Process: Stakeholder Interviews

- Board of County Commissioners
- Lucas County
- City of Toledo
- SMG / SeaGate Centre
- CVB and Board members
- Maumee Bay Brewing Co.
- Regional Growth Partnership
- Imagination Station
- The Blade
- Toledo Municipal Court
- The Toledo Club
- Toledo Museum of Art
- Toledo Regional Chamber of Commerce
- Toledo Zoo
- City of Perrysburg
- Downtown Toledo Improvement District
- Assets Toledo
- Destination Toledo
- The Arts Commission
- Maumee Bay Lodge
- Oregon Economic Development Foundation
- Renaissance Toledo
- Toledo-Lucas County Port Authority
- Park Inn
- Toledo Mud Hens
SeaGate Centre

1987
Year Opened

92,000
Total Square Feet

125,000
Annual Attendance
(Avg. 2001-2015)

75,000
Exhibition Space S.F.

295,000
Peak Attendance
(2006)

0
Ballroom S.F.

Sources: SMG/SeaGate Centre
WHAT YOU WILL LEARN:

- Tourism is Big Business
- Conventions can play an important role in the diversification of the Toledo Economy
- Downtown has great momentum underway, creating opportunities for the convention business
- The Seagate Center will require repositioning to compete with peer cities
- Capital improvements to the Seagate Center will not pay for themselves directly; but...
- Repositioning the convention center will lead to hundreds of millions of dollars of economic activity for Toledo/Lucas County
DEVELOPMENT STRATEGIES

Introduction

The Role of Convention Centers
> Economic Development

Marketability

Markets

Hospitality/Hotels

Economic Impacts

Conclusions and Next Steps
THE VIRTUOUS CYCLE FOR CONVENTION CENTERS

MARKETABILITY
- Activity Generators
- Public Space
- Amenities
- Security & Image

MARKETS
- Housing
- Retail

HOSPITALITY
- Employment
- Tourism
- Conventions & Groups

ECONOMY
- Visitor Spending
- Earnings
- Enhanced Marketability

DEVELOPMENT STRATEGIES®
- Jobs
- Private Investment
- Tax Revenue
- Worker Spending
THE VIRTUOUS CYCLE FOR CONVENTION CENTERS

- **ECONOMIC SUPPORT**
  - **ECONOMY**
  - **MARKETABILITY**
  - **HOSPITALITY**
  - **MARKETS**
  - **VISITOR SPENDING**

**DEVELOPMENT STRATEGIES**

**MARKETABILITY**
- Activity Generators
- Public Space
- Amenities
- Security & Image

**MARKETS**
- Housing
- Retail
- Employment
- Conventions & Groups

**HOSPITALITY**
- Retail, Restaurants, Transportation
- Jobs
- Hotels

**ECONOMY**
- Worker Spending
- Private Investment
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THE VIRTUOUS CYCLE FOR CONVENTION CENTERS

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- Tourism
- Retail, Restaurants, Transportation

ECONOMY
- Jobs
- Hotels
- Tax Revenue
- Worker Spending
- Private Investment
THE VIRTUOUS CYCLE FOR CONVENTION CENTERS

ECONOMIC SUPPORT

ECONOMY

MARKETABILITY

HOSPITALITY

MARKETS

ENHANCED MARKETABILITY

VISITOR SPENDING

DEVELOPMENT STRATEGIES

MARTKABILITY

MARKETS

HOSPITALITY

ECONOMY

Activity Generators

Public Space

Amenities

Security & Image

Housing

Retail

Retail, Restaurants, Transportation

Employment

Conventions & Groups

Tourism

Jobs

Hotels

Worker Spending

Private Investment

Tax Revenue
THE VIRTUOUS CYCLE FOR CONVENTION CENTERS

MARKETABILITY
- Activity Generators
- Public Space
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- Security & Image

MARKETS
- Housing
- Retail

HOSPITALITY
- Retail, Restaurants, Transportation
- Employment
- Conventions & Groups
- Tourism
- Hotels

ECONOMY
- Worker Spending
- Private Investment
- Tax Revenue
Downtown Master Plan
Economic Development
Tourism is Big Business

$730B  U.S. Auto Sales  
2013  
Source: Auto Alliance

$890B  U.S. Travel Expenditures  
2013  
Source: Longwoods International
Tourism is Big Business

$1.3B  Lucas County Manufacturing Payroll

$290M  Lucas County Tourism Payroll

$1.3B  Lucas County Tourism Sales

Sources: U.S. Census, Longwoods International
Loss Leaders

“Convention centers are generally not expected to make a profit on their operations or cover their construction costs.”

-U.S. Government Accountability Office
Convention Centers’ Economic Benefits, 1998

<table>
<thead>
<tr>
<th>Location</th>
<th>Amount</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dayton</td>
<td>$1.1M</td>
<td>Annual deficit</td>
</tr>
<tr>
<td>South Bend</td>
<td>$1.1M</td>
<td>Deficit 2011</td>
</tr>
<tr>
<td>Akron</td>
<td>$1.7M</td>
<td>Annual deficit</td>
</tr>
<tr>
<td>Toledo</td>
<td>$0.5M</td>
<td>Annual deficit</td>
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Sources: Dayton Daily News; WNDU; State of Ohio Auditor
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<tr>
<th>Loss Leaders</th>
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<tbody>
<tr>
<td>$11.40 Average income per attendee Seagate Centre</td>
<td>$225 Per night expenditure per convention attendee</td>
</tr>
</tbody>
</table>

Sources: SMG/SeaGate Centre, TourismOhio, Development Strategies
THE VIRTUOUS CYCLE FOR CONVENTION CENTERS

MARKETABILITY
- Activity Generators
- Public Space
- Amenities
- Security & Image

MARKETS
- Housing
- Retail
- Employment
- Tourism
- Conventions & Groups

HOSPITALITY
- Retail, Restaurants, Transportation
- Jobs
- Hotels

ECONOMY
- Worker Spending
- Private Investment
- Tax Revenue

DEVELOPMENT STRATEGIES®
Marketability: The SWOT Analysis

STRENGTHS

Internal Positive

WEAKNESSES

Internal Negative

OPPORTUNITIES

External Positive

THREATS

External Negative
# Marketability: The SWOT Analysis

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Location</th>
<th>Exterior</th>
<th>Interior</th>
<th>Operations</th>
</tr>
</thead>
</table>
| • Hensville  
  • Riverfront  
  • Nearby Hotel(s)  
  • Destinations  
  • Corporations  
  • Affordability | • Revitalized Fort Industry  
  • New Hotel(s)  
  • Repositioned Park Inn | • SeaGate Hotel  
  • Enhanced Skin  
  • Enhanced Entrance on Summit | • Current cosmetic renovations underway | • Low operating deficit  
  • Dedicated staff |
| Opportunities | • Quality hotel shortage  
  • Vacant Ft. Industry Storefronts  
  • Vacant SeaGate Hotel | • SeaGate Hotel  
  • Poor Summit Entrance  
  • Monroe Façade  
  • Inactive Jefferson | • Ballroom  
  • Cosmetic Upgrades  
  • Gallery/Public Spaces  
  • Visitor Hub | • Joint marketing with destinations |
| Weaknesses | • Competition from Other Markets  
  • Hotel Tax Lower in Wood County | | • No Ballroom  
  • Dated Interior  
  • Kitchen Location  
  • Cavernous Exhibition Hall | • Limited public funding/marketing resources  
  • Lack of data tracking |
| Threats | | | | • Underfunded operations  
  • Conflicting local priorities  
  • Lack of coordination |
Marketability: Strengths

LOCATION

- Toledo Art Museum
  1 mile west
- Hensville
- Toledo Zoo
  3 miles south
- Huntington Center

EXTERIOR

INTERIOR

OPERATIONS

- Riverfront/ProMedica
- Fifth Third Field
Marketability: Strengths

LOCATION

EXTERIOR

INTERIOR

OPERATIONS

Cosmetic Renovations
Marketability: Weaknesses

- **LOCATION**
  - Huron Street Vacancy
  - Jefferson Avenue
  - Park Inn Interior
  - Fort Industry
  - SeaGate Hotel

- **EXTERIOR**

- **INTERIOR**

- **OPERATIONS**

Lack of storefront activity
Marketability: Weaknesses

LOCATION

EXTERIOR

INTERIOR

OPERATIONS

Monroe Facade

Jefferson Entrance

Monroe Exterior

Summit Entrance & Facade
Marketability: Weaknesses

LOCATION

EXTERIOR

INTERIOR

OPERATIONS

Cavernous Exhibit Hall

Dated Interior

Lack of Dedicated Ballroom

Dated Interior
Marketability: Opportunities

LOCATION

EXTERIOR

INTERIOR

OPERATIONS

Secor Hotel Redevelopment

New Retail

SeaGate Site

New Renaissance Hotel

Fort Industry Square

Promenade Park/ProMedica
Marketability: Opportunities

- Activated Summit Entrance and Ballroom
- New Skin
Marketability: Opportunities

LOCATION

Art & Public Space

EXTERIOR

Ballroom

INTERIOR

Art & Public Space

Cosmetic Changes

OPERATIONS

Toledo History / Identity

Visitor Center
Marketability: Threats

Total Annual Attendance
SeaGate Convention Centre, 2002-2015

Source: SMG/Seagate Convention Centre

<table>
<thead>
<tr>
<th>YEAR</th>
<th>ATTENDANCE</th>
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<tbody>
<tr>
<td>2002</td>
<td>193,000</td>
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<tr>
<td>2003</td>
<td>172,000</td>
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<tr>
<td>2004</td>
<td>226,000</td>
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<tr>
<td>2005</td>
<td>218,000</td>
</tr>
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<td>2006</td>
<td>296,000</td>
</tr>
<tr>
<td>2007</td>
<td>208,000</td>
</tr>
<tr>
<td>2008</td>
<td>- ? -</td>
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<tr>
<td>2009</td>
<td>140,000</td>
</tr>
<tr>
<td>2010</td>
<td>133,000</td>
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<td>2011</td>
<td>144,000</td>
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<td>2012</td>
<td>170,000</td>
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<tr>
<td>2013</td>
<td>103,000</td>
</tr>
<tr>
<td>2014</td>
<td>86,000</td>
</tr>
<tr>
<td>2015</td>
<td>125,000</td>
</tr>
</tbody>
</table>
SWOT: Operations

Strengths
- Low operating deficit (-$0.5M)
- Dedicated staff!

Opportunities
- Joint marketing with destinations
- Repositioned facility
- Huntington Center synergies
- Visitor Center Hub

Weaknesses
- Limited funding for marketing

Threats
- Continued lack of funding
- Lack of coordination
- Local priorities
Marketability Conclusions

- General location for convention center is excellent, and getting better
- Current, interior cosmetic renovations are timely
- Exterior, entrance, and lack of ballroom are the biggest physical deficiencies
- Adequate funding for operations and marketing are hurdles
THE VIRTUOUS CYCLE FOR CONVENTION CENTERS

1. ECONOMIC SUPPORT
2. MARKETABILITY
3. HOSPITALITY
4. MARKETS
5. VISITOR SPENDING

DEVELOPMENT STRATEGIES

- MARKETABILITY
  - Activity Generators
  - Public Space
  - Amenities
  - Security & Image

- MARKETS
  - Housing
  - Retail
  - Employment
  - Tourism
  - Conventions & Groups

- HOSPITALITY
  - Retail, Restaurants, Transportation
  - Jobs
  - Hotels

- ECONOMY
  - Worker Spending
  - Private Investment
  - Tax Revenue
DEVELOPMENT STRATEGIES

Markets
- Convention Center
- Hospitality/Hotels
- Economic Impacts

Conclusions

Introduction
- The Role of Convention Centers
- Marketability
- Markets
  > Convention Center
- Hospitality/Hotels
- Economic Impacts
- Conclusions
Minor League Markets: Peer Cities

- Grand Rapids
- South Bend
- Toledo
- Akron
- Dayton
- Columbus
- Pittsburgh
- Cincinnati
- Indianapolis
- Detroit
- Cleveland
Minor League Markets: Peer Cities

- Grand Rapids
- South Bend
- Fort Wayne
- Toledo
- Akron
- Dayton
- Indianapolis
- Columbus
- Pittsburgh
- Cleveland
- Detroit
- Cincinnati
Minor League Markets: Peer Cities

**GRAND RAPIDS**
- MSA Pop: 1.0M
- ‘00-’15: 9.3%
- GDP: $52B

**TOLEDO**
- MSA Pop: 608K
- ‘00-’15: (1.7%)
- GDP: $33B

**SOUTH BEND**
- MSA Pop: 322K
- ‘00-’15: 1.7%
- GDP: $13B

**FORT WAYNE**
- MSA Pop: 430K
- ‘00-’15: 9.6%
- GDP: $20B

**AKRON**
- MSA Pop: 706K
- ‘00-’15: (1.6%)
- GDP: $32B

**DAYTON**
- MSA Pop: 800K
- ‘00-’15: (0.8%)
- GDP: $38B
Minor League Markets: Convention Facilities

**DEVOS PLACE**
- Total SF: 234K
- Exhibit Hall SF: 160K
- Ballroom SF: 40K

**SEAGATE CENTRE**
- Total SF: 92K
- Exhibit Hall SF: 75K
- Ballroom SF: N/A

**CENTURY CENTER**
- Total SF: 75K
- Exhibit Hall SF: 41K
- Ballroom SF: 12K

**GRAND WAYNE**
- Total SF: 225K
- Exhibit Hall SF: 48K
- Ballroom SF: 16K

**JOHN S. KNIGHT CENTER**
- Total SF: 123K
- Exhibit Hall SF: 43K
- Ballroom SF: 12K

**DAYTON CONV. CENTER**
- Total SF: 150K
- Exhibit Hall SF: 77K
- Ballroom SF: N/A
Minor League Markets: Convention Visitors

**PERSONS PER S.F.**

- **0.59**
  - Devos Place, Grand Rapids
  - 590,000

- **3.20**
  - John S. Knight Center, Akron
  - 390,000

- **0.98**
  - Great Wayne Center, Fort Wayne
  - 220,000

- **0.84**
  - Century Center, South Bend
  - 185,000

- **1.18**
  - Dayton Center
  - 170,000

- **1.35**
  - Seagate Center
  - 125,000
Competitive Local Supply

### Park Inn
- Attached to SeaGate
- 12,000 sf function space
- 5,500 sf ballroom
- 294 guest rooms

### Ramada
- 20,000 sf function space
- 5,600 sf ballroom
- 303 guest rooms
- 14 meeting rooms

### Hilton Garden Inn
- 18,000 sf function space
- 9,800 sf ballroom
- 184 guest rooms
- 10 meeting rooms

### Maumee Bay Lodge
- 7,500 sf function space
- 5,000 sf ballroom
- 120 guest rooms
- 8 function rooms

### Kalahari Resort
- 215,000 sf function space
- 38,000 sf ballroom
- 17,200 sf ballroom
- 890 guest rooms

50 miles southeast (Sandusky, OH)
### Tulsa, OK

- **Added**: 85,000 ft² in 2009, including 30,000 ft² ballroom  
  - **Total cost**: $50.5M
- **Funding**: Vision 2025 sales tax
- **Renovation and expansion seen as key to keeping center competitive.**

### Sharonville, OH

- **Added**: 38,000 ft² in 2012, converting the old exhibition hall into a 14,000 ft² ballroom  
  - **Total cost**: $30M
- **Funding**: County hotel tax (same funding source as Duke Energy Center in Cincinnati)

### Green Bay, WI

- **Added**: 35,000 ft² in 2015, including 25,000 ft² ballroom  
  - **Total cost**: $24M
- **Funding**: Loans to redevelopment authority and support from Kress Family and Green Bay Packers  
  - **Expected to generate**: $4M add’l spending
New Convention Center Case Studies

**WILMINGTON, NC**
- Total cost: $62M
- Funding: 3% county hotel tax
  - 12,000 ft$^2$ ballroom
  - 5,800 ft$^2$ meeting space
  - 12,000 ft$^2$ event lawn
  - 578 space parking deck
  - 33,000 ft$^2$ adj. hotel site
  - Located on Cape Fear River

**OWENSBORO, KY**
- Total cost: $50M
- Funding: Insurance premium tax
  - 48,000 ft$^2$ ballroom and meeting space
  - 44,000 ft$^2$ exhibit hall
  - Adj. privately-funded 151-room hotel
  - View of city and Ohio River

**PROVO, UT**
- Total cost: $42M
- Funding: County “Tourism, Recreation, Cultural and Convention Tax” revenue and city-donated land
  - 17,000 ft$^2$ ballroom
  - 20,000 ft$^2$ exhibit hall
  - 5,600 ft$^2$ rooftop garden
  - 580 space parking deck
  - View of mountains
Conventional Conclusions

200,000 Annual Attendees
Convention Conclusions

- Dayton and Akron are most comparable convention markets
- Grand Rapids has several advantages, including limited competition within Michigan
- Ballroom additions have proven successful in driving increased attendance
- Pre-recession attendance figures are a reasonable target for a repositioned SeaGate Center
Markets: Downtown Employment

19,500
Total Downtown Jobs

1,450
HCR Manor Care

1,300
Libbey

1,200
Owens Corning

400
Fifth Third

1,500
ProMedica*

500
SSOE
CASE STUDY: PROMEDICA

- **750**
  Attendance per semi-annual management team meetings

- **300**
  Attendance for annual governance retreat

- **300**
  Attendance for annual governance dinner

- **300**
  Attendees for annual innovation summit

- **6-8**
  Annual regional education conferences

Source: ProMedica 2016
Did you know...

$48,000 The Toledo region has a higher GDP, per capita than any of its peer regions?

12% The Toledo region’s GDP growth is tied with Grand Rapids, far exceeding that of its other peers—as well as the national average (4%)?

14% Per capita income growth in the Toledo region has slightly exceeded the national figure?

47% The Toledo region has added 1,800 hospitality and tourism jobs—a growth rate greater than any of its peer regions?
DEVELOPMENT STRATEGIES

Hotels and Conventions

- Marriott Hotel will add 241 rooms to the existing Park Inn, which has 294 rooms.

- **1 MILLION** overnight visitors to Lucas County each year

- **5,077** hotel rooms in Lucas County

- **535** hotel rooms downtown*

*Marriott Hotel will add 241 rooms to the existing Park Inn, which has 294 rooms.
Visitor Spending

$75
Per day expenditure per day visitor

$225
Per night expenditure per overnight visitor
Markets: Convention Visitors

AVERAGE EVENT INCOME BY TYPE, 2011-2015

- Consumer Shows: $12,000
- Trade Shows: $7,500
- Conventions, Banquet: $6,000
- Assembly, Concerts, Entertainment, Sporting: $4,000
- Meeting: $1,000
Market Conclusions

> Business/business travel is a particular strength for Toledo

> Business can provide a third column of support for hotels and hospitality

> Overnight visitors are the primary driver of economic activity in the tourism/visitor industry

> Consumer shows, trade shows, and conventions will have the biggest impact
Introduction

The Role of Convention Centers

Marketability

Markets

Hospitality/Hotels

Economic Impacts

Conclusions
Cultural Anchors

- Toledo Zoo: 1.3M Visitors
- Toledo Museum of Art: 440K Visitors

- 600 Supportable Hotel Rooms
- 1.7M Total Visitors
- 300,000 Overnight Visitors
Hotels: Overview

The Hotel Market is Improving: 2011-2015

18% Increase in Lucas County Tourism Sales
5% Increase in Lucas County Hotel Occupancy
15% Increase in average room rates
Regional Hotel Overview

Total Number of Rooms

- Downtown: 294*
- Westgate: 637
- Perrysburg: 672
- Maumee: 1,529
- Holland: 795

* Does not include 241 room Marriott hotel to open in late 2016.
Conventional Hospitality: Half Mile Radius

- **GRAND RAPIDS**
  - Hotel Beds: 1,300
  - Restaurants: 94

- **SOUTH BEND**
  - Hotel Beds: 370
  - Restaurants: 32

- **FORT WAYNE**
  - Hotel Beds: 495
  - Restaurants: 37

- **DAYTON**
  - Hotel Beds: 470
  - Restaurants: 64

- **TOLEDO**
  - Hotel Beds: 535
  - Restaurants: 42

- **AKRON**
  - Hotel Beds: 145
  - Restaurants: 36
Hotel Demand Estimates

600 rooms supported by cultural/tourism patrons

100 rooms supported by existing convention business

? rooms supported by corporate/business travelers

535 existing hotel rooms

250-400 additional hotel rooms supported downtown

*Marriott Hotel will add 241 rooms to the existing park inn, which has 294 rooms
Hospitality Conclusions

> The hotel market in Lucas County is improving

> There is an opportunity for Downtown Toledo to capture more hotel demand from tourists

> Downtown Toledo is generally more competitive than its peers in terms of hotels and amenities

> There is growing market demand for more quality hotels Downtown
THE VIRTUOUS CYCLE FOR CONVENTION CENTERS

1. Business & Worker Revenue
2. Hospitality
3. Markets
4. Marketability
5. Economic Support
6. Visitor Spending

MARKETABILITY
- Activity Generators
- Public Space
- Amenities
- Security & Image

MARKETS
- Housing
- Retail

HOSPITALITY
- Retail, Restaurants, Transportation
- Conventions & Groups
- Hotels
- Jobs

ECONOMY
- Worker Spending
- Private Investment
- Tax Revenue

DEVELOPMENT STRATEGIES®
Introduction to Economic Impacts

Concept One
Direct and Indirect Impacts: The Ripple Effect

- Jobs
- Payroll
- Operating Expenses/CapEx
- Taxes

Direct Impacts → Induced Impacts

- Jobs
- Earnings
- Output

Induced Impacts → Induced Impacts
Introduction to Economic Impacts

2 Concept Two

Leakage

NEW MONEY

Re-spending in Lucas County economy

LEAKAGE
Introduction to Economic Impacts

CONCEPT THREE

Measures of Economic Performance

Economic Output

Household Earnings

Jobs Supported
## Introduction to Economic Impacts

### CONCEPT FOUR

**Multipliers**

64 industry sectors

<table>
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<tr>
<th>Industry</th>
<th>Economic Output</th>
<th>Earnings</th>
<th>Jobs</th>
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<tr>
<td>Accommodation</td>
<td>1.58</td>
<td>0.37</td>
<td>13.96</td>
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<tr>
<td>Construction</td>
<td>1.67</td>
<td>0.39</td>
<td>8.87</td>
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<tr>
<td>Performing arts, spectator sports, &amp; related activities</td>
<td>1.77</td>
<td>0.47</td>
<td>14.48</td>
</tr>
<tr>
<td>Household</td>
<td>0.97</td>
<td>0.22</td>
<td>6.65</td>
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*RIMS II Multipliers, U.S. Department of Commerce*

*per $1 million expenditures*
Introduction to Economic Impacts

The Economic Impact Model

SEAGATE CONVENTION CENTRE

MULTIPLIERS*

INDIRECT IMPACTS

DIRECT & INDIRECT IMPACT

Operations

Visitor Spending

Economic Output

Household Earnings

Jobs Supported

Economic Output

Household Earnings

Jobs Supported

*RIMS II Multipliers
Introduction to Economic Impacts

Economic Inputs: Operations and Visitor Spending

**SeaGate Operations**
- $2.3 Million
  - Payroll ($785K)
  - Non-Labor Operations ($1.2M)
  - Capital Expenditures ($366K)

**SeaGate Visitor Spending**
- $10.1 Million
  - Hotels ($2.5M)
  - Bars/Restaurants ($2.6M)
  - General Retail ($1.5M)
  - Recreation ($1.5M)
  - Gasoline (840K)
  - Transportation ($1.1M)

*Average Annual Spending, 2011 to 2015
DEVELOPMENT STRATEGIES

Economic Impacts

> Economic and Fiscal Impacts

Hospitality/Hotels

Conclusions and Next Steps

Introduction

The Role of Convention Centers

Marketability

Markets

Hospitality/Hotels

Economic Impacts

> Economic and Fiscal Impacts

Conclusions and Next Steps
Visitor Spending Overview

Daytrip Visitors
- Accommodations: $0
- Food & Beverage: $25
- General Retail: $15
- Recreation: $15
- Gas: $10
- Transportation: $10
Total: $75

Overnight Visitors
- Accommodations: $100
- Food & Beverage: $45
- General Retail: $25
- Recreation: $25
- Gas: $10
- Transportation: $20
Total: $225
## Visitor Spending Overview

### SeaGate Average Annual Attendance by Event (2011-2015) and Overnight Visitor Assumptions

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Average Attendance by Event</th>
<th>% Overnight Visitor (DS Estimate)</th>
<th>Est. Overnight Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer/Trade Shows</td>
<td>51,000</td>
<td>10%</td>
<td>5,000</td>
</tr>
<tr>
<td>Assembly</td>
<td>19,000</td>
<td>10%</td>
<td>2,000</td>
</tr>
<tr>
<td>Conventions</td>
<td>29,000</td>
<td>90%</td>
<td>26,000</td>
</tr>
<tr>
<td>Banquets</td>
<td>7,000</td>
<td>5%</td>
<td>-</td>
</tr>
<tr>
<td>Meetings</td>
<td>3,000</td>
<td>5%</td>
<td>-</td>
</tr>
<tr>
<td>Other events</td>
<td>16,000</td>
<td>10%</td>
<td>2,000</td>
</tr>
<tr>
<td><strong>Total Average Annual Attend.</strong></td>
<td><strong>125,000</strong></td>
<td><strong>28%</strong></td>
<td><strong>35,000</strong></td>
</tr>
</tbody>
</table>

*Source: SMG/SeaGate, Development Strategies*
125,000 annual visitors

Overnight Visitors
35,000
(28%)

Daytrip Visitors
90,000
(72%)

Room Nights
21,000
(17%)

Travel Day
14,000
(11%)

Non-Lucas County Resident
45,000
(36%)

Lucas County Resident
45,000
(36%)

Exhibitors
(4,000)

Overnight Spending Profile
25,000

Daytrip Spending Profile
59,000

NO ECONOMIC IMPACTS
## Economic Impacts

### Average Annual Economic Impacts of SeaGate Operations and Visitor Spending on Lucas County, 2011-2015, in 2015 dollars

<table>
<thead>
<tr>
<th></th>
<th>SeaGate Operations</th>
<th>SeaGate Visitor Spending</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Direct Spending</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>$2,344,000</td>
<td>$10,050,000</td>
<td>$12,394,000</td>
</tr>
<tr>
<td>Operations (Non-Labor)</td>
<td>$1,193,000</td>
<td>$7,660,000</td>
<td>$8,853,000</td>
</tr>
<tr>
<td>Wages</td>
<td>$785,000</td>
<td>$2,390,000</td>
<td>$3,175,000</td>
</tr>
<tr>
<td>Capital Expenditures</td>
<td>$366,000</td>
<td>N/A</td>
<td>$366,000</td>
</tr>
</tbody>
</table>

|                                |                    |                          |         |
| **Indirect Economic Impacts**  |                    |                          |         |
| Output                         | $3,486,000         | $15,073,000              | $18,559,000 |
| Earnings                       | $874,000           | $3,530,600               | $4,404,600 |
| Jobs                           | 30                 | 140                      | 170     |

|                                |                    |                          |         |
| **Total Direct and Indirect Impacts** |                   |                          |         |
| Output                         | $5,830,000         | $25,123,000              | $30,953,000 |
| Earnings                       | $1,659,000         | $5,920,600               | $7,579,600 |
| Jobs                           | 50                 | 280                      | 330     |
Average Annual Economic Impacts

SeaGate Operations
- $5.8M Output
- 50 Jobs

SeaGate Visitor Spending
- $25.1M Output
- 280 Jobs

Total
- $31.0M Output
- 330 Jobs
Fiscal Impacts on Lucas County

Average Annual Fiscal Impacts 2011-2015, in 2015 dollars

Spending from SeaGate Operations and Visitors $12.4 million

Multiplier Effects

Sales Tax Revenue $118,000
Hotel Tax Revenue $175,000

Total Tax Revenue $293,000
Convention Conclusions

200,000
Annual Attendees
<table>
<thead>
<tr>
<th>VISITOR TYPE</th>
<th>EVENT TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERNIGHT</td>
<td>12 CONVENTIONS</td>
</tr>
<tr>
<td>DAYTRIP</td>
<td>$5.6M</td>
</tr>
<tr>
<td>OUTPUT</td>
<td>$1.9M</td>
</tr>
<tr>
<td>EARNINGS</td>
<td>$440K</td>
</tr>
<tr>
<td>JOBS</td>
<td>65</td>
</tr>
<tr>
<td>COUNTY TAX REVENUE</td>
<td>$95K</td>
</tr>
</tbody>
</table>
Scenario Projections

Annual Average Impacts

<table>
<thead>
<tr>
<th></th>
<th>No Change</th>
<th>Cosmetic Investments</th>
<th>Ballroom Addition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic Output</td>
<td>$25M</td>
<td>$33M</td>
<td>$50M</td>
</tr>
<tr>
<td>Jobs Supported</td>
<td>270</td>
<td>370</td>
<td>530</td>
</tr>
<tr>
<td>County Tax Revenue</td>
<td>240K</td>
<td>325K</td>
<td>480K</td>
</tr>
<tr>
<td>Attendance</td>
<td>100,000</td>
<td>135,000</td>
<td>200,000</td>
</tr>
</tbody>
</table>
Scenario Projections

Total 20-Year Impacts

20-Year Net Present Value

- **NO CHANGE**: $3.9 million
- **COSMETIC INVESTMENTS**: $5.3 million
- **BALLROOM ADDITION**: $7.8 million

Attendance

- 100,000
- 135,000
- 200,000
Scenario Projections

Total 20-Year Impacts

<table>
<thead>
<tr>
<th>NO CHANGE</th>
<th>COSMETIC INVESTMENTS</th>
<th>BALLROOM ADDITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>$3.9 MILLION</td>
<td>$5.3 MILLION</td>
<td>$7.6 MILLION</td>
</tr>
<tr>
<td>$400 MILLION</td>
<td>$540 MILLION</td>
<td>$800 MILLION</td>
</tr>
<tr>
<td>100,000</td>
<td>135,000</td>
<td>200,000</td>
</tr>
</tbody>
</table>

20-Year Net Present Value

20-Year Net Value of Economic Output

Attendance

DEVELOPMENT STRATEGIES
Hospitality Conclusions

- Order-of-magnitude investments in the Seagate Centre have to be right-sized

- Cost estimates for potential improvements are needed

- SeaGate a part of a series of improvements: marketability-convention-hotels

- Hotel synergies with business travel and other attractions are vital

- SeaGate can be a cornerstone in rebranding Toledo
THE VIRTUOUS CYCLE FOR CONVENTION CENTERS

ECONOMIC SUPPORT

MARKETABILITY

HOSPITALITY

MARKETS

VISITOR SPENDING

BUSINESS & WORKER REVENUE

ENHANCED MARKETABILITY

DEVELOPMENT STRATEGIES®

MARKETABILITY

Activity Generators
Public Space
Amenities
Security & Image

MARKETS

Housing
Retail

HOSPITALITY

Retail, Restaurants, Transportation
Employment
Conventions & Groups
Tourism

ECONOMY

Worker Spending
Private Investment
Tax Revenue
Appendix
# Appendix

## SeaGate Convention Centre Annual Income Statement, 2011 to 2015

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>5-Year Average</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EVENT INCOME</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Event Income</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rental Income</td>
<td>515,120</td>
<td>579,881</td>
<td>484,875</td>
<td>394,075</td>
<td>428,743</td>
<td>480,529</td>
</tr>
<tr>
<td>Service Revenue</td>
<td>241,368</td>
<td>292,357</td>
<td>267,260</td>
<td>283,642</td>
<td>274,322</td>
<td>271,790</td>
</tr>
<tr>
<td>Service Expenses</td>
<td>(333,788)</td>
<td>(416,652)</td>
<td>(318,016)</td>
<td>(310,135)</td>
<td>(324,706)</td>
<td>(341,059)</td>
</tr>
<tr>
<td>Total Direct Event Income</td>
<td>422,700</td>
<td>453,586</td>
<td>434,069</td>
<td>367,852</td>
<td>378,359</td>
<td>411,259</td>
</tr>
<tr>
<td>Ancillary Income</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F&amp;B Concessions</td>
<td>93,000</td>
<td>89,133</td>
<td>76,423</td>
<td>68,857</td>
<td>80,432</td>
<td>81,569</td>
</tr>
<tr>
<td>F&amp;B Catering</td>
<td>104,684</td>
<td>173,429</td>
<td>141,492</td>
<td>181,026</td>
<td>125,191</td>
<td>145,164</td>
</tr>
<tr>
<td>Novelty Sales</td>
<td>11,310</td>
<td>7,182</td>
<td>10,621</td>
<td>1,820</td>
<td>4,482</td>
<td>7,083</td>
</tr>
<tr>
<td>Parking</td>
<td>83,059</td>
<td>126,220</td>
<td>114,576</td>
<td>76,864</td>
<td>101,686</td>
<td>100,438</td>
</tr>
<tr>
<td>Telephone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>31,436</td>
</tr>
<tr>
<td>Electrical Services</td>
<td>34,689</td>
<td>42,856</td>
<td>36,862</td>
<td>35,650</td>
<td>31,436</td>
<td>36,299</td>
</tr>
<tr>
<td>Internet Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Ancillary Income</td>
<td>326,742</td>
<td>438,820</td>
<td>379,974</td>
<td>364,000</td>
<td>343,227</td>
<td>370,553</td>
</tr>
<tr>
<td>Other Events Income</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ticket Rebates</td>
<td>13,954</td>
<td>11,324</td>
<td>13,659</td>
<td>13,438</td>
<td>11,049</td>
<td>12,685</td>
</tr>
<tr>
<td>Facility Fees</td>
<td>35,531</td>
<td>32,160</td>
<td>27,316</td>
<td>30,350</td>
<td>27,058</td>
<td>30,483</td>
</tr>
<tr>
<td>Total Other Event Income</td>
<td>49,485</td>
<td>43,484</td>
<td>40,975</td>
<td>43,888</td>
<td>38,107</td>
<td>43,168</td>
</tr>
<tr>
<td><strong>TOTAL EVENT INCOME</strong></td>
<td>798,927</td>
<td>935,890</td>
<td>855,018</td>
<td>775,370</td>
<td>759,693</td>
<td>824,980</td>
</tr>
<tr>
<td><strong>OTHER OPERATING INCOME</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-Event Parking</td>
<td>455,955</td>
<td>507,797</td>
<td>534,608</td>
<td>542,424</td>
<td>540,363</td>
<td>516,229</td>
</tr>
<tr>
<td>Advertising</td>
<td>25,000</td>
<td>4,000</td>
<td>8,850</td>
<td>5,243</td>
<td>781</td>
<td>8,619</td>
</tr>
<tr>
<td>Bank Interest</td>
<td>65</td>
<td>35</td>
<td>35</td>
<td>349</td>
<td>781</td>
<td>253</td>
</tr>
<tr>
<td>County funds for Capex</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Misc</td>
<td>62,595</td>
<td>67,257</td>
<td>72,248</td>
<td>73,457</td>
<td>76,506</td>
<td>70,413</td>
</tr>
<tr>
<td><strong>TOTAL OTHER OPERATING INCOME</strong></td>
<td>543,615</td>
<td>579,089</td>
<td>615,741</td>
<td>621,473</td>
<td>617,647</td>
<td>595,513</td>
</tr>
<tr>
<td><strong>ADJUSTED GROSS INCOME</strong></td>
<td>1,342,542</td>
<td>1,514,979</td>
<td>1,470,759</td>
<td>1,396,843</td>
<td>1,377,340</td>
<td>1,420,493</td>
</tr>
</tbody>
</table>

*Source: SMG, SeaGate Convention Centre*
### SeaGate Convention Centre Annual Income Statement, 2011 to 2015 (cont.)

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>5-Year Average</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INDIRECT EXPENSES</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries and wages</td>
<td>738,940</td>
<td>755,252</td>
<td>771,532</td>
<td>804,656</td>
<td>774,459</td>
<td>768,968</td>
</tr>
<tr>
<td>Payroll taxes and benefits</td>
<td>228,084</td>
<td>235,050</td>
<td>206,087</td>
<td>214,285</td>
<td>230,451</td>
<td>222,791</td>
</tr>
<tr>
<td>Contracted Services</td>
<td>140,348</td>
<td>144,488</td>
<td>135,238</td>
<td>145,338</td>
<td>138,983</td>
<td>140,879</td>
</tr>
<tr>
<td>General and Admin</td>
<td>108,843</td>
<td>92,620</td>
<td>174,658</td>
<td>158,031</td>
<td>86,238</td>
<td>124,078</td>
</tr>
<tr>
<td>Operating</td>
<td>27,641</td>
<td>47,059</td>
<td>19,572</td>
<td>23,052</td>
<td>17,814</td>
<td>27,028</td>
</tr>
<tr>
<td>Retails and Maintenance</td>
<td>80,591</td>
<td>120,669</td>
<td>117,875</td>
<td>134,391</td>
<td>126,204</td>
<td>115,946</td>
</tr>
<tr>
<td>Operating Supplies</td>
<td>34,593</td>
<td>51,257</td>
<td>39,289</td>
<td>34,296</td>
<td>28,789</td>
<td>37,645</td>
</tr>
<tr>
<td>Insurance</td>
<td>64,543</td>
<td>63,268</td>
<td>77,644</td>
<td>76,684</td>
<td>78,699</td>
<td>72,168</td>
</tr>
<tr>
<td>Utilities</td>
<td>303,089</td>
<td>346,600</td>
<td>295,835</td>
<td>287,850</td>
<td>238,571</td>
<td>303,389</td>
</tr>
<tr>
<td>Other</td>
<td>425</td>
<td>1,625</td>
<td>1,502</td>
<td>100</td>
<td>1,500</td>
<td>1,031</td>
</tr>
<tr>
<td>SMG Management Fees</td>
<td>79,499</td>
<td>118,568</td>
<td>128,927</td>
<td>129,877</td>
<td>124,919</td>
<td>116,358</td>
</tr>
<tr>
<td>Bad Debt</td>
<td>-</td>
<td>10,471</td>
<td>12,518</td>
<td>1,301</td>
<td>15,738</td>
<td>8,006</td>
</tr>
<tr>
<td><strong>Total Indirect Expenses</strong></td>
<td>1,806,597</td>
<td>1,986,927</td>
<td>1,980,677</td>
<td>2,009,861</td>
<td>1,907,365</td>
<td>1,938,285</td>
</tr>
</tbody>
</table>

| **NET OPERATING INCOME (LOSS)** | (464,055) | (471,948) | (509,918) | (613,018) | (530,025) | (517,793) |

| **NON-OPERATING REVENUE/EXPENSES** |         |         |         |         |         |                |
| Other non-operating income        | 453,331 | 175,809 | 107,144 | 411,596 | 110,315 | 251,639        |
| Funds from Lucas County            | 550,000 | 1,551,323 | 1,009,123 | 803,240 | 1,380,806 | 1,058,898     |
| Interest                          | (65,401) | (54,278) | (45,925) | (36,450) | (16,417) | (43,694)       |
| Federal Taxes                      | (200)    | (200)    | -        | -        | -        | (80)           |
| Legal                             | -        | -        | -        | -        | (30,050) | (6,010)        |
| Real Estate Tax                   | (47,023) | (35,501) | (38,644) | (35,322) | (96,466) | (50,591)       |
| Gain/Loss on Sale of Assets       | -        | -        | -        | -        | -        | -              |
| Depreciation & Amort.             | (144,905)| (145,919)| (207,206)| (320,659)| (306,570)| (225,052)      |
| Naming rights costs               | (7,837)  | (1,950)  | -        | -        | -        | (1,957)        |
| **Total Non-Operating Expenses**  | 737,955  | 1,489,284| 824,492  | 822,405  | 1,041,618| 983,153        |

| **ADJ. NET INCOME/LOSS**          | 273,910  | 1,017,336 | 314,574  | 209,387  | 511,593  | 465,360 |

*Source: SMG, SeaGate Convention Centre*
### SeaGate Convention Centre Operating Expenses, 2011 to 2015, in 2015 dollars

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>5-Year Average</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reported</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll</td>
<td>739,000</td>
<td>755,000</td>
<td>772,000</td>
<td>805,000</td>
<td>774,000</td>
<td>769,000</td>
</tr>
<tr>
<td>C&amp;M</td>
<td>1,068,000</td>
<td>1,232,000</td>
<td>1,209,000</td>
<td>1,205,000</td>
<td>1,133,000</td>
<td>1,169,400</td>
</tr>
<tr>
<td>Capital Expenditures</td>
<td>24,000</td>
<td>697,000</td>
<td>529,000</td>
<td>528,000</td>
<td>20,000</td>
<td>359,600</td>
</tr>
<tr>
<td><strong>Total Operating Expenditures</strong></td>
<td>1,831,000</td>
<td>2,684,000</td>
<td>2,510,000</td>
<td>2,538,000</td>
<td>1,927,000</td>
<td>2,298,000</td>
</tr>
</tbody>
</table>

|                      |       |       |       |       |       |               |
| **In 2015 dollars**  |       |       |       |       |       |               |
| Payroll              | 779,000 | 780,000 | 785,000 | 806,000 | 774,000 | 785,000       |
| C&M                  | 1,125,000 | 1,271,000 | 1,230,000 | 1,207,000 | 1,133,000 | 1,193,000     |
| Capital Expenditures | 25,000  | 720,000 | 538,000 | 529,000 | 20,000 | 366,000       |
| **Total Operating Expenditures** | 1,929,000 | 2,771,000 | 2,553,000 | 2,542,000 | 1,927,000 | 2,344,000     |

*Source: SMG, SeaGate Convention Centre*
## Appendix

### SeaGate Convention Centre Attendance and Income by Event Type, 2011-2015

<table>
<thead>
<tr>
<th>Type</th>
<th>Total Attendance</th>
<th>Total Operating Income</th>
<th>Total Events</th>
<th>Income per Event</th>
<th>Income per Attendee</th>
<th>Attendance per Event</th>
<th>5-Year Average Annual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meetings</td>
<td>15,000</td>
<td>$141,000</td>
<td>144</td>
<td>$1,000</td>
<td>$9.34</td>
<td>100</td>
<td>3,000</td>
</tr>
<tr>
<td>Assembly</td>
<td>95,000</td>
<td>$250,700</td>
<td>66</td>
<td>$3,800</td>
<td>$2.64</td>
<td>1,440</td>
<td>19,000</td>
</tr>
<tr>
<td>Concerts/Sporting/Entertain.</td>
<td>20,000</td>
<td>$161,000</td>
<td>42</td>
<td>$3,800</td>
<td>$8.20</td>
<td>470</td>
<td>4,000</td>
</tr>
<tr>
<td>Other events</td>
<td>57,000</td>
<td>$487,900</td>
<td>84</td>
<td>$5,800</td>
<td>$8.54</td>
<td>680</td>
<td>11,000</td>
</tr>
<tr>
<td>Banquets</td>
<td>36,000</td>
<td>$391,300</td>
<td>65</td>
<td>$6,000</td>
<td>$10.96</td>
<td>550</td>
<td>7,000</td>
</tr>
<tr>
<td>Conventions</td>
<td>145,000</td>
<td>$1,143,000</td>
<td>179</td>
<td>$6,400</td>
<td>$7.90</td>
<td>810</td>
<td>29,000</td>
</tr>
<tr>
<td>Trade Show</td>
<td>6,000</td>
<td>$164,000</td>
<td>22</td>
<td>$7,500</td>
<td>$29.45</td>
<td>250</td>
<td>1,000</td>
</tr>
<tr>
<td>Consumer</td>
<td>251,000</td>
<td>$1,386,000</td>
<td>119</td>
<td>$11,600</td>
<td>$5.52</td>
<td>2,110</td>
<td>50,000</td>
</tr>
<tr>
<td><strong>Total/Average</strong></td>
<td><strong>624,000</strong></td>
<td><strong>$4,124,900</strong></td>
<td><strong>721</strong></td>
<td><strong>$5,700</strong></td>
<td><strong>$6.61</strong></td>
<td><strong>870</strong></td>
<td><strong>125,000</strong></td>
</tr>
</tbody>
</table>

*Source: SMG, SeaGate Convention Centre*
## Appendix

SeaGate Convention Centre Capital Improvements, 2011-2016

<table>
<thead>
<tr>
<th>Description</th>
<th>Year</th>
<th>Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parking Garage Lighting Upgrade</td>
<td>2011</td>
<td>$ 24,000</td>
</tr>
<tr>
<td>Roof replacement</td>
<td>2012</td>
<td>443,400</td>
</tr>
<tr>
<td>Exhibit Hall Lighting Upgrade</td>
<td>2012</td>
<td>52,000</td>
</tr>
<tr>
<td>Boom Lift</td>
<td>2012</td>
<td>25,000</td>
</tr>
<tr>
<td>Meeting Room Renovation</td>
<td>2012-13</td>
<td>98,926</td>
</tr>
<tr>
<td>Seating Repairs</td>
<td>2012-13</td>
<td>53,000</td>
</tr>
<tr>
<td>Phase I &amp; 2</td>
<td>2012-13</td>
<td>151,389</td>
</tr>
<tr>
<td>Wireless internet</td>
<td>2012</td>
<td>25,000</td>
</tr>
<tr>
<td>Chairs and Tables</td>
<td>2013</td>
<td>139,289</td>
</tr>
<tr>
<td>Marquee Video Board</td>
<td>2013</td>
<td>122,936</td>
</tr>
<tr>
<td>Building Management System</td>
<td>2013-14</td>
<td>86,600</td>
</tr>
<tr>
<td>Air Handler Units</td>
<td>2013-14</td>
<td>47,925</td>
</tr>
<tr>
<td>Bouiler pumps</td>
<td>2013-14</td>
<td>61,784</td>
</tr>
<tr>
<td>Micro-turbine</td>
<td>2013-14</td>
<td>33,800</td>
</tr>
<tr>
<td>Performance stage</td>
<td>2014</td>
<td>101,000</td>
</tr>
<tr>
<td>Drape Replacement</td>
<td>2014</td>
<td>20,000</td>
</tr>
<tr>
<td>New Boiler Installation</td>
<td>2014</td>
<td>250,112</td>
</tr>
<tr>
<td>Domestic Hot Water Heaters</td>
<td>2014</td>
<td>41,779</td>
</tr>
<tr>
<td>Chiller Pumps</td>
<td>2015</td>
<td>20,000</td>
</tr>
<tr>
<td>Concourse Flooring</td>
<td>2016</td>
<td>320,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>$ 2,117,940</strong></td>
</tr>
</tbody>
</table>

*Source: SMG/SeaGate*
### Average Annual SeaGate Convention Centre Operating Expenses from 2011 to 2015, in 2015 dollars

<table>
<thead>
<tr>
<th>Expense Category</th>
<th>Five-Year Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll</td>
<td>$ 785,000</td>
</tr>
<tr>
<td>Operations and Maintenance (O&amp;M)</td>
<td>1,193,000</td>
</tr>
<tr>
<td>Capital Expenditures</td>
<td>366,000</td>
</tr>
<tr>
<td><strong>Total Operating Expenditures</strong></td>
<td><strong>$ 2,344,000</strong></td>
</tr>
</tbody>
</table>

*Source: SMG, SeaGate Convention Centre*
### Appendix

**RIMS-II Multipliers, Lucas County, Ohio**

<table>
<thead>
<tr>
<th>Category</th>
<th>Output</th>
<th>Earnings</th>
<th>Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SeaGate Operations</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Performing arts, spectator sports, museums, etc.</td>
<td>1.77</td>
<td>0.47</td>
<td>14.58</td>
</tr>
<tr>
<td>Construction</td>
<td>1.67</td>
<td>0.39</td>
<td>8.87</td>
</tr>
<tr>
<td>Households</td>
<td>0.97</td>
<td>0.22</td>
<td>6.65</td>
</tr>
<tr>
<td><strong>Visitor Spending</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodations</td>
<td>1.58</td>
<td>0.37</td>
<td>13.96</td>
</tr>
<tr>
<td>Food Services and Drinking Places</td>
<td>1.70</td>
<td>0.43</td>
<td>20.36</td>
</tr>
<tr>
<td>General Retail</td>
<td>1.71</td>
<td>0.42</td>
<td>16.07</td>
</tr>
<tr>
<td>Amusements, Gambling, and Recreation</td>
<td>1.57</td>
<td>0.28</td>
<td>12.41</td>
</tr>
<tr>
<td>Local Transport</td>
<td>1.82</td>
<td>0.45</td>
<td>15.88</td>
</tr>
</tbody>
</table>

*Source: U.S. Department of Commerce, Bureau of Economic Analysis, 2016*
## Appendix

### Average Annual Economic Impacts of SeaGate Convention Centre Operations on Lucas County, 2011 to 2015, in 2015 dollars

<table>
<thead>
<tr>
<th></th>
<th>Capital Expenditures</th>
<th>Operating Expenditures</th>
<th>Employee Compensation</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Spending</td>
<td>$366,000</td>
<td>$1,193,000</td>
<td>$785,000</td>
<td>$2,344,000</td>
</tr>
<tr>
<td><strong>Multipliers</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Output</td>
<td>1.669</td>
<td>1.774</td>
<td>0.966</td>
<td>1.487</td>
</tr>
<tr>
<td>Earnings</td>
<td>0.391</td>
<td>0.466</td>
<td>0.224</td>
<td>0.373</td>
</tr>
</tbody>
</table>

**Added Economic Impact on Lucas County**

<table>
<thead>
<tr>
<th></th>
<th>Output</th>
<th>Operating Expenditures</th>
<th>Employee Compensation</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>$611,000</td>
<td>$2,117,000</td>
<td>$758,000</td>
<td>$3,486,000</td>
</tr>
<tr>
<td>Earnings</td>
<td>$143,000</td>
<td>$555,000</td>
<td>$176,000</td>
<td>$874,000</td>
</tr>
</tbody>
</table>

**Indirect Jobs Held by Lucas County Res**

<table>
<thead>
<tr>
<th></th>
<th>Output</th>
<th>Earnings</th>
<th>Jobs Held</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indirect Jobs</td>
<td>3</td>
<td>17</td>
<td>5</td>
<td>26</td>
</tr>
</tbody>
</table>

**Total Economic Impact on Lucas County**

<table>
<thead>
<tr>
<th>Rationale</th>
<th>Output</th>
<th>Earnings</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct and Indirect Jobs in Lucas County</td>
<td>$5,830,000</td>
<td>$1,659,000</td>
<td>25</td>
</tr>
</tbody>
</table>

*Output - Total dollar change in the county’s economy due to expenditures for SeaGate operations
Earnings - Total dollar change in earnings of households in the county due to expenditures for SeaGate operations
Employment - Total change in the number of jobs held by county residents per $1 million of direct spending for SeaGate operations*
## Visitor Spending Profile for SeaGate Visitors

<table>
<thead>
<tr>
<th>Spending Category</th>
<th>Daytrip</th>
<th></th>
<th>Overnight</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Spending</td>
<td>%</td>
<td>Spending</td>
<td>%</td>
</tr>
<tr>
<td>Total</td>
<td>$75</td>
<td>100.0%</td>
<td>$225</td>
<td>100.0%</td>
</tr>
<tr>
<td>Accommodations</td>
<td>$0</td>
<td>0.0%</td>
<td>$100</td>
<td>44.4%</td>
</tr>
<tr>
<td>Food and Beverage</td>
<td>$25</td>
<td>33.3%</td>
<td>$45</td>
<td>20.0%</td>
</tr>
<tr>
<td>General Retail</td>
<td>$15</td>
<td>20.0%</td>
<td>$25</td>
<td>11.1%</td>
</tr>
<tr>
<td>Recreation</td>
<td>$15</td>
<td>20.0%</td>
<td>$25</td>
<td>11.1%</td>
</tr>
<tr>
<td>Gas</td>
<td>$10</td>
<td>13.3%</td>
<td>$10</td>
<td>4.4%</td>
</tr>
<tr>
<td>Transportation</td>
<td>$10</td>
<td>13.3%</td>
<td>$20</td>
<td>8.9%</td>
</tr>
</tbody>
</table>

*Source: TourismOhio, Development Strategies*
## SeaGate Average Annual Attendance by Event (2011-2015) and Overnight Visitor Assumptions

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Average Attendance by Event</th>
<th>% by Event Type</th>
<th>% Overnight visitor (DS Estimate)</th>
<th>Est. Overnight Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer/Trade Shows</td>
<td>51,000</td>
<td>41%</td>
<td>10%</td>
<td>5,000</td>
</tr>
<tr>
<td>Assembly</td>
<td>19,000</td>
<td>15%</td>
<td>10%</td>
<td>2,000</td>
</tr>
<tr>
<td>Conventions</td>
<td>29,000</td>
<td>23%</td>
<td>90%</td>
<td>26,000</td>
</tr>
<tr>
<td>Banquets</td>
<td>7,000</td>
<td>6%</td>
<td>5%</td>
<td>-</td>
</tr>
<tr>
<td>Meetings</td>
<td>3,000</td>
<td>2%</td>
<td>5%</td>
<td>-</td>
</tr>
<tr>
<td>Other events</td>
<td>16,000</td>
<td>13%</td>
<td>10%</td>
<td>2,000</td>
</tr>
<tr>
<td><strong>Total Average Annual Attend.</strong></td>
<td><strong>125,000</strong></td>
<td><strong>13%</strong></td>
<td><strong>10%</strong></td>
<td><strong>35,000</strong></td>
</tr>
</tbody>
</table>

*Source: SMG/SeaGate, Development Strategies*
## Appendix

### Assumptions for SeaGate Visitor Origin

<table>
<thead>
<tr>
<th>Visitor Category</th>
<th>%</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight</td>
<td>28%</td>
<td>35,000</td>
</tr>
<tr>
<td>Daytrip</td>
<td>72%</td>
<td>90,000</td>
</tr>
<tr>
<td>Lucas County Resident</td>
<td>36%</td>
<td>45,000</td>
</tr>
<tr>
<td>Non-Lucas County Resident</td>
<td>36%</td>
<td>45,000</td>
</tr>
<tr>
<td><strong>Total Average SeaGate Visitors</strong></td>
<td></td>
<td><strong>125,000</strong></td>
</tr>
<tr>
<td>Exhibitors (Overnight)¹</td>
<td></td>
<td><strong>4,000</strong></td>
</tr>
</tbody>
</table>

¹ Assumes a 20 to 1 attendee to exhibitor ratio for trade shows, conventions, and consumer shows

### Assumptions for SeaGate Spending Profiles, Annual Average from 2011 to 2015, in 2015 dollars

<table>
<thead>
<tr>
<th>Visitor Category</th>
<th>Total Visitors</th>
<th>Average Daily Spending</th>
<th>Total Average Annual Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight Visitor Spending</td>
<td>25,000</td>
<td>$225</td>
<td>$5,625,000</td>
</tr>
<tr>
<td>Daytrip (non-local) Visitor Spending</td>
<td>59,000</td>
<td>$75</td>
<td>$4,425,000</td>
</tr>
<tr>
<td>Average Annual Visitors with Economic Impacts¹</td>
<td>84,000</td>
<td>$120</td>
<td>$10,050,000</td>
</tr>
</tbody>
</table>

¹ Includes spending from exhibitors at conferences, trade shows, and consumer shows
## Appendix

### Annual Average SeaGate Convention Centre Direct Visitor Spending, Lucas County, 2011-2015, in 2015 dollars

<table>
<thead>
<tr>
<th>Sector</th>
<th>Overnight Visitors</th>
<th>Daytrip Visitors</th>
<th>Overall Breakdown</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Percent</td>
<td>Total</td>
<td>Percent</td>
</tr>
<tr>
<td>Accommodations</td>
<td>44%</td>
<td>$2,500,000</td>
<td>0%</td>
</tr>
<tr>
<td>Food Services and Drinking Places</td>
<td>20%</td>
<td>$1,125,000</td>
<td>33%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>11%</td>
<td>$625,000</td>
<td>20%</td>
</tr>
<tr>
<td>Amusements, Gambling, and Recreation</td>
<td>11%</td>
<td>$625,000</td>
<td>20%</td>
</tr>
<tr>
<td>Gasoline</td>
<td>4%</td>
<td>$250,000</td>
<td>13%</td>
</tr>
<tr>
<td>Other Transportation</td>
<td>9%</td>
<td>$500,000</td>
<td>13%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>100%</td>
<td>$5,625,000</td>
<td>100%</td>
</tr>
</tbody>
</table>

Sources: TourismOhio, Development Strategies

### Direct Jobs Supported in Lucas County by SeaGate Convention Centre Visitor Spending

<table>
<thead>
<tr>
<th>Sector</th>
<th>Spending by SeaGate Visitors</th>
<th>% Payroll</th>
<th>Total Wages</th>
<th>Average Annual Wage</th>
<th>Total Direct Jobs Supported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodations</td>
<td>$2,500,000</td>
<td>28.8%</td>
<td>$721,000</td>
<td>$16,400</td>
<td>44</td>
</tr>
<tr>
<td>Food Services and Drinking Places</td>
<td>2,600,000</td>
<td>29.5%</td>
<td>$767,000</td>
<td>$13,800</td>
<td>56</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>1,510,000</td>
<td>9.4%</td>
<td>$142,000</td>
<td>$25,700</td>
<td>6</td>
</tr>
<tr>
<td>Amusements, Gambling, and Recreation</td>
<td>1,510,000</td>
<td>26.3%</td>
<td>$397,000</td>
<td>$21,200</td>
<td>19</td>
</tr>
<tr>
<td>Gasoline</td>
<td>840,000</td>
<td>39.3%</td>
<td>$330,000</td>
<td>$17,000</td>
<td>19</td>
</tr>
<tr>
<td>Ground Transportation</td>
<td>1,090,000</td>
<td>2.6%</td>
<td>$28,000</td>
<td>$24,200</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$10,050,000</td>
<td>23.7%</td>
<td>$2,385,000</td>
<td>$16,500</td>
<td>144</td>
</tr>
</tbody>
</table>

1. U.S. Bureau of the Census. 2012 Economic Census: Payroll listed as a percent of employer sales, shipments, receipts, revenue, or business done by industry sector for Lucas County
2. Average wage data for Lucas County from Ohio Department of Job and Family Services, 2014
3. Data unavailable for Lucas County; therefore, percentage of payroll reflects the statewide average.
### Weighted Tourism Multipliers for Lucas County, SeaGate Visitors

<table>
<thead>
<tr>
<th>Sector</th>
<th>Percent</th>
<th>Output</th>
<th>Earnings</th>
<th>Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodations</td>
<td>26%</td>
<td>1.58</td>
<td>0.37</td>
<td>13.96</td>
</tr>
<tr>
<td>Food Services and Drinking Places</td>
<td>25%</td>
<td>1.70</td>
<td>0.43</td>
<td>20.36</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>15%</td>
<td>1.71</td>
<td>0.42</td>
<td>16.07</td>
</tr>
<tr>
<td>Amusements, Gambling, and Recreation</td>
<td>15%</td>
<td>1.57</td>
<td>0.28</td>
<td>12.41</td>
</tr>
<tr>
<td>Gasoline</td>
<td>8%</td>
<td>1.71</td>
<td>0.42</td>
<td>16.07</td>
</tr>
<tr>
<td>Transportation</td>
<td>11%</td>
<td>1.82</td>
<td>0.45</td>
<td>15.88</td>
</tr>
<tr>
<td><strong>Weighted Visitor Spending Multipliers</strong></td>
<td><strong>100%</strong></td>
<td><strong>1.66</strong></td>
<td><strong>0.39</strong></td>
<td><strong>16.04</strong></td>
</tr>
</tbody>
</table>

*Source: U.S. Department of Commerce, Development Strategies*
### Average Annual Economic Impacts of SeaGate Convention Centre Visitors on Lucas County, 2011 to 2015, in 2015 dollars

<table>
<thead>
<tr>
<th></th>
<th>Tourism Spending</th>
<th>Direct Wages Supported</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Spending</td>
<td>$7,660,000</td>
<td>$2,390,000</td>
<td>$10,050,000</td>
</tr>
</tbody>
</table>

**Multipliers (see explanatory notes below)**

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>1.666</td>
<td>0.966</td>
<td>1.500</td>
</tr>
<tr>
<td>Earnings</td>
<td>0.391</td>
<td>0.224</td>
<td>0.351</td>
</tr>
<tr>
<td>Employment</td>
<td>16.085</td>
<td>6.654</td>
<td>13.843</td>
</tr>
</tbody>
</table>

**Added Economic Impact on Lucas County**

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>$12,765,000</td>
<td>$2,308,000</td>
<td>$15,073,000</td>
</tr>
<tr>
<td>Earnings</td>
<td>$2,995,000</td>
<td>$535,600</td>
<td>$3,530,600</td>
</tr>
<tr>
<td>Indirect Jobs Held by Lucas County Residents</td>
<td>123</td>
<td>16</td>
<td>139</td>
</tr>
</tbody>
</table>

**Total Economic Impact on Lucas County**

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Output</td>
<td>$25,123,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earnings</td>
<td>$5,920,600</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Jobs Supported in Lucas County</td>
<td>144</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Direct and Indirect Jobs</td>
<td>283</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Output** - Total dollar change in the county’s economy due to spending by SeaGate visitors
- **Earnings** - Total dollar change in earnings of households in the county due to spending by SeaGate visitors
- **Employment** - Total change in the number of jobs held by county residents per $1 million of direct spending by SeaGate visitors

---

*Weighted "tourism multiplier" derived by Development Strategies based on average spending in each of the tourism-related multipliers identified previously. See Appendix for derivation of multipliers.*
## Average Annual Economic Impacts of SeaGate Operations and Visitor Spending on Lucas County, 2011-2015, in 2015 dollars

<table>
<thead>
<tr>
<th></th>
<th>SeaGate Operations</th>
<th>SeaGate Visitor Spending</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Direct Spending</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>$ 2,344,000</td>
<td>$ 10,050,000</td>
<td>$ 12,394,000</td>
</tr>
<tr>
<td>Operations (Non-Labor)</td>
<td>$ 1,193,000</td>
<td>$ 7,660,000</td>
<td>$ 8,853,000</td>
</tr>
<tr>
<td>Wages</td>
<td>$ 785,000</td>
<td>$ 2,390,000</td>
<td>$ 3,175,000</td>
</tr>
<tr>
<td>Capital Expenditures</td>
<td>$ 366,000</td>
<td>N/A</td>
<td>$ 366,000</td>
</tr>
<tr>
<td><strong>Indirect Economic Impacts</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Output</td>
<td>$ 3,486,000</td>
<td>$ 15,073,000</td>
<td>$ 18,559,000</td>
</tr>
<tr>
<td>Earnings</td>
<td>$ 874,000</td>
<td>$ 3,530,600</td>
<td>$ 4,404,600</td>
</tr>
<tr>
<td>Jobs</td>
<td>30</td>
<td>140</td>
<td>170</td>
</tr>
<tr>
<td><strong>Total Direct and Indirect Impacts</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Output</td>
<td>$ 5,830,000</td>
<td>$ 25,123,000</td>
<td>$ 30,953,000</td>
</tr>
<tr>
<td>Earnings</td>
<td>$ 1,659,000</td>
<td>$ 5,920,600</td>
<td>$ 7,579,600</td>
</tr>
<tr>
<td>Jobs</td>
<td>50</td>
<td>280</td>
<td>330</td>
</tr>
</tbody>
</table>
Appendix

Average Annual Fiscal Impacts from SeaGate Operations and Visitor Spending, 2011-2015, in 2015 dollars

<table>
<thead>
<tr>
<th>Fiscal Impacts from Visitor Spending</th>
<th>Direct and Indirect Spending</th>
<th>Sales Tax Revenue</th>
<th>Hotel Tax Revenue</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Visitor Spending</td>
<td>$ 10,050,000</td>
<td>$ 83,000</td>
<td>$ 175,000</td>
<td>$ 258,000</td>
</tr>
<tr>
<td>Impacts from Direct Wages</td>
<td>2,390,000</td>
<td>11,000</td>
<td>11,000</td>
<td>11,000</td>
</tr>
<tr>
<td>Impacts from Indirect Earnings</td>
<td>3,530,600</td>
<td>16,000</td>
<td>16,000</td>
<td>16,000</td>
</tr>
<tr>
<td>Fiscal Impacts from SeaGate Operations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Impacts from Direct SeaGate Wages</td>
<td>785,000</td>
<td>4,000</td>
<td>4,000</td>
<td>4,000</td>
</tr>
<tr>
<td>Impacts from Indirect Earnings</td>
<td>874,000</td>
<td>4,000</td>
<td>4,000</td>
<td>4,000</td>
</tr>
<tr>
<td>Total Fiscal Impact on Lucas County</td>
<td>-</td>
<td>$ 118,000</td>
<td>$ 175,000</td>
<td>$ 293,000</td>
</tr>
</tbody>
</table>
SeaGate Operations Overview

SeaGate Convention Centre Operating Income and Expenses, 2011-2015

Source: Toledo Lucas County Convention and Visitors Bureau
## Minor League Markets: Convention Facilities

<table>
<thead>
<tr>
<th>Facility</th>
<th>Total Square Footage</th>
<th>Exhibition Hall Space</th>
<th>Ballroom Space</th>
<th>Annual Attendance</th>
<th>Attendance Per SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>SeaGate Center</td>
<td>92,000</td>
<td>75,000</td>
<td>N/A</td>
<td>125,000</td>
<td>1.36</td>
</tr>
<tr>
<td>Century Center</td>
<td>75,000</td>
<td>41,000</td>
<td>12,000</td>
<td>185,000</td>
<td>2.46</td>
</tr>
<tr>
<td>South Bend, IN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>John S. Knight Center</td>
<td>123,000</td>
<td>29,000</td>
<td>12,000</td>
<td>390,000</td>
<td>3.17</td>
</tr>
<tr>
<td>Akron, OH</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dayton Convention Center</td>
<td>150,000</td>
<td>68,000</td>
<td>N/A</td>
<td>170,000</td>
<td>1.13</td>
</tr>
<tr>
<td>Dayton, OH</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grand Wayne Convention Center</td>
<td>225,000</td>
<td>48,500</td>
<td>16,000</td>
<td>220,000</td>
<td>0.97</td>
</tr>
<tr>
<td>Fort Wayne, IN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Devos Place</td>
<td>234,000</td>
<td>162,000</td>
<td>40,000</td>
<td>590,000</td>
<td>2.52</td>
</tr>
<tr>
<td>Grand Rapids, MI</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Visitor Spending Overview

Key data points for evaluating visitor impacts
- Total visitors
- Length of Stay
- Overnight vs. Daytrip
- Average Daily Spending
- Average Daily Spending by Category
- Location of Spending (in region)

What we know about SeaGate Attendance
- Total attendance annually
- Total attendance by event type
- General room night patterns for conventions

What we don’t know about SeaGate Attendance
- Visitor origin
- Length of stay
Downtown Retail Demand Estimates

**SPORTS FACILITIES**

**CURRENT DEMAND**

53,000 SQ.FT.

**CONVENTION & DESTINATIONS**

Conventions: 22,000 SQ.FT  
Destinations: 230,000 SQ.FT

28,000 SQ.FT.

**CULTURAL**

98,000 SQ.FT.

**WORKERS**

263,000 SQ.FT.

**RESIDENTS**

Downtown Master Plan
Downtown Master Plan: Projections

CONVENTION & DESTINATIONS

PROJECTED ATTENDANCE

- 80 more hotel rooms
- 80,000 more convention attendees

PROJECTED DEMAND

- 14,000 sq.ft.

WORKERS

- 4,000 more workers

RESIDENTS

- 1,500 more households

($13,500 annual/p)

- 67,500 sq.ft.