Springfield, Missouri
Convention, Meetings & Hotel Package Study

Hunden Strategic Partners & Convergence Design

February 22, 2016

Key Questions

- What is the demand for a new or improved convention and meetings package in Springfield?
- What is the condition of the Springfield Exposition Center and how is it performing?
- What is the current local and regional meeting facility supply?
- What is the hotel supply and demand situation? How does this impact recommended package?
- What are the needs of user groups?

Key Questions

- What are the potential funding sources?
- What other facilities offer implications and takeaways?
- What are site options?
- What are the preliminary recommendations for the Springfield Exposition Center and a new hotel?
- Is there funding for a new facility?
- How will a renovated meeting facility perform?

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Headlines

- Springfield is in a tough, crowded marketplace for convention, meetings and events.
- Have a few hooks, but lacks strong destination appeal, therefore should tread conservatively into this market.
- Location near downtown is most compelling, given existing facilities, walkability to downtown and nearby hotel and expansion capability.
- New aquarium should help move the needle for Springfield’s marketing.

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Headlines

- Convention hotel needed should be branded but does not need to be supertanker as considered before. Pricing and room blocks are key.

- Sports as key tenants in multipurpose facility prefer “value” over full-service amenities.

- Suggest 180 - 220-room select service hotel on steroids adjacent.

- Recommend ballroom of 15,000+ SF to compete in market.

- Add kitchen and at least ten more breakout meeting rooms.

How is the local and downtown market performing economically?

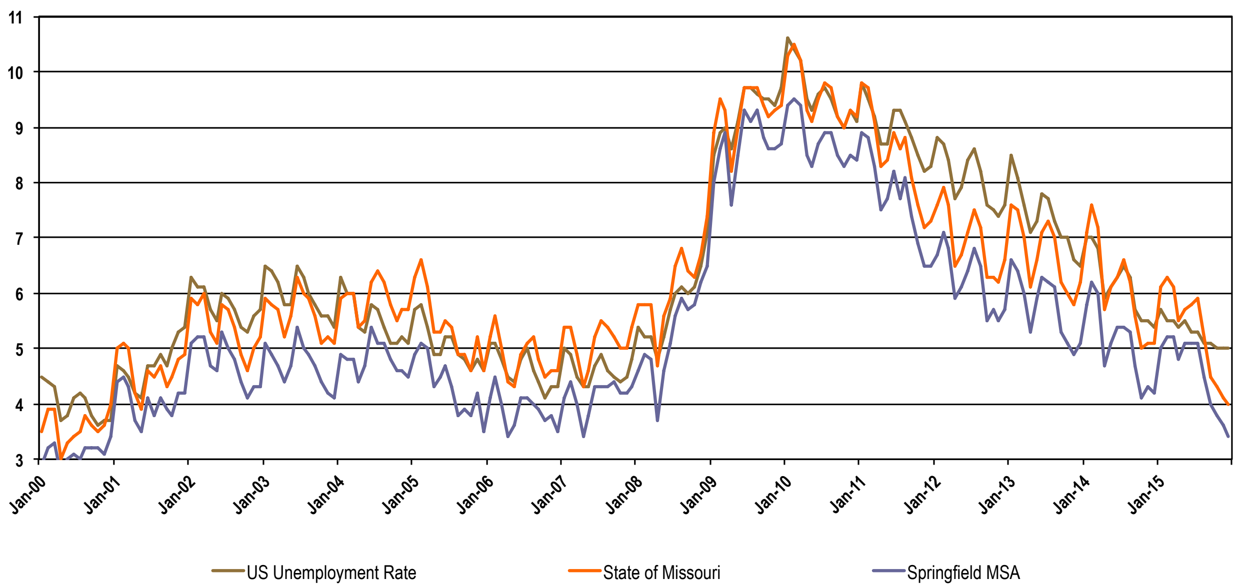
Population & Unemployment

Population and Growth Rates

	Population				Percent Change
	1990	2000	2010	2014 Estimate	*2000 - 2010*
United States	2,487,709,873	281,421,906	308,745,538	318,857,056	9.7%
State of Missouri	5,117,073	5,595,211	5,988,927	6,063,589	7.0%
Springfield MO MSA	264,346	368,374	436,712	452,297	18.6%
Greene County	207,949	240,391	275,174	285,865	14.5%
Springfield, MO	**140,494**	**151,567**	**159,496**	**165,378**	**5.2%**
City Pop. As % of MSA	*53.1%*	*41.1%*	*36.5%*	*36.6%*	--

Source: U.S. Census Bureau

Unemployment Rates



Source: Bureau of Labor Statistics

Colleges & Universities

Springfield Area Colleges and Universities

Institution	Location	Distance (miles)	Highest Degree Offered	Enrollment
Forest Institute of Professional Psychology	Springfield, MO	0.0	Doctorate	200
Assemblies of God Theological Seminary	Springfield, MO	3.2	Doctorate	327
Cox College	Springfield, MO	3.2	Master's	807
Drury University	Springfield, MO	3.2	Master's	4,215
Evangel University	Springfield, MO	3.2	Doctorate	2,006
Ozarks Technical Community College	Springfield, MO	3.2	Associates	14,396
Missouri State University-Springfield	Springfield, MO	3.4	Doctorate	21,816
Baptist Bible College	Springfield, MO	5.5	Master's	373
Southwest Baptist University	Bolivar, MO	31.2	Doctorate	3,696
College of the Ozarks	Point Lookout, MO	46	Bachelors	1,433
Grand Total				**49,269**

Source: National Center for Education Statistics

Major Employers

Greene County Major Employers

Company Name	Industry	# of Employees
Mercy Hospital Springfield	Healthcare	9,030
CoxHealth Systems	Healthcare	7,891
Walmart	Retail	3,917
Springfield Public Schools	Education	3,199
Bass Pro Shops/Tracker Marine	Retail/Manufacturing	2,862
United States Government	Government	2,400
State of Missouri	Government	2,317
Missouri State University	Education	2,184
Citizens Memorial Healthcare	Healthcare	1,900
City of Springfield	Government	1,596
SRC Holdings	Manufacturing	1,500
O'Reilly Auto Parts	Retail/Manufacturing	1,460
Chase Card Services	Financial	1,449
Prime, Inc	Transportation	1,151
Ozarks Technical Community College	Education	1,086
TeleTech	Telecommunications	1,048

Source: Springfield Economic Development

Tourism Demand Generators & Hooks

- New Aquarium: Expected to have 750,000 visitors
- Downtown: Improving, walkable from the key site
- College Town
- Route 66
- Branson nearby: Offers real market with amenities near tourist-oriented destination

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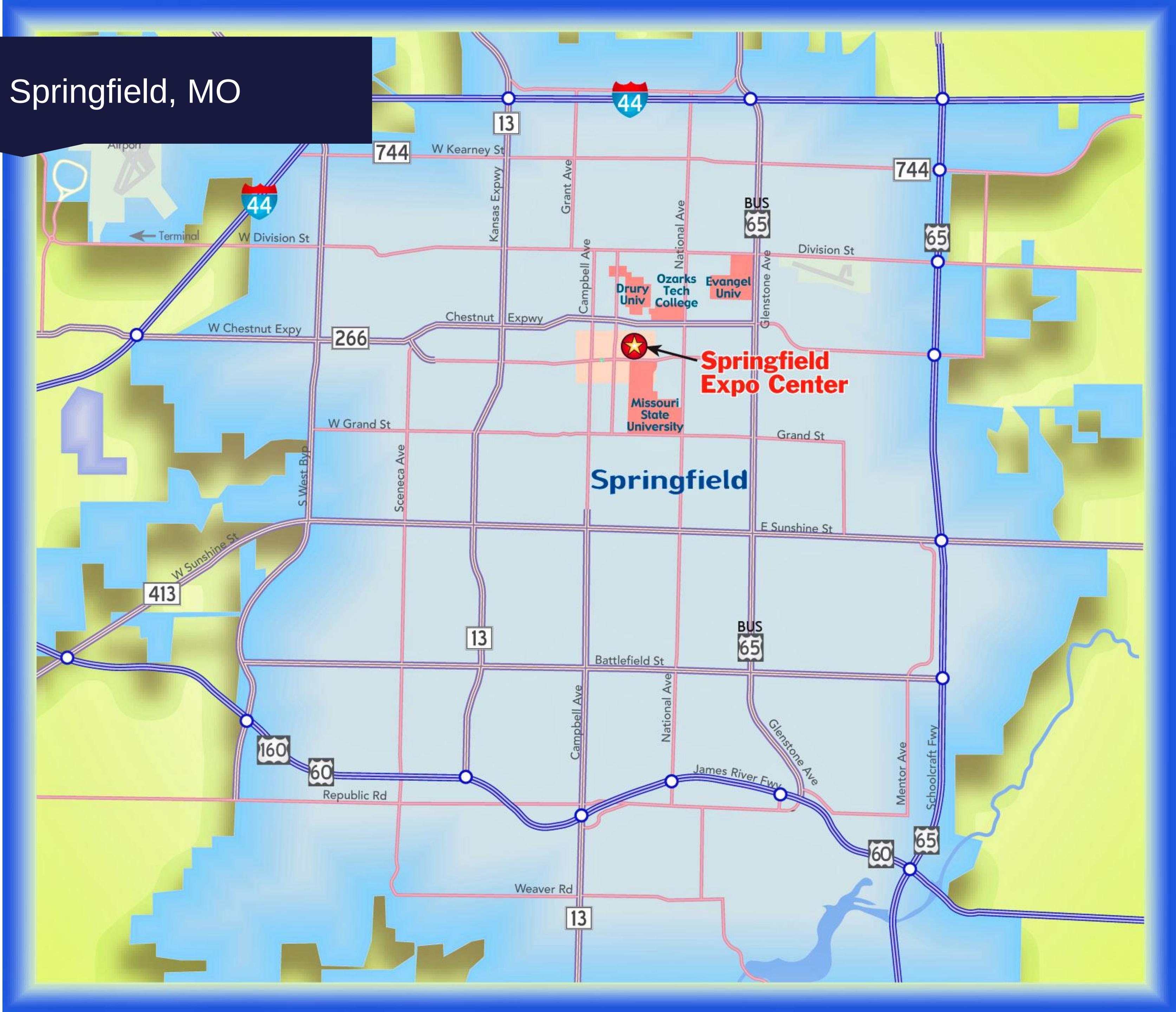
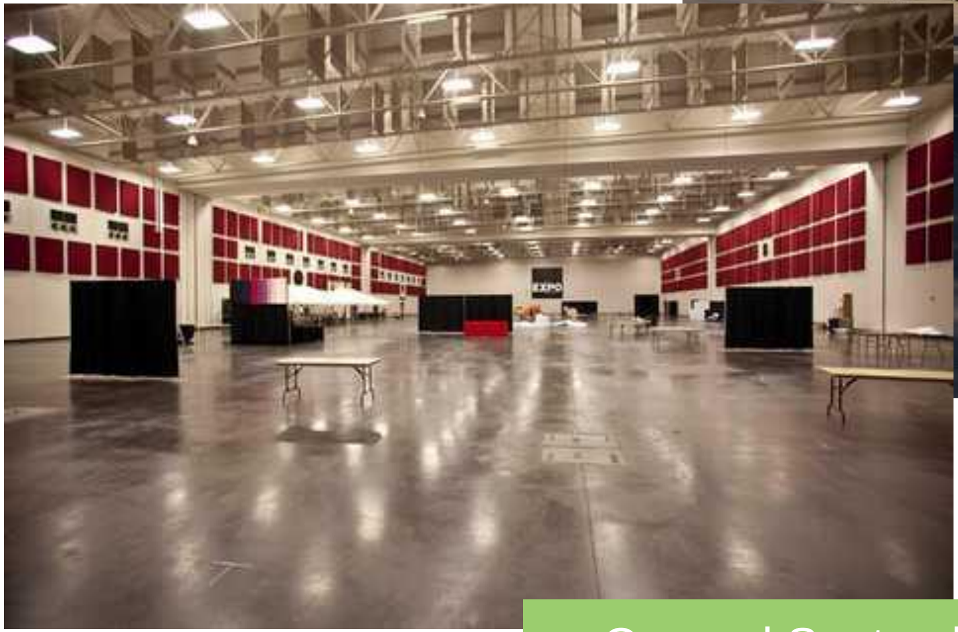
Springfield, MO



Downtown Springfield

What is the condition of the Springfield Exposition Center and how is it performing?

Springfield Exposition Center



- Opened September 2004
- Construction Cost: $15 million
- Owned by City of Springfield
- Managed by John Q Hammons

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Springfield Exposition Center

Facilities	Total (SF)	By Division (SF)	Divisions
Exhibit Hall Facilities			
Expo Center	45,000		3
Hall A		14,700	1
Hall B		14,700	1
Hall C		14,700	1
Hall 1*	25,200		1
Hall 2*	21,500		1
	91,700		5
Meeting Room Facilities			
Breakout 1	635		1
Breakout 2	635		1
Breakout 3	635		1
Breakout 4	635		1
Breakout 5	635		1
Breakout 6	635		1
Breakout 7	635		1
	4,445		7

Hotel Rooms	271		
Total Exhibit Space	91,700	Per Guest Room	338
Total Ballroom Space	0		0
Total Meeting Space	4,445		16
Total Function Space	96,145		355
Total Exhibit Space Divisions	5	/100 Guest Rms	1.85
Meeting Room Divisions	7		2.58
Total Divisions (including Ballroom)	7		2.58

*Sears space

Source: Springfield Exposition Center, Cvent, Hunden Strategic Partners

Springfield Exposition Center

- No ballroom space and limited breakout rooms restrict ability to attract events.
- Sears space (Hall 1 & 2) not ideal space, difficult to market.

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Springfield Expo Center Management Agreement

- Signed in 2002 as a 25-year contract
- John Q Hammons submits annual budget as operator
- JQH maintains full fiscal responsibility of profits and losses
- Agency issue when JQH books internally profitable events that do not produce roomnights (impact for city)
- City-issued bonds for Expo Center development funded by CID

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Springfield Exposition Center Events

Springfield Expo Center Number of Events by Type

	2013	2014	2015	2016
Athletic	2	1	1	1
Conference	11	9	4	5
Consumer	12	18	19	16
Convention	12	17	18	8
Non-Profit	10	9	11	61
Total	**47**	**54**	**53**	**91**

Source: Springfield Expo Center

- Consumer shows and conventions account for most events other than in 2016.
- Non-profit events were consistent until quintupling in 2016.

Springfield Exposition Center Attendance

Springfield Expo Center Attendance by Event Type

	2013	2014	2015	2016
Athletic	3,000	1,500	1,500	1,500
Conference	8,800	4,755	3,245	3,750
Consumer	28,100	26,500	35,700	47,300
Convention	13,250	13,515	22,475	11,275
Non-Profit	37,700	36,150	39,250	22,880
Total	**90,850**	**82,420**	**102,170**	**86,705**

Source: Springfield Expo Center

- Attendance at consumer, convention and non-profit events are most significant.
- Large increase overall from 2014 to 2015.
- Already a great start in 2016.

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Springfield Exposition Center Average Attendance Per Event

Springfield Expo Center Average Attendance per Event

	2013	2014	2015	2016
Athletic	1,500	1,500	1,500	1,500
Conference	800	528	811	750
Consumer	2,342	1,472	1,879	2,956
Convention	1,104	795	1,249	1,409
Non-Profit	3,770	4,017	3,568	375
Total	**1,933**	**1,526**	**1,928**	**953**

Source: Springfield Expo Center, Hunden Strategic Partners

- Attendance per convention and consumer event dropped in 2014, but has exceeded 2013 levels.
- Many smaller non-profit events scheduled for 2016.

Springfield Exposition Center Events by Segment

Springfield Expo Center Number of Events by Market Segment

	2013	2014	2015	2016
Association	4	5	5	4
Corporate	17	25	19	15
Government	3	3	2	1
SMERF	23	21	27	71
Total	**47**	**54**	**53**	**91**

Source: Springfield Expo Center

- Corporate and SMERF segments account for majority of events.
- SMERF groups are holding non-profit events, which spiked in 2016.

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Springfield Exposition Center Attendance by Segment

Springfield Expo Center Attendance by Market Segment

	2013	2014	2015	2016
Association	14,400	13,470	18,600	18,300
Corporate	22,800	21,120	22,200	30,925
Government	12,050	11,585	11,550	550
SMERF	41,600	36,245	49,820	36,930
Total	**90,850**	**82,420**	**102,170**	**86,705**

Source: Springfield Expo Center

- SMERF accounts for nearly half of attendance, typically.
- Government attendance was consistent until 2016. Events may not yet be planned.

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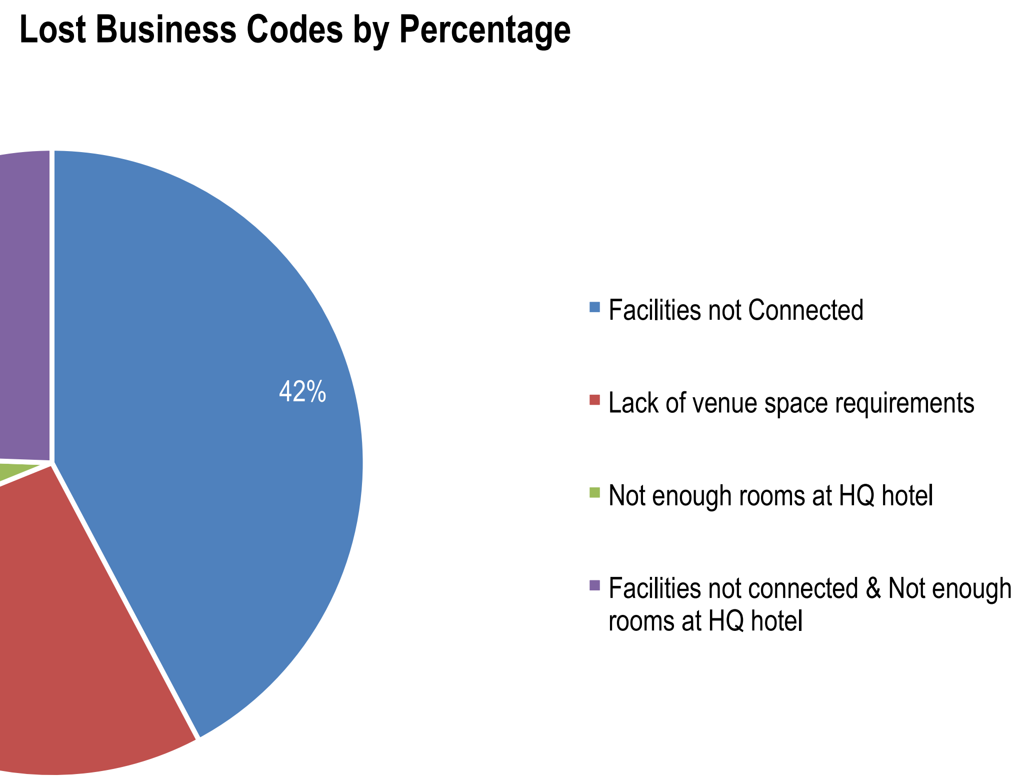
Springfield Exposition Center Lost Business



Source: Visit Springfield, Hunden Strategic Partners

- Facilities not being connected causes nearly half of all lost business.
- Nearly 25% of lost business: disconnected facilities and too small of HQ hotel.

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Springfield Exposition Center Lost Business

Springfield Lost Business	Facilities not Connected		Lack of venue space requirements		Not enough rooms at HQ hotel		Two Reasons *		Total	
	Attendees	Rooms	Attendees	Rooms	Attendees	Rooms	Attendees	Rooms	Attendees	Rooms
Total	39,700	23,691	31,900	32,774	4,850	2,972	14,100	18,318	76,450	59,437
Average	**1,805**	**1,077**	**3,544**	**3,642**	**970**	**594**	**1,567**	**2,035**	**--**	**--**

* Facilities not Connected & Not enough rooms at HQ hotel

Source: Visit Springfield, Hunden Strategic Partners

- Significant potential opportunity for improved performance.

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Implications & Conclusions

- Current management agreement hamstrings facility: only take revenue generating business that limits hotel room nights.
- Current facility cannot host most event types, although can handle sports, which is trending…but needs equipment.
- Addition of kitchen, ballroom and meeting rooms would create true convention facility.
- Additional new hotel adjacent would help competitiveness.
- Need new management agreement.
- City needs to step up to support operating loss.

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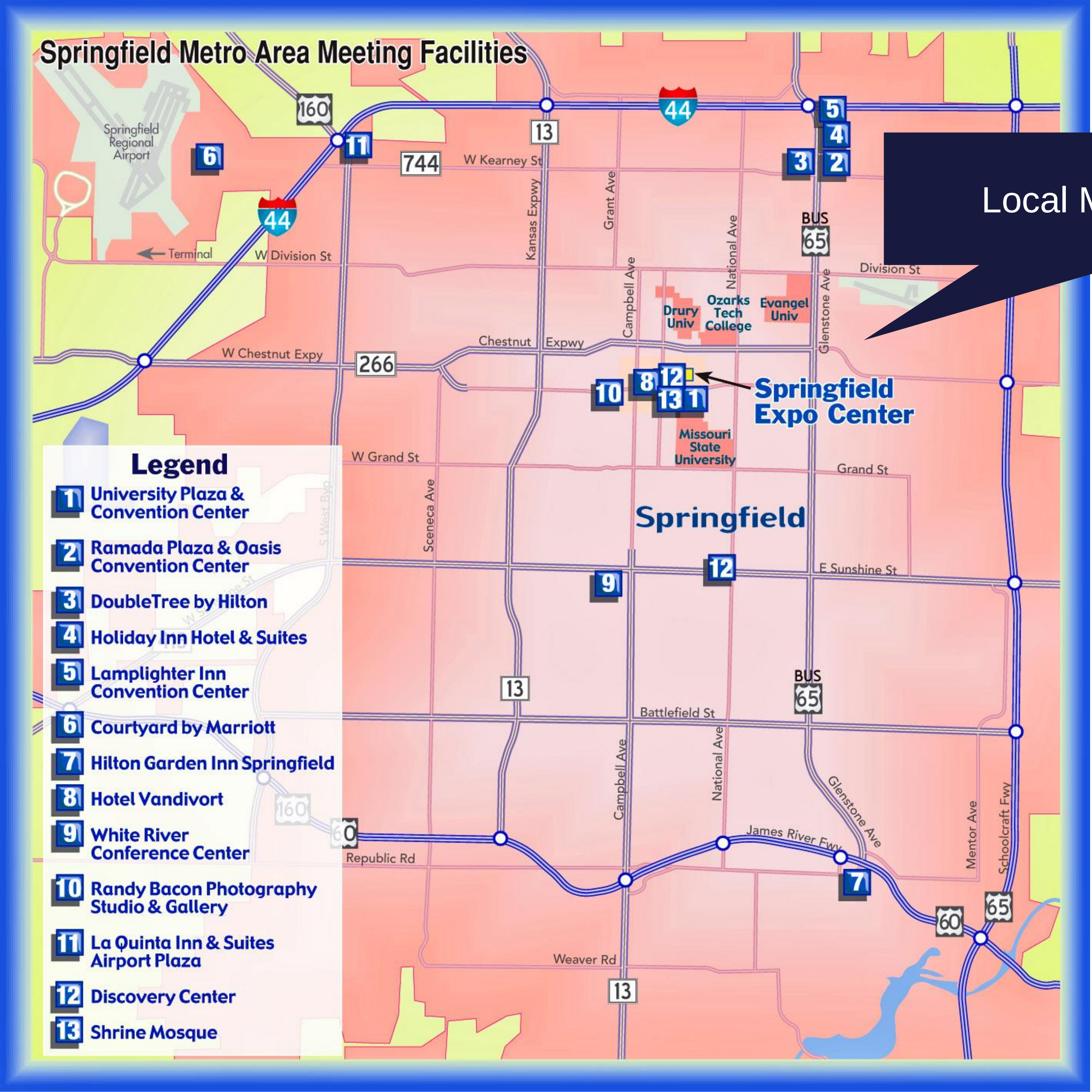
What is the current local and regional meeting facility supply?



Local Meeting Facilities

Local Meeting Facilities

Competitive Environment - Convention and Event Centers

Facility	Total Function Space	Exhibit Space	Ballroom Space	Meeting Room Space
University Plaza & Convention Center	36,020	0	34,400	3,687
Ramada Plaza Hotel & Oasis Convention Center	21,728	0	17,672	4,056
DoubleTree by Hilton Springfield	6,509	0	4,125	2,384
Holiday Inn Hotel & Suites	7,241	0	3,000	4,241
Lamplighter Inn Convention Center	6,660	0	4,320	2,340
Courtyard by Marriott	4,199	0	2,117	2,082
Hilton Garden Inn Springfield	3,671	0	2,697	974
Hotel Vandivort	3,900	0	2,800	1,100
White River Convention Center	13,730	0	9,700	4,030
Randy Bacon Photography Studio & Gallery	4,000	0	4,000	0
La Quinta Inn & Suites Springfield Airport Plaza	1,674	0	0	1,674
Shrine Mosque	17,000	17,000	0	0
Average	**9,718**	**1,417**	**7,069**	**2,214**
Springfield Expo Center incl. Sears	**96,145**	**91,700**	**0**	**4,445**
Springfield Expo Center not incl. Sears	**49,445**	**45,000**	**0**	**4,445**
Difference from Average (incl. Sears)	**86,427**	**90,283**	**-7,069**	**2,231**

Source: Various Facilities, Cvent, Hunden Strategic Partners

- Expo Center is largest facility in Springfield even without Sears
- Only one other facility in Springfield with exhibition space.
- Largest ballroom is 11,505 square feet

Regional Meeting Facilities

Regional Meeting Supply

Competitive Environment - Convention and Event Centers

Facility	City	Total Function Space	Exhibit Space	Ballroom Space	Meeting Room Space
Century II Performing Arts & Convention Center	Wichita, KS	198,160	171,840	0	26,320
Cox Business Center	Tulsa, OK	172,644	102,600	30,060	39,984
Cox Convention Center	Oklahoma City, OK	140,004	81,391	25,956	32,657
Hot Springs Convention Center	Hot Springs, AR	128,802	103,000	16,000	9,802
Statehouse Convention Center	Little Rock, AR	109,482	82,892	18,362	8,228
Branson Convention Center	Branson, MO	87,152	47,172	22,703	17,277
Enid Event Center & Convention Hall*	Enid, OK	52,000	31,500	14,500	6,000
Fort Smith Convention Center	Fort Smith, AR	45,372	40,000	0	5,372
Joplin Memorial Hall	Joplin, MO	30,900	30,000	0	900
Hammons Trade Center Joplin	Joplin, MO	30,800	30,000	0	800
Jack Lawton Webb Convention Center	Joplin, MO	10,000	7,500	0	2,500
Muskogee Civic Center	Muskogee, OK	8,618	0	0	8,618
Average	**--**	**84,495**	**60,658**	**10,632**	**13,205**
Springfield Expo Center	**Springfield, MO**	**96,145**	**91,700**	**0**	**4,445**
Difference from Average		**11,651**	**31,042**	**-10,632**	**-8,760**

* Hotel under development

Source: Various Facilities, Hunden Strategic Partners

size.

- Expo Center is far below average once Sears space is removed.
- Recommended renovations will make SEC far more

Regional Meeting Supply

Competitive Environment - Convention and Event Centers

Facility	City	Arena/Theater Seating	Walkable Hotels	Walkable Hotel Rooms	Walkable Hotel Rooms/ 1k SF of Function Space
Century II Performing Arts & Convention Center	Wichita, KS	2,195	3	634	3
Cox Business Center	Tulsa, OK	8,900	2	597	3
Cox Convention Center	Oklahoma City, OK	0	4	1,388	10
Hot Springs Convention Center	Hot Springs, AR	6,300	2	446	3
Statehouse Convention Center	Little Rock, AR	0	2	706	6
Branson Convention Center	Branson, MO	0	2	536	6
Enid Event Center & Convention Hall*	Enid, OK	4,000	1	150	3
Fort Smith Convention Center	Fort Smith, AR	0	2	393	9
Joplin Memorial Hall	Joplin, MO	0	0	0	0
Hammons Trade Center Joplin	Joplin, MO	0	2	481	16
Jack Lawton Webb Convention Center	Joplin, MO	0	0	0	0
Muskogee Civic Center	Muskogee, OK	3,619	0	0	0
Average	**--**	**2,085**	**2**	**444**	**5**
Springfield Expo Center	**Springfield, MO**	**0**	**1**	**271**	**3**
Difference from Average		**-2,085**	**-1**	**-173**	**-2**

* Hotel under development

Source: Various Facilities, Hunden Strategic Partners

- Most regional facilities do not have theater seating
- Walkable hotels are limited regionally
- Connected hotel to Expo Center will increase competitiveness

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What is the hotel supply and demand situation? How does this impact conclusions?

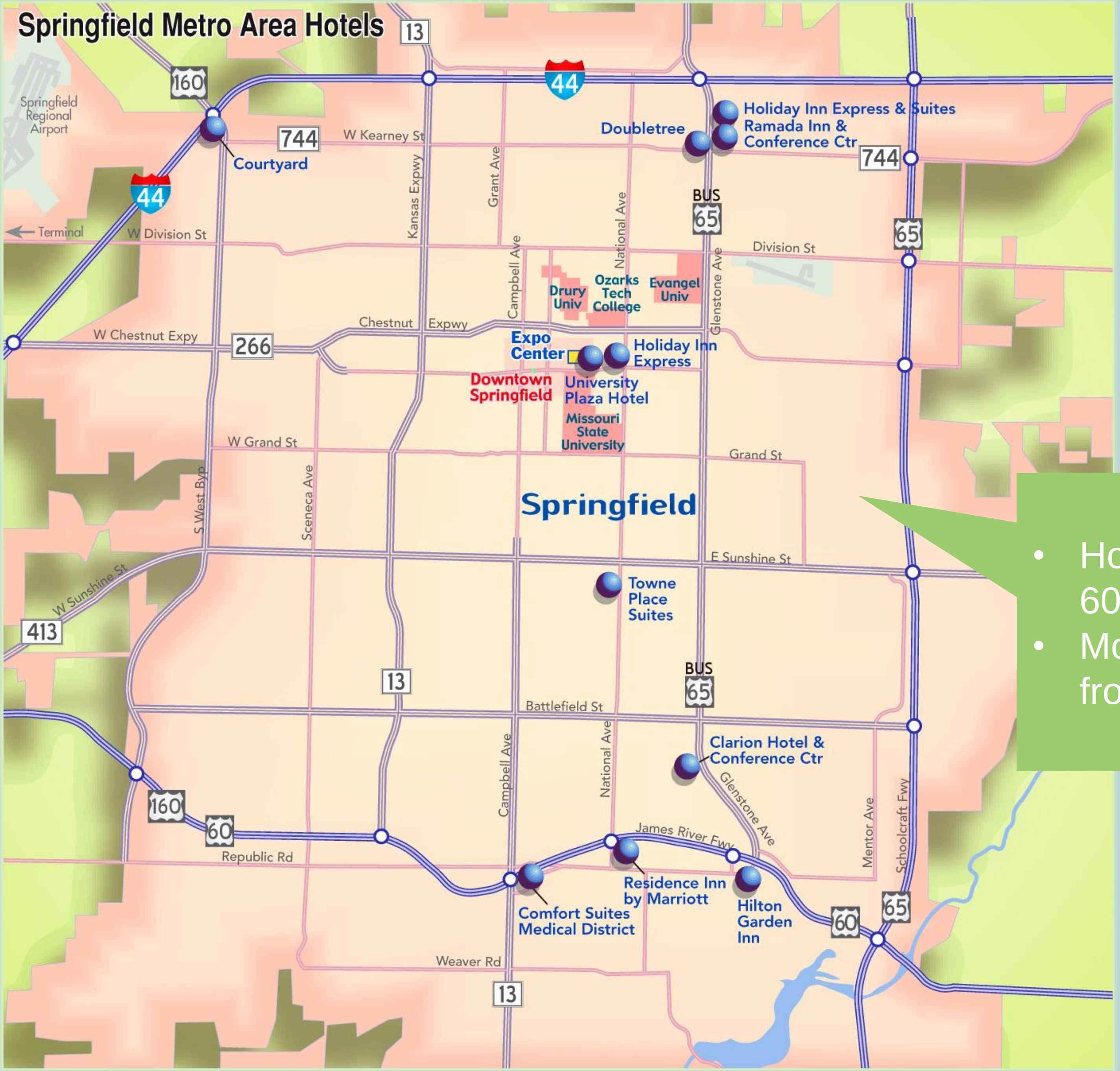
Springfield Hotel Summary

Lodging Summary: Springfield

Chain Scale	Rooms	% of Total Rooms	Hotels	Rooms per Hotel	Avg. Opening Year	Avg. Age in Years
Upper Upscale	--	--	--	--	--	--
Upscale	548	12%	4	137	Sep-97	17
Upper Midscale	1,037	22%	10	104	Sep-91	19
Midscale	1,088	24%	10	109	Jun-81	24
Independent	1,007	22%	10	101	Feb-96	41
Economy	940	20%	9	104	May-80	33
Total / Average	**4,620**	**100%**	**43**	**107**	**Jul-88**	**28**

Source: Smith Travel Research, Hunden Strategic Partners

- Two-thirds of hotels in Springfield are midscale quality or lower.
- Fewer hotel openings than closings since previous study.
- No full-service branded hotels like Marriott, Hilton, etc.



- Hotels mostly along 60 and 65.
- Most hotels away from downtown

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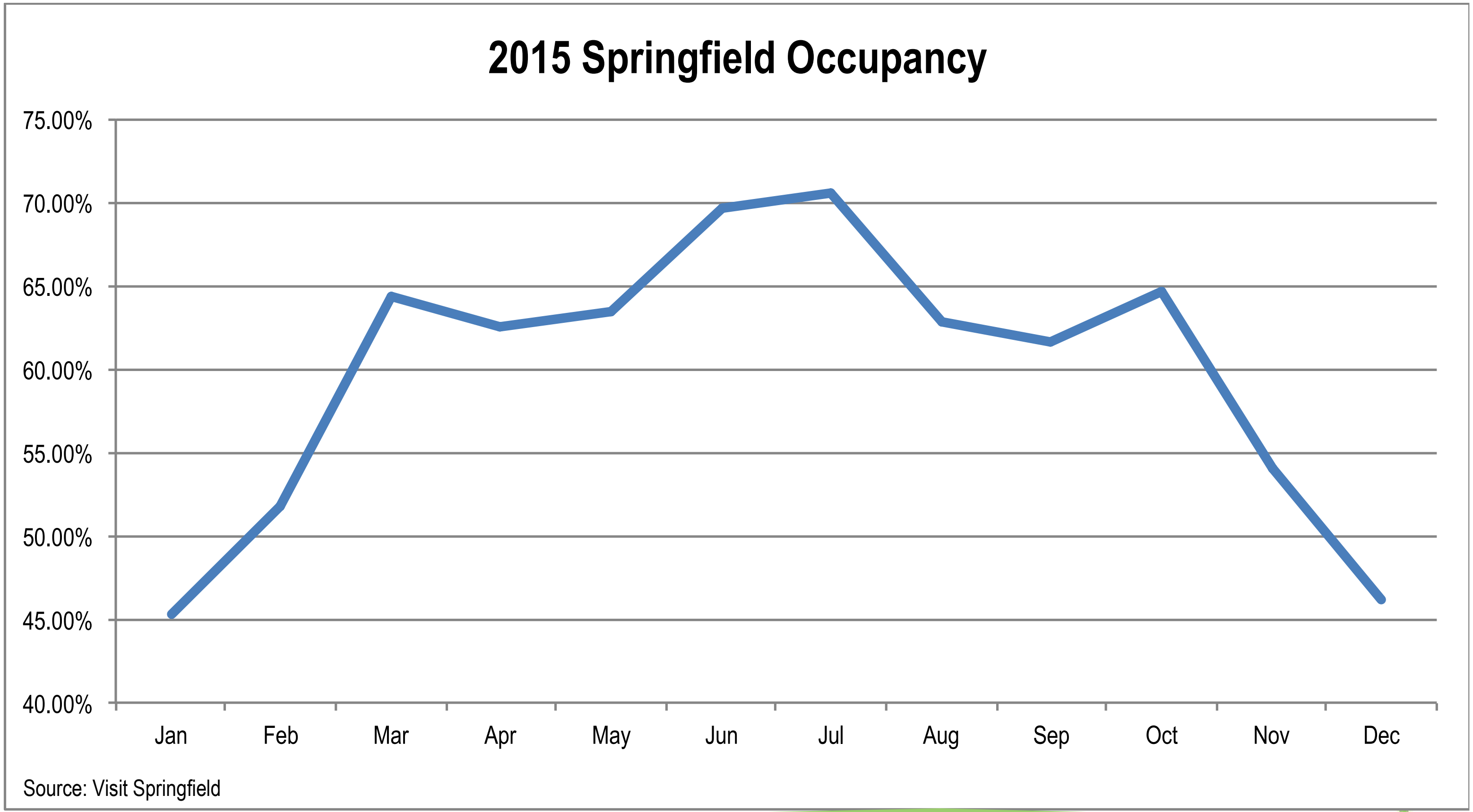
Springfield Hotel Market – Seasonality of Occupancy



- Winter experiences a sharp decline in visitation.
- June/July have highest occupancy and March/October are second.

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Springfield Hotel Market – Occupancy by Year and Month

Springfield Occupancy 2011- 2015

	2011	2012	2013	2014	2015	Avg.
Jan	36.20%	37.10%	40.10%	44.20%	45.30%	**40.58%**
Feb	42.30%	43.70%	46.50%	52.10%	51.80%	**47.28%**
Mar	56.30%	57.00%	58.30%	66.10%	64.40%	**60.42%**
Apr	48.30%	49.20%	55.40%	61.00%	62.50%	**55.28%**
May	59.10%	58.60%	59.50%	66.10%	63.40%	**61.34%**
Jun	69.10%	64.10%	64.60%	69.70%	69.60%	**67.42%**
Jul	59.30%	58.80%	62.40%	69.70%	70.50%	**64.14%**
Aug	58.20%	56.40%	58.90%	68.70%	62.90%	**61.02%**
Sep	54.30%	52.80%	57.20%	59.30%	61.60%	**57.04%**
Oct	56.20%	55.60%	63.10%	63.50%	64.60%	**60.60%**
Nov	46.70%	49.90%	52.60%	53.20%	54.00%	**51.28%**
Dec	37.60%	40.40%	43.20%	45.20%	46.20%	**42.52%**
Average	**51.97%**	**51.97%**	**55.15%**	**59.90%**	**59.73%**	

Source: Visit Springfield

(yellow)	75-80
(orange)	80-90
(red)	> 90

- Demand growth needed to catalyze private hotel development.
- Demand fully accommodated by supply

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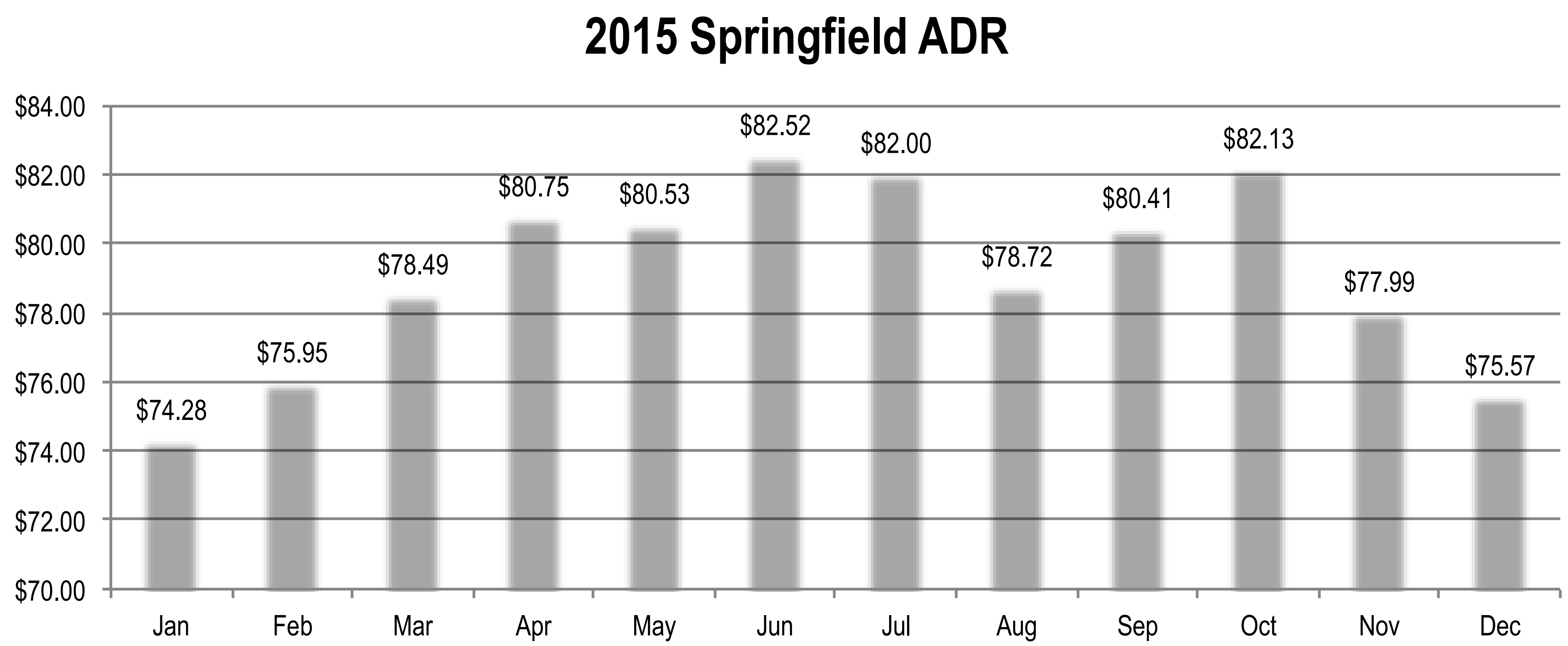
Springfield Hotel Market – Seasonality of ADR



Source: Visit Springfield

- June, July and October have highest rates.
- January, February and December have lowest rates.

Springfield Hotel Market– ADR by Year and Month

Springfield ADR 2011- 2015

	2011	2012	2013	2014	2015	Avg.
Jan	$61.87	$64.33	$66.70	$69.70	$74.28	**$67.38**
Feb	$64.08	$66.90	$68.57	$70.96	$75.95	**$69.29**
Mar	$68.66	$71.28	$72.57	$74.84	$78.49	**$73.17**
Apr	$67.06	$70.28	$71.60	$73.00	$80.75	**$72.54**
May	$70.66	$71.26	$71.71	$74.66	$80.53	**$73.76**
Jun	$72.52	$75.20	$74.50	$78.13	$82.52	**$76.57**
Jul	$68.04	$70.61	$71.21	$77.01	$82.00	**$73.77**
Aug	$66.43	$69.76	$70.48	$76.37	$78.72	**$72.35**
Sep	$69.54	$70.28	$72.12	$78.68	$80.41	**$74.21**
Oct	$68.57	$70.53	$71.45	$77.66	$82.13	**$74.07**
Nov	$67.14	$68.13	$70.09	$74.81	$77.99	**$71.63**
Dec	$66.50	$67.69	$67.64	$72.08	$75.57	**$69.90**
Average	**$67.59**	**$69.69**	**$70.72**	**$74.83**	**$79.11**	

Source: Visit Springfield

	70-80
	80-90
	> 90

Strong growth since 2013

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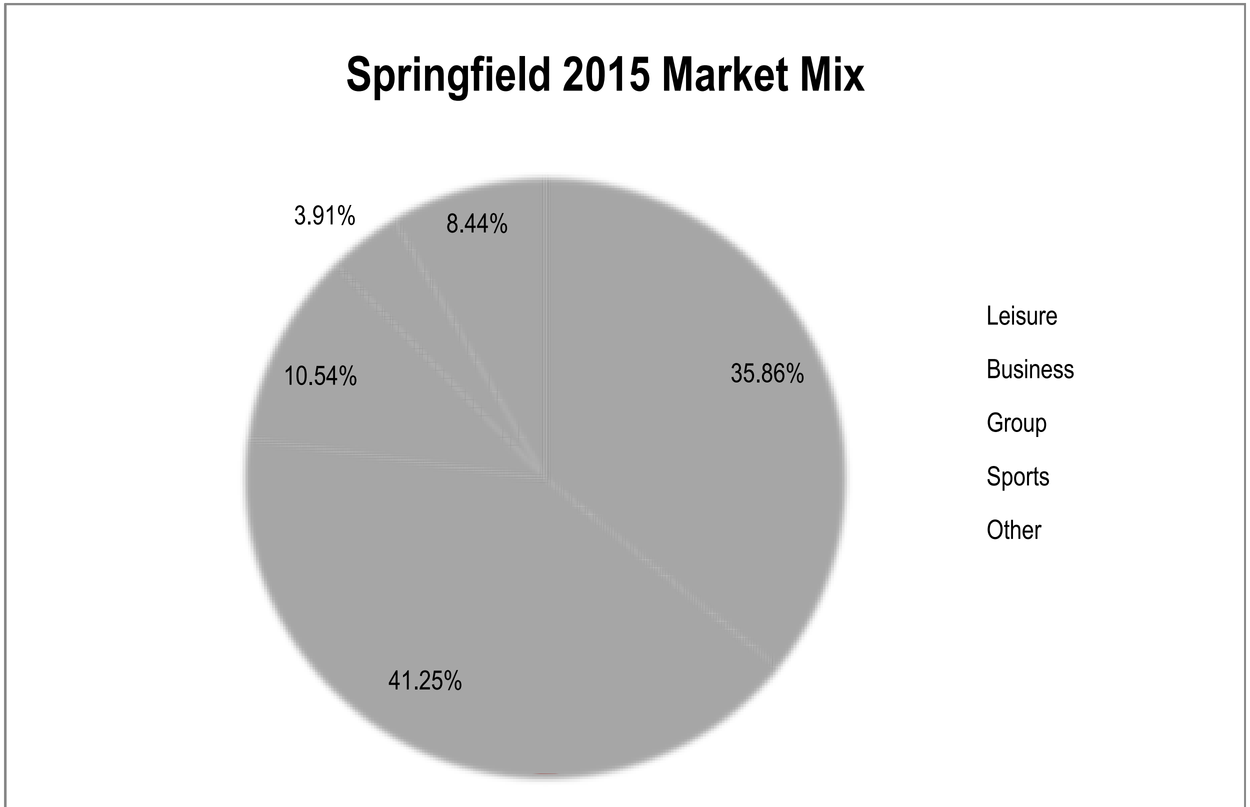
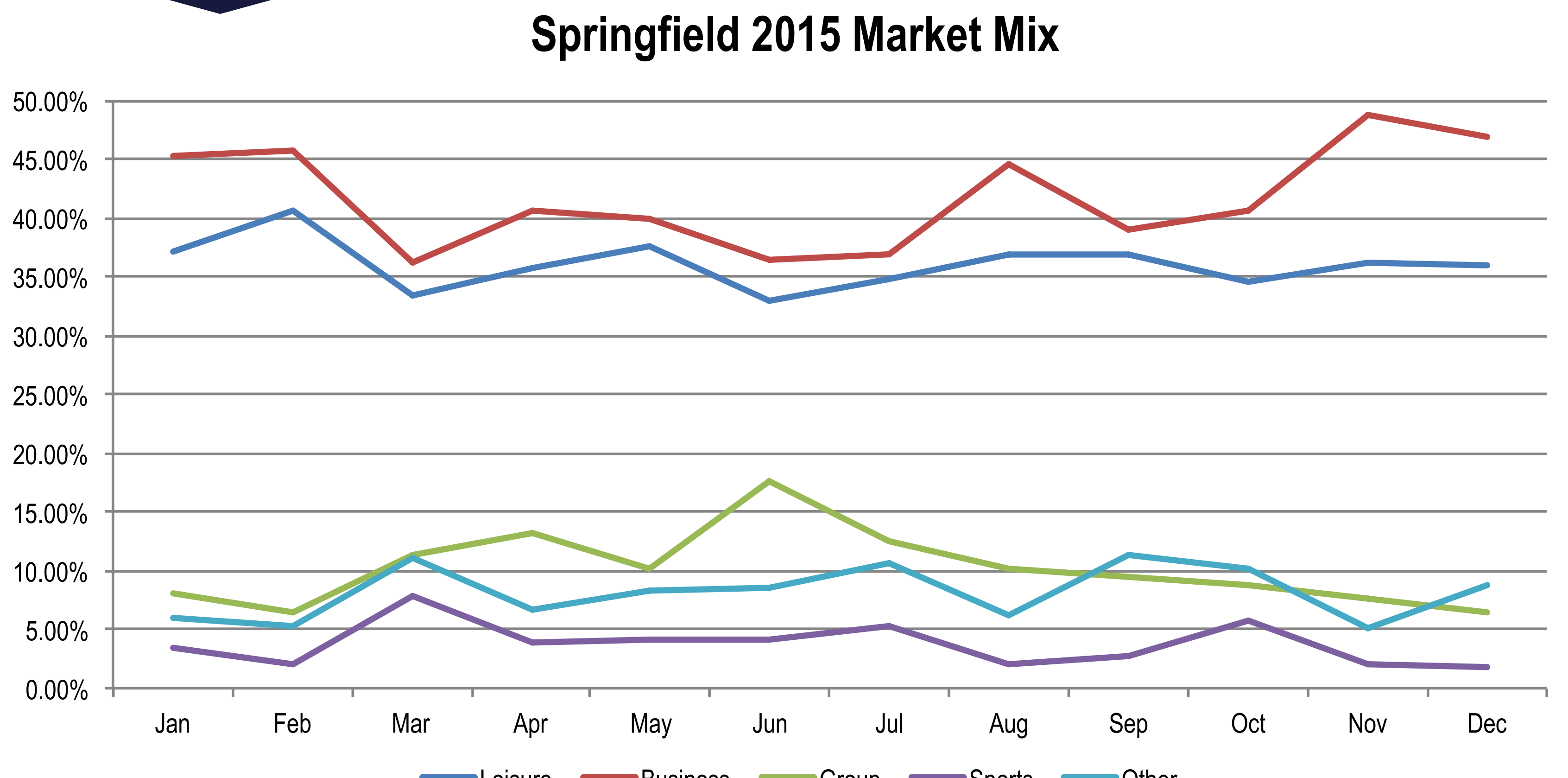
Springfield Hotel Market– Segmentation



Source: Visit Springfield

- Corporate and leisure transient combine to > 75 percent of demand.
- Groups accounts for nearly 15 percent (including sports).

Springfield Hotel Market– Segmentation



Source: Visit Springfield

- SMERF and group appear correlated, just as corporate and leisure are.
- At its highest, group accounts for < 20 percent.

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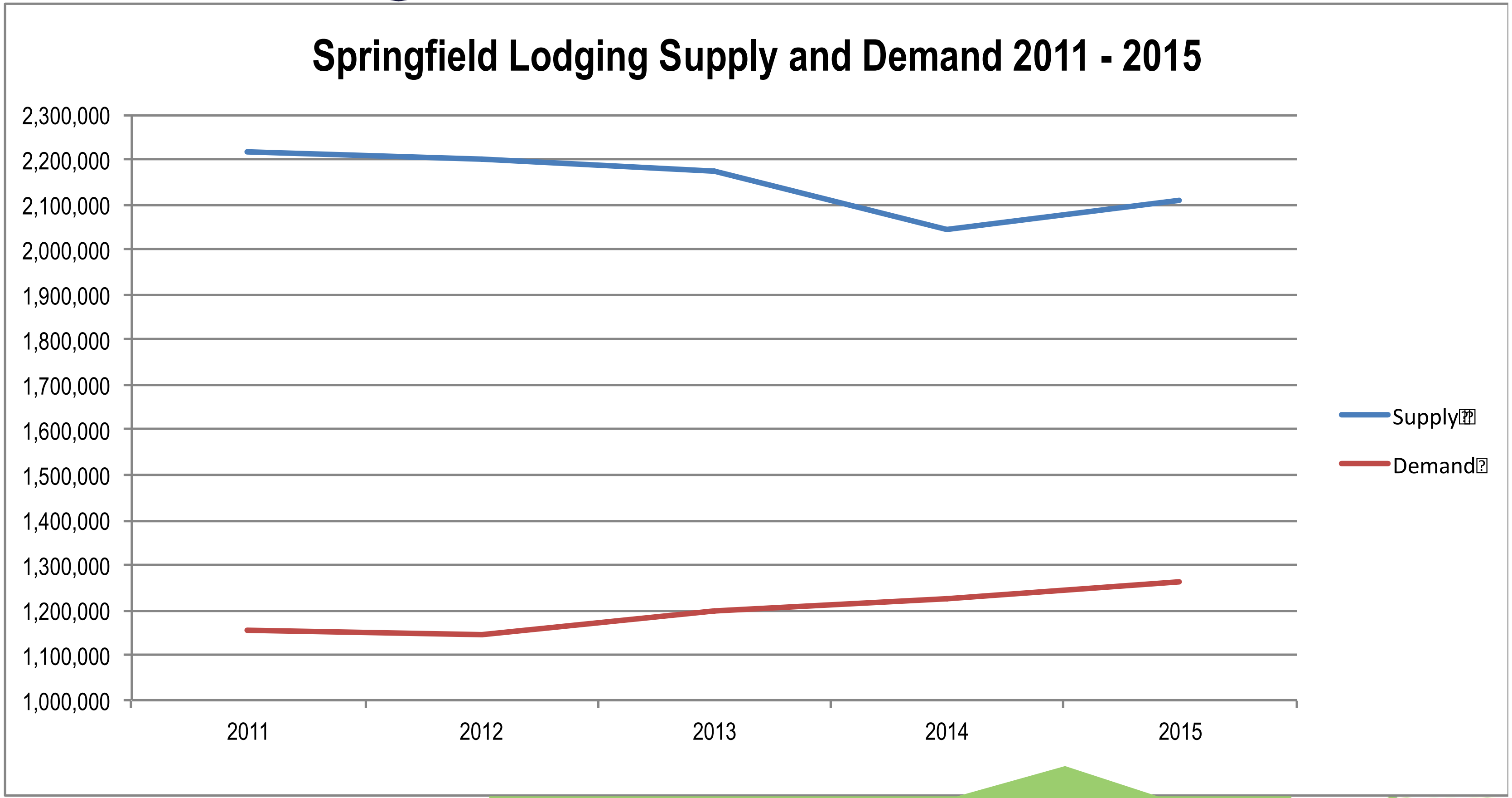
Springfield Hotel Market– Supply & Demand of Roomnights



- Supply has decreased from 2011 levels.
- Demand continues to rise.

Group Hotel Preferences

- In general, groups prefer adjacent or walkable hotels related to the primary meeting facility. This means within 1,200 – 1,500 linear feet.
- Hotels outside of this area reduce competitiveness and increase shuttling cost.
- Groups prefer large blocks of rooms in as few hotels as possible.
- Typically, facility should have at least 10-15 hotel rooms per 1,000 SF of ballroom/exhibit space, therefore 600-900 rooms.
- Groups are often rate sensitive.

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What are the meeting and event needs of user groups? What is the key compelling information?

Springfield Expo Center User Group Feedback

- Typically small, day-trip events are planned by Springfield planners.

- Local organizations hold larger events elsewhere due to space restrictions.

- Expo Center not optimized.
  - Load-in and setup very difficult
  - Limited parking
  - More breakouts
  - Need ballroom and kitchen
  - Technology expenses high
  - Etc.

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Springfield Expo Center User Group Feedback

- Distance to downtown entertainment, especially during inclement weather
- Airlift is expensive and may necessitate driving from Kansas City or St. Louis
- Rate sensitive business does not stay near downtown
- Shuttling to downtown from perimeter hotels may be solution until new hotel developed

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What other facilities offer implications and takeaways?

Comparable Situations

Function Space Overview - Comparable Cities

Rank	City	Facility	Total Function Space	Exhibit Space	Largest Ballroom	Total Ballroom	Largest Mtg Room	Meeting Space	Breakout Rooms
1	Greenville, SC	TD Convention Center	339,870	280,000	30,000	30,000	11,376	29,870	15
2	Chattanooga, TN	Chattanooga CC	139,470	100,000	17,466	17,466	5,400	22,004	21
3	Knoxville, TN	Knoxville Convention Center	181,406	119,922	27,300	27,300	4,611	34,184	14
4	Peoria, IL	Peoria Civic Center	153,510	108,668	26,550	26,550	7,289	18,292	12
5	Tulsa, OK	Cox Business Center	172,644	102,600	30,060	30,060	20,000	39,984	32
6	Wichita, KS	Century II Convention Center	198,160	171,840	0	0	7,750	26,320	15
7	Lexington, KY	Lexington CC & Rupp Arena	112,134	66,000	17,070	23,498	5,525	22,636	12
8	Amarillo, TX	Amarillo Civic Center	107,600	43,575	20,845	30,925	16,000	33,100	9
9	Syracuse, NY	Oncenter Complex	86,956	65,250	14,880	14,880	2,784	6,826	10
10	Waco, TX	Waco Convention Center	78,302	33,300	13,818	13,818	11,752	31,184	13
11	Fort Wayne, IN	Grand Wayne CC	75,930	48,480	9,955	15,955	6,420	11,495	8
12	Springfield, IL	Prairie Capital Convention Center	65,000	40,000	0	0	9,100	25,000	17
13	Evansville, IN	Old National Events Plaza	61,660	36,252	13,312	13,312	1,008	12,096	12
14	Columbia, SC	Columbia Metropolitan CC	57,025	24,700	17,135	17,135	5,540	15,190	13
	Average	**-**	**130,691**	**88,613**	**17,028**	**18,636**	**8,183**	**23,442**	**15**
15	**Springfield, MO**	**Springfield Expo Center**	**49,445**	**45,000**	**0**	**0**	**635**	**4,445**	**7**

Source: Various Facilities, Mpoint, Cvent, Hunden Strategic Partners

- Ranked lowest in total (marketable) function space
- Meeting space and ballroom space currently undersized.
- Recommended renovation will make SEC competitive

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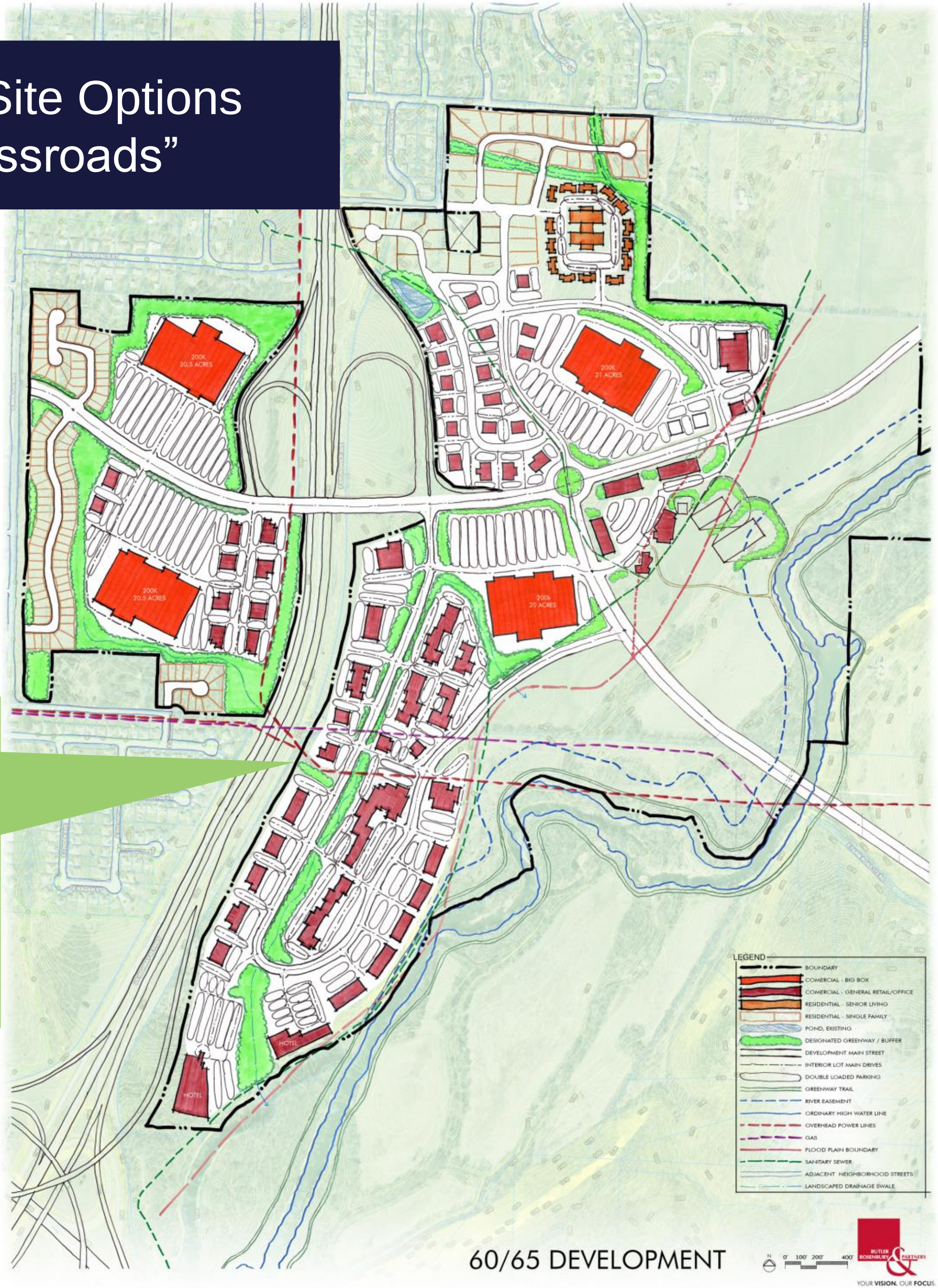
What are potential funding sources?

Funding Headlines

- 0.5 cent hotel tax funding Wonders of Wildlife may be diverted to Expo Center expansion
- Incremental hotel tax from proposed hotel could be used as incentive
- Concerns about funding for Expo Center taking away from police and storm water projects

What are site options?

Springfield Site Options
“The Crossroads”



- Development in very initial stages
- Far away from nodes of activity

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Springfield Site Options
North Side

- Has beginnings of a workable hotel package
- No destination appeal in area

What are the preliminary recommendations?

Preliminary Recommendations

- Demolish Sears building to open site for select-service hotel connected to SEC

- Expand Springfield Expo Center & Change Name to Springfield Convention Center:
  - 18,000 SF ballroom
  - 14,000 SF meeting rooms
  - Full-service kitchen

- Develop 180 – 220 key select-service+ hotel connected to parking garage. More meeting space and F&B options than normal, but not heavy meeting/ballroom full service Marriott, Hilton, etc.

Preliminary Recommendations

- Renegotiate or cancel management agreement with JQH

- Take on operating losses and expand support of debt service beyond JQH properties.

Recommendations

Likely Cost

- Expansion & Renovation of Convention Center to be approximately $20 million.

- Will likely need to incentivize adjacent hotel at additional cost, but can do mostly from project-generated taxes and impacts.

Next Steps

- Refine program, site options
- Refine demand and financial projections
- Determine funding sources
- Create impact projections
- Determine best scenario for short- and long-term strategy

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Questions

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