



State of the industry: Travel & Tourism



OUTLOOK



Lancaster County's tourism industry is coming back from one of the hardest years our community has ever faced, and we know the way we achieve economic recovery here is through recovery of the travel & tourism sector.



2020 Industry Economic Impact report

- Visitation down **36.3%**, to 5.69M, and visitor spending declined **43.3%**, to \$1.27B
- Total tourism economy dropped **40.3%**, to \$1.75B, and direct industry employment fell **29.6%**, to 12,066
- These figures track with STR declines of **38.6%** in Demand and **47%** in Revenue, and a county lodging tax drop of **45.6%**

TRAVEL EXPECTED IN THE NEXT 3 MONTHS



QUESTION: WHICH OF THE FOLLOWING TYPES OF TRAVEL ARE YOU PLANNING DURING THE NEXT 3 MONTHS?

Motivations Behind Americans' Next Leisure Trip



**RELAX OR
ESCAPE STRESS**
(64.8%)



**GET AWAY FROM
MY DAILY LIFE**
(59.8%)



**SPENDING TIME
WITH FAMILY**
(59.7%)



**ESCAPE
BOREDOM**
(51.4%)



**HAVE NEW
EXPERIENCES**
(48.1%)



**VISIT NEW
PLACES**
(44.8%)



**GOOD EXPERIENCES
FOR MY CHILDREN**
(35.3%)



**PARTY, HANG OUT,
HAVE FUN**
(33.5%)



**MEET
NEW PEOPLE**
(23.0%)

Many Travelers Seeking Newness

American Travel Trends & Sentiment—Week of **June 7th**

- ***80% of Americans say they are in a travel ready state-of-mind.***
 - **Meanwhile, a historic low 6.7% expect things to get worse.**
- ***More Americans than ever during the pandemic recall seeing travel-related advertising.***
 - **American travelers want ads that are honest, friendly and fun.**
- ***Average leisure trip spending over next 3 months is anticipated to be \$1,810, higher than \$1,691 reported last week.***

“The appeal of attending in-person meetings has improved, although the majority of business travelers still need at least a few more months before they are ready to be back.”

Destination Analysts Report

May, 2021

AMERICANS

**TRAVEL PLANNING BACK IN
SWING FOR SUMMER**

77% of Americans are planning
on traveling this summer

29% planned a leisure trip
last summer (2020)



AMERICANS



2/3 of Americans have some sort of summer travel planned **(36%)** or booked **(30%)**



2021 BOARD OF DIRECTORS



Rebecca Gallagher (Chair)
Hope Graby (Vice Chair)
Steve Barrall (Treasurer / Secretary)

Lisa Riggs
Jonas Nissley
Carl Smucker
Bill Moshos
Kevin Molloy
Stephen Sikking
Jim Launer
Devon Burnley

Historic Smithton Inn
Scheffey Marketing
Strasburg Rail Road

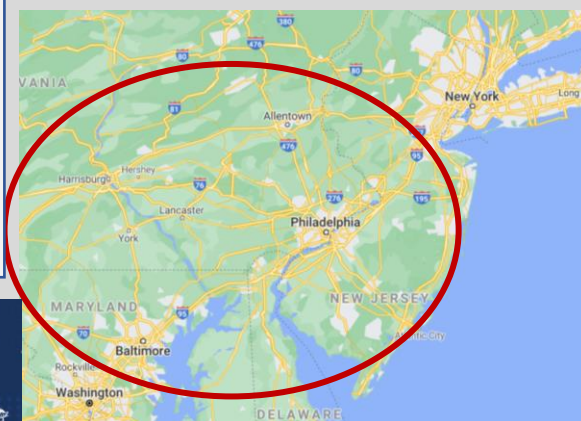
EDC Lancaster County
Nissley Vineyards
Smucker Village
Miller's Smorgasbord / Amish View Inn
Lancaster County Convention Center Authority
Eden Resort / Fulton Steamboat Inn
Spooky Nook Sports
Burnley Enterprises Inc, of Kitchen Kettle Village



Marketing – CARES Act



November - December



CARES ACT GRANT: \$500,000

January - February

#LancasterStaycation

YouTube



HEAVY DIGITAL MARKETING & SOCIAL MEDIA

Marketing

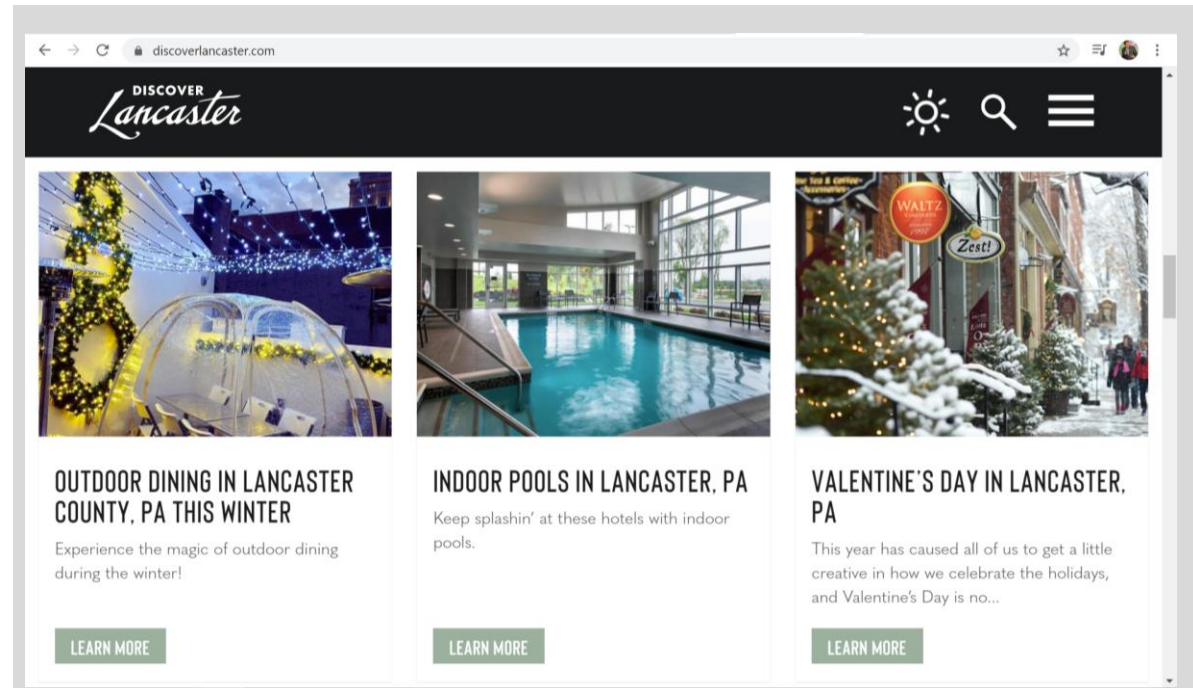


November - December



CARES ACT GRANT: \$500,000

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CLICK TO BOOK
YOUR STAY



HEAVY DIGITAL MARKETING & SOCIAL MEDIA

Marketing

DISCOVER
Lancaster

April/May

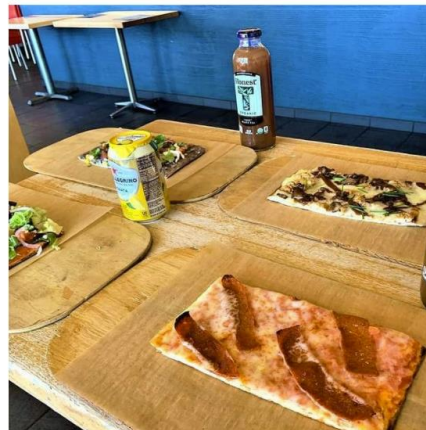


DISCOVER
Lancaster

HOPE *for* HOSPITALITY

#HopeforHospitalityPA

Share the love by tagging your Instagram, Facebook and Twitter posts with hashtag #HopeforHospitalityPA and the restaurant you purchased from.



\$25 Gift Cards

**2 WINNERS
EACH WEEK**

Lancaster City
Restaurant Week

4/12 - 4/18

Marketing

DISCOVER
Lancaster



Marketing

DISCOVER
Lancaster



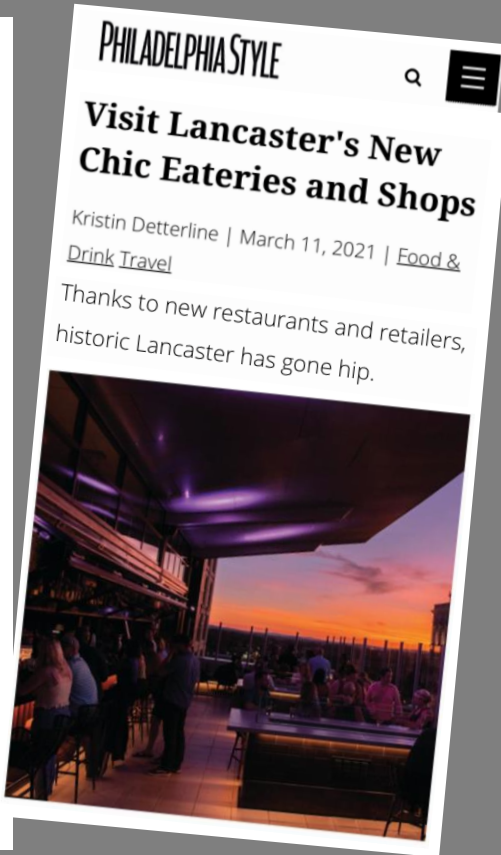
PR & Communications



RECENT PRESS



Classic Cars and Fine Craftsmanship: Pennsylvania's New Attractions for Spring



Lancaster is known for its rich farms but it's also a great destination for holiday shopping.

By Timothy Walton
Monday, December 14, 2020



**** Lancaster also featured in *ABA's Destinations* magazine, and *SportsEvents* magazine.**

Group Tour Planner outreach

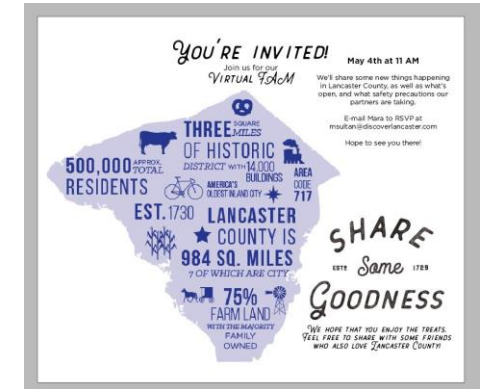


LANCASTER LOCAL PROVISIONS

Group Tour Planner outreach



Lancaster Pennant Flag - Madcap & Co., Lancaster City
Songbird Hex Sign - Good 'N Plenty, Smoketown
Tea Blend Tin - The Railroad Museum of PA, Strasburg
Wet Bottom Shoofly Pie - Bird-in-Hand Bakery and Cafe, Bird-in-Hand
Roasted Almonds - Sight & Sound Theatres, Strasburg
Chocolate Covered Pretzels - Wilbur Chocolate and Julius Sturgis Pretzels, Lititz
Horse & Buggy Traffic Jam - Shady Maple Smorgasbord, East Earl
Cave Aged Cheddar - Lancaster Local Provisions, Lititz
Blueberry Jam - Kitchen Kettle Village, Intercourse
Phone Charger - Discover Lancaster
Kettle Corn - Miller's Smorgasbord, Ronks
PA German Foods & Traditions Cookbook - Landis Valley Museum, Lancaster



Partnership Update



Partners have joined or re-joined in Q1-Q2:

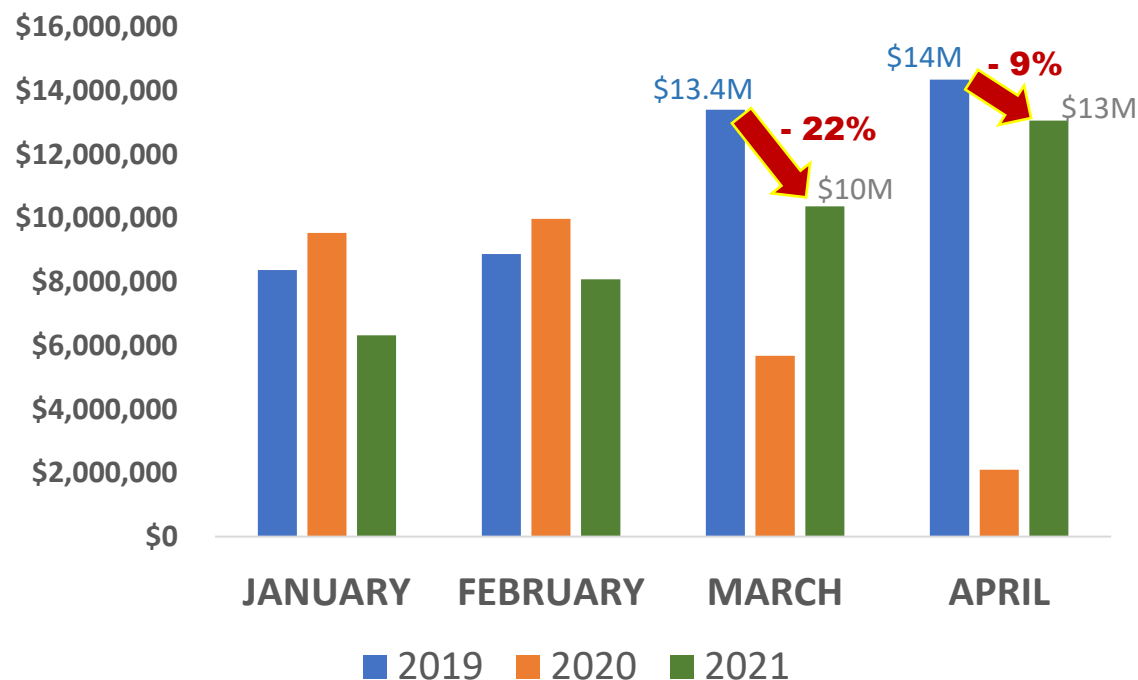


LANCASTER LOCAL
PROVISIONS

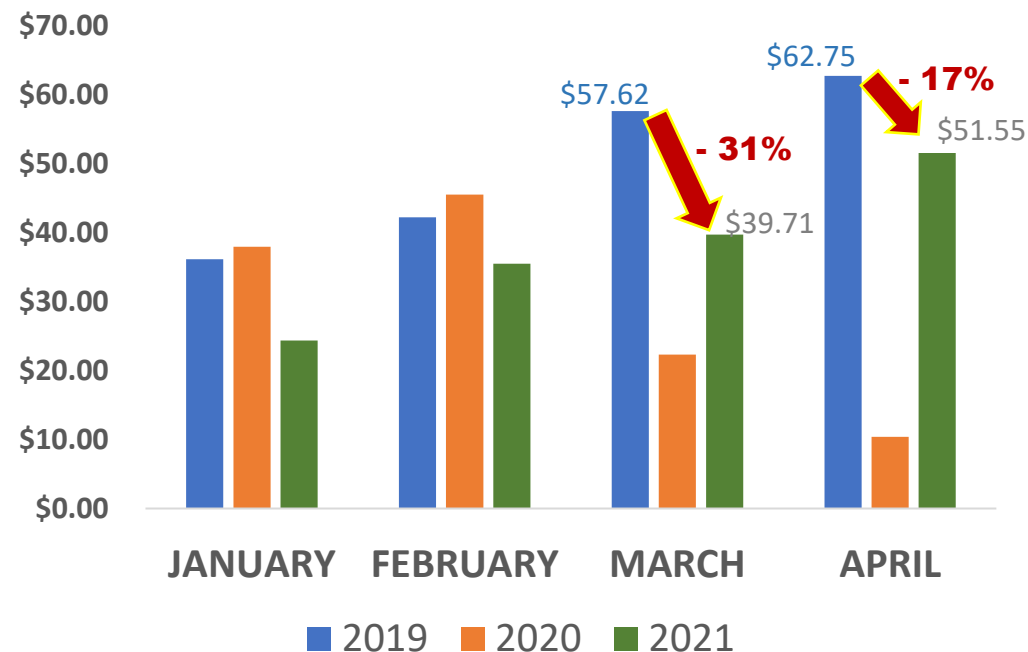


Lancaster County Performance

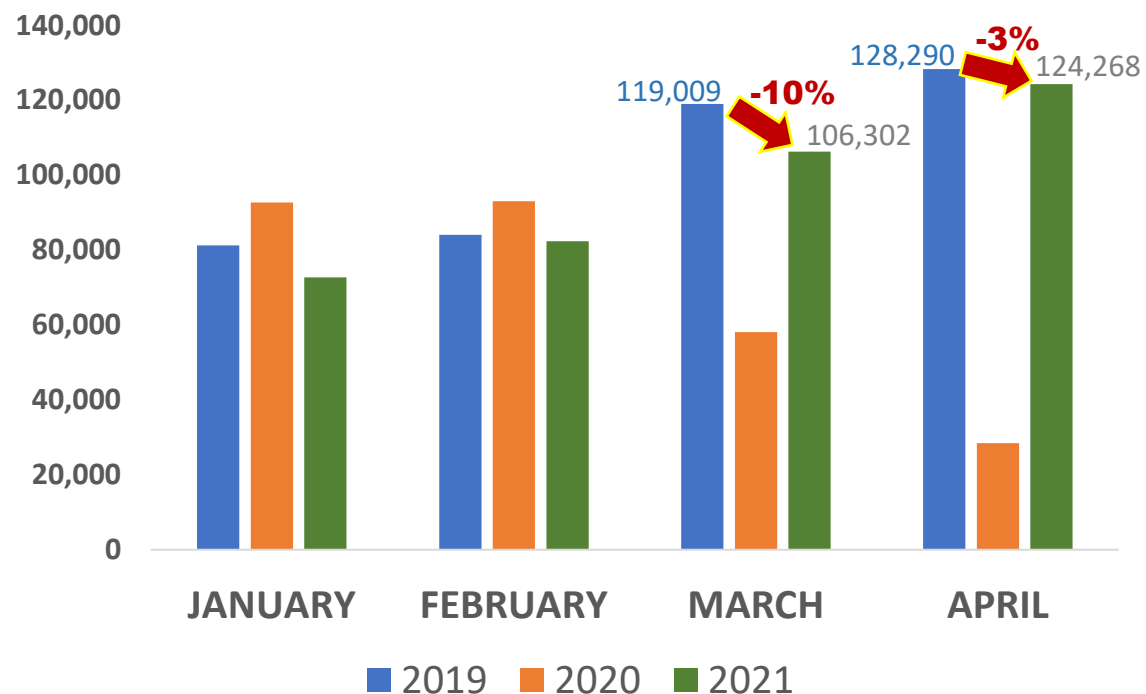
REVENUE



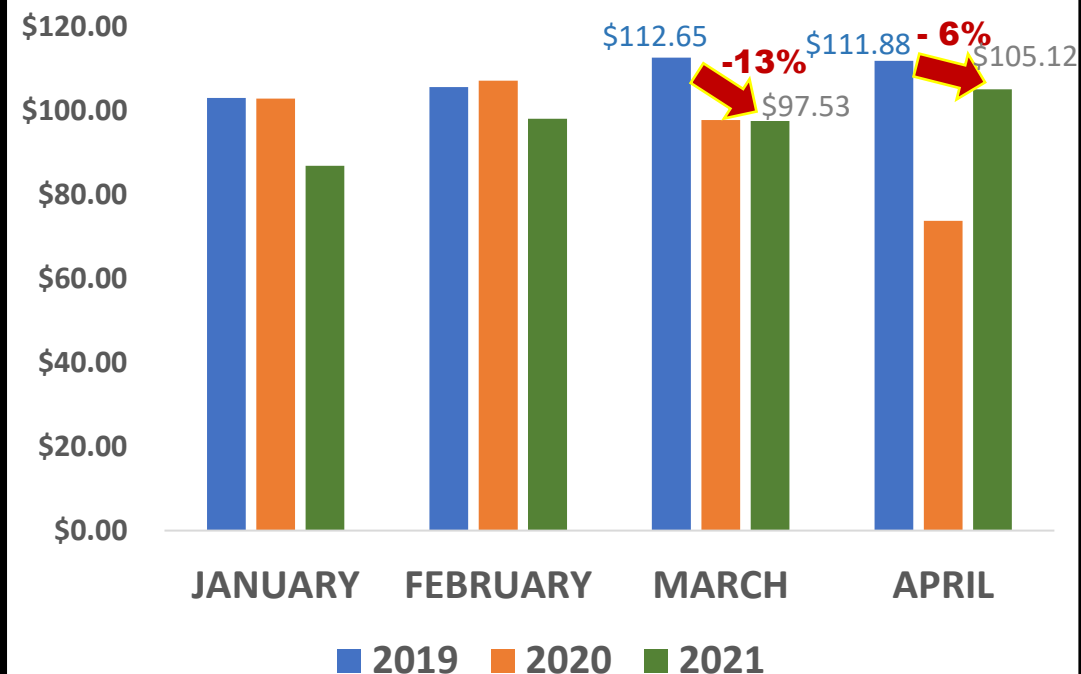
REV PAR (Per Available Room)



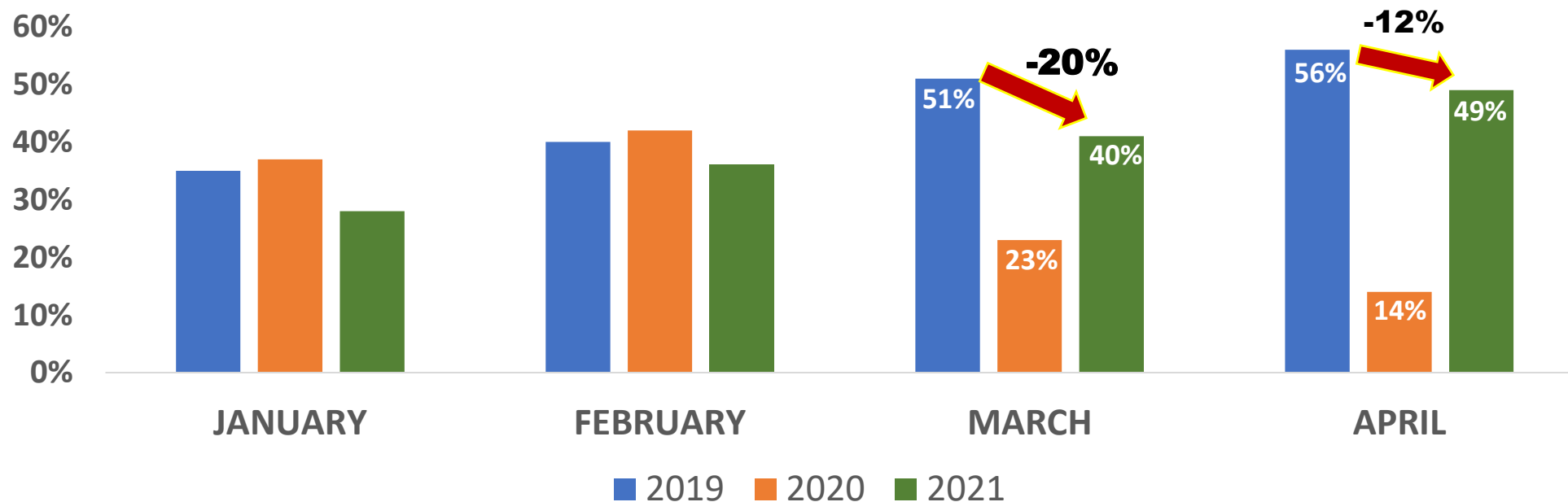
DEMAND



Avg. Daily Rate



OCCUPANCY



SALES Lead Generation



GROUP

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One-Of-A-Kind Group Experience

SIGN UP

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Start Planning Today!

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BRING YOUR TEAMS TO LANCASTER, PA

Discover Lancaster

FORM ON FACEBOOK

Sports Venues & Facilities

Let us help plan your sports event!

SIGN UP

Like

Comment

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FEBRUARY DATA SUMMARY

February 1 – February 28	
Impressions	243,986
Reach	116,896
Inline Link Clicks	1,668
Post Engagement	16,014
Video Views	13,643
Amount Spent	\$581.53



Hospitality/ Service Work Force



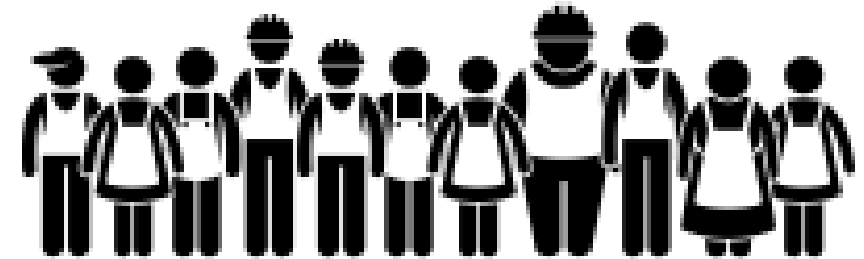
CURRENT WORK FORCE CHALLENGES

Unemployment benefits can be a disincentive

- *Weekly \$300 unemployment benefits through September 6*

COVID-19 health concerns

- *Possibility of contracting a deadly disease*



At-home care is still needed

- *The need for parents to stay at home with their kids while they take online classes*

Workers are holding out for higher wages

- *Costco recently raised its minimum wage to \$16 an hour, and Target and Amazon have raised their wages to \$15 an hour. Big companies raising their wages place difficulties on workers in service industries.*



3 Year Strategic Plan (2022 – 2024)



3-Year Strategic Plan Draft Timeline (UPDATE)



The timeline includes the following next steps:

- The process will begin in March with an Executive Committee Meeting to determine priorities and strategic focus areas for RFP development.
 - During the Draft Plan Development phase, the hired consultant will solicit community feedback via partner surveys/interviews.
 - On August 19th, a Draft 2022-2024 Strategic Plan will be presented at the Board Advisory Committee Meeting.
 - Consultations will occur with stakeholder groups including the Board, Board Advisory Committee and County leaders to further refine the plan in September/October.
 - In November, we will present the Plan to the Board for adoption and vote.
- The development cycle for this year's Strategic Plan recognizes a commitment to include extensive engagement with the multi-stakeholder community across Lancaster.*

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2021: SECOND HALF (Q3 & Q4)



Out of Market TV



Social Media Push



Build Membership and
Co-op Revenue



Increase Heads in Beds



Maximize Sports
Opportunities



Arts and Culture Re-Opened



Secure Grant Funding

Q & A