

Key Objectives & Methodology

Objectives & Deliverables

- Assessment of Visitation.
- Brand Perception.
- Destination Product Evaluation.
- Appeal of New Product Categories.
- Hurdles to Visitation.

Methodology

- Conducted online in early June using an email panel and the CVB's house list.
- Only those who travel and who make or participate in the household's travel decisions were included.
- A total of 895 travelers were interviewed: 491 from the house list and 404 general travelers from the online panel, Mid-Atlantic region.

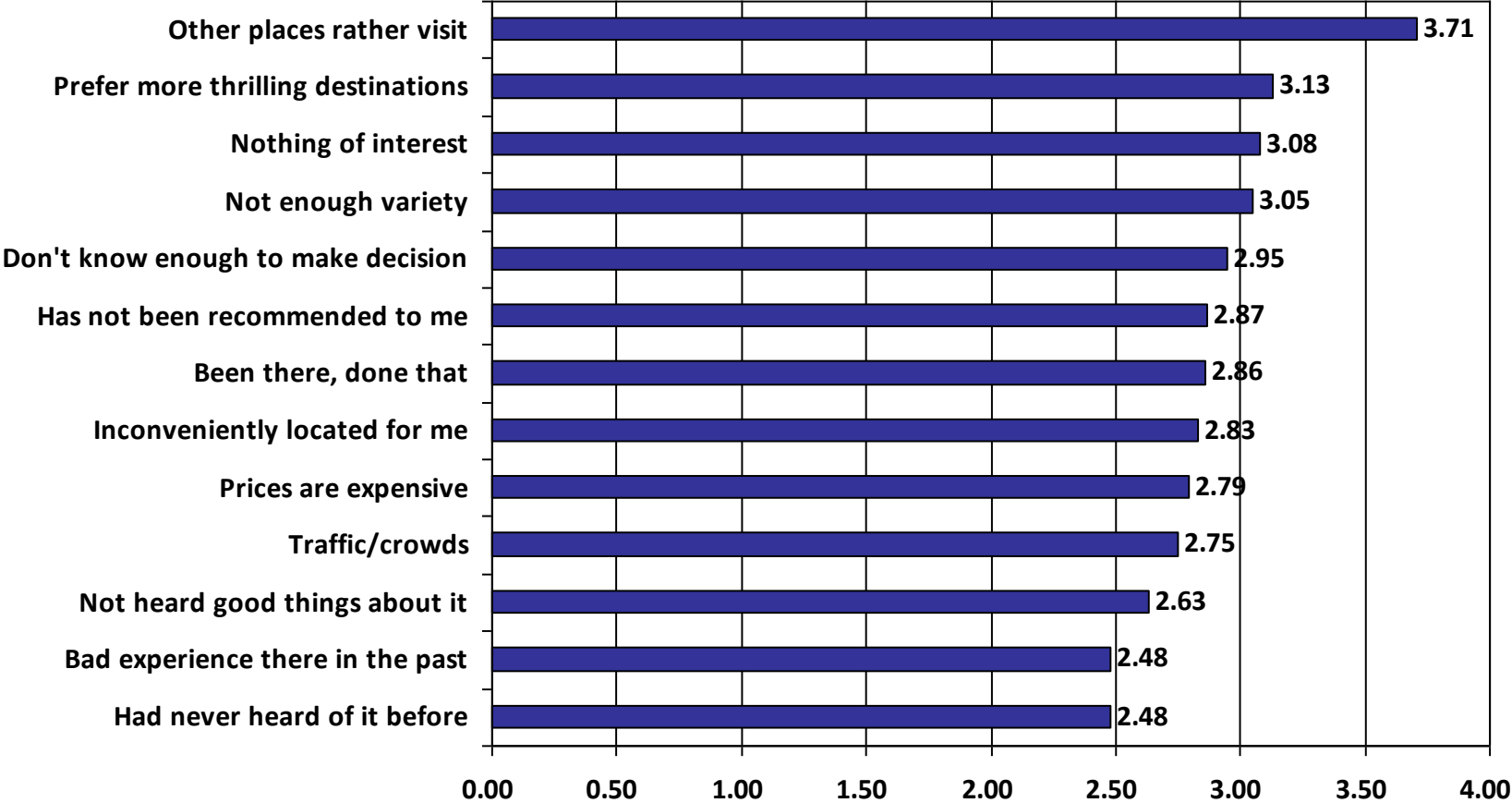
Executive Summary

- Current visitor base is comprised of high repeat travelers from within the region who visit often, but have comparatively short lengths of stay (average 2.6 nights).
- Lancaster is a peaceful, relaxing destination that visitors describe as being beautiful, friendly and a unique place to experience Amish Country and good Pennsylvania Dutch cooking.
- What some see as being peaceful and relaxing others view as, well, “boring.”
- Millennials appear to present the biggest challenge. They are less familiar with Lancaster, significantly less likely to have visited and view the brand much less favorably than adult travelers over 33 years of age.

Executive Summary

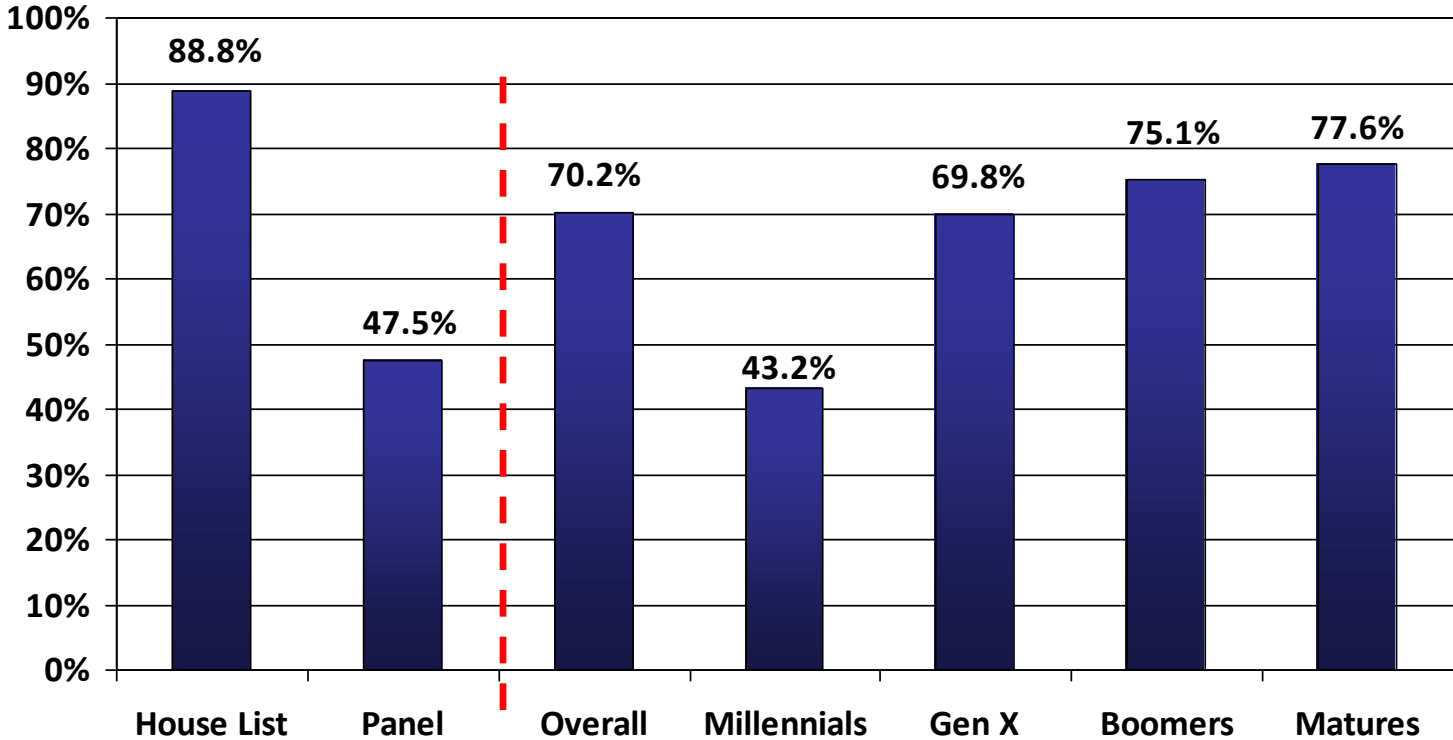
- Four biggest hurdles preventing visitation are all product-related in some way.
- Lancaster's overall awareness and brand favorability are excellent, but top-of-mind awareness is not.

Reasons Why Some Travelers Have Not Visited Lancaster, PA

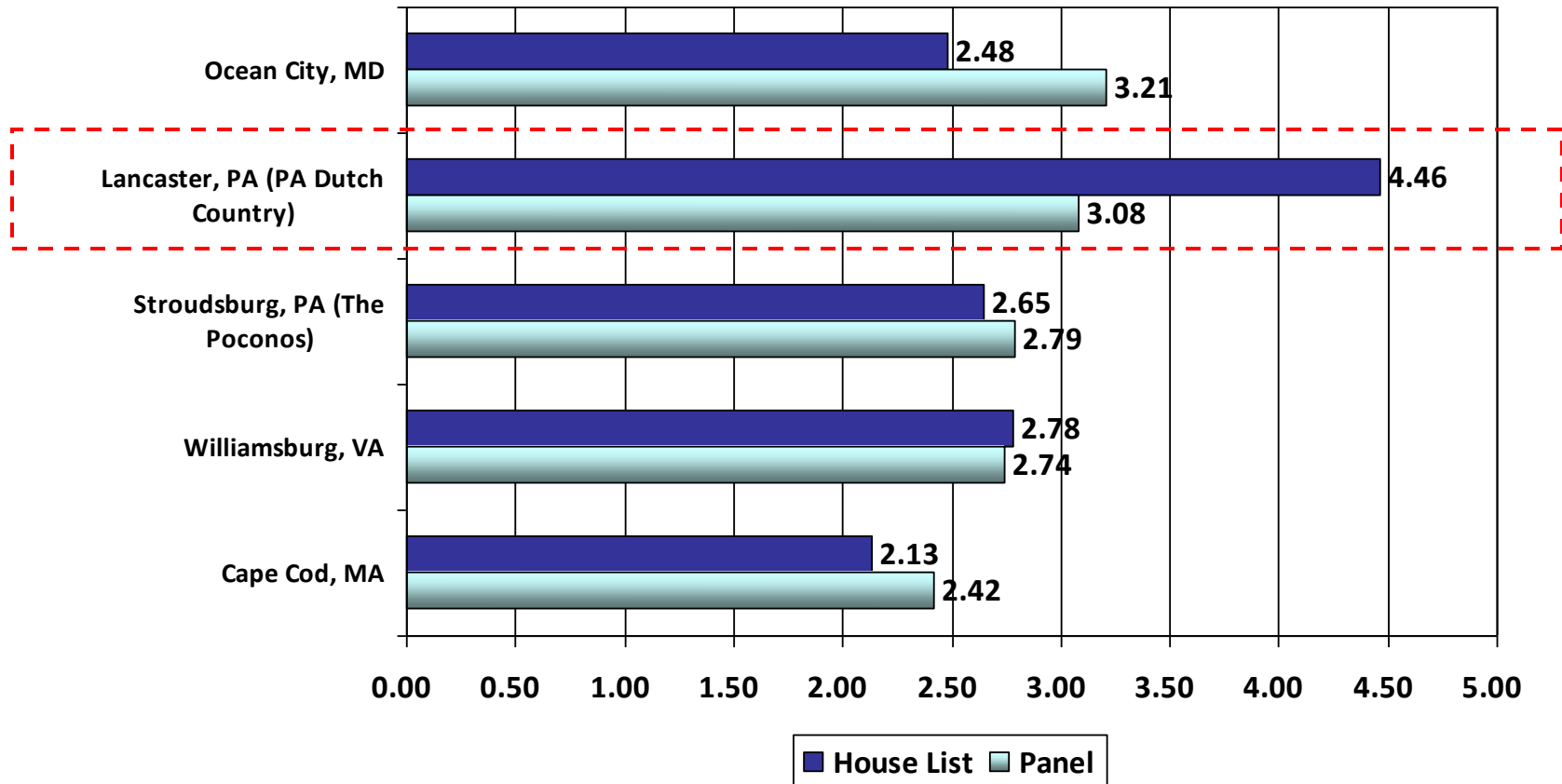


5-Point Scale

Incidence of Visitation *by Source & Generation*

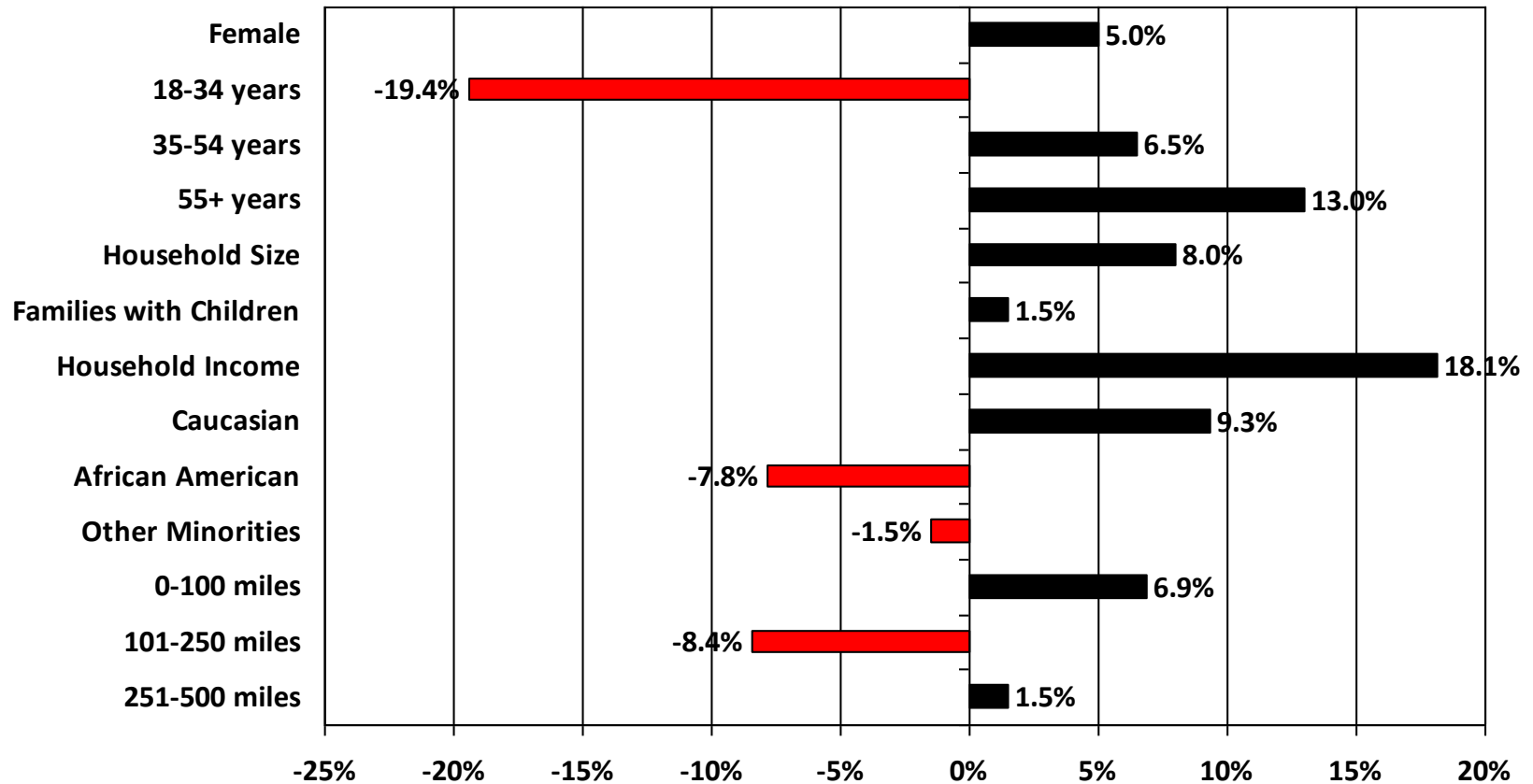


Comparison of Intent to Visit with Competitive Set



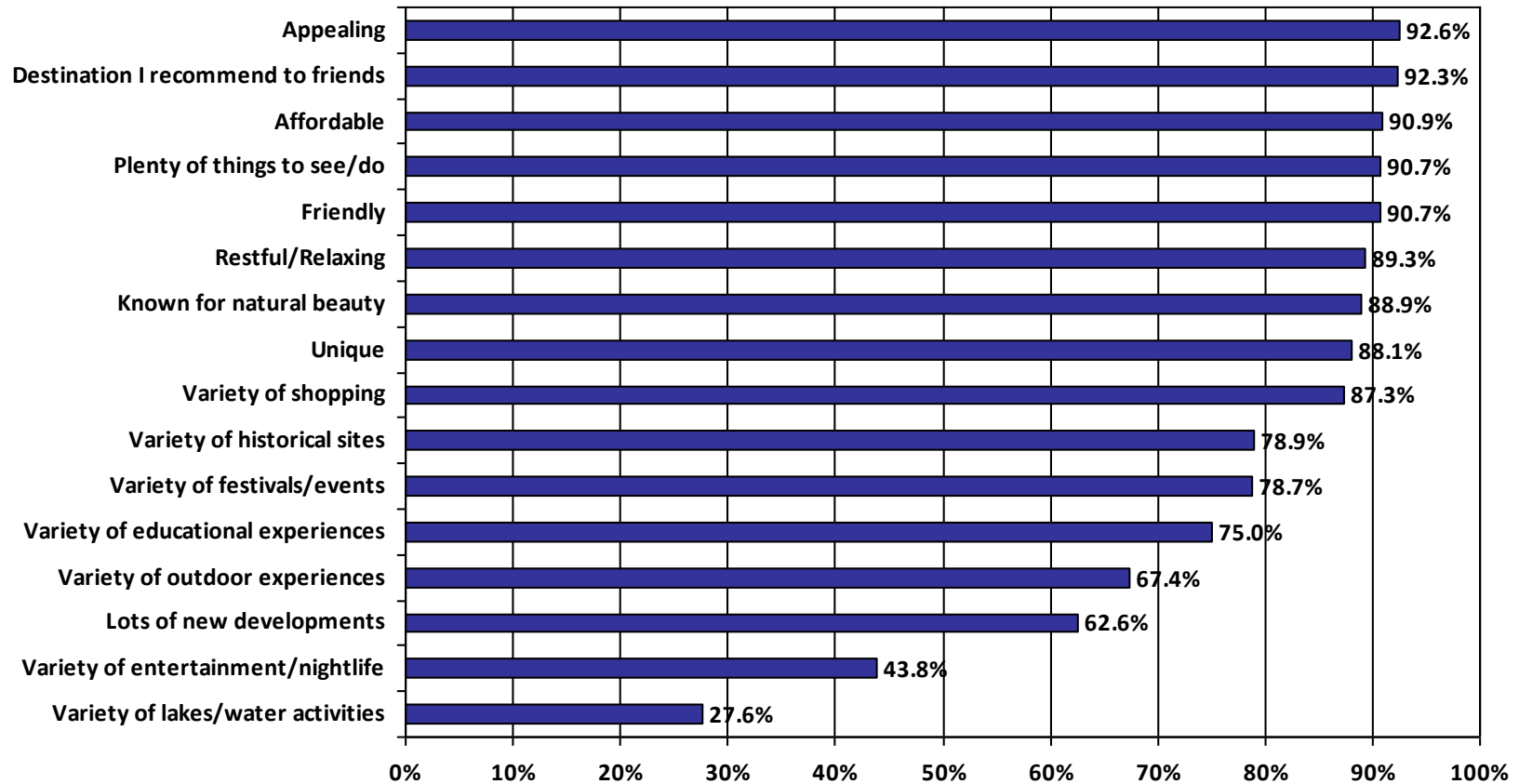
Demographic Comparisons

Visitors Compared to Non-Visitors



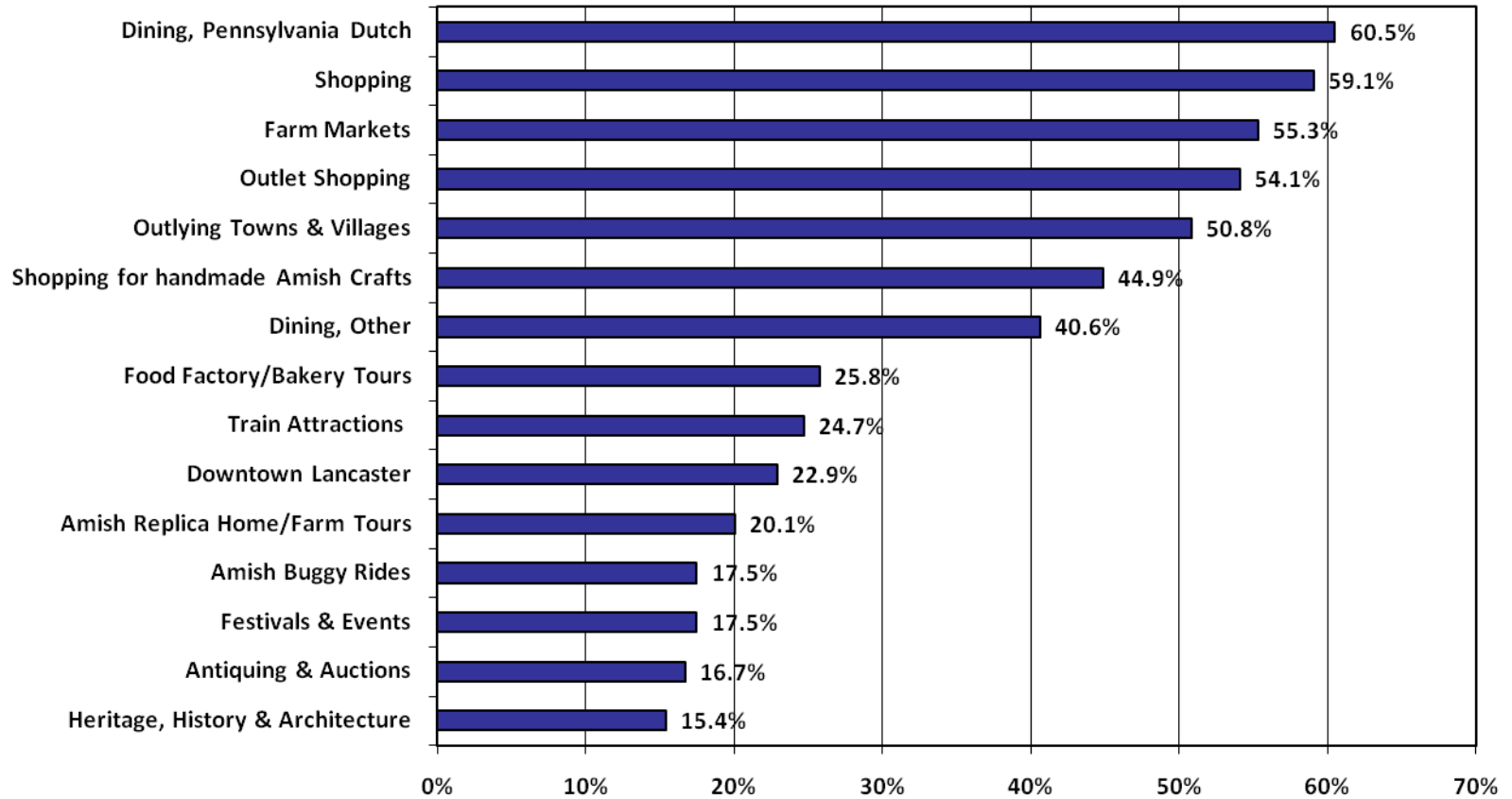
Lancaster, PA's Brand Perception Ratings

% in agreement.....



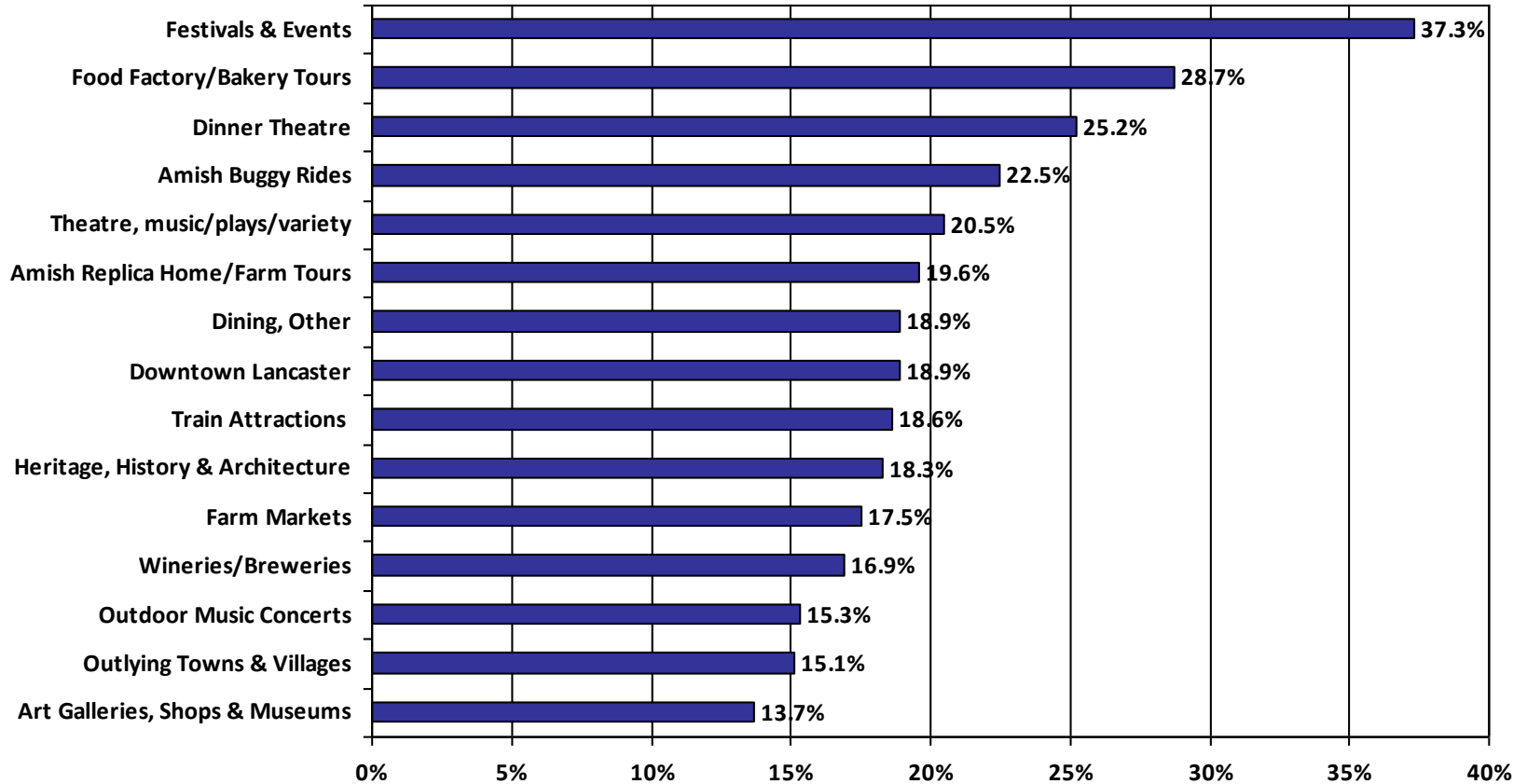
Many **visitors and non-visitors alike** seem to agree that Lancaster would benefit by having **more attractions and fun things to do** —especially **night time entertainment**, longer operating hours and **more things for children and young adults.**

Most Popular Activities on Last Visit



Activities Plan To Visit on *Next* Visit to Lancaster, PA

Top Activities Planned for Next Visit



Biggest Drivers/Motivators of Trips

- Three activities were among the biggest drivers, but not among the 15 most visited activities.
- Three of the most popular activities were not considered among the most important drivers.

- **Part of Biggest Drivers**
 - Theatre, Christian-Based (9.2%)
 - Amusement Parks (8.8%)
 - Theatre, music/plays/variety (4.9%)
- **Not Among Biggest Drivers**
 - Food Factory/Bakery Tours (2.2%)
 - Heritage, History & Architecture (4.6%)
 - Amish Buggy Rides (4.5%)

Drivers/Motivators

Millennials & Gen Xers Versus Other Generations

- While many of the most popular attractions remain on everyone's list of drivers (i.e. Dining-Pennsylvania Dutch, Shopping & Farm Markets), Millennials' list of drivers is a little different.

Millennials

- **Included in Biggest Drivers**
 - Amusement Parks
 - Miniature Golf
 - Amish Buggy Rides
 - Boutique Shopping
 - Children's Museums
 - Outdoor Activities
- **Not Included Among Biggest Drivers**
 - Outlying Towns/Villages
 - Food Factory Tours
 - Train Attractions
 - Festivals & Events
 - Antiquing & Auctions
 - Heritage, History & Architecture

Gen Xers

- **Included in Biggest Drivers**
 - Amish Buggy Rides
 - Heritage, History & Architecture
 - Outdoor Activities
- **Not Included Among Biggest Drivers**
 - Festivals & Events
 - Theatre, music/plays/variety

Drivers/Motivators

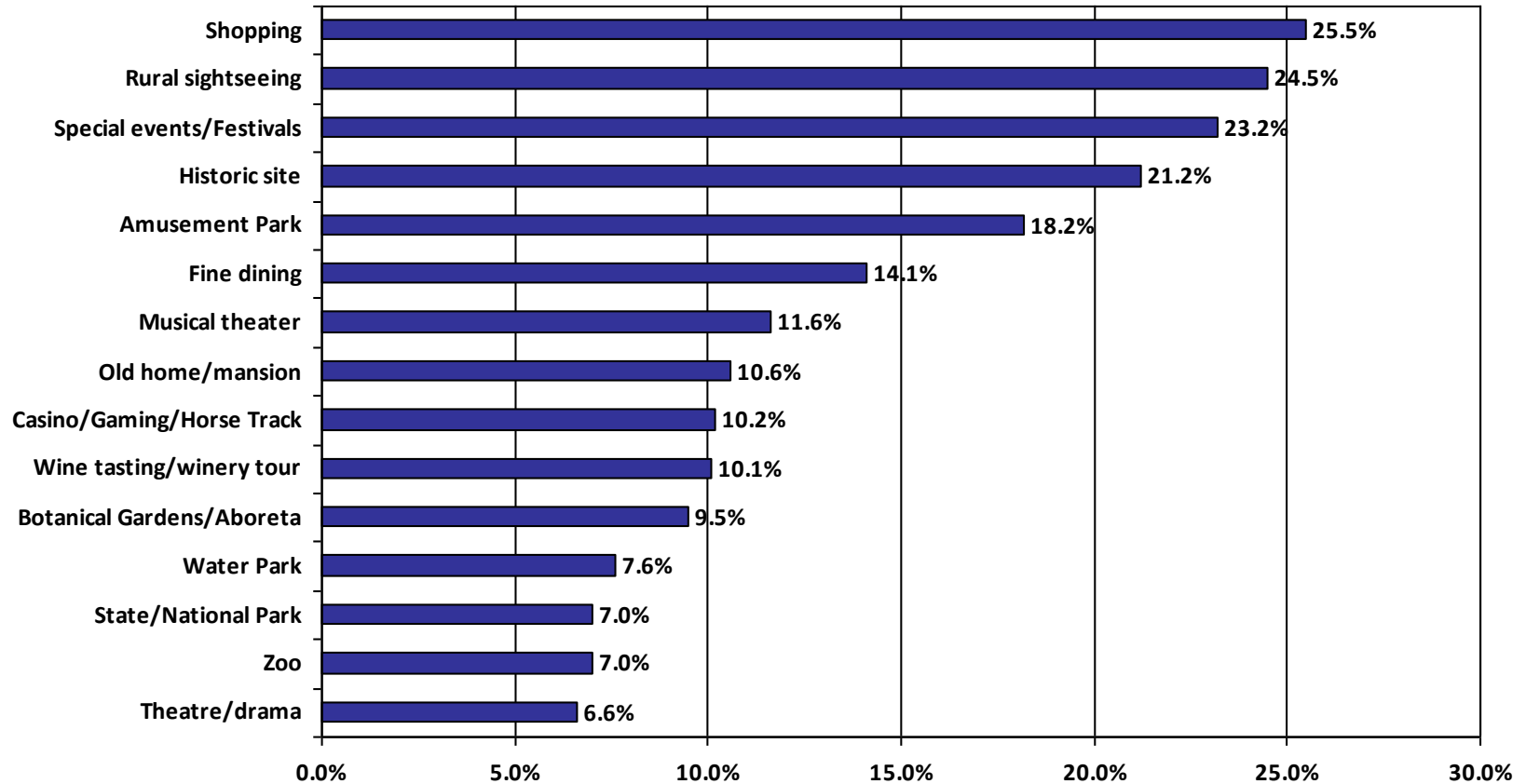
Gen Xers Versus Baby Boomers and Matures

- Amish Buggy Rides, Heritage-History-and-Architecture and Outdoor Activities are all area activities that are among Gen Xers' most significant drivers of visitation.

- **Included in Biggest Drivers**
 - Amish Buggy Rides
 - Heritage, History & Architecture
 - Outdoor Activities
- **Not Included Among Biggest Drivers**
 - Festivals & Events
 - Theatre, music/plays/variety

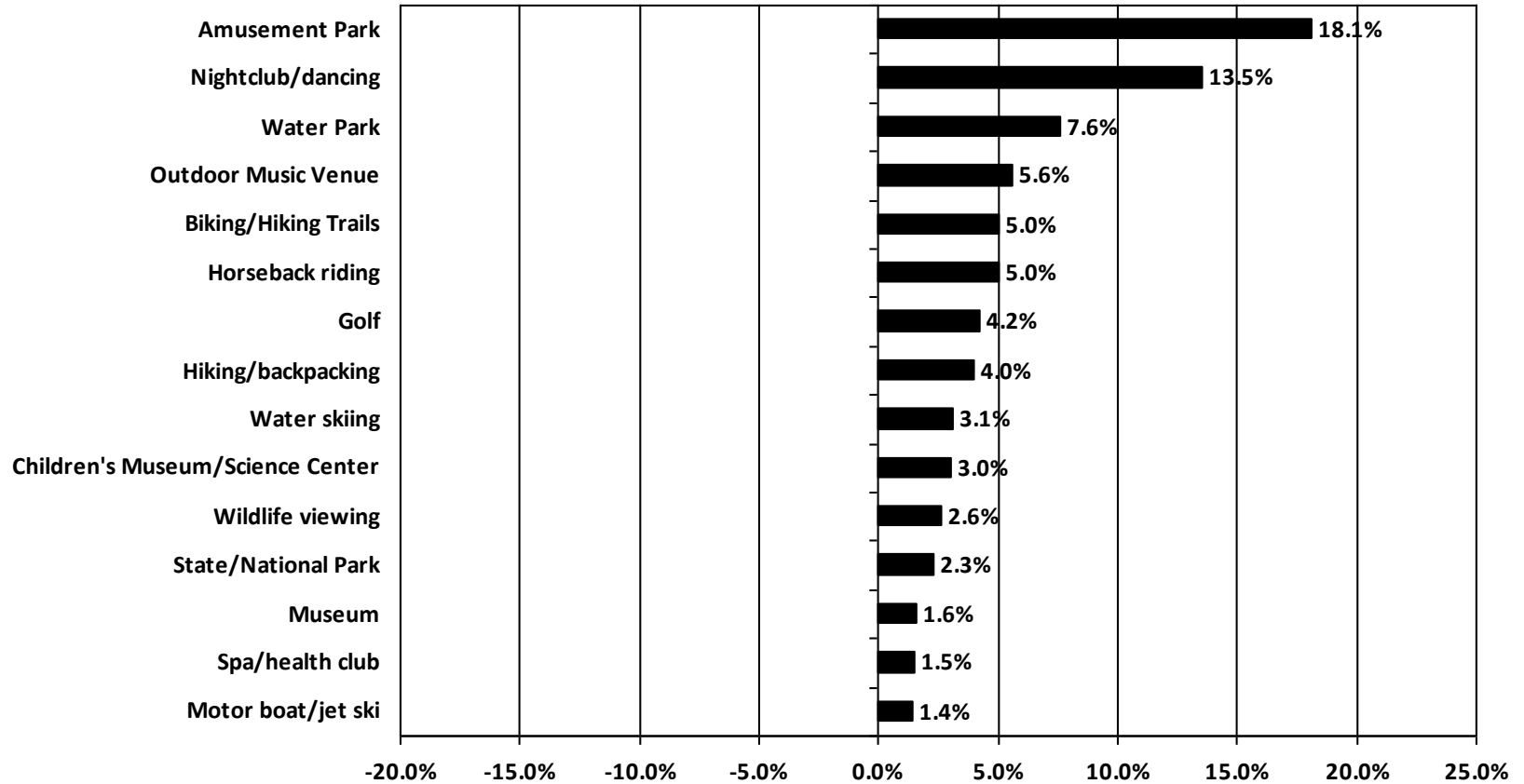
Biggest Motivators for Incremental Visits to Lancaster

New Product Ideas that are Most Motivational



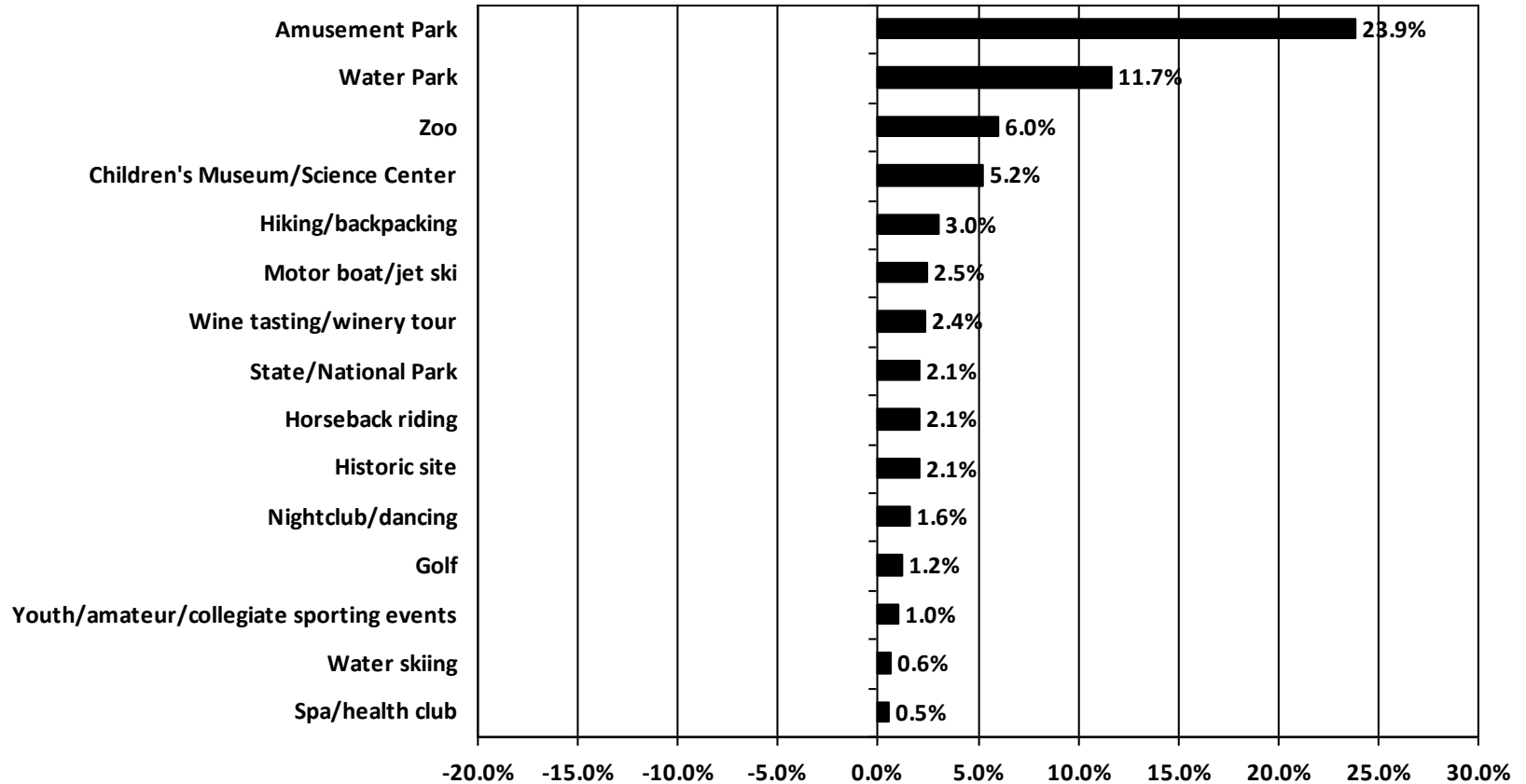
Millennials' Biggest Motivators for Incremental Visitation

Compared to Other Age Groups



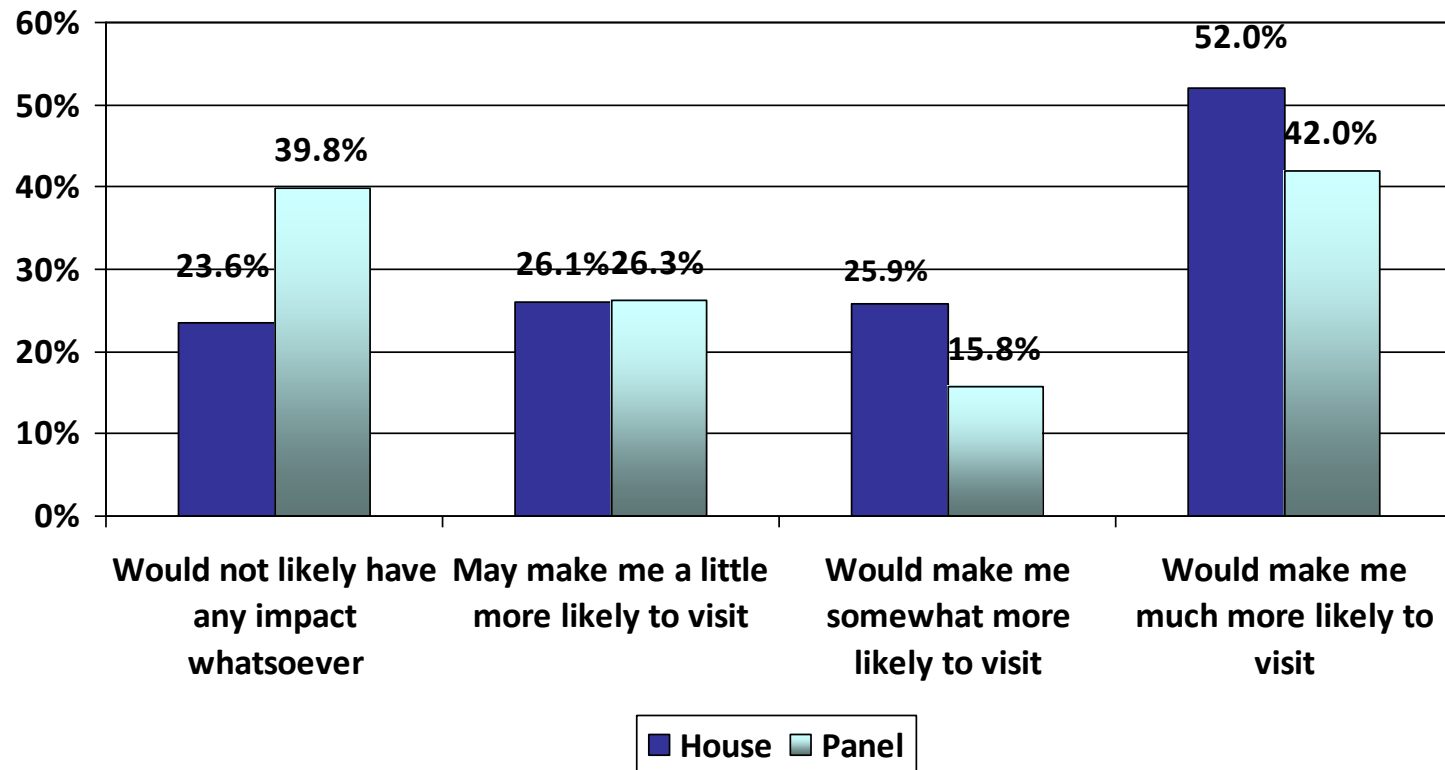
Gen Xers' Biggest Motivators for Incremental Visitation

Compared to Baby Boomers & Matures



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New Products' Impact on Likelihood to Visit



Recommendations

- Product such as nightlife/entertainment, amusement parks, water parks, fine dining, festivals/events, history or children's museums, concerts and outdoor activities would be most appealing to young adults.
- Prior to any product development, our recommendation would be to begin with the development of a long-term master plan for the community.
- There are experts in this field who are experienced at helping communities select the right product additions in the right locations in the right priority of occurrence. These companies can develop a long-term master plan that includes products and enhancements for multiple audiences that would be added one by one over the next 10-20 years.