



PA Dutch CVB Member Briefing

May 26, 2010



Agenda

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AQS Re-cap

- 2755 rooms booked through Passkey
- 1500 – 2000 additional booked outside block
- Preliminary attendance numbers = 23,400
- 18% higher than Des Moines Show
- Largest Saturday attendance ever
- Reviewing all services to make improvements
- Reviewing Passkey procedures
- Post-con meeting with client



Media Plan Proposal



Creative Approach

- Using 30-second spots highlighting activities for families and couples; highlighting Amish and Lancaster City (same spots as 2009)
- Positioning value, closeness and density of activity
- Demo is females 25-54



Lodging Zip Code Origins

- New York DMA: 37.9%
- Philadelphia DMA: 22.4%
(encompasses Delaware & New Jersey)
- 6 of the top 10 performing counties were in NY & NJ
- 32% of bookings occur June - August
- Our backyard (HLLY) provided 5.4% of the total



Lodging Zip Code Origins

- Top performing zip: 11701- Amityville, NY
- On average, 11% of bookings are at B&Bs

2010 Proposal Considerations

- We will be placing \$100,000 for DCR and \$25,000 for the state of PA
- Media costs are beginning to increase
- PA Ren Faire again placing their media full schedule through us (\$425,500)
- Planned co-op buys total \$500,000+

2010 Proposal Considerations

- Zip code analysis identifies Philadelphia and NY/NJ as primary markets
- We will target counties within the DMAs above that show the best promise
- A mix of radio and TV will be utilized with a heavier weighting on TV
- Use :15's to maximize reach and frequency in combination with :30's

2010 Proposal Considerations

- Deploy :30's in all markets to build brand awareness
- Radio to consist of :10 traffic sponsorships in Washington, DC in combination with online
- Increase buys in Philadelphia and New York (vs. 2009) leveraging existing brand equity
- Since 2005, \$2,972,143 has been spent in New York
- Since 2005, \$1,923,008 has been spent in Philadelphia



Markets

- New York
- Philadelphia
- Washington, DC
- HLLY (Harrisburg, Lebanon, Lancaster, York)



Spending Recap

(2010-Proposed)

- 2005: \$1,111,069
- 2006: \$736,399
- 2007: \$1,231,463
- 2008: \$1,455,134 (with co-op)
- 2009: \$1,830,233 (with co-op)
- 2010: \$1,950,000 (with co-op, est.)



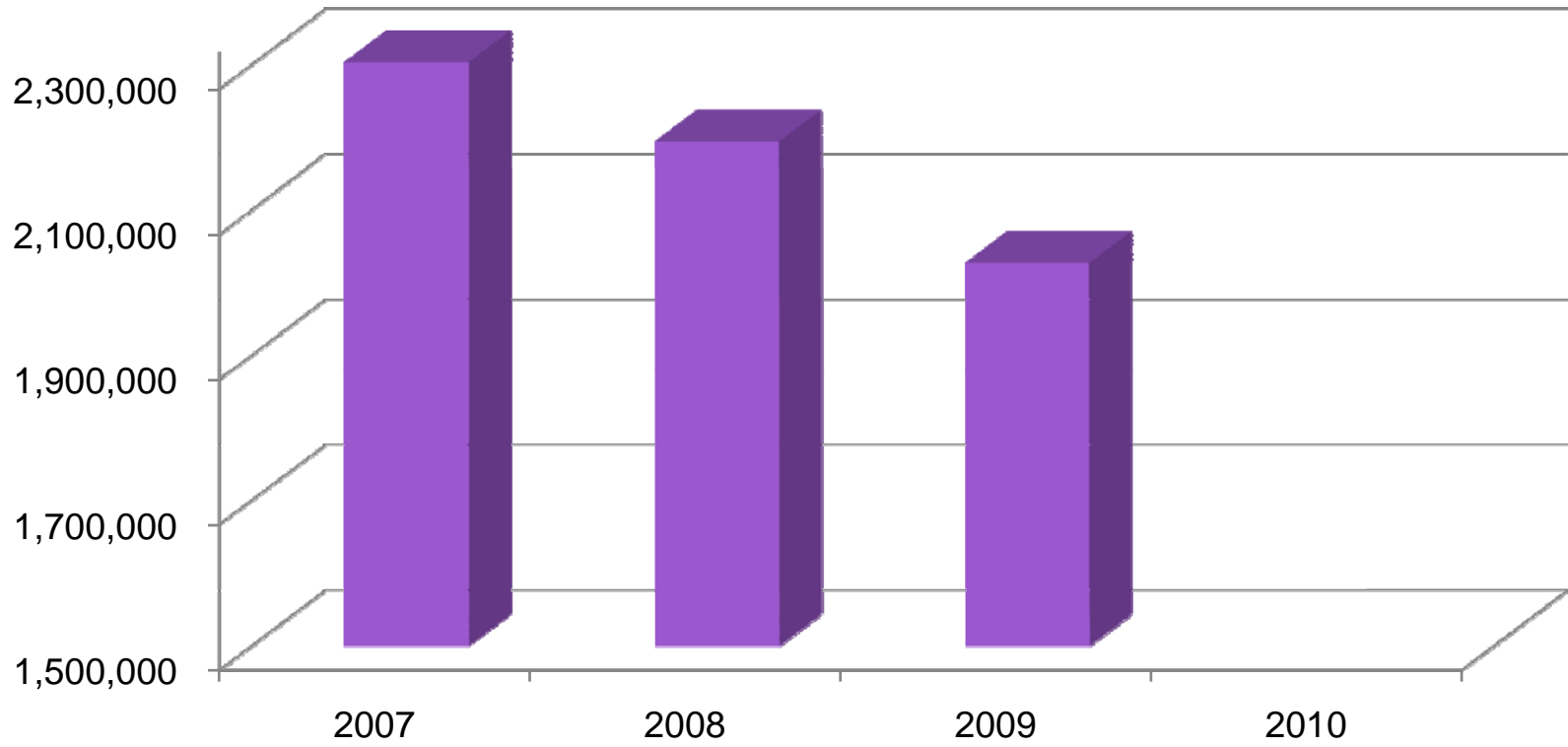
Regional Buys Dutch County Roads

- Investing \$100,000 in radio and online
- Positioning the 8-county area that comprises the region
- Investing \$40,000 in Facebook advertising



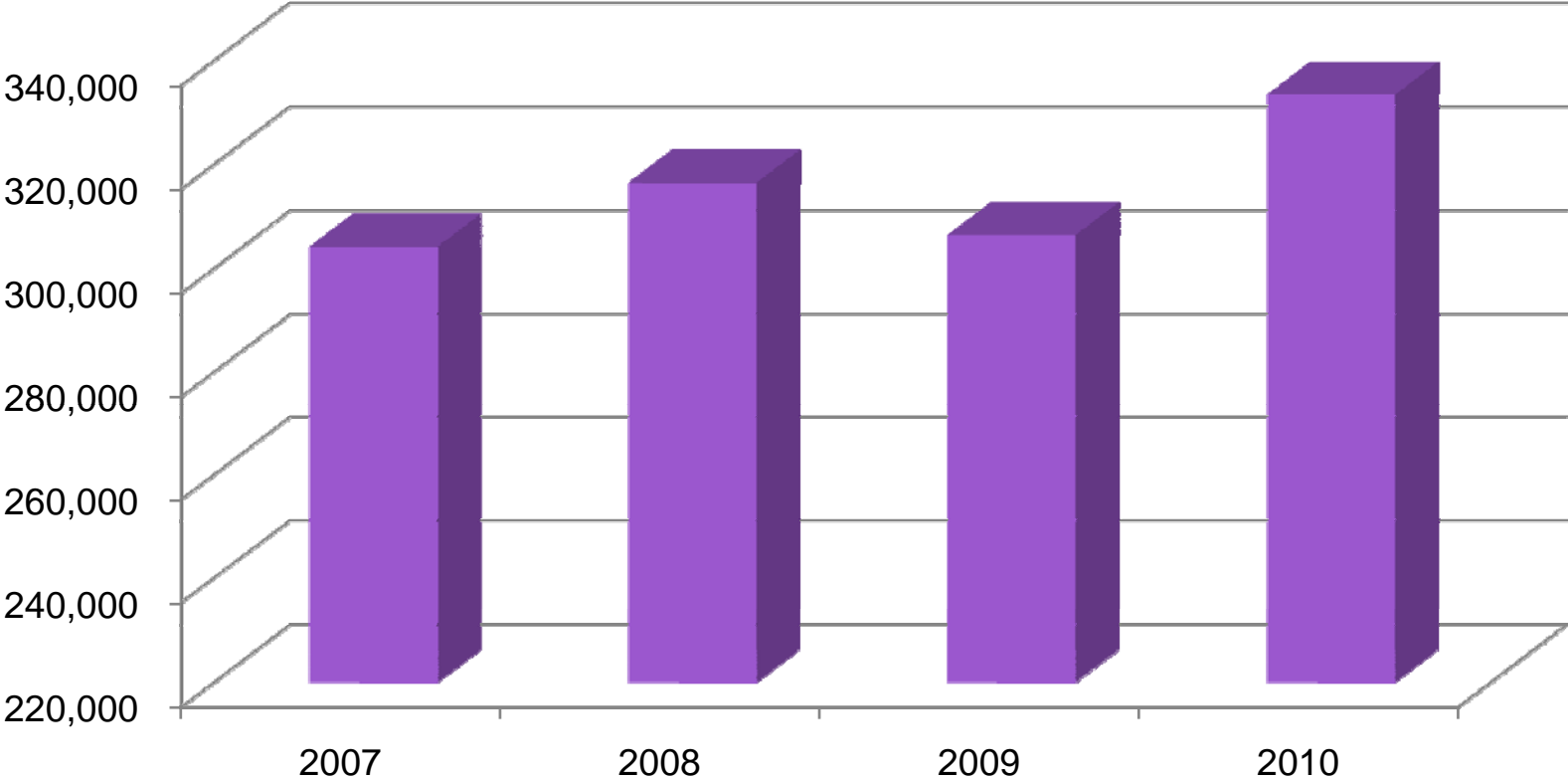
Current State of Affairs

Total Tax



	2007	2008	2009	2010
Total Tax	\$2,303,640	\$2,193,126	\$2,027,335	

YTD 1st Quarter



	2007	2008	2009	2010
YTD 1st Qtr	\$304,149	\$316,454	\$306,448	\$333,387



Comparison

Through 4/20	State	County
Occupancy	4.0%	1.9%
ADR	(2.5%)	(0.3%)
RevPar	1.4%	1.6%
Supply	3.2%	4.8%
Demand	7.3%	6.9%
Revenue	4.6%	6.5%

Lancaster County STR Report Summary

Year-to-date

(through May 15, 2010)

YTD	2010	2009	Variance
Occupancy	40.5%	39.7%	2.1%
ADR	\$83.32	\$83.72	-0.5%
RevPar	\$33.78	\$33.23	1.7%
Supply	1,001,647	944,626	6.0%
Demand	406,138	374,980	8.3%
Revenue	\$33,839,396	\$31,394,065	7.8%

PA Dutch CVB Sales Activity

Leads Converted into Bookings

Bookings			Room Nights		
2010	2009	% Chg	2010	2009	% Chg
435	378	15%	67,439	18,914	256%

Bookings represent all markets for dates in the future.



2010 Summer Packages

- Sight & Sound Theatres' "Joseph" package
- Hersheypark
- Dutch Wonderland

These packages are currently being promoted via our website and *TravelGuide* e-news. Sight & Sound package is also being promoted to AAA offices.



Forecast – What We Know

- Experienced demand growth for four consecutive months for first time in more than two years.
- Average Daily Rate is stabilizing.
- Rooms on the books for future months are pacing ahead of last year (based on property response).
- Hotel tax revenue is outpacing last year.
- Attractions are reporting higher attendance and pre-sells.



Forecast – What Can We Expect

- Smith Travel Research expects demand to increase by 4.4% this summer nationwide (compared to a 6.2% decrease in 2009) with rates decreasing slightly compared to 2009.
- Based on first five months, we predict Lancaster County will see a better than expected demand increase with a slight increase in Average Daily Rate.
- While this by no means gets us back to the levels we have experienced in the past, all indicators say we are headed in the right direction!



Question & Answer



***Thank you* for
your membership!**