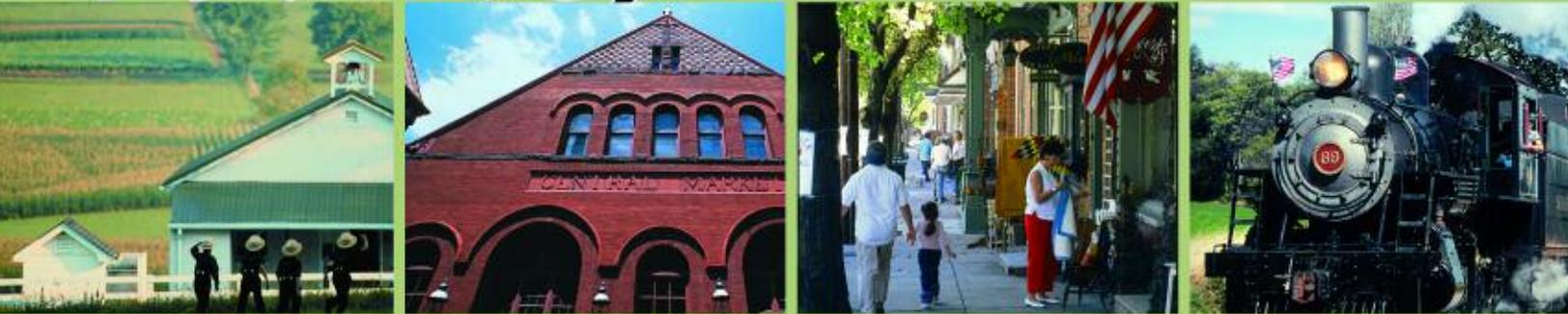


Tourism



The Strategic Tourism Development Element

June 2005



The Comprehensive Plan for Lancaster County, Pennsylvania

Acknowledgments

RESOLUTION NO. 39 OF 2005

On motion of Commissioner Shaub, seconded by Commissioner Henderson;

WHEREAS, The Board of County Commissioners charged the Lancaster County Planning Commission with developing a Comprehensive Plan for the County; and

WHEREAS, The Comprehensive plan identifies tourism as an important component of Lancaster County's economic vitality, by generating over \$8 million in direct revenue annually, and by contributing to residents' quality of life; and

WHEREAS, The Board of Commissioners and the Lancaster County Planning Commission directed their staff and a twelve member Tourism Task Force to ensure the long-term sustainability of tourism by preparing the County's first Strategic Tourism Development Plan as an element of the County Comprehensive Plan; and

WHEREAS, The Tourism Plan will build upon the area's historic commitment to tourism, enhance existing and develop new sustainable and authentic tourism products that appeal to both current and new market audiences, and create linkages to satisfy tourist needs while enhancing the quality of life for local residents; and

WHEREAS, The Tourism Plan is consistent with and supports all other elements of the County Comprehensive Plan; and

WHEREAS, The Lancaster County Planning Commission has distributed the Tourism Plan to all segments of the community, as required by the PA Municipalities Planning Code; and

WHEREAS, The Lancaster County Planning Commission and the Tourism Task Force sought extensive public involvement and comment on the Plan; and

WHEREAS, The Lancaster County Planning Commission has considered and incorporated all appropriate comments into the Tourism Plan; and

WHEREAS, The Lancaster County Planning Commission, at its regular meeting on June 13, 2005, recommended that the Lancaster County Board of Commissioners adopt the Strategic Tourism Development Plan as an official element of the Lancaster County Comprehensive Plan.

NOW, THEREFORE, BE IT RESOLVED BY THE LANCASTER COUNTY BOARD OF COMMISSIONERS, That the Board hereby adopts the Lancaster County Strategic Tourism Development Plan, June 2005, as an official element of the Lancaster County Comprehensive Plan.

Motion passed unanimously.

I, Andrea McCue, Chief Clerk to the County of Lancaster, Pennsylvania, do hereby affirm that the above resolution was passed unanimously by the Lancaster County Board of Commissioners on the 15th of June 2005.

ATTEST



Andrea McCue
Chief Clerk
County of Lancaster
Date: June 15, 2005

6/15/05

Prepared by

Lancaster County Planning Commission
Lancaster County Tourism Task Force

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Introduction

BACKGROUND

Lancaster County, located in southcentral Pennsylvania, has been called the “Garden Spot of America.” It is a quickly growing, changing and dynamic place. And yet, it is a place where agriculture and farming still dominate the landscape, where the Amish and the Plain Sect communities still practice an agrarian way of life, and where numerous farmers’ markets and roadside stands offer fresh produce and the bounty of the land.

Lancaster County is also a place steeped in a rich history with a countless number of historic and architectural resources that can be found, not only throughout the rural landscapes, but also in Lancaster City and its numerous small towns and villages.

As a result, Lancaster County is a major destination for visitors and a magnet for visitor-related attractions, facilities and services. This status is due, in large part, to the County’s ability to remain a prosperous agrarian oasis in the midst of the ever-expanding northeastern megalopolis. This rural atmosphere and scenic countryside attract millions of visitors every year, generate millions in annual revenue, and play an integral role in the County’s economic stability.

During the last few decades, however, there has been growing concern among many community leaders about the future direction of tourism and whether it will continue to play an important role in the County’s overall economic stability and quality of life that residents and visitors have come to know and enjoy.

To begin addressing these many tourism related opportunities and challenges, the Lancaster County Board of Commissioners and Lancaster County Planning Commission appointed a Tourism Task Force in August of 2003. The twelve-member Task Force played a central and key role in the planning process, and included representatives with a variety of backgrounds and experiences from the public, private and non-profit sectors. The charge to the Task Force was to create a Strategic Tourism Development Plan that would be adopted as an official component of the Lancaster County Comprehensive Plan. The Task Force engaged the professional expertise of Parter International, Inc., with its team members McCormick Taylor & Associates, Econsult, and C. Frederic John & Associates, to guide the planning process.

HISTORY OF TOURISM IN LANCASTER COUNTY

Lancaster County has a long and proud history as a major tourist destination, largely because of its scenic countryside, its Amish and other Anabaptist inhabitants, and its understanding of and commitment to the tourism industry.

The County has always been identified as a driving destination, decades before that tourism marketing term was in vogue. As the automobile became affordable to millions of Americans, Lancaster County’s tourism industry grew.

The post-World War II era saw even greater growth. The Hotel Brunswick served as a precursor to the PA Dutch Tourist Bureau in 1940 by marketing several tours of the Amish and rural areas of the County. In 1946, a visitor’s center was established.

Lancaster County’s fate has always been positively affected by the media and the arts. In 1955 the play *Plain and Fancy* premiered on Broadway, and “seemingly overnight, the world had discovered the destination of Lancaster County.”

In 1957, Lancaster County’s official tourism office was formed to promote the area and to help lead the tourism industry into the second half of the twentieth century. In five years, the organization incorporated as an autonomous not-for-profit and changed its name to Pennsylvania Dutch Tourist Bureau.

By the 1970s, Lancaster County was reported to be one of the leading tourist centers in the US. The Amish themselves had quietly diversified into cottage industries, in many cases to subsidize their farms. The Amish crafts, foods, furniture, and quilts were appealing to tourists, and new shopping opportunities expanded the available activities for the tourist to the region. The industry survived despite the oil crisis of the decade that discouraged tens of thousands from traveling by car; Legionnaire’s Disease, which discouraged visitors from going within driving distance of Philadelphia; and the accident at Three Mile Island’s nuclear power plant on Lancaster’s western border.

National Geographic Magazine had a profound influence on readers in the 1980s. In 1984, the magazine ran a story about the Plain People of Pennsylvania. With stunning photography and sympathetic text, there was renewed interest in the destination.

Just on the heels of the article was the movie *Witness*, with box-office star Harrison Ford in the lead role. Once again outside influence played a tremendous role in Lancaster's tourism history. For ten years, tourists came to Lancaster in droves, wanting to see the locations used in the popular film and seeking the peace and serenity portrayed on screen.

Over the last 20 years, there has been a diversification of tourism, with Amish attractions still at the forefront, but with outlet shopping, faith-based attractions, and family attractions becoming prominent as well. Some new products and services, however, have caused concern, because they have no direct relationship to the earlier areas of focus and do not contribute to the retention of the County's "sense of place."

Additionally, concern has been raised because the double-digit growth in sales that occurred during the 1970s and 1980s is no longer the norm. Increased competition from new destinations, as well as from within Lancaster County itself, and changes in the national and international economies have all contributed to sluggish growth in the industry. There is evidence that Lancaster County's traditional markets may be eroding and that some of the County's tourism players have begun to postpone maintenance in response to or in anticipation of some softness in the market. Such a trend, if continued, could lead to additional disinvestment and ultimately to a decline in the quality of the visitor experience.

These changing tourism trends and dynamics caused community leaders to become proactive and begin investigating ways to update Lancaster's tourism product and organization. In the 1990s, the Lancaster County Comprehensive Plan was adopted by the Lancaster County Board of Commissioners. The plan laid out goals and objectives pertaining to tourism, economic development, and historic and cultural preservation. The policy plan called for a type of tourism development that was "...complementary to the natural, cultural, and historic features of the County." The plan discouraged tourism services and attractions that inaccurately reflected the County's history or that had an unfavorable effect on local residents' quality of life. The policy plan also emphasized the strong link between the careful management of land use and growth and a high quality tourism destination. The Plan made it clear that if you want to create a great place to visit, you must first create a great place to live.

To further this policy direction, Lancaster County seized the opportunity to become one of four areas to receive funds from the Commonwealth as part of a pilot program to promote heritage tourism in 1994. This program was initiated by the Pennsylvania Historical and Museum Commission, with the National Trust for Historic Preservation's (NTHP) Heritage Tourism Program providing technical support. Now referred to as Lancaster County Heritage, the local program is administered by the Lancaster County Planning Commission with support from the PA Dutch Convention & Visitors Bureau. The Heritage Tourism Initiative energized local tourism businesses, expanded the product offering for the general tourist, staked a place for Lancaster at the heritage and cultural tourism table, and provided a visual organization element with its quilt-like banners that herald "Lancaster County Heritage."

More recently, in 2001, Lancaster County joined with York County, its neighbor to the west, to become one of the twelve designated Heritage Regions in the Commonwealth. Two of the goals of the Lancaster-York Heritage Region are to enhance the visitor experience and strengthen the area's "sense of place" through appropriate heritage tourism and development. Since the organization has been established, two new tourism products have been created related to agri-tourism and eco-tourism in the two counties.

The latest heritage tourism focus in Lancaster County has been the awakening interest in tourism by a number of the County's towns and smaller villages. Adamstown is established as an antique center. Ephrata has the Ephrata Cloister. Although the municipalities marketed by the Planning Commission and PDCVB as "Towns & Villages" are in different stages of tourism development, they nonetheless indicate a huge heritage tourism potential with the capability to move tourists all around the County.

Even with all of the positive activity related to tourism in the last few years, it is still safe to say that tourism in Lancaster County is at a crossroads as it enters into the 21st century. There are a number of factors, both locally and nationally, that will impact visitation to the County in the years ahead. Some of these local impacts that have significant positive potential for the area include major new investments and projects under way or planned in Lancaster City, new local and regional heritage tourism initiatives, new and planned intermodal transportation facilities, and new resources in the form of bed tax dollars.

And yet, Lancaster County as a mature destination could face major stagnation or ultimate decline if it does not reinvest or rejuvenate itself by addressing, proactively and strategically, these changes that are taking place within and outside of the County. Therefore, the preparation and adoption of this Strategic Tourism Development Plan as a component of the Lancaster County Comprehensive Plan is both timely and necessary, if the County is to remain competitive in the tourism arena at the dawn of this new century.

ECONOMIC IMPACTS OF TOURISM IN LANCASTER COUNTY

To many, Lancaster County is synonymous with tourism. Regions tend to specialize in the production of the goods and services they produce best, and tourism is clearly one of the activities in which the Lancaster County region has a strong competitive advantage.

While tourism has been prominent in the area for decades, there has been little attempt to analyze its overall importance to the County's economy. In part this is because tourism as an "industry" is hard to measure accurately. Economic data does not identify a single tourism sector, but rather several components (hotels, restaurants, retail and others) where only part of their customer bases are tourists. Therefore, simple measurement issues have undoubtedly contributed to this dearth of analysis.

Another area of need for economic analysis is the competitive position of Lancaster County's tourism industry. Is its competitive advantage growing or declining? This plan addresses these two fundamental issues. It provides a comprehensive analysis of the economic importance of tourism in Lancaster County. It also gives an assessment of the sector's recent performance relative to its competitors, focusing on measures of competitiveness.

As is usually the case with tourism, public resources are expended in marketing and planning for the industry. It is of great use to be able to measure the magnitude of the tourism industry in Lancaster County and estimate its economic and fiscal impact on the local economy.

THE TOURISM CLUSTER IN LANCASTER COUNTY

The tourism industry in Lancaster County is composed of various interrelated factors that can be described as a

cluster. The concept of an industry cluster is closely associated with the work of Harvard's Michael Porter, and his definitions have stressed the geographical proximity and interconnectedness of industries and institutions within a cluster, linked by commonalities and complementarities in the production of goods or services. In general, one can expect that in a tourism cluster the association with the location is an intimate one: tourism activity revolves around people visiting a specific location, usually one endowed with a specific attribute. Lancaster County's tourism industry is likewise built around the consumption of various leisure activities within a specific area.

A cluster is typically composed of several layers of industries and institutions. The most visible layer is made up of the first-tier industries that provide goods and services directly to tourists. These include hotels, restaurants, entertainment venues, performing arts organizations, and others. Second-tier industries are those that provide goods and services to the direct industries as inputs in their own production. These would include real estate services, food manufacturers and suppliers, suppliers of gasoline, utilities, and others. Clusters share resource markets, including labor markets in particular regions and locations.

In terms of institutions, these could include government agencies or nonprofit agencies that directly or indirectly promote and encourage tourism. In Lancaster County, these include the Pennsylvania Dutch Convention & Visitors Bureau, Lancaster County Planning Commission, the Lancaster Chamber of Commerce and Industry, Lancaster County Convention Center Authority, Destination Downtown, and others. Institutions could also include those that indirectly promote tourism, for example by providing educational or job training services that improve the supply of skilled workers to the first- and second-tier industries. These could include the Lancaster County Workforce Investment Board or the Lancaster campus of Harrisburg Area Community College and the Lancaster County Career and Technology Center, both of which have culinary and hospitality programs that make a significant contribution to the hospitality workforce.

First-Tier Industries Within the Tourism Cluster

The percentage of tourism expenditures received by first-tier tourism industries varies from location to location. For example, air travel represents 25% of tourism expenditures nationally, but for Lancaster air travel is insignificant. The following table relates to Lancaster County:

**TABLE 1:
First-Tier Tourism Industries
in Lancaster County**

Industry:	Percent of Tourism Expenditures Received:
Accommodations	19%
Transportation (car rental, rail, taxi, bus)	16%
Food services and drinking places	25%
Retail trade (including gas stations)	23%
Entertainment (amusements, sports, and performing arts)	13%
Other (including travel and reservation services)	4%

Sources: D.K. Shifflet and Associates, Inc. (2003); BEA and Econsult Corporation (2003).

**TABLE 2:
Second-Tier Tourism Industries
in Lancaster County**

Industry:	Total Sales per \$100 in Tourism Expenditures:
Real estate	\$4.80
Management of companies and business services	\$2.90
Wholesale trade	\$2.30
Food manufacturing	\$2.20
Monetary authorities and credit intermediation	\$1.80
Miscellaneous services	\$1.70
Telecommunications	\$1.40

Source: Econsult Corporation (2003).

Second-Tier Industries Within the Tourism Cluster

The second-tier industries in the tourism cluster are those that provide significant levels of necessary goods and services to first-tier industries. These input-output relationships are based on monetary transactions between firms. These could include purchases of accounting and legal services by hotels or the purchase of specialized carpentry and lighting services by performing arts venues that cater to tourists.

As with first-tier industries, there are considerable local differences in what constitute second-tier industries. For one, various second-tier industries that appear nationally simply do not exist in Lancaster County (for example, oil and gas extraction), and these cannot figure into an accounting of the local tourism cluster. The major second-tier industries in Lancaster's tourism cluster are reported in Table 2, along with the sales engendered in these industries following expenditures in the local tourism industry.

The fact that total sales in the second-tier industries are lower in Lancaster County than nationwide for a given tourism expenditure of \$100 reflects the fact that tourism impacts tend to shrink with the size of the region, reflecting leakages: since not all suppliers are located in the region, the proportion of supplies purchased outside the region will increase as the size of the region decreases.

Institutions Within the Lancaster County Tourism Cluster

As mentioned, the tourism cluster is not uniquely composed of industries. The cluster also includes a number of government and nonprofit entities involved in various aspects of tourism, including its promotion, the training of its employees, and the carrying out of various local government licensing, planning, and regulating functions. A partial list of these institutions is outlined below.

- Lancaster County Planning Commission
- Pennsylvania Dutch Convention & Visitors Bureau
- City of Lancaster
- Lancaster Chamber of Commerce and Industry
- Historic Preservation Trust of Lancaster County
- Lancaster Parking Authority
- Lancaster City and Borough Councils
- Township Supervisors
- Board of Lancaster County Commissioners
- Community Business Association of Lancaster
- Economic Development Company

- Lancaster County Convention Center Authority
- Lancaster Campaign
- Lancaster County Workforce Investment Board
- Lancaster Downtown Investment District
- Stevens Technology College
- Harrisburg Area Community College (Lancaster campus)
- Lancaster County Career and Technology Center
- Franklin and Marshall College
- Lancaster Redevelopment Authority

THE ECONOMIC IMPACTS OF TOURISM IN LANCASTER COUNTY

The Direct Expenditures on Tourism in Lancaster County

In order to obtain measures of the importance of tourism locally in Lancaster, figures provided by D.K. Shifflet & Associates were used. These figures are the most comprehensive available, outlining details on the types of tourism expenditures as well as on the total number of tourism visits to the County. The expenditures for both overnight and day visits are outlined in Table 3. In the former category, it is estimated that the typical overnight visitor spends an average of three days in the County.

**TABLE 3:
Per-Trip* Tourism Expenditures
in Lancaster County, 2001**

Expenditure Type:	Overnight Trips	Day Trips
Transportation	\$45.40	\$14.00
Retail trade	\$84.30	\$41.90
Hotels	\$54.00	–
Other lodging places	\$1.10	–
Eating and drinking places	\$84.30	\$22.30
Performing Arts	\$21.10	\$6.10
Other amusement & recreation services	\$34.00	\$8.80
Total	\$324.20	\$93.10

*Note: Each trip is a person-trip. Source: D.K. Shifflet & Associates (2003).

By using estimates by D.K. Shifflet on total trips to Lancaster County, the data in Table 3 is converted to total direct tourism expenditures in Lancaster County. It is estimated that in 2001 there were over 4 million overnight person-trips and over 4.3 million day person-trips to Lancaster County (see Table 4).

**TABLE 4:
Total Direct Tourism Expenditures
in Lancaster County, 2001**

Expenditure Type (in millions):	Overnight Trips	Day Trips
Total Trips	4.10	4.35
Total Direct Expenditures	\$1,313	\$404

Sources: D.K. Shifflet & Associates (2003) and Econsult Corporation (2003).

Using the per-trip expenditure estimates above, this translates into total direct tourism expenditures of over \$1.7 billion. These are expenditures made by tourists for the goods and services provided by first-tier industries in the cluster, and do not account for the indirect and induced expenditures. These wider economic impacts are estimated below, relying on the regional economic input-output models.

The Indirect and Induced Expenditures from Tourism in Lancaster County and Pennsylvania

The total expenditures on tourism outlined in Table 6 will generate further expenditures in the County and the State of Pennsylvania as various firms produce the goods and services needed to support the hotels, restaurants, amusement parks, performing arts venues, and other first-tier tourism establishments. For example, a hotel may employ a law firm to complete its various contracts. The law firm will, in turn, employ an accountant, purchase office machinery, and employ lawyers in part to carry out its work for the hotel. The lawyer will purchase goods and services for her or his family, setting off a further round of expenditures, and so on. These subsequent expenditures are examples of the indirect and induced expenditures generated by the direct tourism expenditures.

As shown in Table 5, it is estimated that the \$1.7 billion in direct tourism expenditures in 2001 generated an additional \$2.2 billion in indirect and induced expenditures. The total expenditures attributable to tourism in 2001 were equal to \$3.9 billion, which included an estimated \$898

million in wages and salaries paid to workers and performers. Finally, using the model, it is estimated that 47,000 person-years of employment were generated in the County, including 20,500 person-years of employment in the first-tier industries of the cluster. The figures in Table 5 imply that every \$36,000 in direct tourism expenditures generates one job in the Lancaster economy.

TABLE 5:

Total Impacts of Tourism Expenditures in Lancaster County on the County, 2001

<i>(in millions)</i>	Overnight Trips	Day Trips	All Trips
Total Expenditures	\$2,999	\$917	\$3,916
Direct Expenditures	\$1,313	\$404	\$1,717
Indirect & Induced Expenditures	\$1,687	\$512	\$2,199
Total Earnings	\$688	\$210	\$898
Total Employment	36,000	11,000	47,000
Employment in First-Tier	15,700	4,800	20,500

Note: Total Earnings include all wages and salaries of employees. Total Employment includes part-time employees. Source: Econsult Corporation (2003).

The estimates for employment in the tourism cluster include a total of 10,200 retail employees whose employment is tied, directly or indirectly, to tourism. This implies that fully one-third of the County’s retail activity is tied to tourism.

TABLE 6:

Total Impacts of Tourism Expenditures in Lancaster County on the State, 2001

<i>(in millions)</i>	Overnight Trips	Day Trips	All Trips
Total Expenditures	\$3,666	\$1,121	\$4,787
Direct Expenditures	\$1,313	\$404	\$1,717
Indirect & Induced Expenditures	\$2,353	\$717	\$3,070
Total Earnings	\$853	\$263	\$1,116
Total Employment	42,000	12,800	54,800

Note: Total Earnings include all wages and salaries of employees. Total Employment includes part-time employees. Source: Econsult Corporation (2003).

The Multiplier Effects from Tourism in Lancaster County

The input-output model provides summary measures of economic impacts generated from direct expenditures that are usually referred to as multipliers. An expenditure multiplier tells how much total expenditures (direct, indirect, and induced expenditures) can be expected following an increase in direct expenditures for the good produced by a particular regional industry. For example, if an industry in a particular region is said to have an output multiplier of 2, this tells us that a \$1 increase in the direct expenditures for the good produced by the industry leads to indirect and induced expenditures of another \$1 and total expenditures of \$2 in the regional economy. The \$2 includes the various wages and salaries (which are referred to here as earnings) generated across industries in the particular region. According to the model calculations, the various direct expenditures associated with tourism in Lancaster County are associated with an average expenditure multiplier of 2.3 – meaning every dollar spent in first-tier industries generates another 1.3 dollars in spending in other County industries.

The Fiscal Impacts of Tourism in Lancaster County

Another key impact of tourism is the local and State taxes generated by the activity described above. Using Econsult Corporation’s Fiscal Impact Model (see Appendix A), the expenditure and earnings impacts from the input-output model were used to generate estimates of the State and County tax revenues generated by tourism.

Table 7 outlines the estimates for taxes generated in the County and the State due to the County’s tourism activities by trip type. As shown, estimated tax revenues in the State and County attributable to total tourism expenditures are over \$237 million in 2001.

TABLE 7:
Total Fiscal Impacts of Tourism
in Lancaster County and the
State of Pennsylvania, 2001

<i>(in millions)</i>	Overnight Trips	Day Trips	All Trips
Total Taxes	\$184	\$53	\$237
Pennsylvania Sales Tax	\$124	\$38	\$162
Pennsylvania Personal Income Tax	\$24	\$7	\$31
Pennsylvania Gross Receipts Tax	\$19	\$6	\$24
Lancaster County Earned Income Tax	\$6	\$2	\$8
Lancaster County Hotel Room Tax	\$11	\$0	\$11

Source: Econsult Corporation (2003).

RECENT PERFORMANCE OF THE LANCASTER COUNTY TOURISM CLUSTER

Location Quotients

In order to understand the recent performance of the County's tourism cluster, two related economic methods are used to analyze the industry's performance relative to all other tourist destinations. A first indication of the industry's relative performance is the change, by components of the tourism cluster, in the County's relative concentration of employment in that component. This measure of concentration (known as a location quotient) is a ratio whose value increases with the degree of concentration.

Table 8 outlines the results of the analysis of changing concentration by industry between 1998 and 2001. For example, performing arts and spectator sports (with over 760 employees) is found to have increased its location quotient value by 12% between 1998 and 2001. While inferring an increase in competitiveness of 12% may be imputing too much precision to the technique, the data do support the notion that the industry increased its relative share of national employment in this activity. This would be unlikely to happen if the Lancaster performing arts and spectator sport industries did not offer a product that consumers were increasingly interested in attending.

TABLE 8:
Change in Regional Concentration of
First-Tier Tourism Industries, 1998 - 2001

Industry	2001 Lancaster Employment	Percent Change in Concentration
Performing arts, spectator sports, and related industries	765	12%
Of which: performing arts companies	519	48%
Museums and historical sites	169	15%
Amusement, gambling and recreation industries	1,598	-1%
Accommodation	2,616	-7%
Of which: hotels and motels	2,215	-9%
Food services and drinking places	13,239	-6%
Clothing and clothing accessories stores	2,938	-6%
Art dealers	55	90%
Marketing consulting services	89	-24%
Travel agencies	193	-7%

Source: Econsult Corporation (2003).

As can be seen from the results in Table 8, the changes in competitiveness of specific industries within tourism's first tier is quite variable. While performing arts and museums have gained in competitiveness, accommodations and food services have not. Overall, the industries represented in Table 8 have, as a group, lost about 5% of their relative concentration, implying a slight decline in overall competitiveness of the tourism sector during this period.

Shift-Share Analysis

Similar conclusions regarding the performance of tourism are reached when using a different analytical tool, shift-share analysis. Shift-share techniques allow us to calculate the change in employment in Lancaster County's tourism sector that is due to changing competitiveness. Briefly, shift-share "decomposes" changes in an industry's employment into different causes, such as national economic growth, changes in the mix of industries in a region, and changes in the competitiveness of specific industries.

**TABLE 9:
Change in Regional Employment of First-Tier Tourism Industries
Attributable to Changing Competitiveness, 1998 - 2001**

Industry	National Share (NS)	Industry Share (IS)	Competitive Share (CS)	NS + IS + CS
Performing arts, spectator sports, and related industries	176	56	85	316
Museums and historical sites	13	14	22	49
Amusement, gambling and recreation industries	850	67	-19	899
Accommodation	4	-104	-194	-293
Food services and drinking places	2	-63	-790	-851
Clothing and clothing accessories stores	8	67	-172	-97
Art dealers	184	0	26	210
Marketing consulting services	94	43	-28	108
Travel agencies	38	-13	-14	10
Total	1369	67	-1084	351

Source: Econsult Corporation (2003).

For the present analysis, changes in employment in the tourism cluster's first-tier industries are analyzed, and using shift-share techniques the components of employment change that are due to changing competitiveness are identified. These estimates, which are primarily indicative, are contained in Table 9.

According to the estimates contained in Table 9, the County's tourism industry lost nearly 1,100 jobs because of changes in its competitiveness as a tourism destination (labeled "Competitive Share (CS)"). It is important to note that in absolute terms the first-tier industries did not lose, but gained, employment on the order of 352 jobs in Lancaster from 1998 to 2001. However, after accounting for the change in employment due to the national trends, and its industry mix, the performance of the County's tourism sector was actually one of modest relative decline. The National Share (NS) column in the table indicates the difference in total employment for a given industry in Lancaster due to growth in the national economy from 1998 to 2001. The Industry Share (IS) column shows the portion of employment growth attributable to Lancaster County's industry mix relative to the nation's mix.

ECONOMIC ANALYSIS SUMMARY

The economic component prepared for this Plan is a comprehensive analysis of the tourism cluster in Lancaster County. While not as important in terms of overall employment as health care or manufacturing, tourism is

nevertheless a major economic force in the County. According to estimates above, first-tier industries in the cluster account for 9 percent of County employment, and total cluster employment is equal to 85 percent of employment in manufacturing. Other measures of the cluster's importance, including overall expenditures, earnings, and tax generation confirm the evidence that the sector is an important, though not the only, driver of the County's economy.

Another key point to keep in mind in assessing the tourism cluster's importance is the fact that it is essentially entirely *export-oriented*, which means new dollars coming into the region. The calculation of the cluster's importance contained in this analysis is derived from data on tourist expenditures, which are by definition expenditures by non-residents in the County. These tourism expenditures in turn were used to calculate the total indirect and induced expenditures and the fiscal impacts to the County.

While tourism is an export industry, sectors such as health care and education are mostly geared to a local resident-based market. While this does not reduce their importance in terms of contributions to the well-being of the County, their role is not primarily to bring spending into the County. Tourism, on the other hand, is by definition an industry whose sales bring in spending from outside the County. That said, all regional industries compete, to some extent, in related labor markets. The nature of tourism employment is very different from many other industries,

and the County should endeavor to minimize any negative labor market repercussions on other industries caused by increasing tourism activity. This can be mitigated by upgrading the tourism product and by facilitating occupational connections between the tourism industry and other industries in Lancaster County.

An indicative assessment of the cluster's competitiveness reveals some cause for concern, namely the apparent loss of competitiveness in some of the cluster's industries. The trends may well imply a change in the type of visits, with some overnight visits and outlet shopping based visits seeing slower growth than in the past. While these findings do not purport to be accurate identifications of weaknesses in Lancaster tourism, they are quantitative support for the notion that the sector has been losing some ground to other national tourist locations since the late 1990s.

TRAVEL TRENDS AND LANCASTER COUNTY

Given the excellent infrastructure of many American destinations, the diversity of experiences within the United States, the professionalism of tourism service providers, and the high percentage of disposable income many devote to travel, tourism has become a determining factor in the health and well-being of many of America's regions. In fact, travel and tourism employ one of every seven people in the US civilian workforce.

For a number of years leading up to September 11, 2001, many US destinations had been devoting considerable resources to and had seen considerable growth in leisure tourism. Growth in the first three quarters of 2001 had begun to slow as a result of the downturn in the American economy.

The immediate effects of the 9/11 terrorist attacks were to modify the tourism trends of previous years and to turn a new page for the tourism industry. While the reverberations of 9/11 were felt everywhere, the tourism industry was among those most dramatically affected. Tourism is inextricably tied to the potential consumer's emotions. Tourists need to feel secure, and will avoid destinations where they have doubts about their safety.

Despite continued weakness in the economy, tourism has seen resurgence. The reasons are varied and complex. Americans value their leisure time and, as fear of travel has subsided, our population is resuming travel during vacations. Some have attributed this resurgence to

consumers' understanding that tourism is important to the financial health of the nation. A more profound emotional explanation is that Americans travel in order to reaffirm their freedom to travel.

Transportation

Air travel continues to be the hardest hit by 9/11 due to the increased security measures at airports, the resulting delays, extended travel time, and the still-present fear of terrorist attacks. Many travelers therefore opt for other modes of transportation: car, bus, motorcoach, or train. Lancaster County, being a drive destination, is benefiting from this trend.

Recent studies indicate ridership for charter bus services and motorcoaches is strong. Even though growth is down, *National Bus Trader Magazine* reports that the total number of nearly 2,500 motor coaches sold in 2002 is higher than all the years from 1985-1996. (The American Bus Association in its "State of the Motorcoach Industry 2004" writes that "the group travel industry is poised to increase ridership from the past few years." Motorcoach travel is popular partly because of market demographics, value and the fact that charter bus service/motorcoach has always been one of the safest ways to travel. Lancaster County has long been a popular bus destination and as a result its attractions have developed positive relationships with the motorcoach industry. Its motorcoach preparedness exceeds that of most other destinations. Lancaster benefits from the strength of busing because this alleviates the traffic congestion that would be caused by bringing an equal number of visitors to the region by private automobile.

Train ridership has expanded significantly, so that Amtrak has drastically revised its business plan since 2001. Lancaster County is poised to benefit from this trend as it has several Amtrak stops, with improvements and extensions to many stations contemplated or already under way.

Trend in Shorter Trips

There has been a decade-long trend of increased short visits of three to four days to nearby locations. This trend has continued after 9/11. Lancaster has benefited from this trend, particularly because of its location and proximity to major travel markets.

Cultural Tourism

While cultural tourism has been the largest-growing segment of leisure travel in the past decade, since 9/11 there has been a rapid rise in interest in activities and

destinations that are deemed patriotic, either because of special events or the destination's stature in American history. The region as a whole benefits from this trend.

Tourists want to see and experience something unique, a reason for them to travel away from home. This has been a dominant motivator for the past decade. Tourists are especially motivated by the "I was there to see that" factor. While Lancaster County has many unique experiences, there is little emphasis on time-limited activities, such as a special event or festivals targeted at tourists.

Geo-tourism

A recent National Geographic/Travel Industry Association study identified "geo-tourism" as a label that exemplifies 55 million American travelers' environmental and cultural behavior. These geo-tourists support tourism that sustains or enhances the geographical character of the place being visited, including its environment, culture, aesthetics, heritage, and the well-being of its residents. The difference between the traditional cultural/heritage tourist and the geo-tourist is that the geo-tourist is attracted to the entire array of unique products Lancaster County has (or can have) to offer: the City of Lancaster, farmlands, nature trails, outdoor recreation areas, and heritage attractions such as the Amish. The majority of geo-tourists prefer trips to destinations with authentic historic or archeological buildings and sites, as well as trips where they can experience cultures and lifestyles very different from their own.

Developing products in Lancaster County, such as nature tourism and the City of Lancaster, can benefit from satisfying the needs of the geo-tourist.

Family Travel

There has been a consistent rise in tourists traveling as families with school-aged children, which has been even more pronounced since 9/11. The tragedy of the 2001 attacks and the fear of new attacks make clear how dear family is and how tenuous our ability to spend time with loved ones. Family travel presents an opportunity for Lancaster. Although family visits to the region are strong, they can be stronger. The County has a wealth of product offerings for families and an infrastructure that is family-friendly, but not as well-known as it might be. Obviously travel times are limited because of school schedules, so that summer, winter, and spring recesses and three-day holiday weekend packages must be promoted.

Empty Nesters

As Baby Boomers' children reach college age, it is anticipated that this demographic group will become an even more important target for tourism destinations. The consumer study conducted for this report indicates that adults (those traveling without children) have been an important staple for Lancaster County, and is a group that is predisposed to appreciate the Lancaster product whether or not they have visited. For example, a Tourism Industry Association study shows that mature travelers are much more likely than their young counterparts to prefer trips for which the primary purpose is to learn about the destination. Both the County and the City can benefit from this predisposition.

Cross-Promotions

The Pennsylvania Dutch region attracts three main categories of visitors: those visiting friends and family, those on leisure trips, and those on business. All three categories can benefit from cross-promotions. For example, following the trend that more and more people want to travel with their families since 9/11, the business traveler is seeking more ways to "bring the family along," thereby combining business travel with leisure tourism. Lancaster County is positioned to benefit from this trend.

Convention and Meeting Travelers

A fourth category of visitor – those attending conventions and meetings – may become a greater part of the mix if a Convention Center is completed. There will soon be even more opportunities to conduct cross-promotions of business and leisure activities which will extend the business/convention traveler into the category of the overnight discretionary leisure tourist. The convention and meeting visitor will also stimulate the development of new and enhanced tourism product in the City of Lancaster.

Marketing to Locals

Another change brought about by 9/11 is that cities and regions are spending more time and resources marketing to their own residents. To boost in-state/in-region visitation, SeaWorld Orlando/Adventure Island and Busch Gardens in Tampa launched a package that allows visitors to pay for a one- or two-year pass on a monthly basis, with no interest charges or additional fees.

Nebraska is the first state to implement a statewide toll-free 511 telephone system to give its driving travelers road and weather conditions. In the future, hotel accommodations, restaurants, and other travel destinations can be added to create an "Intelligent Travel System."

The Greater Philadelphia Tourism Marketing Corporation has launched a Visiting Friends and Relatives program wherein road shows are organized throughout Philadelphia and the surrounding five counties to promote pride among residents. A special press kit is available, complete with accompanying Residents Guide. Special events occurring anywhere within the region are promoted aggressively through advertising, presentations, public relations efforts, and the web site. Lancaster would do well to heed these examples by marketing to its residents and ensuring that they are knowledgeable and supportive of the tourism product.

Packaging

Packaging is an effective attraction tool used increasingly by destinations. For example, some AAA clubs have developed additional regional packages and are offering “One Tank Trips” specifically for motorists in their areas.

Lancaster County is positioned to benefit from this trend. The PDCVB has repeatedly packaged for heritage tourism with Hershey, “Philadelphia and Its Countryside” via the Greater Philadelphia Tourism Marketing Corporation, and York County, all of which offer a large variety of tourism experiences. While individual attractions within the County occasionally create packages together, and there are a few cross-industry packages grouping hotels with restaurants and/or attractions, more opportunities should be pursued.

Internet

The use of travel agents has been decreasing steadily in the past few years. The internet has played a major role in this decline. Increased use of the internet for vacation planning has been astounding. From 1997 to 2002, the use of the internet in travel planning/booking increased more than fivefold. More than 39 million bookings were made online in 2002, a number that continues to increase exponentially every year. Reaching out directly to the consumer has become the most critical element of tourism marketing, because more and more travelers go online not only for travel information, but also to buy train tickets, book hotel rooms, and order tickets for special events. The PDCVB has launched and upgraded an extensive website, and the organization needs to ensure that the site remains state-of-the-art and user-friendly. To remain competitive, individual attractions also need to invest in their web sites and promotion through the internet.

Guiding Principles

Lancaster County has long been active in tourism and has been thoughtful about its approach to planning and growth over the past several decades. Building on these efforts, the Strategic Tourism Development Planning process has as its foundation four guiding principles.

STAKEHOLDER INVOLVEMENT

The first guiding principle was to **continue the County's long tradition of including the public in all of its planning efforts.**

It was clearly understood that for the strategic plan to succeed, local buy-in (especially by a knowledgeable and committed tourism industry and active local residents) would be essential. Therefore it was a top priority to draw stakeholders into the planning process through numerous one-on-one interviews and group meetings. Focus groups and presentations to organizations with interest and involvement in tourism-related issues were conducted. Additional research and surveys were conducted to gain the broadest input possible. Involving stakeholders provided the opportunity to obtain suggestions, understand concerns, and receive feedback on ideas, while helping the community understand the crucial role they have in the planning process. Over the course of the planning process regular presentations to tourism-related groups in Lancaster County regarding progress and findings were made. Not only did many of the best ideas and insights come directly from stakeholders, but every effort was made to foster a feeling of ownership of the plan that will lead stakeholders to more readily accept and help implement the plan's recommendations.

SUSTAINABILITY

The second guiding principle in the strategic planning process was to **support the strong preservation and stewardship efforts that Lancaster County already has under way to protect its outstanding natural, cultural, and historic resources.** It is clearly understood that successful tourism depends on the quality of the natural and built environments. As such, the long-term viability of the industry in any location is directly dependent on maintaining its natural, cultural, and historical integrity. Sustainable tourism solutions that would preserve this integrity, history, and beauty of the Lancaster area provide the foundation for the goals and actions contained in this plan.

Therefore, it is critical that a unified and integrated system for sustainable tourism planning, development, and

management in Lancaster County be created. Without such a system, the likelihood of inconsistent, non-prioritized, insufficiently focused tourism growth increases. A sustainable tourism development system, on the other hand, can fulfill economic, social, and aesthetic needs while maintaining cultural integrity and ecological processes. It can provide for today's hosts and guests while protecting and enhancing the same opportunity for the future. To create a coordinated sustainable approach, the plan has concentrated on creating:

- *Greater understanding of the positive economic impact of tourism*
- *A strategic plan that will increase visitation to the region and extend stays without negatively impacting the residents and their quality of life*
- *Locally-appropriate new and enhanced tourism products and experiences that respect the scale, nature, and character of Lancaster County's unique places*
- *Improved quality of life for residents/communities through the provision of new cultural, recreational, and entertainment facilities, improved directional and wayfinding signage, and job opportunities*
- *Increased funding for sustainable tourism planning and development*

Local businesses in the tourism sector, and the economy as a whole, will prosper as a result of the attention and planning devoted to these goals. Yet businesses will not be the only ones to benefit. Because the overall approach in this Plan addresses the setting in which tourism takes place, and because the recommendations will result in enhancements to the quality of the tourist experience, local residents will also benefit. What tourists find attractive in an area are often the same features and characteristics that draw residents (this is borne out by the primary research conducted for this plan, which found a nearly one-to-one correspondence in thinking between the residents of the County and travelers to the area). Therefore, strategic tourism development in Lancaster County will both achieve economic development goals and enhance quality of life for residents.

INTEGRATION OF SUPPORTING STUDIES AND REPORTS

The third principle was to **integrate and build on the many relevant and quality studies, reports, and plans created in the past decade in Lancaster County, rather than "starting from scratch" or "reinventing the wheel."** These plans and

studies have been completed for the public, private, and nonprofit sectors and provided a strong foundation on which to build this strategic tourism plan.

Much attention has been paid to tourism planning in Lancaster County, largely through the efforts of the Lancaster County Planning Commission. In the 1990s, LCPC pointed out that few of the County's historic resources are made accessible or marketed to visitors and residents in a coordinated and authentically interpreted manner. To begin addressing these issues, the 1991 LCPC Plan related one of its policy components directly to tourism. Three years later, Lancaster County initiated a countywide heritage tourism program, which focuses on types of resources that make the County an identifiable place, and on the need to build strong links between promotion and preservation. In January 1998, the LCPC submitted a Heritage Tourism Plan with the thesis that Lancaster County, "despite its changing landscape, is uniquely positioned to gain significantly from its greatest assets – its natural, cultural, architectural, and historic heritage." The 1998 plan evolved from the earlier efforts. It is a complete plan in that it addresses every aspect of heritage tourism, such as criteria for resources, inventory, principles, tour routes, public involvement process, organizational structure, mobility issues, public relations, and marketing.

In 2001, the "Lancaster-York Heritage Region Executive Summary and Management Action Plan" was completed, as a requirement for designation as a Pennsylvania Heritage Park. The Plan includes an interpretive component that focuses solely on heritage tourism. Most importantly, this plan identified five major themes: 1) Quest for Freedom; 2) Foodways: From Farm to Table; 3) Innovation, Invention, and Tradition; 4) Town & Country: Forging Communities, Cultivating the Land; and 5) Natural Ways: The Susquehanna River and Beyond. An organizational entity has been created to manage the interpretation, packaging, and marketing of these five themes, and marketing materials have already been produced for the two-county region.

Several studies pertaining solely to the City of Lancaster have been conducted. In 1998, an "Economic Development Action Agenda" for Lancaster was prepared that was to "stimulate the economic revitalization of the City of Lancaster by developing a community-supported vision and action agenda." The 17 strategies in the Action Plan were intended for implementation over the course of

15 to 20 years, thereby providing much-needed long-term planning for the City. In 2003, the status of the first five years of the plan was assessed. While "some progress has been made in all seventeen areas," it is important to note that some projects are much further along in development than others. Crucial to the Strategic Plan process was the fact that less than one-third of the strategies were tourism-related, although it clearly acknowledges "developing tourism as economic development." Indeed, Team Lancaster has listed the 17 strategies and tracks the progress on each of them.

More current tourism-related studies and reports have been completed by a variety of consulting firms with a focus on several county or citywide opportunities including multi-cultural tourism, the arts, and positioning Lancaster City as a tourism destination. Additionally, several other reports have been completed that focused on specific tourism development opportunities including museum and attraction development in Lancaster City. Other scholarly reports and studies have also provided invaluable background and guidance to the preparation of this Strategic Plan. It is this comprehensive wealth of ongoing planning and research that forms the foundation for this Strategic Tourism Development Plan.

ACHIEVABLE RECOMMENDATIONS

The fourth and final principle was to **ensure that the plan was concise and straightforward and resulted in "doable" or achievable recommendations.** The plan is written to be concise and straightforward, and to make recommendations that could be easily accomplished within the scope of area resources and stakeholder capacity. While the plan does identify many implementable actions and opportunities to be undertaken over the life of the plan, only a limited number of catalytic recommendations are proposed initially to allow for greater focus of efforts and limited resources. When implemented, these recommendations will lead to tangible, easily measured accomplishments that can be used as building blocks to get the community more involved. These recommendations are also meant to serve as catalysts for the introduction of additional initiatives over time.

The Planning Process

The strategic tourism planning process included two initial components: 1) an assessment of current conditions and background research, and 2) a strong public and stakeholder involvement process.

RESEARCH AND ASSESSMENT

The research phase of this process included 1) a review of dozens of studies, reports, marketing materials and electronic sources, 2) a current attractions and infrastructure audit, 3) a market identification and comparative destinations analysis, and 4) a tourism leadership assessment.

In addition, the planning process included the preparation of two very detailed and important studies: 1) an Economic Impact Study, and 2) a Mobility Study (See Appendices A & B respectively). Both of these research documents provided critical information for the formation of appropriate goals and strategies contained in this plan.

PUBLIC INVOLVEMENT STRATEGY

The public involvement and stakeholder process was a meaningful and integral component of this tourism planning effort. A SWOT (strengths, weaknesses, opportunities, and threats) analysis was utilized throughout most of the process to allow for consistency in the feedback. Components of this process included:

TOURISM TASK FORCE

The Lancaster County Board of Commissioners and Lancaster County Planning Commission appointed a Tourism Task Force in August of 2003 to begin addressing the many tourism-related opportunities and challenges that Lancaster County is currently facing and will need to face over the next several decades. The twelve-member Task Force played a central and key role in the planning process. The charge to the Task Force was to create a Strategic Tourism Development Plan that would be adopted as a component of the Lancaster County Comprehensive Plan.

INTERVIEWS

Over fifty one-on-one interviews were conducted with individuals recommended by the Tourism Task Force. A wide range of stakeholders was represented including academics, bed & breakfasts, hoteliers, operators of attractions, restaurateurs, and public officials. Interviewees

were chosen because of their tourism-related experience and insights.

SPECIAL INTEREST GROUP MEETINGS

Group meetings were held with Team Lancaster, Destination Downtown, and several other groups whose primary interest was the City of Lancaster.

Four focus groups were held to solicit ideas and obtain feedback on recommended concepts. The groups ranged from 7 to 12 participants and included bed & breakfast operators, hoteliers, towns and villages representatives, and representatives from funding/financing institutions. A fifth group meeting was conducted with local state legislators to discuss the preliminary concepts being formed as a result of the public input component of the planning process.

SURVEYS

Four public input surveys were conducted to take the pulse of local residents, municipal officials, members of the PA Dutch Convention & Visitors Bureau, and the traveling public.

The Lancaster Sunday News published the *Resident Survey* on March 7, 2004, along with an accompanying story about the Tourism Plan. This survey asked particular questions related to tourism in Lancaster County and engaged the public to respond based upon their local knowledge of what makes Lancaster County a unique tourism destination. The community sent back 189 completed responses.

The *2004 Local Government Survey* was created as an independent survey to track the goals and concerns of Lancaster's 60 municipalities regarding tourism. This survey was mailed to local government officials with a cover letter explaining the long-term planning process. One-third of the municipalities responded.

The *Local Tourism Industry* was surveyed as well, represented by those business owners who belong to the PDCVB. Among the PDCVB membership, nearly 17% of surveys were returned. Among the respondents, nearly 40% ran accommodations, another 20% ran shopping or retail businesses, and another 24% were operators of attractions.

The above-mentioned surveys appear in Appendix C and are discussed further in Public Involvement Findings.

A *Consumer Survey* of the traveling public who are within Lancaster's overnight visitor market was conducted by Frederic John and Associates via telephone. A total of 451 interviews were successfully completed among adults who travel either with families (225) or as adults only (226). A remarkable 43% of the respondents had visited PA Dutch Country within the last three years. The 26-minute interview asked questions about general attitudes concerning destinations, specific attitudes concerning what people want in this kind of destination based on a lengthy list of characteristics, behavior (e.g. where they have been over the past three years, for how long, with whom), preferences based on evaluation of specific places they have been to or have heard about including Lancaster, overall impressions of these places, and the likelihood of visiting these places in next two years. The findings and conclusions of this survey can be found in Appendix D.

PUBLIC INVOLVEMENT FINDINGS

The overall research and public involvement phase of the planning process provided invaluable information and guidance to the Tourism Task Force and consultant team. Findings from the volumes of documents, dozens of meetings, scores of interviews, on-site assessment, and research data were distilled into a listing of major strengths, weakness, threats, and opportunities, often referred to as a SWOT Analysis, for tourism in the area. Two sets of SWOT analyses were compiled, one for the City of Lancaster and one for Lancaster County, and are included in the Supporting Documents section.

The results of the SWOT Analysis were integrated into each of the Strategic Goal Chapters under the Lessons Learned and Critical Issues section.

RESIDENT SURVEY

The resident public agreed that Lancaster County is unique and distinguishable from other travel destinations due to:

- *Amish and Plain Sect Communities*
- *Farm Market/Roadside Stands*
- *Rural Landscape*
- *Historic Buildings/Architecture/History*

Interestingly, nearly one-third of the respondents cited Downtown Lancaster as the best opportunity for tourism development among communities in the County. Central

Market took an overwhelming first place when residents were asked which places or events they would recommend to out-of-town guests visiting Lancaster City for the first time. References were also made to the substantial tourism draw or potential of Lititz, Ephrata, Columbia, and Marietta.

The most popular tourism sites for residents in the County were not necessarily the most popular for non-resident consumers. For example, while the Heritage Center Museum, the Fulton Opera House, and Wheatland are enjoyed by local residents, they are lesser-known to non-resident consumers. Locals recommending places to an out-of-town visitor overwhelmingly support sites such as the Strasburg Rail Road, Landis Valley Museum, Ephrata Cloister, and Wheatland.

Everyone seems concerned about traffic congestion and inadequate roads, both as a current weakness and as a major threat in the future.

Respondents bring friends and family (either residents or out-of-towners) to attractions or special events in Lancaster County an average of four times a year. There is therefore considerable opportunity for word-of-mouth-related visitation and a clear need to keep the local public informed of the product offerings available.

The majority of people agreed the tourist attractions that should be emphasized to keep Lancaster County a competitive destination in the future are:

- *Attractions and events that relate to the County's historic, cultural, and architectural heritage, including museums, historic buildings and rural landscapes, and agricultural attractions*
- *Attractions and events that relate to the County's antiques and local craft offerings, art galleries, and the performing arts*
- *Attractions and events which relate to Lancaster County's natural and outdoor resources, including camping, hiking, canoeing, kayaking, and bird watching*
- *Attractions and events that are located primarily in the County's urban places, like the City, boroughs, towns, and villages*

LOCAL GOVERNMENT SURVEY

One-third of Lancaster's 60 municipalities responded to the Local Government Survey of 2004. The top three tourism-related goals that the survey participants believed would most benefit their municipalities in the future were:

- *Preservation of local culture/heritage*
- *Preservation of natural/protected areas*
- *Increased opportunities for local residents and/or visitors for shopping, eating, visiting attractions*

While no municipal officials responded that tourism was "extremely important" to their municipality, most indicated that tourism was "very important."

Issues and challenges of concern to these municipalities were:

- *Directional/wayfinding signage for visitors*
- *Transportation mobility*
- *Product enhancement*
- *New product development – historic sites and museums, heritage attractions, walking tours, antique and local craft shops, bicycling tours, and art galleries and studios*

As with the local resident public, there is a tremendous opportunity to educate and inform municipal officials about the breadth and depth of product offerings in the County. For example, currently two-thirds of respondents have never visited Lancaster's tourism web site - www.padutchcountry.com.

TOURISM INDUSTRY SURVEY

This survey reveals that business owners who are members of the PDCVB share the same views as the general public about what makes Lancaster County a unique tourism destination:

- *Amish and Plain Sect communities*
- *Rural landscape*
- *Farm markets/roadside stands*
- *Antiques/crafts*
- *Community character/uniqueness*
- *Quiet/peaceful/relaxing*
- *Affordability*

More than 40% of respondents said their business has been doing "well above" or "somewhat above" average in the last four years relative to the overall county industry. Slightly more than 40% said their business was "about the

same." The relative success indicated by these responses pertained to several important factors:

- *Specific marketing by the businesses or sites themselves to augment the PDCVB marketing*
- *Marketing of local relationships and themed tours*
- *Knowledge of and access to existing customers*
- *Ability to attract repeat business through relationship-building*
- *Brand recognition*
- *Optimizing the location of Lancaster County*
- *Good web sites and online marketing*
- *Addition of new programs and exhibits*
- *Enhancement of the product*
- *Good customer service*

The local tourism industry is optimistic about the future. Nearly 25% believe their "business will grow faster than the overall industry." Another 30% believe their business and the industry will grow at about the same rate. Very few think either their business or the industry is likely to decline.

The concerns and issues challenging the Lancaster County tourism industry today echo the thoughts of the local resident public:

- *Over-development (commercial and residential)*
- *Loss of farmland*
- *Loss of authenticity*
- *Traffic*
- *Poor signage*
- *Loss of uniqueness*

Industry-specific concerns are:

- *Having an old, unchanged product*
- *Remaining competitive*
- *Reaching out to new, non-traditional markets*
- *Lack of reinvestment in products*

CONSUMER TELEPHONE SURVEY

The consumer telephone survey results reveal that Pennsylvania Dutch Country meets or exceeds almost all of the most critical demands of both families and adults (traveling without children). By far the most prevalent associations that come to mind when travelers think of PA Dutch Country are historic towns and villages, interesting customs and traditions, and/or Amish culture.

The survey results also revealed that Lancaster has the characteristics that are important to travelers. The destination characteristics with the highest salience and the strongest impact for both families and adult travelers are: a) opportunity to learn about other customs and traditions, b) place where you feel safe, c) scenic beauty, d) overall good value, e) opportunities to eat unique local foods, and f) easy to get around. Leverageable characteristics important to families are amusement parks, rides, and fun activities, and the opportunity to share special experiences with children. A leverageable characteristic for adults is the wide range of shopping opportunities.

When evaluating ideas for new attractions, ice cream factory tours and a museum about the Constitution and Civil Rights generate the most interest, with half of all travelers indicating they would definitely take the tour or visit the museum. The next most popular contemplated attractions were a historic walking tour of the City of Lancaster and upscale dining (the latter was especially important for those who had already visited the destination). Third-tier attractions included a mega indoor water park and a Quest for Freedom tour.

The findings of the considerable research and public involvement processes that were conducted as part of this planning process provided a strong foundation for the Tourism Task Force and consultant team to develop the strategic vision, overall objective, goals, and achievable actions that are outlined in the next chapter.

SUMMARY OF SURVEY RESULTS

Astonishingly, all four surveys resulted in consistent findings regarding Lancaster County and its unique characteristics as a destination. Locals, government officials, industry representatives and consumers all identified Lancaster County's rural landscape, Amish and Plain Sect communities, farm markets, and historic towns and villages as the characteristics that distinguish Lancaster County from everywhere else. They also all agreed that attractions and events that relate to the area's natural, cultural, historic and architectural heritage should be what is promoted and developed in the future. Unmanaged growth and sprawl, loss of authenticity, traffic congestion, and lack of reinvestment in current attractions were also identified in the local surveys as major concerns.

Strategic Vision

VISION

Becoming and remaining a successful tourist destination is a complex undertaking. It requires strong community and government support, quality leadership, continuous marketing efforts, the ability to build upon the region's intrinsic tourism strengths and resources, an understanding of the importance of infrastructure and linkages, and competitive funding.

The vision for Lancaster County is to build upon the area's historic commitment to tourism, enhance existing and develop new sustainable and authentic tourism products that appeal to both current and new market audiences, and create linkages to satisfy tourist needs while enhancing the quality of life for the local residents.

OVERALL OBJECTIVE

The overall objective of long-term tourism planning for Lancaster County is to:

Increase the economic, social and environmental benefits of tourism in Lancaster County.

Strategic Recommendations

The Lancaster County Strategic Tourism Development Plan has been designed to guide and lead Lancaster County towards achieving its strategic vision of becoming a successful and sustainable tourism destination that will benefit all stakeholders.

The following chapters are arranged around the five key Strategic areas which evolved from this planning process: Product Development; Infrastructure and Mobility; Marketing; Outreach and Public Involvement Strategy; and an Organizational and Collaborative Strategy.

Each chapter includes 1) background information related to that chapter's specific Tourism Strategy 2) lessons learned and critical issues that were identified during the public involvement process, 3) strategic goals, and 4) an associated actions. Additionally, for each action, there is an identified time-frame and suggested leadership for implementation.

And finally, each chapter concludes with "measurements for success" for that respective strategy. While the Strategic Tourism Plan's success can only be determined over time, it is important that benchmarks be established as early as possible. These benchmarks or "measurements for success" can be established by a new Lancaster County Tourism Development Corporation to achieve the vision in this plan.

PRODUCT DEVELOPMENT STRATEGY

BUILD ON LANCASTER COUNTY'S STRENGTH AS A TOURISM DESTINATION

Background

Product development and enhancement must be an ongoing and critical component of any successful tourism destination. The Strategic Tourism Development Plan recognizes that there are four ways by which destinations can improve their tourism product:

- **Maintenance** – *this involves efforts to keep attractions fresh, facilities up-to-date, etc. In most cases, Lancaster sites and attractions are being maintained. Those that aren't should be handled on an individual basis.*
- **Enhancement** – *this includes improving the quality of sites, enlarging upon current offerings, renovating existing facilities, and extending programming or hours of operation. Again, many sites and attractions in Lancaster are pursuing this method privately and should be encouraged to continue to do so.*

- **Build on Currently Existing Foundations** – *this method takes the products and strengths of the area and utilizes existing resources to shape new products.*
- **New Blockbuster Product** – *this is the "silver bullet" theory that a destination needs to look for a major new and different product that significantly increases numbers of tourists entering and staying in the area. The blockbuster product is often the most expensive route to take because of the size of investment involved. Gambling and aquariums are examples of this category.*

Based on an analysis of these four approaches, the Strategic Tourism Development Plan recognizes that it is very unlikely that a single blockbuster product could be found to guarantee that Lancaster will attract new audiences while remaining a premier tourism destination for future decades. To identify such a "silver bullet," there would need to be a concurrence of a unique idea, substantial funding, appropriate location, entrepreneurial expertise and commitment, government assistance, and perfect timing. Even when identified, blockbuster products can harm the quality of life for residents, are often not sustainable, and can quickly lose their allure.

Therefore, the overarching product development recommendation for Lancaster County is to build on currently existing foundations. Lancaster's character is distinct and its product is ample and deep enough to provide a solid base for product development of many different kinds. Previous planning documents, studies and the public involvement process conducted for this study all identify the County's heritage resources as the "product" and that they that must be preserved and protected, at all costs, to remain a unique and competitive destination in the future. As a result, Lancaster County should enhance, extend, remodel, create add-on products, and package what is already there so as to achieve a cumulative result. New product development recruitment guidelines should be established to ensure the appropriate types of new attractions and visitor services are encouraged.

With these goals in mind, the Plan proposes that Lancaster City, particularly downtown, the James Street Improvement District and ChurchTowne, has the greatest opportunity to be the new and exciting tourism product for Lancaster County. The City has so many key assets that it can be viewed as a new product whether or not a convention center is built. Since there has been little packaging, partnering, or marketing of attractions in the City heretofore, the City can be presented to the tourist as a new and exciting product.

Other unique characteristics of the County, including its several towns and villages and scenic corridors, should be a focus of product development in the near future because they can also offer a truly authentic Lancaster County heritage experience. The Strategic Tourism Plan also proposes the designation of Tourism Development Areas and Corridors to facilitate this focused effort. Outside of these designated areas, the County's rural landscapes and large pristine natural areas also offer an opportunity to expand agri-tourism and eco-tourism products in a sustainable manner. These culturally and environmentally significant areas will require additional protection measures through the implementation of smart growth tools and techniques, if they are to continue to be sustainable into the future.

And last, but not least, a concerted effort needs to be made to create connections between the City and County products. This symbiotic relationship will increase the likelihood of longer stays and greater economic impact.

Thus, the Strategic Tourism Plan prioritizes the product development recommendations to create the most substantial economic impact possible, ensure sustainability, be true to the spirit of Lancaster County, enhance the quality of life for residents, and live up to the standards of quality expected by tourists. This, of course, will require the region to take a more active role in new tourism product development.

Lessons Learned & Critical Issues

- *The Amish provide Lancaster with a distinctive product offering*
- *Lancaster County's rural country setting is an important selling point and must be preserved*
- *The authenticity of Lancaster's attractions is important to visitors*
- *Lancaster County has a large volume and variety of attractions*
- *Lancaster's heritage and cultural offerings need to be developed further*
- *Lancaster County has opportunities in terms of thematic tours, product, and marketing*
- *There is a limited number of attractions for multicultural audiences, and few nighttime activities for any kind of tourist*
- *Lancaster County's tourism activities do not satisfy all demographic groups*

- *Considering the volume of attractions, there is very little collaboration*
- *Substantial portions of attractions need enhancement and reinvestment to be sustainable*
- *The City of Lancaster has opportunities for product expansion*

Strategic Goals

GOAL 1:

PROTECT, PRESERVE, AND ENHANCE LANCASTER COUNTY'S AUTHENTIC NATURAL, CULTURAL, HISTORIC, AND ARCHITECTURAL HERITAGE ASSETS AND DISTINCTIVE "SENSE OF PLACE" AS THE FOUNDATION FOR FUTURE SUSTAINABLE TOURISM DEVELOPMENT AND PROMOTION

Lancaster is blessed with tremendous natural and man-made resources to develop, enhance and promote eco-tourism and heritage tourism. Enhancements that are made to existing product (whether infrastructure or attractions) must take advantage of the enormous pride Lancaster County has in its "sense of place." Tourists are drawn to the real and the authentic, so that creating new products that reflect the County's unique natural, cultural, historic, architectural and cultural heritage will be appealing. These new products also need to reach new markets and reflect the cultural diversity of Lancaster County's resident base. To achieve this goal, sustainable tourism practices and development that enhances the cultural and environmental quality of the County must be established. New product development recruitment guidelines also need to be prepared to provide guidance for the types of attractions and visitor services that would be appropriate and encouraged in the County. To make certain that new product development actually moves from concept to reality, personnel and technical resources must be engaged to ensure that appropriate mechanisms are in place to "close the sale" on new attractions and visitor services.

New product in this regard can take the form of thematic and geographic-based visitor packages, and thematic automobile, bicycling and walking tours. The enhancement and expansion of the Lancaster County Heritage Program is another way to increase "authentic" heritage products in the County. Additionally, support should be given to enhance existing and create new hallmark special events, such as the existing "Quilters Heritage Celebration."

Two areas that would have substantial visitor appeal and an opportunity for success could be centered on Lancaster's craftsmanship and food.

Develop a Master Crafts Tour

The development of a Master Crafts tour could add a significant new product offering for Lancaster County. Local residents are known to be good with their hands. Homespun articles and handmade goods abound throughout the County. There are already several sites making use of a "Made in Lancaster, PA" concept, some of which are not "tourist" sites per se, such as furniture stores. Indeed, Turkey Hill's market research has indicated a high brand equity in a "Made in Lancaster" position.

A package of Master Crafts could easily be created from existing resources to link stores, sites, and individuals so the tourist could enjoy demonstrations by master craftsmen, learn about the joy of creating from scratch, and buy locally-made goods for themselves and as gifts. LCPC might take the lead here, at least initially, to develop criteria and guidelines that pertain to the authenticity of the area.

PDCVB would then create an itinerary that would be self-guided to allow the tourist to begin and end the tour at any point and choose how many points of interest to visit.

In order to create a sense of urgency that would compel the tourist to book a visit to Lancaster at a particular time and not postpone the trip, a week-long "Made in Lancaster Celebration" could be marketed. This would not require investment dollars nor any retrofitting or renovation of existing product. It would require organization and collaboration, however. Furniture stores, for example, would have to agree to pay for an ad and listing in a Master Crafts brochure (both printed and online) to help underwrite the marketing costs. For the special event portion of the celebration, stores would offer a special Made in Lancaster Celebration discount of 10%, free shipping within 200 miles, or some other incentive simply to underscore the special, be-here-then notion.

Create a "Made in Lancaster County" Food Route and Food Celebration

Another new product that could be "developed" includes the creation of a "Made in Lancaster County Food Route" and Lancaster Food Celebration. Throughout local and consumer research data, common refrains were pride in local food and interest in eating local foods. Not only is food appealing to both the local resident and the tourist, but it also abounds in Lancaster and is a fitting

exemplification of Lancaster's heritage. It is both authentic and unique. A focus on food is a good way to move tourists around the County. It has been packaged as a wonderful heritage product called Growing Traditions through the Lancaster-York Heritage Region Program, but this emphasizes markets, dairies, stands, and orchards. The Made in Lancaster County Food Route can expand the notion of Lancaster Food to make it attractive to a wide variety of audiences by including restaurants, ice cream factory tours, and specialty stores that carry distinctive food items such as Miesse Chocolates, which tie the City to the wider County product.

As with the Master Crafts itinerary, the Made in Lancaster County Food Route is simply a cohesive map with good descriptions of ALL the opportunities in the County to sample Made in Lancaster County Food. Again LCPC would set forth the criteria and guidelines; PDCVB would develop an itinerary that would be appealing to visitors.

A Lancaster County Food Celebration could be developed to create a sense of urgency in the tourist. Yet again, this idea would not require additional investment dollars or renovation of existing sites. Sample activities might include several restaurants competing for the best shoofly or rhubarb pie in a two-week period, with consumers using a common form to vote for their favorite and the winner posted on the PDCVB website; signage in stores and restaurants explaining that particular foods have been made with the latest pickings from Lancaster County and even providing a date picked (mostly in the summer months); and listings in PDCVB materials of special recipes in which Lancastrians take pride and want others to taste (similar to clam chowder in New England).

Enhance and Expand the Lancaster County Heritage Program

Currently, the Lancaster County Planning Commission is in the process of enhancing and expanding its nationally recognized Heritage Program. Currently the program designates authentic heritage resources including historic sites, services and events. The program should be expanded to include the designation of entire communities, landscapes, routes, and products. The expansion and maintenance of this program is vital to the County's integrity and attractiveness as a heritage destination.

GOAL 2:

FOCUS RESOURCES ON PRIORITIZED AREAS AND CORRIDORS THAT HAVE THE GREATEST POTENTIAL FOR TOURISM DEVELOPMENT

The Strategic Tourism Development Plan proposes the designation of Tourism Development Areas and Corridors, the purpose of which is to assist the public, private and non profit sectors in directing resources (both financial and technical) to create a countywide network of focused attractions and services. By clustering and concentrating attractions and services in specific areas, visitors will also become aware of these places and choose to go there.

The Plan proposes that a hierarchy of Tourism Development Areas and Corridors be established to differentiate the levels of visitor readiness, local support and thus priority. Two major categories are proposed: 1) Urban Tourism Development Areas and Corridors, and 2) Rural Resource Based Areas.

Urban Tourism Development Areas/Corridors are those that are within County-designated Urban or Village Growth Areas and are recognized as having a critical mass of attractions and services necessary for tourism development, or have the potential to become designated as Tourism Development Areas in the future with the appropriate level of support and financial resources. Many of the County's towns and villages, for example, fall into this category and could be established as "new" and authentic heritage products.

Urban Tourism Development Areas/Corridors (TDA/C's) are further broken down into Primary, Secondary and Tertiary Areas. Primary TDA/C's have existing and recognized attractions, services and infrastructure and are further defined as Tier 1 and Tier 2. Tier 1 areas need only continued enhancement of attractions and services to remain competitive, such as Lititz, Strasburg area (east of the Borough), and the Route 340 corridor (Bird-in-Hand, Smoketown and Intercourse). Tier 2 areas, on the other hand, require significant enhancement, reinvestment and upgrading in order to remain competitive. These include the Route 30 East and the Route 272 North corridors.

Secondary Urban TDA/C's exhibit significant potential for tourism development in the near future, that is, one to five years. Examples of secondary areas include, but are not limited to, the City of Lancaster, and the boroughs of Marietta, Columbia, Strasburg, and Ephrata.

Areas/Corridors defined as Tertiary, in the Plan, do not currently exhibit strength in attractions, visitor services or infrastructure but have longer term potential for tourism development provided the appropriate local public and private support is harnessed.

The second type of Tourism Development Area proposed in the Plan is *Rural Resource Based Tourism Areas*. These areas include large rural and natural landscapes, generally outside of established Urban Growth Areas, identified in the Lancaster County Comprehensive Plan. Preservation of the natural, cultural and historic resources of these areas is paramount. The towns and villages within these designated landscapes could serve as gateways for interpretation and provide limited visitors services and facilities. The types of attractions and services most appropriate for these sensitive landscapes include agri- and eco-tourism based opportunities including but not limited to B&B's, country inns, farm stays, farm markets and roadside stands, wineries, outfitter services, campgrounds, scenic roads and bicycle routes.

The Rural Resource Based Areas defined in this Plan have also been designated as either Tier 1 or Tier 2 areas. Tier 1 areas are those that are generally recognized currently or are in the process of creating sustainable tourism development, such as the Susquehanna River Valley. Tier 2 areas are those that have the potential for rural resource-based tourism opportunities and include Northwestern Lancaster County Agricultural Landscape and Southern Lancaster County Agricultural Landscape. The rural towns and villages within these landscapes, such as Landis Valley, ChurchTowne and Maytown, could serve as gateways for interpretation and provide limited tourism facilities and services.

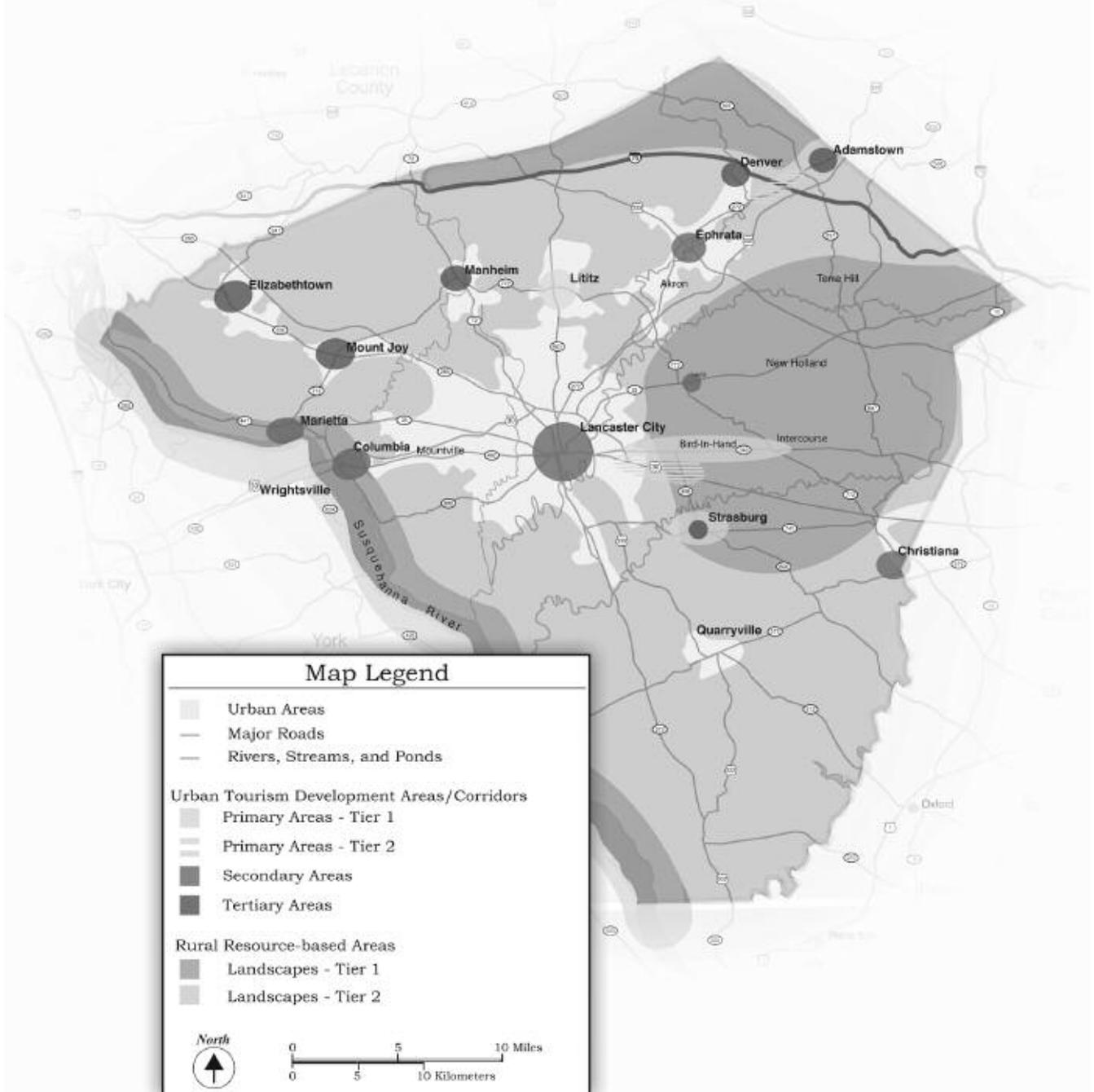
In all of the defined Urban Tourism Development Areas/Corridors and Rural Resource Based Tourism Areas, a variety of tools and incentives should be made available to improve and enhance the quality of life in these places. For example, design guidelines, historic preservation programs, tax incentives for commercial and residential property owners for façade improvements, preservation zoning, and sign controls would go very far in reaching the dual goals of creating great places to live *and* great places to visit. Brief and focused strategic plans for each existing and proposed Tourism Development Area/Corridor should be prepared. These plans should address all aspects of tourism planning and development and can serve as a "prospectus" for potential developers and individual entrepreneurs.

In addition, the concept of creating a network of Tourism Development Areas also requires that transportation linkages be established to connect the various designated areas together into a seamless system of scenic byways, shuttle routes, and non-motorized pathways which would represent a cohesive, enjoyable way of touring the entire region. These linkages could be further enhanced by

coordinating with the Lancaster/York wayfinding program already under way.

For a complete listing of designated areas, as well as the criteria for designation and an enlarged color version of this map, please see Appendix E.

Lancaster County Proposed Tourism Development Areas/Corridors



GOAL 3:

ESTABLISH THE CITY OF LANCASTER AS A NEW AND EXCITING TOURISM PRODUCT FOR THE COUNTY

The City of Lancaster has the best opportunity to become the new product for the Lancaster area. It has several advantages. It is an already existing product that is geographically compact, well-served by roads, and optimally located within the County's tourist domains. An inventory of the City's attractions reveals numerous historic sites, architectural marvels, museums, restaurants, galleries and specialty shops. The City exemplifies the wealth and depth of Lancaster's heritage offering, especially in the large volume of sites listed on the National Register of Historic Places. This heritage is attractive to travelers. With a commitment to product enhancement and new product development, the City of Lancaster can build on its strengths to become a very attractive and competitive destination, a place not just to visit but a dynamic and interesting place where people live. For this to occur, the City must take ownership of its product. Public officials must implement an aggressive tourism product recruitment program based on solid planning, which would be augmented by private initiative.

In addition, the City as a new tourist product has begun to be marketed, albeit in limited fashion, as part of the Towns & Villages product. Because marketing and packaging of the City is still in its infancy, the City can be presented to the tourist as a new and exciting destination.

To establish Lancaster City as the new product, the City must:

Create Connections with the County Product by Providing Complementary but Different Experiences

Schematically, the connections between the City and County's product offering can be presented as follows:

<u>County</u>	<u>City</u>
Outlets	Boutiques and galleries
Faith-based	ChurchTowne, Houses of Worship
Amish	Central Market and Quilt Museum
Heritage	Heritage
Theatre	Arts & culture
Family-based entertainment	Evening entertainment
High tourist season	Special events

While the County has shopping outlets with franchises, chain stores and brand names, the City can provide a complementary but different experience by focusing on specialty shopping such as boutiques, unique items, handmade goods, and local input.

In the same way, the faith-based experience of the County can be combined with ChurchTowne and Houses of Worship within the City. Several historic churches are already being marketed, but a greater connection must be made with attractions in the County so the tourist feels he/she can't see one without the other.

In all surveys, the County's main tourism asset is the Amish culture, and the agricultural landscape. The embodiment of that culture in a single building is the Central Market. It is already a major connector of the City with the County, but purely from a tourism point of view, currently its impact is limited by its three-day-a-week schedule.

Packaging the heritage product will connect the City and the County. Heritage encompasses historical, arts, and cultural attractions. The County and City are rich in both. The City holds potential for tourists interested in the Underground Railroad with Bethel Harambee Historical Services "Living the Experience," with the Thaddeus Stevens/Lydia Hamilton Smith project, and with Rock Ford Plantation. Wheatland can be used as a threshold between the City and County. Indeed, interpretation of history can be a link connecting the City, the County and other areas in the region, such as Gettysburg and York.

"Live performance" attractions in the County should be connected to the "lively arts" in the City. Packages can link both areas using, for example, American Music Theatre, Amish Experience Theatre, Dutch Apple Dinner Theatre, The Rainbow Dinner Theatre, Sight & Sound Theatres, the Pennsylvania Academy of Music, and the Fulton Opera House.

The County hosts large volumes of tourists in the summer (predominantly families), spring, and fall months (predominantly adult travelers). The City should create a symbiosis with these audiences by organizing special authentic City events that would attract County visitors who might extend their stay in order to attend an event in the City. Another excellent model for this linking the City and County together is the *Witness* package that will be available in 2005.

There are three existing art-related events that occur just before the majority of summer tourists arrive. If they could

be pushed to later in the calendar and packaged through a PDCVB marketing effort, those events would become accessible to the tourist. If Hometown Day could be held before New York schools start their academic year, it would be accessible to tourists. Most importantly, the events must be authentic to the nature, history, and personality of the City of Lancaster.

Support New Product Development that Focuses on the Arts, Culture and Heritage of the City and Coordinate Thematically

Lancaster City has one of the largest, if not the largest, nationally designated Historic Districts in the United States. The architectural and historic resources that can be found, not only in the downtown area, but also throughout its diverse neighborhoods, provide the City with its distinctive “sense of place.” New product development, in Lancaster City, must reflect, enhance and build upon these unique characteristics.

In addition, the City now has a huge opportunity, to focus on the arts, as a complementary new product and as a catalyst for downtown revitalization and tourism development. The May 2004 Plan, *City Stages - A Design Plan for Lancaster Arts*, initiated by Destination Downtown, proposes many recommendations that provide a first step in what will be a long-term, multifaceted approach for using the arts as a means for strengthening downtown Lancaster. These recommendations should be strongly supported because they not only add a new dimension to Lancaster’s “sense of place,” but they also encourage opportunities for catalyzing collaborative projects and encouraging collective thinking among the City’s arts groups and businesses.

Other efforts currently being discussed and/or planned for that should be supported include the development of multi-cultural products such as the Thaddeus Stevens/Lydia Hamilton Smith National Historic Site and ChurchTowne African American Museum. The concept of creating a Folk Life Center that would tie together existing visual arts, performing arts and craft venues, along with new ones such as the Shear America! Collection also has great potential. All of the City’s attractions and tourism products should explore the concept of joint-ticketing which has worked very successfully in many other destinations.

Another project that will benefit both residents and visitors in downtown Lancaster is the revitalization of Lancaster Square. The project envisions three major elements:

1) removal of the concrete superstructure, 2) incorporation of the Stoner Carousel, and 3) the establishment of Binns Park. Work is now under way on the park, which will be designed as a large outdoor community gathering place and desirable location for holding events with a wide variety of requirements and sizes.

The City also has the opportunity to develop an architectural lighting program that would highlight the outstanding features of its dozens of historic buildings and structures. Such a program would, in itself, become a new evening tourism product and provide opportunities for walking tours and events.

There is a particular opportunity to create themed and neighborhood tours to work in collaboration with receptive operators. The new Lancaster City Tours and the City Stories initiative being developed by Franklin and Marshall College are excellent models for this type of tourism product development. Consumers indicated a great willingness to participate in a historical walking tour of the City. These tours, however, will need to be up to the highest standards expected by heritage and geo-tourists. Historically accurate and lively scripts must be available to interpreters who must either be trained (if not professional performers) or rehearsed (if professional performers).

Lancaster City also has a tremendous opportunity to create hallmark seasonal events and festivals that could directly relate and exemplify its unique and distinctive arts, culture and heritage.

Concentrate New Product Development Initially on Central Market and Surrounding Area

In all of the surveys, respondents identified the Amish and agricultural landscape as the main assets of Lancaster County. Central Market offers a tremendous opportunity to experience this unique culture, up close, and also understand the strong farm-to-market connection with the County. Central Market, however, is facing many challenges, including management, merchandising, and physical maintenance. A recently completed study addressed these concerns and should be consulted in achieving the goal.

Due to the significance and iconic recognition that Central Market holds with Lancaster’s residents, it is recommended that new product development be complementary and begin initially within the immediate area. Later phases of product development can be carried out in ever-widening concentric circles around this core area.

If A Convention Center is Constructed, New Products That Support and Enhance the Center Should Be Created

If a Lancaster County Convention Center is constructed in downtown Lancaster in the near future, it will be critical that consideration be given to addressing the needs of conventioners for entertainment, shopping, and sightseeing within walking distance or a short trolley or taxi ride from the Convention Center. Clearly these activities need a nighttime focus, as it is assumed that the majority of conventioners will be in meetings and sessions during the day.

Explore Options for Creating a State-of-the-Art “Lancaster Experience” Interpretive Center in Downtown Lancaster

The development of an interactive “Lancaster Experience” Interpretive Center, centrally located within the downtown area, should be explored. The Center should be an attraction unto itself and include state-of-the-art interpretive venues that enhance the visitor’s and resident’s experience and that tell the “Lancaster Story.” The Center should be of outstanding quality and serve as an orientation focal point and gateway that encourages visitors to explore the City and its surrounding countryside.

Efforts should be made to locate such a center in close proximity to other complimentary and supportive facilities or attractions such as the Stoner Carousel or the proposed Folk Life Center, both of which are identified in this Plan. It would also be logical for the Center to provide other destination and informational services to visitors and local residents within the same location.

Concentrate on Evening Entertainment of all Kinds

The City can differentiate itself from other tourism areas in the County by providing evening entertainment. The downtown area can benefit from additional restaurants, nightclubs, and bars. Evening entertainment should not be aimed solely at the adult audience, but rather should include family-based attractions and venues for young adults. Additionally, existing attractions should be encouraged to provide evening entertainment venues. The Pennsylvania College of Art and Design and the Pennsylvania Academy of Music could offer more evening events to complement the Fulton Opera House. Galleries, bookstores, and coffeehouses will all benefit from nighttime clientele.

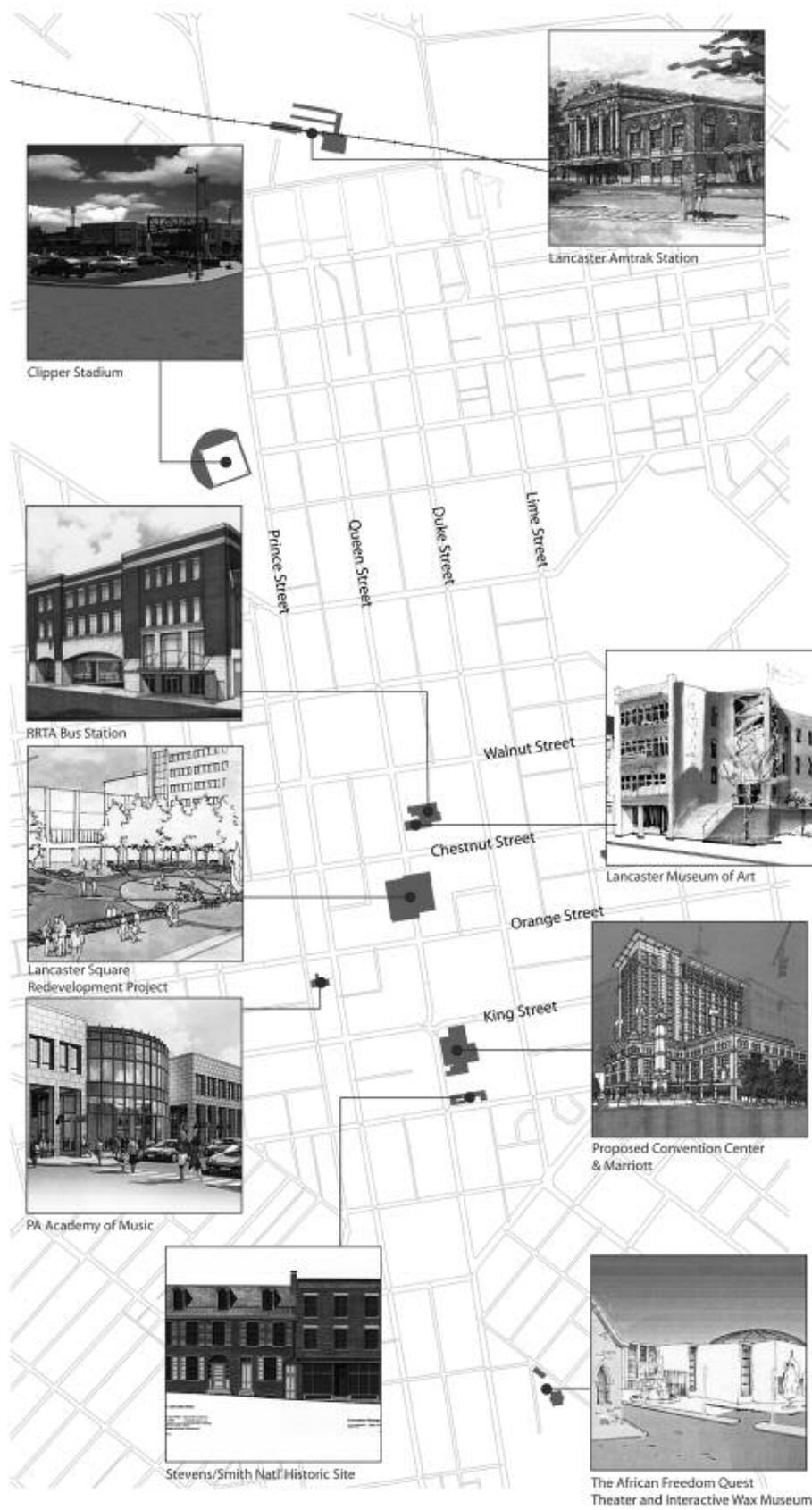
Serve the Needs of Young Adults

The City has institutions of higher learning both within the downtown area and in the immediate environs. Nowhere in the City, nor indeed in the County, is their need for leisure activity being adequately met. Additional attractions need to be geared toward the young adult audience, which consists of active students, alumni, and non-matriculated young adults in the area, groups that have considerable disposable income. For the first two categories, liaison with the local colleges will be important to product development.

Connect Multi-Purpose Stadium with Downtown

There is a tremendous amount of excitement and energy focused around the construction and opening of the new multi-purpose Clipper Magazine Stadium in the northwestern part of the City. As a result, significant new investment is occurring with the development of new dining, lodging, and entertainment venues. Every effort should be made to facilitate the connection between the stadium area and the downtown.

Tourism-Related Projects Under Way or Proposed in Lancaster City, PA



PRODUCT DEVELOPMENT STRATEGY

BUILD ON LANCASTER COUNTY'S STRENGTH AS A TOURISM DESTINATION

STRATEGIC GOALS

GOAL 1: TO PROTECT, PRESERVE, AND ENHANCE LANCASTER COUNTY'S AUTHENTIC NATURAL, CULTURAL, HISTORIC, AND ARCHITECTURAL HERITAGE ASSETS AND DISTINCTIVE "SENSE OF PLACE" AS THE FOUNDATION FOR FUTURE SUSTAINABLE TOURISM DEVELOPMENT AND PROMOTION

ACTIONS	TIME FRAME	SUGGESTED LEADERSHIP
Create new products and services that directly relate to the County's unique natural, cultural, historic and architectural heritage and sense of place	Mid-Term	LCTDC/LCPC
Create new product that reaches new markets and that reflects the cultural diversity of Lancaster County's resident base	Mid-Term	LCTDC/LCPC
Establish and create sustainable tourism practices and development that enhance the cultural and environmental quality of Lancaster County	Mid-Term	LCTDC/LCPC
Establish new product development recruitment guidelines	Short-Term	LCTDC/LCPC/PDCVB
Engage personnel and technical resources to ensure the appropriate mechanisms are in place to "close the sale."	Short-Term	LCTDC
Support and enhance existing and create new hallmark special events	Short-Term	PDCVB
Create new and exciting thematic automobile, bicycling, and walking tours	Short-Term	PDCVB/LCPC
Develop a Master Crafts Tour	Mid- and Short-Term	PDCVB/LCPC
Develop a "Made in Lancaster" Food Route and an authentic Lancaster Food Celebration	Mid- and Short-Term	PDCVB/LCPC
Enhance and expand the Lancaster County Heritage Program	Mid-Term	LCPC

GOAL 2: FOCUS RESOURCES ON PRIORITIZED AREAS AND CORRIDORS THAT HAVE THE GREATEST POTENTIAL FOR TOURISM DEVELOPMENT

ACTIONS	TIME FRAME	SUGGESTED LEADERSHIP
Working in partnership with local municipalities, develop a system of Tourism Development Areas/Corridors, within the County's designated Urban and Village Growth Areas	Short-Term	LCPC
<ul style="list-style-type: none"> Prepare brief focused strategic plans for each existing and proposed Tourism Destination Area/Corridor 	Long-Term	LCPC
<ul style="list-style-type: none"> Establish appropriate Towns and Villages as new and "authentic" heritage products Provide assistance to communities interested in developing, preserving and presenting their heritage assets (design guidelines, Main Street Program, etc.) 	Long-Term	LCPC
Reinvest in existing recognized Tourism Development Areas within Lancaster County	Long-Term	LCTDC/LCPC
Create and/or modify zoning ordinances and other regulatory and non-regulatory tools to facilitate appropriate tourism development in designated Tourism Development Areas/Corridors and Rural Conservation Areas	Long-Term	LCPC/Municipalities
Create incentive programs for individual businesses and homeowners to restore their historic properties in Designated Tourism Development Areas and Corridors	Mid-Term	Municipalities/Orgs/Agencies
Enhance agri-tourism and eco-tourism opportunities in appropriate Rural/Conservation Areas	Mid-Term	LCTDC/LCPC

LCTDC = Lancaster County Tourism Development Corporation, LCPC = Lancaster County Planning Commission, PDCVB = Pennsylvania Dutch Convention & Visitors Bureau, RRTA = Red Rose Transit Authority, T&V Partners = Towns & Villages Partners

PRODUCT DEVELOPMENT STRATEGY (continued)

BUILD ON LANCASTER COUNTY'S STRENGTH AS A TOURISM DESTINATION

STRATEGIC GOALS

GOAL 3: ESTABLISH THE CITY OF LANCASTER AS A NEW AND EXCITING TOURISM PRODUCT FOR THE COUNTY

ACTIONS	TIME FRAME	SUGGESTED LEADERSHIP
Create connections between the County and City Products by providing complementary but different experiences	Short-Term	LCTDC/PDCVB/LCPC
Support new product development and partnerships that focus on the arts, culture, and heritage of Lancaster City		
<ul style="list-style-type: none"> • Support and implement priority actions of the LancasterArts Initiative • Support the development of multi-cultural product including the Thaddeus Stevens/Lydia Smith National Historic Site and the ChurchTowne African American Museum and Theater • Explore the concept of creating a Folk Life Center that would tie together existing visual arts, performing arts and craft venues, along with the creation of new ones such as the Shear America! Collection • Encourage the development of additional entertaining and historically authentic walking tours • Build on the City Stories concept currently being developed with Franklin and Marshall College • Create hallmark seasonal events and festivals tied to tourism visitation that relate to Lancaster City's arts, culture, and heritage • Develop joint ticketing of attractions • Develop an architectural lighting program as a new evening heritage tourism product 	<p>Short-Term</p> <p>Mid-Term</p> <p>Long-Term</p> <p>Short-Term</p> <p>Mid-Term</p> <p>Mid-Term</p> <p>Short-Term</p>	<p>LCTDC/City organizations</p>
Concentrate new Downtown product development initially on Central Market and surrounding area	Mid-Term	LCTDC/City organizations
If a Convention Center is constructed, new products that support and enhance the Center should be created	Mid-Term	PDCVB
Explore options for creating a state-of-the-art "Lancaster Experience" Interpretive Center in Downtown Lancaster	Mid-Term	LCTDC/City organizations
Concentrate on developing a diversity of new evening entertainment opportunities and extend current attractions/services to include evening hours	Long-Term	LCTDC/City organizations
Create opportunities for young adults by coordinating with and getting feedback from local institutes of higher education	Mid-Term	LCTDC/City organizations
Connect multi-purpose stadium and nearby lodging, dining, and entertainment facilities and services in the northwestern part of the City with downtown	Mid-Term	LCTDC/City organizations

Measures of Success:

Increased number of collaborative partnerships per year involving attractions, towns/villages, non profit organizations, networks, etc.

Increased number of new sustainable tourism product projects per year in Lancaster City as result of assistance or data supplied by the Lancaster County Tourism Development Corporation.

LCTDC = Lancaster County Tourism Development Corporation, LCPC = Lancaster County Planning Commission, PDCVB = Pennsylvania Dutch Convention & Visitors Bureau, RRTA = Red Rose Transit Authority, T&V Partners = Towns & Villages Partners

INFRASTRUCTURE/MOBILITY STRATEGY:

MAKE IT EASY FOR THE VISITOR

Background

Planning for quality visitor infrastructure is critical to the success of any tourism destination. One of the major infrastructure needs of a destination is the provision of a wide variety of intermodal transportation facilities and opportunities to improve mobility. This will require reducing vehicular congestion, providing more transportation choices, better integrating these options, and providing better and more detailed information on the travel choices that are available within the destination.

Improving and enhancing other visitor services, such as visitor information, parking facilities, a diversity of accommodations, and wayfinding programs, is also needed in order to increase the quality of the visitor experience. Because there are limited public resources with which to do all this, the tourism industry must work with government to share this responsibility.

Lessons Learned & Critical Issues

- *Lancaster is easily accessible from major markets although it is difficult for visitors to navigate throughout the County once they have arrived*
- *Public transit does not well serve the needs of visitors*
- *Developing a complete, coordinated, countywide tourist transportation system is not feasible at this time*
- *The City is improving transportation for tourists*
- *The current wayfinding system is inadequate*
- *Traffic congestion is a growing problem*

Strategic Goals

GOAL 1:

ENHANCE VISITOR MOBILITY AND ACCESS THROUGH TRANSPORTATION IMPROVEMENTS

Lancaster County attracts so many people – visitors, residents and employees – that the long-term sustainability of its unique amenities and environments is cause for concern. In fact, Lancaster County is one of the fastest-growing areas within Pennsylvania and has experienced double-digit growth in each of the last two decades. Increases in population have led to increasing automobile and truck traffic, which is threatening the quality of life of the County and therefore tourism.

Therefore, Lancaster County is justified in taking greater measures to limit traffic congestion and encourage alternative travel options than otherwise comparable communities.

Unfortunately, at the present time, there are very few options for travel within the County other than by automobile. Attractions dispersed throughout the County make it nearly impossible to create a countywide mass transit system economically or logistically feasible. Existing bus routes are not conducive to visitor travel either, since they emanate from downtown and don't provide convenient travel between recognized tourism domains.

Create Attractive and Efficient Transportation Linkages between Proposed Tourism Development Areas

To begin addressing these concerns, the Strategic Tourism Development Plan is proposing the creation of a system of designated Tourism Development Areas. Focus should be given to developing transportation links between these areas to create a seamless system of scenic byways, shuttle routes and non-motorized pathways which would provide a cohesive, affordable and enjoyable way of touring the entire region. Access and corridor management plans should be developed for these linkage corridors to reduce traffic congestion and increase mobility.

Initially, during the peak tourist season, a shuttle and loop service could be developed for eastern Lancaster County attractions, thereby linking Strasburg, Paradise, Intercourse, Bird-in-Hand, and the outlets along US 30. This should be at nominal cost to the tourist, or better yet, a free ride. Alternatively, or indeed additionally, weekend or weeklong passes that permit unlimited riding on RRTA buses could be successful. However, any shuttle service or bus pass would have to be offered as part of a visitor package with accommodations and promoted heavily.

Create and Enhance Transportation Linkages in Lancaster City

If Lancaster City is to be developed as the next new tourism product for Lancaster County, considerable attention will be required to improve transportation linkages between the County and City domains and within the City itself. This could begin by developing a shuttle system that would link large volume tourist areas such as Routes 340 and 30 with downtown.

Within the City, other transportation improvements are being made that have importance to tourism. Amtrak is currently undergoing significant renovations to the Lancaster Train Station which will improve roadway access with a direct

connection to Duke Street, separate bus and automotive traffic, establish a Red Rose Transit Station, create a separate waiting area for interstate bus passengers, and develop a possible themed restaurant and retail space. In addition, the new site for the baseball stadium will be only a three-block walk from the station. Local buses, trolleys and taxis must be available to station users, easily recognizable, and operated in a professional manner.

The Red Rose Transit Authority has also developed a new shuttle trolley system, primarily aimed at commuters, that should be enhanced to cater to visitors during peak seasons. Whether or not a Convention Center is opened, considerable effort needs to be made to ensure that there is sufficient parking for both visitors and the downtown workforce. A detailed parking study to accomplish this goal should be initiated. Additionally, the possibility of re-establishing an “authentic” steel rail trolley as a functional and experiential transportation alternative between the Lancaster Train Station and a possible Convention Center should be explored.

Lancaster City should also work with the PDCVB to develop tour bus facilities in appropriate and strategic places in the downtown to improve the visitor’s experience and reduce negative impacts.

Encourage Non-Fixed Route Services

The private sector can also actively engage in improving transit services for tourists as well. Apparently, some private vehicle transport service is already available through selected attractions in the County where visitors can request transportation to a particular destination on an ad hoc basis. There may be a larger market for small group transportation around the County via small buses or vans. Such services could be offered through travel agencies and/or the hotels in the areas and coordinated with private businesses that have ample parking facilities. Tailored non-fixed route tours could additionally provide access to more remote destinations in the County, such as the River Towns, thereby extending the Lancaster product and encouraging tourists to move around the County.

Improve Conditions for Non-Motorized Travel

Conditions for non-motorized travel could be improved throughout the County. One option is a “share the road” approach that provides for wider shoulders. This should be a priority for designated Heritage Bicycle and Walking Tour routes. Another option is through separate facilities such as rails-to-trails projects, as well as pedestrian and

bicycle facilities in downtown Lancaster, village centers, and designated Tourism Development Areas. Non-motorized travel safety and comfort is a crucial concern for both residents and tourists and particularly as it relates to Amish buggies.

Expand Parking Facilities

To reduce congestion during the main tourist season (July-October), a number of Park-and-Ride lots should be constructed around the County in appropriate towns and villages and other proposed Tourism Development Areas. If the County provides transportation, it will be able to attract more and different kinds of tourists and create further opportunities. The lots could support both the proposed Shuttle Service and the non-fixed route services offered by businesses. Visitor facilities are needed at these lots, including passenger shelters, information kiosks, restrooms, benches, and lighting.

Subscribing to the idea that many tourists will use alternative modes of transportation if they are convenient, enjoyable, and affordable, these park-and-rides could be authentically themed. The building architecture could incorporate barn, train station, covered bridge, or other local contexts. Fun sculpture could reinforce this concept. Cows you can climb on, giant ears of corn, or Conestoga wagons could help to create a family-friendly setting that would be frequently used by visitors. These facilities would then be an asset to the towns and villages in which they would be located.

Not all towns and villages would have park-and-ride lots, however. In those villages that do not, additional parking might be needed to sustain growth in tourism.

Support Improvements to Rail Facilities and Service in Lancaster County

Nearly one-quarter of a million people pass through Amtrak train stations in Lancaster County. It is crucial, especially with the multi-purpose stadium and a possible Convention Center coming online, that the train service and passenger services be upgraded and modernized. Infrastructure rehabilitation, particularly for rail and tie replacement, is taking place between Lancaster and Harrisburg. Most importantly, four stations serving established or upcoming Tourist Development Areas are being renovated or built: Lancaster, Elizabethtown, Mount Joy and the new station at Paradise. The Amtrak station in Middletown is being moved to the new Harrisburg International Airport terminal and will also be a key stop on

the Corridor One line, which will provide new transportation choices to travelers in the County.

Publish a Facilities and Services Guide for Bus Drivers

Since motorcoach travel is still an important component of the tourism industry in Lancaster County, every effort should be made to help facilitate and enhance this transportation option. A Facilities and Services Guide for bus drivers can be developed that details businesses supportive of motorcoaches and identifies facilities for sanitary disposal, washing, and routine and emergency vehicle maintenance.

GOAL 2:

INCREASE THE QUALITY OF THE VISITOR EXPERIENCE

There are a variety of ways in which a tourism destination can improve the visitor experience. The following recommendations assist in achieving that goal.

Support the Development of Wayfinding Systems

Creating wayfinding programs, for both automobiles and pedestrians, facilitates the ease of movement around the County. Lancaster City already has an existing and successful vehicular wayfinding program and is now in the process of developing a pedestrian system. Priority should also be given to developing these programs within other designated Tourism Development Areas and Corridors. Lancaster and York counties are already preparing a regional wayfinding plan that will lay the foundation for such a program.

Create a County Scenic Byways Program

Another way to enhance the visitor experience would be through the creation of a system of scenic byways. Such a program would not only facilitate an enjoyable means for travel for visitors around the County, but also would stimulate the preservation of important natural, cultural and scenic resources important to residents as well. Roads like PA Routes 340, 772 and 441 all offer great opportunities for such designation and are already recognized in many commercial tourism guides as especially scenic. Other corridors, such as the Strasburg Rail Road, could be considered for designation and heritage corridors.

In addition, the Lincoln Highway - a 3,300 mile long historic roadway - is now under study by the National Park Service for some level of recognition and protection. The highway passes through Lancaster County; the section west of Adams County, to the Pennsylvania/Ohio boundary, is

designated as a State Heritage Corridor. Strong consideration should be given to expanding this designation through York and Lancaster counties as a means for increasing the impact on tourism within the region.

Utilize Context-Sensitive Design in Planning New Transportation Facilities

Transportation facilities and roadways should be designed to enhance the natural, cultural and historic features of Lancaster County and contribute to its “sense of place” rather than detract from it. Priority should be given to facilities within and between existing and proposed Tourism Development Areas and Corridors, along scenic byways, and in other appropriate areas in the Rural/Conservation Areas designated in the Tourism Plan.

Improve Transit-Related Information/Create a Car-Free Travel Guide

To improve travel efficiency within the County, linkages between different transportation modes must be improved and more convenient access information about these modal connections must be made available. Intermodal joint ticketing programs should be created to allow a visitor to connect with various modes of transportation (train, bus, taxi) easily and affordably. The PDCVB and Red Rose Transit Authority should also include transit-friendly information on their websites. Kiosks in high tourist traffic areas should also be developed in coordination with efforts already under way with the Lancaster-York Heritage Region.

In addition, a car-free guide to Lancaster County could be created. It could be produced in both written and electronic form, the latter of which would be available on the PDCVB website. An integrated travel information and booking system could be created which would allow the user to enter a home address and an address for the desired destination and then retrieve information about all the options for car-free travel. A travel planner on the site could help the visitor select the best modes of travel. Complete travel information should be available at all Visitor Centers, wayfinding “Lighthouse Attractions,” and transit stations. This would be especially important if a Convention Center is up and running.

Adopt Quality Performance Standards and Assessment Processes

Visitors today are demanding higher quality visitor services when they travel. Lancaster County should consider exploring the adoption of quality performance standards and performance assessment processes as a

means to raise the overall quality for visitor facilities and services within the industry.

Organize a Long-Term Rental Facilities Initiative

Consumer research shows that, while three-quarters of travelers stay in hotels, some do stay in time-share or other rental accommodations, especially for extended stays of more than 3-4 days. In order to encourage longer stays, especially for families, the PDCVB could organize an entrepreneur-based initiative focused on week- or month-long rentals.

Develop Additional Visitor Services in Lancaster City

As the next new tourism product in the County, Lancaster City will also need to support and develop additional high quality visitor services. Adequate public restroom facilities will need to be created in key locations and for special events in the downtown area. Other visitor service improvements include wayfinding programs. Already, the recently implemented vehicular wayfinding system has been working very well within the City limits and should be expanded. A pedestrian wayfinding program is now being developed by the Lancaster Campaign and should be

strongly supported. Additionally, a system of interpretive signs should be considered to create another opportunity for visitors to experience Lancaster City's rich heritage.

Lancaster City also needs to encourage the development of a variety of new accommodations within Downtown. The Ramada/Brunswick Hotel needs to be re-invented and rehabilitated in order to be successful. Other options, including "boutique hotels," bed and breakfast operations, and urban inns, at varying cost levels, need to be available in the downtown area.

And finally, Lancaster City will need to improve the overall streetscapes within its jurisdiction if it is to be attractive to visitors. Initial focus should be on the key corridors identified in the LDR Plan – Prince Street, Central/Prince Street, and South Duke Street. Efforts are already under way to make such improvements as lighting, benches, garbage receptacles, and façade improvements on some of these corridors. A part of making the streets more pedestrian-friendly and "livable" will be to make every effort to improve the routing of existing truck traffic through and around the City.

INFRASTRUCTURE/MOBILITY STRATEGY
MAKE IT EASY FOR THE VISITOR

STRATEGIC GOALS

GOAL 1: ENHANCE VISITOR MOBILITY AND ACCESS THROUGH TRANSPORTATION IMPROVEMENTS

ACTIONS	TIME FRAME	SUGGESTED LEADERSHIP
<p>Create a seamless system of motorized and non-motorized linkage routes between designated Tourism Development Areas within Lancaster County</p> <ul style="list-style-type: none"> • Provide seasonal shuttle service between designated Tourism Development Areas/develop Eastern Lancaster County route as a model • Develop access management plans for high priority corridors which link Tourism Development Areas together <p>Create and enhance transportation linkages and facilities</p> <ul style="list-style-type: none"> • Create easy transit to and from Lancaster Train Station and Downtown • Enhance the existing RRTA shuttle system to be more accommodating to visitors by linking key attractions and visitor services • Ensure a sufficient variety of parking facilities in the Downtown area for visitors and local workforce • Ensure adequate public restroom facilities in key locations and for special events in the downtown area • If a Convention Center is opened, provide appropriate transportation options • Educate trolley/bus operators on visitor needs; provide travel information to conventioners; provide visitor passes as part of lodging package • Develop tour bus facilities and relations in order to prevent negative impact of buses <p>Encourage non-fixed route transportation services (private vehicle transport service provided by attractions and accommodations)</p> <p>Improve conditions for non-motorized travel in Designated Tourism Development Areas and Rural/Conservation Areas</p> <ul style="list-style-type: none"> • Focus on roads/walkways identified in the County Bicycle/Pedestrian Plan as a priority and/or designated as Heritage Bicycle and Walking Tour Routes • Support the establishment of the Atglen-Susquehanna Rail Trail and other greenway opportunities <p>Expand parking facilities in designated Tourism Development Areas</p> <p>Support the completion of the Paradise Station and improvements/renovations to the Lancaster, Elizabethtown, and Mount Joy train stations</p> <p>Publish a Facilities and Services Guide for bus drivers</p>	<p>Long-Term</p> <p>Mid-Term</p> <p>Mid-Term</p> <p>Short-Term</p> <p>Short-Term</p> <p>Long-Term</p> <p>Mid-Term</p> <p>Long-Term</p> <p>Long-Term</p> <p>Long-Term</p> <p>Short-Term</p> <p>Short-Term</p> <p>Short-Term</p> <p>Mid-Term</p> <p>Short-Term</p> <p>Short-Term</p>	<p>LCPC/Municipalities/RRTA</p> <p>LCPC/City Partners/RRTA/ City organizations</p> <p>LCPC/Municipalities</p> <p>Municipalities LCPC</p> <p>PDCVB</p>

LCTDC = Lancaster County Tourism Development Corporation, LCPC = Lancaster County Planning Commission, PDCVB = Pennsylvania Dutch Convention & Visitors Bureau, RRTA = Red Rose Transit Authority, T&V Partners = Towns & Villages Partners

INFRASTRUCTURE/MOBILITY STRATEGY (continued)

MAKE IT EASY FOR THE VISITOR

STRATEGIC GOALS

GOAL 2: INCREASE THE QUALITY OF THE VISITOR EXPERIENCE

ACTIONS	TIME FRAME	SUGGESTED LEADERSHIP
Develop pedestrian wayfinding programs in designated Tourism Development Areas	Mid-Term	
Complete wayfinding program within the Lancaster-York Heritage Region and prioritize wayfinding signage in designated Tourism Development Areas and linkages	Short-Term	LCPC/LYHR
Establish and publicize a Countywide Scenic Byways program	Long-Term	LCPC
Utilize “context-sensitive design” elements to plan transportation facilities in designated Tourism Development Areas and Rural/Conservation Areas in the County	Short-Term	LCPC
Create a car-free travel guide	Mid-Term	PDCVB/LCPC
Create an intermodal (train/bus/taxi) joint ticketing program	Short-Term	PDCVB/Partners
Improve transit- and travel-related information on the PA Dutch Convention & Visitors Bureau and Red Rose Transit Authority Websites	Short-Term	PDCVB/RRTA
Create visitor information kiosks at high-traffic tourist areas	Mid-Term	LCTDC
Explore the adoption of quality performance standards and tourism product assessment processes within the tourism industry	Long-Term	LCTDC/LCPC/PDCVB
Organize a Long-Term Rental Facilities Initiative	Mid-Term	LCTDC/PDCVB
Develop additional visitor services in Lancaster City		
<ul style="list-style-type: none"> • Provide information services to conventioners • Provide visitor information services within the City of Lancaster on an ongoing basis • Support the development of the Lancaster City Pedestrian Wayfinding Program • Create a system of interpretive signage for attractions • Improve existing and create additional lodging options • Focus on implementation of the key corridors identified in the LDR Plan for streetscape improvements (Prince Street, Downtown/Central Prince Street, South Duke Street) • Improve the routing of trucks through and around Lancaster City 	<p>Long-Term</p> <p>Mid-Term</p> <p>Short-Term</p> <p>Short-Term</p> <p>Long-Term</p> <p>Long-Term</p> <p>Long-Term</p>	<p>PDCVB/City Partners</p>

Measures of Success:

The number of new infrastructure projects supported per year

The number of Designated Tourism Development Areas/Corridors assisted with infrastructure information, plans, projects

MARKETING STRATEGY

FOCUS ON BRAND EQUITY, CONTINUITY, AND PACKAGING

Background

Lancaster has a long and storied history of effective tourism marketing. The ongoing marketing strategy recommended in this Tourism Plan is to build upon the already strong brand equity, ensure continuity of message, and create or expand upon packages that relate to those characteristics of an overnight destination most appealing to travelers. Lancaster can take advantage of many opportunities in the future by building on its already extensive brand awareness and marketing expertise. It is also essential that marketing strategies be supported by appropriate research. Packaging extends the market reach of the individual products so there is a greater return for all. Packaging also makes the product easier for the consumer to purchase, which results in greater sales.

Lessons Learned & Critical Issues

- *Brand awareness of PA Dutch Country in major markets is extraordinarily high, and repeat visitors extend marketing resources and provide credibility for the marketing message. Lancaster can build on what it already has to create many marketing opportunities for the future.*
- *Lancaster County has extraordinary appeal as a cultural heritage destination*
- *Lancaster County is an experienced tourism destination marketer. Promotional materials and resources are available to communicate Lancaster's messages to key markets.*
- *However, if Lancaster does not keep pace with competitors' marketing budgets, tourism will decline. Already the lack of a dedicated budget for research hampers the designated marketing organization.*
- *The inability to attract new audiences is a threat*
- *Lancaster must excel at internet marketing and web site presence*
- *There is insufficient packaging to attract niche markets and insufficient events marketing*

Strategic Goals

GOAL 1:

BUILD ON LANCASTER COUNTY'S EXISTING AND STRONG BRAND AWARENESS AND EQUITY

Lancaster County is well positioned to embark upon strategies that extend the appeal of the County, that appeal to niche markets and new audiences, that communicate the County's strengths as a heritage destination in a variety of ways, and that can serve as enticements for visitors to add to the length of stay and/or increase their spending while visiting. Any and all of these strategies must be based on ongoing market research.

Aggressively Market the Towns and Villages as a Heritage Product

Lancaster County is well recognized for its peaceful agricultural setting. Scattered throughout this landscape, however, are dozens of quiet, authentic and attractive small towns and villages that have the potential to be a great draw, especially for the adult traveler. Lancaster County is one of the few areas in the United States that offers a Tuscan-like variety of towns and villages, each with its own unique character, interesting to see and all located within easy driving distance. The Towns & Villages product has serious tourism potential and is particularly attractive as a heritage product. By using the City of Lancaster as a base, an easy hub-and-spoke touring itinerary of the Towns & Villages product could be established. Since the City and its immediate environs will have a critical mass of accommodations and evening activities, and because individual Towns & Villages most likely will have an insufficient number of these attributes, this hub-and-spoke tourism idea will have great merit.

Take Advantage of Existing and Already-Planned Product and Services for Core Marketing of the City

Until new products are created and there are more evening activities, marketing efforts should focus on what already exists or is well into the planning stage. For example, resources and marketing support are needed to ensure the success of the Quilt & Textile Museum, an experience that is *quiltessentially* Lancaster. The Fulton Opera House, the Lancaster Cultural History Museum, and Central Market already exist and should be the focus of core marketing efforts.

In order, however, for the visitor to appreciate the full extent of the attractions in and near the City, a signed Heritage Trail should be created to connect Rock Ford, downtown

attractions, and Wheatland. These attractions should pursue common programming, perhaps on a seasonal basis, to complement each other, while demonstrating the unique aspects of each.

Additionally, those projects under development or planned in the near future should also receive focused marketing attention. Examples include the new stadium and the emerging LancasterArts concept that conveys a sense of artistic excitement to attract visitors to art venues, galleries, and related shops.

Build on the Five Established Heritage Themes

As part of the establishment of the Lancaster-York Heritage Region in 2001, five heritage-related themes were identified for further development and interpretation in the two-county area. The first of these – Quest for Freedom – has already been developed as a tour and is currently being expanded to become part of a larger regional initiative led by the PDCVB. The fifth theme is Natural Ways: The Susquehanna River and Beyond. Although much of the area concerned is underdeveloped for tourism needs at this time, this theme will become more and more important as other parts of the County develop further and natural landscape becomes scarcer. There is a tremendous opportunity to build on the recently established Susquehanna River Water Trail and develop other eco-tourism based activities.

For the other three themes, we provide specific suggestions to build on the foundations already established. The second theme – Foodways: From Farm to Table – has taken shape as a marketing vehicle called “Growing Traditions,” although that piece focuses on farm produce sold directly to the consumer. (We elaborate on that theme below; see section on creating a Made in Lancaster food tour.)

The third theme – Innovation, Invention & Tradition – has yet to be packaged and marketed. It comprises mills, watchmaking, weavers and other sites. One of the sites, the Ephrata Cloister, is a state museum. We suggest that this theme take shape utilizing the other two state museums in Lancaster County, which also focus, in different ways, on innovation, invention, and tradition: Railroad Museum of Pennsylvania and Landis Valley Museum. The existing Museums 4 Fun Pass, which combines these three museums with a tour of Cornwall Furnace, may become a tool in this packaging effort.

The fourth theme – Town & Country: Forging Communities, Cultivating the Land – also has yet to be interpreted. In Lancaster County alone, this theme is already exemplified through the Towns & Villages concept. Certain Towns & Villages need reinvestment to become viable tourism destinations.

Market Separately to Families and Adults

Separate targeting, both in terms of presentation and in content, appears essential to motivating both these groups because of their distinct hierarchies of needs. For both audiences, the positioning already in place will serve well as the basis for selecting the right messages and organizing them in ways that resonate with each audience. For example, the fact that a relaxing, unhurried pace is a known attribute of the Lancaster area would reinforce an adult traveler’s decision to visit if it were tied to the more strongly motivating aspect of scenic beauty. At the same time, younger and older adults are looking for exciting nighttime activities and cultural arts attractions. Lancaster City will hopefully provide the former while countywide there is already a wealth of performing arts product. For families, strong motivating factors are the opportunity to share special experiences with children and to get in touch with personal values and beliefs, two messages that can be easily supported by product throughout Lancaster County. Indeed, with the family market, there is an even greater opportunity to market regionally with Philadelphia, Hershey, and Gettysburg, thereby extending length of stay in the area.

Engage in Niche Marketing for Emerging Markets

There needs to be concentrated effort at niche marketing, which would provide the building blocks for future markets and new audiences. This is especially important with multi-cultural groups, adults traveling alone during non-holiday times, and college students/alumni who attend/have attended local institutions of higher education, and those target audiences with thematic interests such as antiques.

Niche marketing has become relatively easy with the proliferation of PC’s and reliance upon the internet as a source of travel information. Web sites devoted to Lancaster tourism can openly address various niche markets on the site, capture email addresses, and send relevant marketing material electronically to each group. The more interactive the site becomes, the greater the potential to reach new markets.

Conduct Tourism Research on a Continual Basis

There are two types of research that need to be conducted on continual bases, the first for return on investment and the second for consumer preferences in both existing and future product, as well as for satisfaction with visitor services and other infrastructure issues. Research should receive annual dedicated funding.

Further Enhance PDCVB Website

The PDCVB has launched and upgraded an extensive website, and it is critical that the site remains state-of-the-art and user-friendly. Mechanisms must continue to be put in place to effectively harness the power of the internet as a tourism source. The website needs to be applicable to niche audiences, suggest do-it-yourself themed itineraries, promote packages to extend length-of-stay, distribute e-newsletters on particular topics, and make the site interactive in order to engage the visitor. The site should also capture email addresses and other important contact or demographic information, which can be used for future marketing decisions. Since the website is not currently top-of-mind, attract attention by placing ads and articles on other popular travel websites and secure a position at the top of oft-used search engines. To remain competitive, individual attractions need to invest in their websites and promotion through the internet.

GOAL 2:

ENHANCE EXISTING AND CREATE NEW COLLABORATIVE MARKETING INITIATIVES AND PARTNERSHIPS

Develop Marketing Partnerships to Create and Develop New Packages

The product in the County lends itself to several different kinds of packages, such as thematic packages (e.g. performing arts) or geographic packages (e.g. the three state museums as anchors to a north-south tour). Although packaging is product-centered, it is also closely tied to marketing. Marketing takes the existing products and groups them together to be attractive and appealing to tourists. In that way the product can be efficiently marketed and easily purchased. Since this strategy does not call for joint ticketing by the attractions within the package, the packaging concept would be implemented by PDCVB, the tourism destination marketing organization. Although numerous organizations need to consider a wide variety of packaging opportunities, a good place to start is with the PDCVB's membership, who can coordinate packages fairly easily and economically.

Specifically, there could be Towns & Villages packages such as Bed & Breakfast, one attraction and one meal per town, or a two-night theater package with two evening and one matinee performance, accommodations, and dinners at local restaurants located close to the theaters. Packages surrounding special events could be created as well. Additionally, building on Lancaster's unique traits, the three state museums could be packaged as anchors to a tour of the entire County. Consideration should be given to packaging daytime activities with nighttime activities to encourage the day-tripper to extend his/her visit overnight. Existing theme-based efforts, like the regional *Quest for Freedom* product, should receive special attention and focus. To ensure success, it will be critical that the appropriate level of personnel, technical resources, and mechanisms are in place and dedicated to "close the sale" on these proposed packages.

And finally, efforts should be made to collaborate with the County's higher education institutions to market to students to increase their spending within Lancaster County.

Create More and New Tourism Packages that Include Lancaster City

Using best practices from other destinations, Lancaster City should not attempt to emulate the County. Instead, it should focus on enhancing the County visitor's experience by providing different but complementary experiences. To that end, new and exciting packages need to be created that appeal to the diversity of people living in and visiting Lancaster City and County. For example, events in the City could be packaged with tourist draws in the County to encourage discovery of the City. Packages can pair lodging outside of the City with events within the City, bundle attractions in the County with events in the City, or link entertainment offerings in the County and City. Crafts and/or antiques shopping packages linking the County with the City, or heritage tours packaged to include both County and City sites, can be especially attractive to visitors.

Take the Lead in Regional Branding

Lancaster finds itself with a unique opportunity not only to capitalize on its branding of Pennsylvania Dutch Country within the confines of the County but also to extend that branding to surrounding areas. Doing so would position Lancaster County as a leader in tourism marketing within Pennsylvania, clarify and define the State for tourists, and result in additional funding from the state.

Pursue Cooperative Marketing with Transportation Providers

Lancaster has relied too heavily on the individual automotive tourist in the past. While car travel remains the predominant mode of travel into and around the County, there is tremendous opportunity to pursue non-car transportation and travel. Natural partners in this regard would be Amtrak (coming into the train stations and towns within the County) and Red Rose Transit Authority. Amtrak has been a willing marketing partner with destinations along the Eastern Seaboard and would be receptive to discussions with Lancaster tourism marketers.

GOAL 3:

FOCUS ON OVERNIGHT VISITORS FOR THE GREATEST ECONOMIC IMPACT

There is a tremendous opportunity to increase the economic impact of visitors by partnering with other local and regional organizations and agencies to extend the length of visitors' stays in the County. This can be done by creating and marketing new thematic and geographic tour packages. Creating multi-day packages with the Lancaster-York Heritage Region or other surrounding counties would provide visitors with new reasons to stay overnight and longer within the area. Additionally, there is a need for the creation of many new partnerships amongst local attractions. The development of hub-and-spoke itineraries of Towns and Villages for overnight stays is one example of how to increase visitor impact. Designated Lancaster County Heritage sites, services and events have a great opportunity to create heritage and culturally related tour packages that would be very appealing to visitors.

MARKETING STRATEGY

FOCUS ON BRAND EQUITY, CONTINUITY, AND PACKAGING

STRATEGIC GOALS

GOAL 1: BUILD ON LANCASTER COUNTY'S EXISTING AND STRONG BRAND AWARENESS AND EQUITY

ACTIONS	TIME FRAME	SUGGESTED LEADERSHIP
Aggressively market the City & Towns and Villages as new and exciting heritage product	Short-Term	PDCVB
Take advantage of existing and already planned product and services for core marketing of the City		
<ul style="list-style-type: none"> Publicize new RRTA downtown trolley service Concentrate on Lancaster Central Market; Lancaster Cultural History Museum, Lancaster Quilt & Textile Museum, Fulton Opera House, Convention Center, Multi-Purpose Stadium Create Heritage Trail to connect City and surrounding area attractions 	<p>Short-Term</p> <p>Short-Term</p> <p>Short-Term</p>	<p>RRTA</p> <p>LCTDC/City Econ. Dev. Orgs.</p> <p>LCTDC/LCPC</p> <p>PDCVB/LCPC</p>
Build on five established Heritage themes of the Lancaster-York Heritage Region	Short-Term	LCTDC/LCPC
Market separately to families and adults	Short-Term	PDCVB
Engage in niche marketing (e.g. young adults)	Mid-Term	PDCVB
Conduct tourism research on a continual basis that focuses on: 1) return on investment; and 2) visitor satisfaction	Short-Term	LCTDC/PDCVB
Further enhance the PDCVB website as a tourism source	Short-Term	PDCVB
Expand group tour marketing to reach new demographics	Mid-Term	PDCVB

GOAL 2: ENHANCE EXISTING AND CREATE NEW COLLABORATIVE INITIATIVES AND PARTNERSHIPS

ACTIONS	TIME FRAME	SUGGESTED LEADERSHIP
Develop marketing partnerships between the City and the County, between City and Towns/Villages, three state museums, and PDCVB members to create new packages	Short-Term	PDCVB/City Partners/T&V Partners/ PDCVB Membership/State
Create more and new tourism packages that include the City		
<ul style="list-style-type: none"> Work with tour operators to expand the "City Tour" concept to include additional creative tours marketed to locals as well as visitors Create new and exciting packages 	<p>Short- and Mid-Term</p> <p>Mid-Term</p>	<p>PDCVB/City Partners/Tour Operators</p> <p>PDCVB/City Partners</p>
Take the lead in regional marketing to maximize the Pennsylvania Dutch Country brand	Mid-Term	PDCVB
Pursue cooperative marketing with transportation providers including Amtrak and our bus operators	Short-Term	PDCVB
Market already-developed Heritage theme-based regional initiatives, such as the Quest for Freedom product	Mid-Term	PDCVB/Amtrak/Tour Bus operators
Support the collaboration of higher education institutions to increase student and visitor spending within Lancaster County	Short-Term	PDCVB
	Mid-Term	LCTDC/PDCVB/Educational Institutions

LCTDC = Lancaster County Tourism Development Corporation, LCPC = Lancaster County Planning Commission, PDCVB = Pennsylvania Dutch Convention & Visitors Bureau, RRTA = Red Rose Transit Authority, T&V Partners = Towns & Villages Partners

MARKETING STRATEGY (continued)

FOCUS ON BRAND EQUITY, CONTINUITY, AND PACKAGING

STRATEGIC GOALS

GOAL 3: FOCUS ON OVERNIGHT VISITORS FOR THE GREATEST ECONOMIC IMPACT

ACTIONS	TIME FRAME	SUGGESTED LEADERSHIP
Promote Lancaster-York Heritage Region/Pennsylvania Dutch Country as a multi-day getaway	Mid-Term	PDCVB/LYHR
Create regional multi-day packaging opportunities	Mid-Term	PDCVB/Regional Partners
Create, develop and market multi-day thematic and geographic tours	Mid-Term	PDCVB
Create hub-and-spoke itineraries of Towns and Villages for overnight stays/daily excursions	Mid-Term	PDCVB
Engage personnel and technical resources to ensure the appropriate mechanisms are in place to “close the sale” on packages	Short-Term	LCTDC/PDCVB

Measures of Success:

- The number of tour packages connecting Lancaster City with other attractions or services in the County
- The number of “Made in Lancaster” tours created
- The percentage increase of overnight visitors
- The percentage increase of survey responses of high awareness (familiar or very familiar) of Lancaster County among key traveling public (currently 48% in our survey)
- The percentage increase of positive impressions (very favorable) among key traveling public (currently 45%)
- The percentage increase in the likelihood of families in key travel markets visiting Lancaster County (currently 73%)
- The percentage increase in the likelihood of adult travelers in key travel markets visiting Lancaster County (currently 65%)
- The number of workshops and seminars conducted per year to educate and involve residents in the tourism planning process and/or to promote agri-tourism
- The number of “good or excellent” ratings of the PDCVB website from external sources
- The percentage increase of the return on investment of marketing dollars per visitor

LCTDC = Lancaster County Tourism Development Corporation, LCPC = Lancaster County Planning Commission, PDCVB = Pennsylvania Dutch Convention & Visitors Bureau, RRTA = Red Rose Transit Authority, T&V Partners = Towns & Villages Partners

OUTREACH/PUBLIC INVOLVEMENT STRATEGY

EDUCATE & INVOLVE THE COMMUNITY IN TOURISM PLANNING AND PROMOTION

Background

To achieve the goals of the Lancaster County Strategic Tourism Development Plan, Lancaster County's tourism industry and its partners must succeed in educating the public and community leaders about the substantial positive impact tourism has on the County's economy, employment, and quality of life. Too often communities fail to recognize, or take for granted, the constant flow of tourism dollars that help fuel local economies. It is necessary for support of Lancaster County's tourism industry to be viewed, not as an expense, but as an investment that yields high return to Lancaster's economy, tax base and overall quality of life. There must also be a very clear understanding that there is a direct link between Lancaster County's "smart growth" strategies *and* the protection of the essential characteristics that define the county as a unique and special destination worth visiting. To achieve this understanding and appreciation, it will be essential to develop an internal public relations campaign and an education program that will inform public and private sector leaders, encourage residents to be tourism ambassadors, and support tourism workforce training efforts.

Additionally, ongoing workshops and educational opportunities for tourism entrepreneurs and others should be conducted which could include topics related to product development, marketing, partnerships, funding opportunities, and management.

And most importantly, an ongoing process for engaging the community in the tourism planning process will be essential to its long-term success.

Lessons Learned & Critical Issues

- *Residents are not sufficiently involved in tourism promotion*
- *The County's residents have enormous pride of product and heritage*
- *There is a strong desire to involve more people in tourism who will reflect the cultural diversity of the County*

Strategic Goals

GOAL 1:

INCREASE THE RECOGNITION OF THE IMPORTANCE OF TOURISM TO THE ECONOMY AND THE OVERALL QUALITY OF LIFE IN LANCASTER COUNTY

During the research for and preparation of this plan, stakeholder inclusion and feedback was central to the work. Because of the tremendous economic, workforce, and lifestyle impacts that tourism has on the County, it is essential that County residents recognize the importance of tourism to the economy and overall quality of life, are engaged in the tourism planning process, and actively promote the area.

Despite the fact that residents on the whole understand the value and importance of tourism marketing, they are largely uninvolved in tourism promotion. Pride of place and acceptance of tourists are two attributes necessary for residents to become tourism ambassadors. Local tourism ambassadors have proved to be the strongest method of on-site marketing and contribute considerably to tourism by creating favorable impressions of a destination.

To engage the community in these efforts, both an internal public relations campaign and an educational program should be established. The educational program would include workshops and seminars for public and private sector leaders about the positive impact of tourism. For farmers and others involved in agri-tourism, there might be agri-tourism product development, management, and marketing workshops that would cover a variety of topics such as conducting farm tours, management of agri- and nature-tourism operations, assessment of assets to determine the potential of agri-tourism, understanding of the agri-tourist, potential enterprises for agricultural and nature tourism, self-marketing of agri-tourism attractions, and tips for building marketing and community partnerships. The information and training required for an effective tourism ambassador program should also be developed.

The public relations campaign would keep the locals advised of Lancaster's tourism strengths, list the activities and accomplishments growing out of the Plan's recommendations, and act as a cheerleader to keep the residents educated and involved. The campaign would also utilize a variety of public involvement processes to engage the community in ongoing planning for tourism at the regional, county and local levels. Such a campaign would help involve the residents in tourism promotion,

keep them supportive in order to obtain the requisite resources, and most importantly increase the highly effective process of word-of-mouth marketing.

Premier hospitality service is also essential to an exceptional vacation experience. To ensure that visitors to Lancaster County receive a consistently superior experience, investment in education and training programs for the County's travel and hospitality workforce must be made. A well-trained workforce will greatly improve Lancaster County's effectiveness in meeting its goals and objectives. As ambassadors for the County, well-trained industry employees will greatly impact visitors' experience, increasing the likelihood of a return visit. Already, the Harrisburg Area Community College has developed a program in this regard and should be strongly supported. Also, the formation of a Hospitality Center of Excellence to design training programs for new and incumbent workers in the tourism industry would be a tremendous vehicle for achieving this goal in Lancaster County.

GOAL 2:

INVOLVE THE COMMUNITY IN TOURISM PLANNING

Since it is also recognized that community support for tourism is so critical to its success, it will be necessary to create an effective communication program between the public and the tourism industry and its partners. It is also well recognized that active and enthusiastic support by political leadership is central to the success of tourism initiatives. The fervent support of the County Commissioners, the Mayor, and local municipal officials will make the difference in ensuring success.

As part of the ongoing tourism planning process, a number of methodologies for involving the public and key stakeholders at the regional, county and local levels must be provided. There is also a strong desire to expand this involvement beyond the strong core of dedicated individuals to reflect cultural diversity, address new audiences more effectively, bring fresh viewpoints, and in general expand the tourism universe in Lancaster County.

It will also be essential for local government and economic agencies to make every effort to integrate tourism goals and objectives contained in this Strategic Tourism Development Plan with their own local comprehensive and economic development plans.

OUTREACH/PUBLIC INVOLVEMENT STRATEGY

EDUCATE & INVOLVE THE COMMUNITY IN TOURISM PLANNING & PROMOTION

STRATEGIC GOALS

GOAL 1: INCREASE RECOGNITION OF THE IMPORTANCE OF TOURISM TO THE ECONOMY AND THE OVERALL QUALITY OF LIFE IN LANCASTER COUNTY

ACTIONS	TIME FRAME	SUGGESTED LEADERSHIP
Educate public and private sector leaders about the positive impact of tourism via workshops and seminars	Mid-Term	LCTDC/LCPC/PDCVB
Create product development, management and marketing workshops on issues such as agri-tourism related initiatives	Mid-Term	LCTDC/LCPC
Create a local ambassador program to involve residents in tourism promotion	Mid-Term	PDCVB
Launch an internal public relations campaign	Short-Term	LCTDC/LCPC
Support the formation of a Hospitality Center of Excellence to design training programs for new and incumbent workers in the tourism industry	Long-Term	Lanc. Co. Workforce Investment Board
Support the addition of tourism and hospitality programs and new tourism-related curriculum at local educational institutions	Long-Term	Local Educational Institutions

GOAL 2: INVOLVE THE COMMUNITY IN THE TOURISM PLANNING PROCESS

ACTIONS	TIME FRAME	SUGGESTED LEADERSHIP
Utilize a variety of public involvement processes to engage the community in ongoing planning for tourism at the regional, County and local levels	Mid-Term	LCPC
Ensure that the organizational structure created implements the plan and draws upon the expertise of the community	Short-Term	LCTDC
Coordinate and integrate tourism goals with other countywide, regional and community comprehensive and economic plans and initiatives	Mid-Term	LCPC

LCTDC = Lancaster County Tourism Development Corporation, LCPC = Lancaster County Planning Commission, PDCVB = Pennsylvania Dutch Convention & Visitors Bureau, RRTA = Red Rose Transit Authority, T&V Partners = Towns & Villages Partners

ORGANIZATIONAL/COLLABORATIVE STRATEGY

KEEP IT SIMPLE, FOCUS ON LEADERSHIP, IDENTIFY RESOURCES, AND COLLABORATE FOR SUCCESS

Background

It is well recognized today that no single organization, agency, or individual working in isolation accomplishes very much. It is no different with tourism, where building partnerships is essential, not just because they help develop local support, but also because tourism demands resources that no single organization or entity can supply. Its success depends on the active participation of political leaders, business leaders, operators and managers of tourist sites, accommodation operators, and many other people and groups. Lancaster County has many opportunities for improving and developing partnerships that can help local tourism, such as between the public and private sectors, different ethnic attractions, City and County, and with other industries for labor sharing and skills transfer.

In addition to the need for ongoing collaborative efforts, strong leadership will be required for tourism to be successful in the County. To accomplish this goal, Lancaster County needs to create a new countywide tourism development organization whose members are knowledgeable about tourism, are able to contribute sufficient time, and are prepared to lead and make decisions. The proposed organization must possess sufficient authority, government support, and competitive funding. The organizational structure needs to be different from current organizations, must be lean, have a defined mechanism for reporting to government officials, and have a process for incorporating community input and expertise.

There is also a need to develop a creative, collaborative, and results-oriented organizational structure to support tourism development in Lancaster City. Developing Lancaster City into a new and exciting tourist attraction for the region is a substantial undertaking that will take time. It requires the belief that it will benefit the county as well as the City, that the necessary cooperation will happen, and that the leadership and resources necessary to effectively follow through are available.

This same model for a collaborative and results-oriented organizational structure, which involves both the public

and private sectors, should also be applied in the proposed Tourism Development Areas and Corridors designated in this Plan.

Lessons Learned & Critical Issues

- *Considering the volume of attractions in Lancaster County, there is very little collaboration*
- *Lancaster's willingness to enter into partnerships extends the Lancaster brand and broadens market reach*
- *There are a great many individuals and organizations in Lancaster County with considerable tourism expertise, and a strong commitment to tourism*
- *There are tremendous opportunities for enhancing and creating new partnerships to help local tourism*
- *Tourism marketing is being done by a professional organization (PDCVB), and the Lancaster County Planning Commission has been an important catalyst for tourism development*
- *Strong public support from the political leadership is critical to these and other tourism organizations' efforts.*
- *Entrepreneurial spirit is strong in Lancaster, and the county and its residents have enormous pride of product and heritage. Therefore, tourism organizations need to have a mechanism for greater public participation*
- *While there is a growing interest in making the City a destination, there is a lack of consensus on the City's tourism development*
- *The County/City relationship regarding tourism and planning has room for improvement.*

Strategic Goals

GOAL 1:

CREATE A TOURISM DEVELOPMENT ORGANIZATION THAT WILL USE EXISTING EXPERTISE, AND WILL TAKE RESPONSIBILITY FOR THE IMPLEMENTATION OF THE LANCASTER COUNTY STRATEGIC TOURISM DEVELOPMENT PLAN

During the course of the stakeholder involvement process, the one frustration other than traffic that seemed most on the minds of the individuals involved in tourism was: What type of organizational improvements can be made to improve the direction and management of tourism planning in Lancaster County?

The general consensus was that:

- *There are too many diverse organizations involved in various aspects of tourism planning and development*

- *Lancaster might benefit from bringing marketing and product development together under one roof*
- *Partnerships among the major players need to be improved*
- *The implementation of ideas is slowed by the lack of one forceful, unifying, powerful tourism organization*
- *Nobody knows who is “in charge” of tourism planning*
- *Each person believed that while his/her own organization is providing quality work, all other organizations were found wanting*
- *Lancaster County and the County’s Towns and Villages need to play a role in the planning and implementation of the County’s tourism future*

Considerable time and thought has been devoted to this subject, and issues discussed ranged from leadership qualities of individuals, to how the regional culture impacts on organizational dynamics, to the realities of the local political scene, to theories of organizational structures.

In order to arrive at a series of recommendations for the organizational approach appropriate to Lancaster, the following issues were addressed:

- *Attributes of successful tourism organizations*
- *Organizational capabilities and responsibilities*
- *Philosophical decisions concerning the organization*
- *Organizational options*

Attributes of Successful Tourism Organizations

From the consultants’ experience and in a study of comparable tourism regions conducted for this report, a list of ingredients and qualities of successful tourism organizations has been compiled:

- *Authority to make decisions, with the power to see that ideas are implemented*
- *Governmental and community support and confidence*
- *Enthusiasm and commitment*
- *Marketing and product development expertise*
- *Qualified staff with tourism experience*
- *Clear delineation of responsibilities*
- *Good communication and cooperation with tourism stakeholders*
- *Continuity of funding allocated exclusively for tourism*
- *Access to sufficient research*

Organizational Capabilities and Responsibilities

In order to be effective at meeting its challenging goals and objectives, the organization envisioned and recommended must have the following capabilities and

responsibilities, which are critical ingredients for Lancaster’s tourism organization:

Leadership

It is important that Lancaster have an energetic, dynamic, and influential tourism development organization. This group must act as a champion and cheerleader for tourism development and promotion and actively convey the value of tourism to the community.

This group should monitor, develop, and help implement tourism action plans that have both short- and long-term goals. In its advocacy role it must encourage long-term planning but also closely scrutinize the progress of short-term projects. It should also effectively convey to the community that continuity and stability, not a quick fix, is the only way a tourism program can succeed.

Continuity and Stability

It is essential that the institutional structure and funding be ongoing. The entity needs to be able to survive the loss of specific individuals. Continuity and stability have been proven time and again to be critical elements of success with respect to both product development and marketing for tourism destinations. Baltimore’s Inner Harbor and the development of Charleston are two examples of how successful tourism development is related to long-term commitment. The importance of continuity and stability is equally important to tourism marketing. “I ♥ NY” and “Virginia is for Lovers” are prime examples.

Marketing and Product Development

For a strategic tourism plan to succeed, there are two essential ingredients. The current product, attractions, and infrastructure must be kept fresh and new product regularly brought on-line, and the destination must be professionally marketed and promoted. One without the other will not work. The responsibility of the organization will be to ensure that these efforts are conducted competently, efficiently, and in tandem.

Coordination

If Lancaster is to move its tourism agenda forward, its various organizations must work together more effectively. One of the key responsibilities of this proposed organization, in its leadership role, will be to act as a catalyst for the coordination and cooperation of tourism organizations, local governments, and individual stakeholders. It must create and help facilitate both formal

and informal networks so that the various tourism organizations not only know what the others are doing, but also find ways to work together. Its objective should be that, with respect to Lancaster tourism, the whole truly becomes greater than the sum of its parts.

Funding

The single most prevalent challenge for tourism organizations is finding adequate funding. There is no one source that will fund 100% of an organization's costs over a period of years. One of the responsibilities of a successful tourism organization is to identify revenue streams that can provide adequate annual funding and the required continuity.

Philosophical Decisions Concerning the Organization

There are five models that Lancaster could adopt for its tourism organization:

- ***One-Stop-Shop*** – In this model all tourism activities, responsibilities, and authority would be found under one roof. A new organization would have responsibility for both product development and marketing and would handle all tourism activities for the county.
- ***Existing Organization*** – Take an existing organization and give it added responsibility and authority, thereby making it the one-stop-shop.
- ***Government*** – Place the tourism responsibilities under the auspices of local government. This would most likely require legislation and would mean creating an Office of Tourism, with the appropriate senior official and staff.
- ***Adapt the Current Situation*** – Currently PDCVB is handling tourism marketing and LCPC has taken a leadership role on product development. Changing little, Lancaster County could develop a regular schedule of meetings between these two organizations (and possibly bring in EDC as a county organization to also work on product development) to ensure coordination, and let them further develop their informal working relationship.
- ***Tourism Development Organization*** – Create a small new organization with appropriate overall authority, but leave the marketing and product development work to the organizations that currently possess that expertise. This tourism development organization would coordinate the efforts of the separate organizations, provide direction, take responsibility for a few tasks that can benefit the tourism effort, and drive the entire process to ensure that the strategic plan programs are implemented.

After a study of the pros and cons of each of the five models in relation to the consultants' analysis of the Lancaster tourism situation, the fifth option, the creation of a new tourism development organization, is recommended as the best for Lancaster County. However, it is proposed that the establishment of the new organization be phased in over a period of two (2) to three (3) years to allow for an appropriate amount of time for the identification of sustainable funding sources and the preparation of the legal documentation and related procedures for the establishment of the new entity.

Keys to Success

Prior to developing the structure for a new Lancaster County tourism organization, it is important to delineate four general rules that are critical for its success:

- ***Clarity of Mission*** – the organization's responsibilities are to monitor the work of the marketing and product development organizations, provide direction, prioritize, bring the County and City together, give voice to the stakeholders, ensure strategic plan implementation, and provide accountability.
- ***The Right People*** – experienced, knowledgeable, hard-working professionals who are able to devote the requisite time to meet the responsibilities of the group
- ***Power and Authority*** – the ability to get things done and to get people and groups to work together
- ***Money*** – sufficient resources to mount an effective, sustained program

The important attributes of the proposed tourism development organization are:

- Ability to overcome perception that current organizations can't do it
- Can be tailor-made to meet specific needs
- Possesses a freshness and energy needed to meet the task
- Enhances image – shows real commitment to tourism
- Not buried in bureaucracy – lean and mean with considerable authority and credibility
- Best chance for coordinating other groups
- Provide continuity and permanence to tourism effort
- Can best facilitate contributions from the private sector
- The board members chosen for this organization should collectively possess the expertise and capabilities necessary to implement and promote Lancaster County's Strategic Tourism Development Plan
- PDCVB should continue to be responsible for tourism marketing

- *LCPC and EDC, together with assistance from the new organization's staff, should be responsible for tourism product development. The combination of LCPC's long-term planning expertise and considerable experience in heritage tourism, the private sector entrepreneurship and development expertise supplied by the EDC, and the direction, initiative, authority, and support of the new organization will successfully move the new tourism product development agenda forward.*
- *This is not "just another organization." The structure is unlike anything now in existence, and possesses the specific attributes necessary to accomplish the tourism goals stated in this plan.*

Format or Structure for the New Proposed Tourism Organization

The process for establishing the proposed new tourism development organization is designed to be a two-step approach, to be carried out over a period of two to three years.

Tourism Development Council – Phase 1

During the first phase of the process, it is recommended that a Lancaster County Tourism Development Council be established which would include seven (7) individuals appointed from participating partnership organizations. Members would include a representative of the PA Dutch Convention & Visitors Bureau, the Lancaster County Planning Commission, and the Economic Development Company. The additional four members of the Council would include a representative from the City's private sector, a County private sector person, and two at-large individuals. The Lancaster County Tourism Task Force would appoint the first members of the Council. The role of the Tourism Development Council will be to 1) begin implementation of the Lancaster County Strategic Tourism Development Plan, 2) create the permanent Corporation that will evolve from the Council, and 3) begin identifying initial funding sources for the operations and management of the new entity. The Council will serve as the transition team through the second phase of the organizational process and will ultimately become the initial Board of the proposed Tourism Development Corporation.

Tourism Development Corporation – Phase 2

The purpose and structure of the proposed Tourism Development Corporation will include the following characteristics:

Mission

- *To contribute to the economic, social and cultural progress of Lancaster County and the enrichment of its quality of life by fostering sustainable tourism practices and helping to further develop the tourism product and promote the County as a travel destination.*

Legal Structure: Not-For-Profit Corporation

- *This provides for a quick, efficient, and formal mechanism to be started as soon as possible. It is also a structure that could facilitate contributions from the private sector because of tax deductibility.*

Board Members – Seven-Person Board

- *PA Dutch Convention & Visitors Bureau representative*
- *Lancaster County Planning Commission representative*
- *Economic Development Company representative*
- *A City private sector representative*
- *A County private sector representative*
- *Two At-Large Individual representatives*

The seven-member Board would be self-perpetuating and their terms should be three years on a staggered basis.

Staffing

- *Similar to the Board, the staff should be "lean and mean." Overhead should be kept low and bureaucracy avoided.*
- *There should be one professional, an Executive Director, with one support staff person. The Executive Director position should be filled by an individual who not only has tourism experience, but also has political savvy and strong communications skills.*

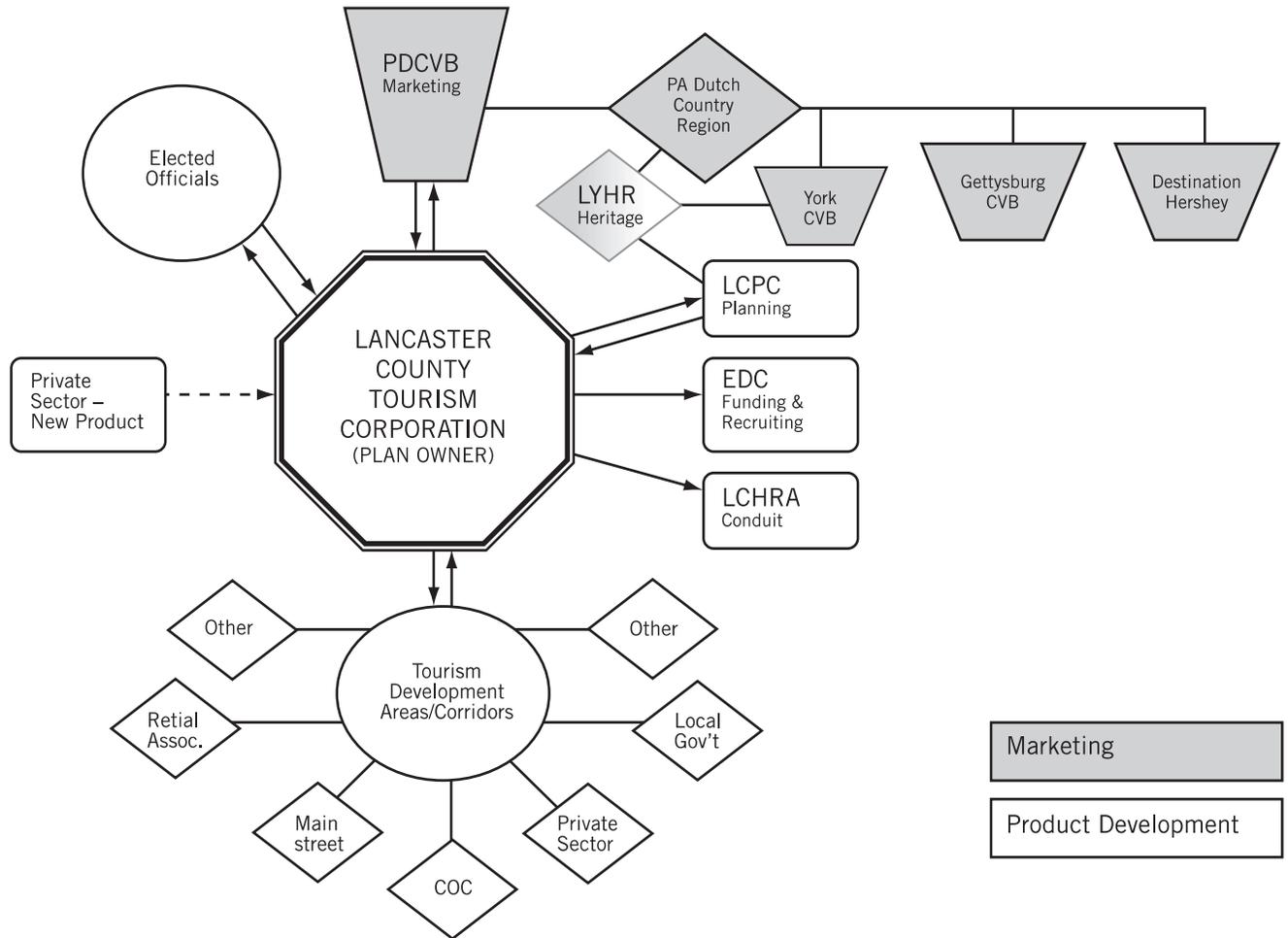
Organization Responsibilities

- *See "Clarity of Mission" (previous page) and the organizational chart that follows.*

Budget

- *Initial funding for the Lancaster County Tourism Development Corporation should be \$200,000-\$250,000. This initial funding should be raised from a combination of contributions from the LCPC, PDCVB, EDC, and Lancaster City and County governments together with contributions from local foundations and corporations. Further budgets will be determined by the Lancaster County Tourism Development Corporation's success in identifying revenue streams (see "Funding the Plan's Recommendations").*

Lancaster County Tourism Plan



GOAL 2:

ESTABLISH A CREATIVE, COLLABORATIVE, AND RESULTS-ORIENTED PARTNERSHIP TO SUPPORT TOURISM DEVELOPMENT FOR LANCASTER CITY

In order for the City to accomplish the product and marketing recommendations proposed in this plan, it is essential that a partnership of appropriate organizations and agencies be in place that can help provide expertise, drive the process, and promote a close working relationship with government officials.

The City has many organizations each with a relatively large membership whose activities are partially devoted to tourism issues. The City government, Destination Downtown, Team Lancaster, DID, the Alliance, LancasterArts, current attractions, local foundations, etc.

all grapple with various issues related to tourism and will continue to do so in the coming years. The expertise, vision, commitment, and resources these organizations bring to tourism development and marketing are vital if the City's government and residents are to "buy into" the importance of tourism for the future economic well-being of the City of Lancaster.

If the City is to succeed in implementing its tourism strategy, it needs to draw upon the expertise and energy of these various groups, but at the same time focus and be accountable for achieving specific results. Therefore the Plan recommends that the organization being created for the County, the Lancaster County Tourism Development Corporation, is the appropriate vehicle for forming and accomplishing the tourism objectives for the City of

Lancaster. It is appropriate because it incorporates the same essential tenets necessary to drive the tourism process. It is appropriate because the City of Lancaster will be well-represented in the organization. It is appropriate because it consolidates the tourism leadership for the entire region. It is appropriate because it becomes the simple, powerful organization that has the full range of talent, the responsibility, and the requisite authority to get things done.

The following tenets, upon which the Lancaster County Tourism Development Corporation is based, are the keys to the tourism development and promotion for the City of Lancaster:

- *Collaboration and coordination*
- *Small representative membership will drive the process more successfully*
- *Inclusiveness must be managed, focused, and results-driven*
- *It is impossible to be all things to all people*
- *Agility and results driven*
- *Experience and expertise in tourism-related issues*

A key objective of the countywide Strategic Tourism Development Plan is to encourage the residents, businesses, organizations, and government entities to understand and then foster the interdependency of the City and County when it comes to tourism development and marketing. Above all, active and efficient coordination is essential. Similarly, with the large number of organizations in the City involved in tourism activities, and with the development of the Lancaster County Tourism Development Corporation, it is not wise to create still another new tourism organization.

The Lancaster County Tourism Development Corporation will be developed so as to have a vital City presence. A City private sector tourism representative will have a seat on the Board. To be successful, the LCTDC must coordinate the City's and County's efforts, possess the resources to support the City's activities, effectively and efficiently take advantage of City expertise, ensure stakeholder participation, engage organizations involved in tourism, and have the professional expertise and authority to move the tourism agenda forward for the entire region.

Rather than create a new City tourism organization, the LCTDC should consolidate the tourism leadership for the entire region, drawing on its City representative members to ensure that the appropriate City-related objectives are accomplished.

Promote Coordination among Arts, Culture, and Heritage Venues in the Greater Lancaster City Area

In addition to recognizing the need to coordinate the various public and private organizations in the City around product development and marketing under the auspices of the proposed Lancaster County Tourism Development Corporation, there is also a need to look at the possibilities of creating greater partnerships or even consolidation of the dozens of arts/cultural/heritage entities in the City.

An inventory of the City revealed 29 galleries, 8 antique galleries, 36 buildings of historic interest, 10 churches or houses of worship, 7 antique stores, 14 entertainment venues, and 12 museums. Many of these can be partnered and consolidated in order to achieve economy of scale, provide meaningful and complete experience for tourists, capitalize on Lancaster's authentic heritage product, and market the City of Lancaster to modern geo-tourists. There is initial discussion, for example, of linking the Shear America Collection of Americana with the existing Quilt and Textile Museum in a common building that would house a Folk Life Center. This is an excellent concept of partnerships that benefit all members and extend the appeal of each to visitors.

GOAL 3:

CREATE STRONG PARTNERSHIPS AND SYSTEMS TO INCREASE COOPERATION OF THE PUBLIC AND PRIVATE SECTORS IN TOURISM PLANNING AND DEVELOPMENT

On every level of consideration – product, marketing, infrastructure and organization – a strategy of partnering will be required to implement this Strategic Tourism Development Plan, and by doing so will yield the strongest results for Lancaster County. Lancaster's willingness to enter into regional partnerships displays a savvy and understanding of how to extend the brand and broaden reach without straining resources. However, on the local level there are an insufficient number of partnerships among attractions. Attraction operators need to be encouraged (and possibly trained) to enter into additional partnerships. Also, because of tourism's importance to the region, together with its long history, many organizations have at least one tourism-related item on their agendas. Unfortunately, all too often there is insufficient collaboration among these organizations.

Collaboration can mean many things. In terms of marketing, this might involve the creation of regional initiatives. On an entrepreneurial level, this might mean

collaboration among attractions. Lancaster County needs to partner with the City of Lancaster. Local businesses and local municipal government need to collaborate for product development and the provision of appropriate levels of needed infrastructure. Private sector activities will not be successful without the support of their local governments. Conversely, public sector initiatives will not thrive without private sector involvement and investment. This will be especially critical in those areas of the county that the Strategic Tourism Plan proposes to be designated as Tourism Development Areas and Corridors.

Therefore, it is critical for organizations with tourism interests to partner with each other to move the tourism agenda forward.

GOAL 4:

DEVELOP NEW AND STABLE SOURCES OF FUNDING FOR PRODUCT DEVELOPMENT, INFRASTRUCTURE IMPROVEMENTS, AND MARKETING

To fully implement the vision and goals of the Strategic Tourism Development Plan, a stable, long-term source of financial resources will be required to create new product, improve visitor-related infrastructure, and enhance the existing marketing efforts. Financial resources can come from a variety of sources including government appropriations, hotel taxes, outside grants, loans and tax incentives. The types of funding available come from Federal, state and local governments; private foundations or corporate sponsors, and entrepreneurial revenues.

Currently, the PDCVB's marketing budget (\$5 million) is critical to the effective performance of its job. Greater resources would allow the PDCVB to appeal to two different market segments simultaneously (families and adult travelers), and also appeal to niche markets while remaining competitive with comparable destinations. There is also concern that if the PDCVB's marketing budget does not keep pace with other destinations' budgets, the county will simply not be able to compete.

One of the major recommendations in the Plan to encourage focused product development is to establish a system of Tourism Development Areas and Corridors. The primary focus of these zones would be sustainable tourism development that helps improve local quality of life while earning revenues from visitors. Under this concept, every effort should be made to work with the State legislators to explore new opportunities and incentives that would help facilitate tourism related reinvestment and development in these focused areas.

Unfortunately, at the current time, local attraction and hospitality operators sometimes have difficulty in securing bank financing because the economics of their business operations will not support a full commercial interest rate loan and/or banks are unwilling to provide funding for projects in the tourism industry. Therefore every effort should be made to work with local financial institutions and lenders, like the Community First Fund, Grow Lancaster Fund, and others, to provide these types of opportunities for local tourism entrepreneurs and developers.

Additional funding opportunities and recommendations are included in the Funding Plan Chapter of this Plan.

ORGANIZATIONAL / COLLABORATIVE STRATEGY
EDUCATE & INVOLVE THE COMMUNITY IN TOURISM PLANNING & PROMOTION

STRATEGIC GOALS

GOAL 1: CREATE A TOURISM DEVELOPMENT ORGANIZATION THAT WILL USE EXISTING EXPERTISE, AND WILL TAKE RESPONSIBILITY FOR THE IMPLEMENTATION OF THE LANCASTER COUNTY STRATEGIC TOURISM DEVELOPMENT PLAN

ACTIONS

Create a process, to be carried out over a two to three year period, that will lead to the creation of a Tourism Development Organization

TIME FRAME **SUGGESTED LEADERSHIP**

Short-Term Tourism Steering Committee

GOAL 2: ESTABLISH A CREATIVE, COLLABORATIVE, AND RESULTS-ORIENTED ORGANIZATIONAL STRUCTURE TO SUPPORT TOURISM DEVELOPMENT FOR LANCASTER CITY

ACTIONS

Work closely with the City organizations to coordinate tourism issues and opportunities

Utilize the proposed Lancaster County Tourism Development Corporation to accomplish marketing and product development goals in Lancaster City

Promote coordination among arts, culture and heritage venues in the Greater Lancaster City area

TIME FRAME **SUGGESTED LEADERSHIP**

Short-Term LCTDC/City organizations

Short-Term LCTDC/PDCVB/LCPC

Short-Term LCTDC

GOAL 3: CREATE STRONG PARTNERSHIPS AND SYSTEMS TO INCREASE COOPERATION OF THE PUBLIC AND PRIVATE SECTORS IN TOURISM PLANNING, DEVELOPMENT, AND MARKETING

ACTIONS

Assist in the creation of public/private partnership models in designated Tourism Development Areas and Corridors

TIME FRAME **SUGGESTED LEADERSHIP**

Mid-Term LCPC

GOAL 4: DEVELOP NEW AND STABLE SOURCES OF FUNDING FOR PRODUCT DEVELOPMENT, INFRASTRUCTURE IMPROVEMENTS, AND MARKETING

ACTIONS

Seek additional federal, state, private sector and foundation funding opportunities for new product development and marketing

Work with state legislators to create incentives to focus financial resources to designated Tourism Development Areas and Corridors

Seek legislative support for agri-tourism

Explore opportunities to work with local financial institutions, like the Community First Fund

Seek programs and financing options for town and city infrastructure improvements

TIME FRAME **SUGGESTED LEADERSHIP**

Short-Term LCTDC

Mid-Term LCTDC/LCPC

Mid-Term LCTDC

Mid-Term LCTDC

Mid-Term LCTDC/LCPC

Measures of Success:

Create tourism development organization, staffing, and start-up funding no later than _____

Identify initial funding sources in the amount of \$_____ that will kick-start the various projects

Develop revenue streams that will continue to serve tourism in the amount of \$_____ annually

Pass _____ legislative initiatives that will benefit tourism

LCTDC = Lancaster County Tourism Development Corporation, LCPC = Lancaster County Planning Commission, PDCVB = Pennsylvania Dutch Convention & Visitors Bureau, RRTA = Red Rose Transit Authority, T&V Partners = Towns & Villages Partners

Catalytic Recommendations

Because of Lancaster’s long history as a tourist destination, the strength of special interest groups in the area, and tourism’s impact among a variety of industries, there are numerous initiatives and programs that will benefit Lancaster County. We believe it is critical to focus the energy and resources of the community on recommendations that are considered primary and catalytic. By concentrating on a few focused recommendations, efforts can lead to measurable and tangible accomplishments that can be used as building blocks to get others involved and, in turn, act as a catalyst to further tourism initiatives.

Catalytic recommendations for Lancaster County are:

PRODUCT DEVELOPMENT

- 1. Establish the City of Lancaster as a new and exciting tourism product for the County.*
- 2. Create connections between county and city products by providing complementary but different experiences.*
- 3. Create thematic tours centered on “Made in Lancaster” and related special events based on attributes and products for which the area is known.*
- 4. Focus resources on prioritized areas and corridors that have the greatest potential for tourism development.*

INFRASTRUCTURE

- 1. Enhance visitor mobility and access through transportation improvements between proposed tourism development areas.*

MARKETING

- 1. Engage in segmented (adults/family) and niche marketing (young adults) to increase the number of visitors and to attract more overnight visitors.*
- 2. Develop marketing partnerships to create and develop new packages.*

OUTREACH/PUBLIC INVOLVEMENT

- 1. Involve the community in tourism planning and development.*

ORGANIZATION

- 1. Create a tourism development organization that will use existing expertise, and will take responsibility for the implementation of the Lancaster County Strategic Tourism Development Plan.*
- 2. Develop new and stable sources of funding for product development, infrastructure improvements, and marketing.*

Funding the Plan's Recommendations

This section describes the plan’s major recommendations and suggests potential sources of funding to implement the recommendations. It should be noted that some funding sources are already being pursued by various entities within the County and that some funding is already in place for a variety of projects or programs.

In general, funding support can take the form of direct local government appropriations, outside grants, loans, and tax incentives. These types of funding are available from the following sources:

- *Local (municipal and county)*¹
- *State*²
- *Federal*
- *Private foundations or corporate sponsors*
- *Entrepreneurial revenues (revenues generated internally by tourist attractions and tourism industry businesses)*

In the first section, major recommendations are listed in bold, and followed by a description of potential funding sources. The second section contains a listing of major sources of federal, state, and foundation funding that are not specific to particular recommendations, but are instead potential sources of funding for a variety of the Plan’s recommendations.

SPECIFIC RECOMMENDATIONS AND SOURCES OF FUNDING

Recommendation

CREATE A TOURISM DEVELOPMENT ORGANIZATION TO OVERSEE THE IMPLEMENTATION OF THE LANCASTER COUNTY TOURISM PLAN, OVERSEEING EXISTING SPECIALTY ORGANIZATIONS.

Funding Options

There is a need for ongoing funding to support this organization. Because this organization should perform some functions that are currently performed by existing groups, one potential source of funding is reallocation of existing revenue sources. Another option is to obtain a seed grant from a local or regional foundation, and use this grant as a basis to seek state matching funds. In addition, this organization should be responsible for

pursuing funding opportunities on an ongoing basis to support its own operations, as well as the other recommendations of this plan.

Recommendation

PROVIDE ENTERTAINING AND HISTORICALLY ACCURATE WALKING TOURS IN THE CITY OF LANCASTER.

Funding Options

One model for funding this sort of activity is Historic Philadelphia, Incorporated (HPI). This organization provides a model for how historic walking tours in downtown Lancaster could be organized and financed, as well as for a variety of other activities that could enhance the experience of visitors to the City.³ Founded in 1994, HPI is funded by a grant from the City of Philadelphia and through the support of private and corporate foundations.

- *HPI’s **Historic Philadelphia Living History Program** is a series of street theatre programs that combine 18th century music, arts, crafts and other theatrical elements to both entertain and educate visitors about events in colonial Philadelphia. HPI’s colonial characters are professional actors who undergo extensive training in the accents, manners and culture of life in 18th century Philadelphia. Their costumes are carefully researched for accuracy of detail. Each actor is assigned a character for which he or she researches and creates a persona. Those personae are scrupulously maintained while the characters are mingling with visitors to the Historic District.*
- *HPI also publishes **The Gazette**, a broadside that features information about Historic District events, a colorful map and a listing of attractions. Nearly half a million total copies are printed in six editions annually.*
- *HPI also produces “Stars, Stripes & Savings,” a coupon book with savings for 20 Historic District museums, tours, restaurants and other attractions. Stars, Stripes & Savings was designed to provide visitors with an economic incentive to visit places they might otherwise have missed.*

To develop historically themed walking tours in the City of Lancaster, one option would be set up an organization similar to HPI, or to manage the program through an existing organization. Funds from the City, County, and corporate and foundation grants could be utilized to develop and subsidize the tours. In-kind or financial assistance may also be available from the Lancaster

¹ This includes both local general revenues, as well as funds generated by taxes or fees levied on tourism-related activity such as the Hotel Tax.

² Fortunately, the State of Pennsylvania has identified tourism promotion as an important part of its economic development strategy, and the state’s new Economic Stimulus Program may have funds ideally suited for some of the programs or initiatives recommended in the report.

³ More information about HPI can be found at www.historicphiladelphia.org.

County Historical Society and the Pennsylvania Historical and Museum Commission that could help with the research and technical assistance necessary to develop the content of the tours. Workforce development programs provided through state and federal government (e.g., the state Customized Job Training program and the federal Workforce Investment Act programs) should be explored as possible sources of funding for training of the actor/interpreters.⁴

Recommendation

CREATE SEVERAL EVENTS TO CELEBRATE LOCALLY PRODUCED CRAFTS AND FOODS, INCLUDING A MASTER CRAFTS TOUR, A MADE IN LANCASTER FOOD ROUTE, AN ANNUAL “MADE IN LANCASTER” CELEBRATION AND LANCASTER FOOD CELEBRATION.

Funding Options

“State Heritage Tourism Cooperative Marketing Grants” would be especially appropriate sources of funding for this recommendation. These grants support groups of “heritage assets” that have banded together to market themselves and their location to visitors. The goal of the program is to encourage productive marketing alliances. The program is specifically targeted toward marketing of heritage tourism “trails” or “clusters” and can also be used to produce and/or promote heritage special events or festivals. The deadline for applications is annually in March. In August, the Commonwealth awarded \$500,000 in grants under this program. To date, the Lancaster-York Heritage Region and the Landis Valley Museum have received \$180,000 to develop packages around heritage themes and market more intensively their key heritage attractions, including the Ephrata Cloister. Future rounds of these grants are likely to be appropriate sources of funding for other cooperative marketing ventures in Lancaster City and County.

It is also possible that a substantial portion of project costs could be supported directly by the private entities that benefit from these initiatives.

State Heritage Parks Program Grants. In 2001, the state Department of Conservation and Natural Resources designated Lancaster County as part of the Lancaster-York Heritage Region. The state’s Heritage Parks Program provides funding for implementation and management of

projects that are part of the Heritage Park program. These funding sources could potentially be utilized to support product development in the County, assuming it is consistent with the Management Action Plan established for the Lancaster-York Heritage Region.

Recommendation

ENSURE THE LONG-TERM VIABILITY OF CENTRAL MARKET.

Funding Options

The Project for Public Spaces (PPS) has as one of its primary concerns the promotion and development of public markets throughout the country. They would be able to provide information on the possible sources of funding for supporting expansion and maintenance of the Central Market. In addition, two RFP’s were recently released, by PPS and the Ford Foundation, to provide \$1 million in support for public markets and community development. The Ford Foundation is largely interested in how public markets can achieve broader community development revitalization goals, promote social integration and encourage the upward mobility of market vendors. Another interest is to help markets become sustainable and achieve economic and social success over the long term. In addition, the U.S. Department of Health and Human Services, through the Office of Community Services, recently released an RFP for a \$1 million grant program for public markets, focusing primarily on capital grants of up to \$250,000. Future sources of funding from these organizations may provide potential sources of funding to expand the hours of operation, or upgrade facilities at the Lancaster Central Market.

Recommendation

THERE ARE A NUMBER OF RECOMMENDATIONS THAT RELATE TO IMPROVEMENTS IN PHYSICAL INFRASTRUCTURE. THESE INCLUDE RECOMMENDATIONS TO IMPROVE THE SYSTEM OF VEHICULAR, PEDESTRIAN AND INTERPRETIVE SIGNAGE IN THE CITY OF LANCASTER, AND TO CREATE DESTINATION SIGNAGE THAT CONNECTS THE COUNTY AND CITY. ONE SPECIFIC RECOMMENDATION IS TO CREATE A SIGNED HERITAGE TRAIL TO LINK VARIOUS ATTRACTIONS IN AND NEAR THE CITY. THE PLAN ALSO RECOMMENDS ENHANCING THE “STREETSCAPE” IN THE CITY OF LANCASTER,

⁴Workforce development programs should more generally be explored as sources of funding for worker training for other jobs created by tourism initiatives in Lancaster County, including management and supervisory positions in hotels.

INCLUDING NEW LIGHTING, GARBAGE RECEPTACLES, AND STREET FURNITURE.

Funding Options

Major sources of potential funding for these recommendations include the utilization of the state's Main Street and Elm Street programs.

Main Street and Elm Street Programs. These programs are potential sources of funding for a variety of projects that could promote the commercial revitalization of downtown Lancaster City and surrounding residential neighborhoods. Both programs are elements of the state's New Communities program, administered by the Department of Community and Economic Development (DCED).⁵

The goals of the Main Street Program are to make the traditional downtown areas of Pennsylvania's cities and urban communities more attractive as a place to live and work, and to act as a catalyst for small business development. The program is based on the National Main Street Center's "Four Point Approach": design (rehabilitating historic buildings and promoting supportive new construction); organization (building consensus among the participating groups); promotion (marketing the district's assets to customers); and economic restructuring (strengthening the existing district economy and building the capacity to embrace new opportunities). The program designates official Main Street "communities." The employment of a full-time professional downtown manager is required for these communities. Four types of funding are available.

- **Planning Grants.** Grants up to \$25,000 will be made available for planning activities. A Main Street Program five-year strategy is required for all designated Main Street Communities. Planning grants can be used to assist in completing the required components of the strategy.
- **Operational/Basic Grants.** Main Street Communities can receive administrative grants totaling \$175,000 over a five-year period to hire a full-time professional downtown coordinator. Local cash matches for the administrative grants are required in years 2-5 of the grant. Main Street Communities are also eligible to receive four years of design challenge/façade improvement grant funding not to exceed \$100,000. Design improvement grant funding must be matched dollar-for-dollar by the individual owner of the property.

- **Downtown Reinvestment Grants.** These grants are available to all Pennsylvania municipalities for a variety of development projects to help eliminate decline and act as a financial gap filler for projects proposed within the community's traditional downtown or neighborhood commercial district. Grants up to 50% of the total development costs are available for projects only if they are identified in and supported by an up-to-date, locally adopted five-year downtown Strategy. The average grant amount is \$250,000 although there is no minimum or maximum. Eligible activities include: substantial rehabilitation of second story commercial structures for use as moderate income housing, restoring commercial building facades and correcting code deficiencies; acquiring properties in historic districts or central business districts; and improving public sites in the commercial target area.

- **Anchor Building Grants.** These are "grants-to-loans" for eligible applicants for important buildings that are located in the downtown district. Generally, these grants-to-loans are grants to a local, public or private non-profit entity that are borrowed by the developer from the grantee and repaid to a local revolving loan fund. DCED will give priority consideration to building projects with these characteristics: greater than 10,000 square feet; vacant or underutilized; considered by the community to be an important downtown building that is vital to the downtown's health; a structurally sound building that is eligible for or already listed on the National Historic Register. Eligible activities for Anchor Building grants-to-loans can be used for up to 30% of the total project investment required to acquire and renovate the building. Total funding cannot exceed \$250,000.

Elm Street Program. This program allows communities to integrate a Main Street or downtown revitalization program with a neighborhood renewal strategy. The Elm Street program is designed to provide assistance and resources to those mixed use and residential areas in proximity to central business districts, to further enhance the downtown area and to improve the viability of older neighborhoods. Three types of grants are available under the Elm Street Program:

- **Planning Grants.** These grants are available to assist a community in developing an Elm Street program, preferably a five-year strategic plan.

⁵ Detailed information on the Main Street and Elm Street programs is available in the New Communities Program Guidelines, available online at www.inventpa.com

- **Operational Grants.** *Operational grants are available to designated Elm Streets over a four-year period for the employment of an Elm Street Manager to implement the five-year strategy. Year one is a provisional year when up to \$25,000 in planning funds may be requested to prepare the organization to operate the program. State funding levels and the required local match are as follows. In year one, up to \$25,000 is available to support planning, and at least \$2,000 or 10 percent of the grant is required as a local match. In the operational years (years 2-5), up to \$50,000 in funding is available, and at least \$5,000 or 10 percent of the grant is required as a local match. Matching funds can be cash and/or documented in-kind services.*
- **Residential Reinvestment Grants.** *Residential Reinvestment grants are available to carry out physical improvements within an established residential neighborhood to a community that has an Elm Street Plan or an acceptable comprehensive strategic plan in place similar to the Elm Street five-point strategy. The normal grant size under this component ranges from \$50,000 to \$250,000. A match of at least 10% of the grant amount is required. Eligible activities include development projects that help eliminate decline within the community's traditional residential district. Monies can be used for small loan programs. Examples of eligible activities include: public infrastructure including streets, streetlights, trees, sidewalks or other pedestrian-oriented features; structural improvements of buildings for mixed use; acquisition of properties that could have historical significance through a subsidized loan program in conjunction with local financial institutions to encourage increased home ownership and/or centralized management of rental units in the project area. Grants for façade improvements, design assistance, and historically accurate improvements are limited to \$2,500 per property.*

Recommendation

CREATE ADDITIONAL LODGING IN THE CITY OF LANCASTER, INCLUDING SMALL HOTELS, BED AND BREAKFAST OPERATIONS, AND URBAN INNS.

Funding Options

Tax Increment Financing. For larger hotel construction, one option is tax increment financing (TIF). Through TIF, communities can borrow funds for redevelopment projects and then repay those borrowed monies through the new tax revenues that will be generated as a result of the development. The state's recently enacted Economic Stimulus Program contained a new program to promote the use of TIF by smaller communities, the Tax Increment Financing Guarantee Program (TIFGP).

This \$100 million program provides a combination of technical assistance and loan guarantee assistance. Under TIFGP, a local issuer of TIF bonds or the Commonwealth Financing Authority may obtain a loan guarantee to serve as credit enhancement for a TIF bond issue, thereby allowing the bonds to be sold on more favorable terms. This could be applied to any infrastructure projects, including hotel projects. This program is a potential source of funding for new hotel development in the City of Lancaster.

Small Business First. This state program is another potential source of funding for development of hotels and bed and breakfasts in the City of Lancaster. The program, administered by the Department of Community and Economic Development, provides funding for small businesses, defined as businesses with 100 employees or less. Hotels, motels and restaurants are eligible. Types of financial assistance that are available include: low-interest loan financing for land and building acquisition and construction; machinery and equipment purchases and upgrades; working capital; and environmental compliance/pollution prevention. Loans can be made for up to \$200,000 or 50 percent of total eligible project costs, whichever is less. The maximum loan amount for working capital is \$100,000 or 50 percent of total eligible project costs, whichever is less.

Other Options. The City should explore the creation of small fund to provide matching grants and low-interest loans to support creation of bed and breakfast operations. For conversion of older buildings to bed and breakfasts, historic tax credits are a potential funding source.

Recommendations

A NUMBER OF RECOMMENDATIONS RELATE TO CHANGES IN THE WAY THAT THE COUNTY AND CITY MARKET TOURIST ATTRACTIONS. THESE RECOMMENDATIONS INCLUDE THE FOLLOWING: AN INCREASED EMPHASIS ON NICHE MARKETING; IMPROVEMENTS TO THE PDCVB WEBSITE; COOPERATIVE MARKETING WITH PUBLIC TRANSIT PROVIDERS; BUILDING ON EXISTING "HERITAGE THEMES"; INCREASED EMPHASIS ON MARKETING TOWNS AND VILLAGES AS A HERITAGE PRODUCT; INCREASED EMPHASIS ON MARKETING GROUPS OF ATTRACTIONS AS PACKAGES, INCLUDING GROUPS OF ATTRACTIONS THAT COMBINE CITY AND COUNTY ATTRACTIONS; AND EFFORTS BY LANCASTER COUNTY TO TAKE THE LEAD IN REGIONAL BRANDING WITHIN SOUTHCENTRAL PENNSYLVANIA.

Funding Options

Tourist Promotion Assistance (TPA) Grants. This program assists county and regional tourist promotion agencies by providing state matching grants to support tourism promotion expenses. There is \$11.0 million in state funds for this program in FY 04-05. Funds can be used to support research, advertising, public relations and other promotional programs designed to stimulate travel and tourism. Program funding is only provided to those county or regional tourism promotion agencies that have been properly designated by the county or counties they represent. Applications are accepted on an annual basis every August. Agencies must also show proof of eligible promotional spending of locally raised funds to qualify for quarterly reimbursement from their grant allocation.

State Regional Marketing Initiative Grants. This competitive grant program is designed to promote coordinated regional tourism marketing efforts across multiple counties. State funds are provided to local tourism promotion agencies and non profit organizations, partnering within a minimum of five counties, to develop destination marketing programs. Funds can be used for research, advertising, public relations and other promotional activities to stimulate travel and tourism. There is a required two-to-one match. In the FY 04-05 budget, there is \$5.0 million appropriated for these grants. Lancaster County is well positioned to receive funding under this program, as the potential core marketer of an extended Pennsylvania Dutch Country brand.

Recommendation

THE PLAN INCLUDES A NUMBER OF RECOMMENDATIONS RELATING TO IMPROVEMENTS IN TRANSPORTATION AND PARKING. THEY INCLUDE: PROVIDING A SEASONAL SHUTTLE SERVICE; UNLIMITED TRANSIT PASSES; ENCOURAGING NON-FIXED ROUTE SERVICES; DEVELOPING NEW CONNECTIONS BETWEEN THE COUNTY AND CITY VISITOR DOMAINS; IMPROVING TAXI SERVICE WITHIN THE CITY; IMPROVING TRANSPORTATION CONNECTIONS TO LANCASTER STATION; IMPROVING CONDITIONS FOR NON-MOTORIZED TRAVEL; AND EXPANDING PARKING FACILITIES.

Funding Options

Federal Transportation Equity Act for the 21st Century (TEA-21). TEA-21 affirmed the eligibility of preservation projects with functional, economic, visual, or other links to the transportation system. Funding has been used for downtown revitalization, heritage area projects, rural

landscape preservation, and the development of bicycle and pedestrian transportation corridors.

National Scenic Byways Program. This component of TEA-21 is designed to protect and enhance America's designated scenic roads. The program is administered by the U.S. Department of Transportation, Federal Highway Administration. Money is available for planning, safety and facility improvements, cultural and historic resource protection, and tourism information signage. Bicycle and pedestrian facilities can be developed in conjunction with scenic roadway projects. Some states with Scenic Byway Programs have developed greenways in conjunction with this initiative.

Congestion Mitigation and Air Quality Improvement (CMAQ) Program. The CMAQ program was created to reduce congestion on local streets and improve air quality. Funds are available to urban communities designated as "non-attainment" areas for air quality. The program is administered by the Federal Highway Administration and the Environmental Protection Agency. A grant recipient must demonstrate that its project will improve air quality throughout the community. Funding requires a 20% local match.

National Recreational Trails Program. These grants are available to government and nonprofit agencies, for amounts ranging from \$5,000 to \$50,000, for the building of a trail or piece of a trail. It is a reimbursement grant program (sponsor must fund 100% of the project up front) and requires a 20% local match. This is an annual program, with an application deadline at the end of January. The available funds are split such that 30% goes towards motorized trails, 30% to non-motorized trails, and 40% is discretionary for trail construction.

Transportation Development Districts. The Transportation Development District, or TDD, is a mechanism by which the cost of needed transportation improvements are carried proportionately to the burden placed on the existing system by new development. The Transportation Development District Act of 1989 provides for public-private cooperation in the planning and funding of transportation improvements within the boundaries of an approved district, based on a joint planning process involving state, county and local governments and representatives of the private sector.

The first Transportation Development District designated in New Jersey was the I-95/295 Corridor in Ewing, Lawrence

and Hopewell townships, Mercer County. The Mercer County TDD Plan requires new projects with traffic impacts to pay for improvements based on a dollar cost per vehicle trip generated.

The TDD concept is not limited to roadway improvements, however. It is possible to establish a TDD for purposes of funding needed improvements to mass transit systems in downtowns or around existing transit stations. Such a TDD would operate much like a Special Improvement District, but the funds raised would be dedicated to improvements that facilitate the use of buses and/or trains.

Impact Fees. Impact fees are authorized by a municipal ordinance that allows municipalities to assess developers for portions of the transportation capital improvement costs related to their developments. These fees are intended to generate revenue for funding the costs of off-site public transportation capital improvements necessitated by and attributed to the new development.

Pennsylvania's Traffic Impact Fee Law, more commonly known as Act 209 or Article V-A of the Municipalities Planning Code, requires a linkage between the development and the need for transportation improvements. In effect, the fees allow the cost of improvements to be proportionally allocated among new property owners. It should be noted that a municipality may only assess an impact fee to address traffic concerns generated by new development, not to correct pre-existing deficiencies.

POTENTIAL SOURCES OF FUNDING FOR A VARIETY OF PLAN RECOMMENDATIONS

This section lists sources of funding that are potentially applicable to a variety of the Plan's recommendations. Funding sources available from federal and state government, and private and corporate foundations are described.

FEDERAL AGENCIES

A number of federal agencies are potential sources of funding, particularly in areas that relate to development of heritage assets in the County.

- **The Institute of Museum and Library Services.** IMLS is an independent federal agency that provides funds to libraries and museums. The Institute provides general operating support, a museum assessment program, conservation project support, conservation assessment, and National Leadership Grants for Museums.
- **National Endowment for the Arts.** NEA provides organization grants, heritage and preservation Grants, and Challenge America grants. Heritage and preservation grants provide funds for the "conservation of highly significant works or collections of art, artifacts or designed elements, or of cultural traditions and practices." NEA's Design Arts Program provides grants to state and local agencies, individuals and nonprofit organizations for projects that incorporate urban design, historic preservation, planning, architecture, landscape architecture and other community improvement activities, including greenway development. Grants to organizations and agencies must be matched by a 50% local contribution. Agencies can receive up to \$50,000.
- **National Endowment for the Humanities.** NEH provides challenge grants, planning grants and consultation grants for museums, libraries and special projects, and preservation assistance grants.
- **National Historical Publications and Records Commission.** NHPRC provides grants for projects collecting, describing, preserving, compiling, and publishing documentary sources significant to US history and making them available to the public.
- **National Park Service.** NPS provides historic preservation funds that support preservation activities carried out through the state Historic Preservation Office, which works with local communities to achieve preservation goals. NPS also provides preservation technology and training grants that fund training, technology, information management, and basic research in historic preservation fields. NPS also provides Save America's Treasures grants, which provide funding for preservation and/or conservation of nationally significant intellectual and cultural artifacts, and historic structures and sites (historic structures and sites include historic districts, buildings, structures, and objects). Finally, NPS provides Federal Historic Preservation Tax Credits (HPTC) of 20 percent toward the certified rehabilitation of certified historic structures for income-producing properties and 10

⁶ These are foundations in the County with assets in excess of \$15 million or annual grants that exceed \$750,000. From Directory of Pennsylvania Foundations, 7th Edition, accessed at <<http://pafoundations.net>>.

percent for the rehabilitation of non-historic, non-residential buildings built before 1936. HPTC's can be received by owners of properties listed on, or eligible for, the National Register of Historic Places, and located in a historic district and a certified contributing structure by the NPS.

FOUNDATIONS

Local Foundations

A number of Lancaster County foundations have historical or heritage related missions, and are likely sources of funds for many of the recommendations. The following is a list of the largest Lancaster County-based foundations.⁶

Name	Assets (in millions):	Grant Support (in millions):
Lancaster County Community Foundation	\$34.3	\$1.0
(John Frederick) Steinman Foundation	\$30.9	\$1.4
(James Hale) Steinman Foundation	\$28.8	\$1.2
Brossman (William and Jemima) Charitable Foundation	\$22.7	\$1.0
Ferree Foundation	\$17.5	\$1.5
1675 Foundation	\$17.5	\$0.9
Crels Foundation	\$18.9	\$0.8
Ressler Mill Foundation	\$15.5	\$0.2
Armstrong Foundation	\$ 5.0	\$2.1
Good (Richard and Annetta) Foundation	\$ 1.1	\$1.0

Regional Foundations

- **The Progress Fund.** The Progress fund is a “community development financial institution” that creates jobs and improves communities. Their target area is southwestern and central Pennsylvania and West Virginia. The Fund provides capital and coaching to new or expanding businesses that seek to create jobs and opportunity. The Fund supports businesses that build the rural economy, typically while honoring the environment, reusing historic structures, reinvigorating traditional business districts, and creating living wage jobs. Since its inception in 1997, the Fund has made 123 loans totaling more than \$8 million, created or retained more than 750 jobs, provided at least 7,000 hours of business counseling, and helped reuse 60 historically significant buildings. The Fund has assisted accounting firms, bed & breakfasts, brewpubs, canoe rental outfitters, clothiers, coffee shops, general stores, ice cream shops, liveries,

manufacturers, museums, quilting emporiums, residential developments, restaurants, a small business school, and many others, including many women-owned businesses. The Fund would be an obvious candidate to support many of the recommendations of the Tourism Plan. The Fund could support many entrepreneurs in the City or County who are developing businesses with a cultural or heritage character, promoting historic preservation, or helping to revitalize the business district of downtown Lancaster City.

National Foundations

There are several national foundations that have a high degree of focus on support of historical and cultural heritage related projects.

- **James Marston Fitch Charitable Foundation.** The Foundation’s purpose is to advance the study and practice of the preservation of the historic architectural heritage.
- **J. Paul Getty Trust.** The Getty Grant Program, administered by the J. Paul Getty Trust, makes grants in the fields of research, conservation, and leadership and professional development to promote research in the history of art and related fields and conservation of cultural heritage. This program is a potential source of funding for upgrading structures of historical significance in the City or County, and conservation of museum collections. The program funds “a diverse range of projects that promote learning and scholarship about the history of the visual arts and the conservation of cultural heritage, and it consistently searches for collaborative efforts that set high standards and make significant contributions.” There are two major types of conservation grants, focused on conservation of museum collections and architectural conservation. Museum Conservation Grants are designed to assist institutions in caring for their permanent collections, and include survey grants to assist museums in identifying conservation requirements of their collections, and treatment grants to support actual conservation. Architectural Conservation Grants support organizations in their efforts to preserve buildings or sites of “outstanding architectural, historical, and cultural significance.” They include planning grants to assist in the development of conservation plans, and implementation grants to support actual conservation of a building’s historic structure and fabric. Recent architectural conservation grants have ranged from \$20,000 to \$250,000.
- **Graham Foundation.** Grants focus on architecture and the built environment; generally activities that lead to the public dissemination of ideas through publication, exhibition, or educational programming.

- **Wilbur Foundation.** *The Foundation seeks to support institutions and projects that are calculated to enhance or preserve the “permanent things” of society. Its purpose is to “enhance, preserve and protect the transcendent and permanent values of civilization and our temporary society through support of the humanities.” The Foundation concentrates its funding in the field of humanities, especially history, literature, religion, and philosophy. Support is given only through tax-exempt public foundations that reflect a concern for historical continuity and studies of a traditional nature. The foundation does not consider grants for general building purposes. Grant applications are accepted between September 1st and December 31st of any year. This would be a potential source of funding for research that could help support the preservation and development of Lancaster’s culture and heritage, as well as product development that specifically relates to museums, libraries, and other institutions that preserve and clarify Lancaster County’s cultural heritage.*
- **American Express Foundation.** *Their grants for cultural heritage emphasize: “public awareness of the importance of historic and environmental preservation; preservation and management of major tourism sites; direct support for important cultural institutions...that are representative of national, regional and local cultures...”*
- **National Trust for Historic Preservation.** *The Trust’s Rural Heritage Program is dedicated to the recognition and protection of rural historic and cultural resources. Through educational programs, publications, and technical assistance, the Rural Heritage Program supports the efforts of rural communities across the country to both preserve and live with their heritage. The Program works with communities on topics as diverse as farmland preservation, scenic byways, heritage areas and parks, historic roads, and sprawl.*

STATE FUNDING

The state’s Department of Community and Economic Development offers a wide range of economic development programs, many of which are potential sources of funding for tourism-related projects.⁷ These programs have been substantially expanded with the passage of a variety of programs proposed by Governor Rendell and collectively referred to as the Economic Stimulus Program. These programs have been enacted

over the past two years. The most relevant Economic Stimulus Programs for purposes of funding the recommendations of the Lancaster Strategic Tourism Development Plan include the following:

- **Business in Our Sites.** *This is a \$300 million statewide loan and grant pool, made available to communities statewide to help them develop shovel-ready sites to accommodate expanding businesses. Funds may be used for land acquisition, conducting environmental assessment and remediation, demolition, site preparation activities and installation of infrastructure, including but not limited to sewer, water, storm water, utilities and telecommunications. Funds may also be used for access roads or other necessary on-site and off-site transportation improvements. These include rail, costs associated with engineering, legal and other professional services; and any other activities necessary to make a specific site ready for reuse. The program recognizes that many smaller communities lack the expertise or resources to perform the upfront work required to pull together a site preparation project. Up to \$10 million will be provided as grants for feasibility studies.*
- **Building PA.** *This program will provide \$150 million in funding for the development of real estate assets within the Commonwealth. The \$150 million should be matched by private investors and foundations. The resulting \$300 million fund will provide mezzanine capital for developers seeking to redevelop and revitalize real estate assets in small to mid-sized Pennsylvania communities.*
- **First Industries Fund.** *Historically, the Commonwealth has provided little in the way of financial incentives to owners of tourism-related businesses or assisted farmers with their capitalization or working capital needs. Through its two main components – the Tourism Development Fund and the Agriculture Expansion Fund - the First Industries Fund provides \$150 million in planning grants, revolving loans and loan guarantees aimed at helping these two vital segments stay healthy and dynamic. For tourism, the First Industries Fund will be available to, among others, businesses involved in destination tourism, hospitality and other tourism-oriented services, and nonprofit entities that promote regional and local tourism.*
- **Infrastructure and Facilities Improvement Program.** *This program is a multi-year grant program (to help pay debt service) for certain types of infrastructure*

⁷ More detail on the state economic development programs is available from the website of the Department of Community and Economic Development, www.inventpa.com.

and building projects. The amount of grant funding will be calculated on the basis of the anticipated amount of state sales tax, hotel occupancy tax, and personal income tax to be generated by a project. Entities that issue debt to finance a project may apply to the Department of Community and Economic Development (DCED) for grant funding. This would include: authorities that issue debt for tax increment financing; redevelopment authorities; convention center authorities, including municipal authorities formed for that purpose; and the Pennsylvania Economic Development Financing Authority.

- **Redevelopment Assistance Capital Program.** This grant program, administered by the Office of the Budget, funds the acquisition and construction of regional economic, cultural, civic and historical improvement projects. Preference will be given to those projects that display significant potential for improving economic growth and the creation of jobs and new opportunities to a diverse group of communities throughout the Commonwealth.

LOCAL FUNDS

Funds from local general revenues are potential sources of funding for any of the recommendations. Act 72 of 2004, which is expected to create a pool of funding for property tax relief generated by revenues from legalized gaming, may generate some additional fiscal capacity at the local level. The City or County may wish to dedicate some of this new fiscal capacity to finance tourism-related initiatives.

OTHER CONCEPTS

Tax Abatement

Tax abatement programs could be of potential use for stimulating tourism-related business development – including hotels, restaurants, and other retail businesses – in targeted areas within Lancaster City or other parts of the County. The County, and local municipalities, would need to identify the sites where tax abatement programs would be of the greatest use in encouraging development of tourism-related industries.

- The state's **Keystone Opportunity Zone (KOZ)** program is designed to revive economically distressed urban and rural communities. The program incentivizes economic development in targeted zones through the elimination or reduction of taxes levied on businesses and residents within the zone. State and local taxes in the designated areas are reduced to almost zero through credits,

waivers, and comprehensive deductions. The tax abatements remain in effect through 2010, with some areas continuing until 2013. The original KOZ program, enacted in 1998, was expanded in 2000 and 2002 to include new types of tax abatement zones referred to as **Keystone Opportunity Expansion Zones (KOEZ's)** and **Keystone Opportunity Improvement Zones (KOIZ's)**.⁸

- An additional tool is local property tax abatement under the **Local Economic Revitalization Tax Assistance Act (LERTA)**. Under LERTA, local municipalities, school districts and counties can offer tax abatements on improvements to property for up to 10 years.

Designated Tourism Development Zones

The primary focus of these zones would be sustainable tourism development that helps improve local quality of life while earning revenues from visitors. Every effort should be made to work with the state legislators to identify potential new incentive programs that could be applied in these specific areas and corridors.

Legislative Support for Agri-Tourism

In order to assist Lancaster County farmers, particularly the Amish, to develop agri-tourism services to visitors, use a precedent set by the State of California to establish a Pennsylvania Agricultural Homestay Bill. The California version, passed in July 1999 and subsequently amended, paved the way for more farmers (and ranchers) to offer tourists overnight visits. The bill exempts farms that offer overnight stays from the more stringent requirements of operating a commercial restaurant. To qualify for overnight stays, the farms must produce agricultural products as their primary source of income and therefore be a "restricted food service transient occupancy establishment." Additionally, farmers are limited to six guest rooms and 15 visitors a night – less than the amount allowed for a Bed & Breakfast operation.

⁸ More information on the state's KOZ, KOEZ, and KOIZ programs is available from the website of the state Department of Community and Economic Development, www.inventpa.com.

Economic Impact Forecasts

POTENTIAL ECONOMIC IMPACT OF LANCASTER COUNTY STRATEGIC TOURISM DEVELOPMENT PLAN RECOMMENDATIONS

A range of estimates of the potential economic impact of the Plan's recommendations through 2009 have been developed and included in this section of the Strategic Tourism Development Plan. The first step in developing these estimates was to determine the level of current economic activity related to tourism in the County, to use as a base for future projections. The second step was to project future trends in tourism-related economic activity in the County, under the assumption that the Plan recommendations are not implemented, and under the assumption that the recommendations are implemented.

ESTIMATING THE BASE LEVEL OF TOURISM-RELATED ECONOMIC ACTIVITY

In 2001, tourism-related economic activity in Lancaster County accounted for \$3.916 billion in expenditures, \$898 million in earnings, 47,000 jobs, and \$237 million in state and local tax revenue, taking into account direct, indirect, and induced economic effects.¹ It is necessary to update these estimates to produce a base level of tourism-related economic activity in the County. Estimates were developed for the most recently completed year 2003, based on national data on tourism growth, and use the 2003 estimate as the base for future forecasts.

The percentage change between 2001 and 2003 based on the U. S. Department of Commerce, Bureau of Economic Analysis, U. S. Travel and Tourism Satellite Accounts was estimated. These accounts provide estimates of the total output and employment in tourism-related industries in the US in 2001 and 2003. The percentage change in national tourism-related output was utilized as the basis for estimating the percentage change in expenditures, earnings and tax revenue generated by Lancaster County tourism-related economic activity between 2001 and 2003. The national change in tourism-related employment during this period was used to estimate the change in tourism-related employment in the County between 2001 and 2003.

Calculation of Base Year Economic and Fiscal Impact of Tourism in Lancaster County

(\$ in millions)	2001 Estimate	2003 Estimate	Percent Change
Expenditures	\$3,916	\$4,155	6.1%
Earnings	\$898	\$953	6.1%
Employment	47,000	45,919	-2.3%
Fiscal Impact	\$237	\$251	6.1%

Note: Figures represent the total economic and fiscal impact of Lancaster County tourism-related activity, including direct, indirect, and induced activity. Source: Econsult Corporation. (2004)

PROJECTING FUTURE TRENDS IN TOURISM-RELATED ECONOMIC ACTIVITY

The next step in the analysis was to develop projections of tourism-related activity in Lancaster County over the 2003 to 2009 period. Our projections are based on projections for national growth in the travel and tourism industry over the 2004-2014 period from the World Travel and Tourism Council (WTTC).² The Council projects that U. S. travel and tourism GDP will grow at a real annual rate of 3.6 percent from 2004 to 2014, and that U.S. travel and tourism employment will grow at an annual rate of 1.7 percent over this period.

Three scenarios for Lancaster County were developed based on these national growth projections. The baseline scenario assumes that Lancaster County's economic activity related to tourism will equal the national growth rates projected by the WTTC through 2009. This assumption is equivalent to the assumption that the County's share of the national travel and tourism economy will remain constant. Two scenarios were also developed under which the County will capture a gradually increasing share over time of the national tourism market. The "moderate" scenario assumes that Lancaster County's growth will exceed national growth by 50 percent. The "optimistic" scenario assumes the County's tourism economy will grow at twice the rate of the national tourism economy. Both scenarios are designed to represent plausible estimates of the impact of implementing the Plan recommendations. Significant efforts to improve marketing, develop product, and increase the accessibility

¹ *The Economic Impact of Tourism in Lancaster County*. February 2004. Philadelphia and New York: Econsult Corporation and Parter International, Inc.

² *United States Travel and Tourism Forging Ahead: The 2004 Travel and Tourism Economic Research*. February 2004. New York: World Travel and Tourism Council.

of Lancaster County attractions are likely to mean that the County's tourism economy will grow significantly more rapidly than the national tourism economy.

These assumptions translate into the following projected growth rates for Lancaster County tourism-related economic activity. Over the 2003-2009 period, expenditures, earnings, and tax revenues are projected to grow at 6.1 percent annually in the baseline, 7.9 percent annually in the moderate scenario, and 9.7 percent annually in the optimistic scenario. Employment is projected to grow at 1.7 percent annually in the baseline, 2.6 percent annually in the moderate scenario, and 3.4 percent annually in the optimistic scenario.³ Applying these growth rates to the 2003 base levels presented on the previous page produces the projections presented in the table below.

A reasonable way to measure the impact of the Plan's recommendations is to measure the difference between the projections under the moderate and optimistic scenarios, and the baseline scenario. This is a conservative way to measure the impact of the Plan since it assumes that, in the absence of implementing any of the Plan recommendations, Lancaster would maintain its market share of the national tourism economy. It is likely that the County's market share would decline without implementation of the Plan, since competitor destinations across the country are always taking steps to improve product and marketing. So we view these as a plausible, but conservative, way to measure the economic value of the Plan to the County.

Projected Economic and Fiscal Impact of Tourism in Lancaster County, 2004-2009

(\$in millions)	2004	2005	2006	2007	2008	2009
Travel Expenditures						
Baseline	\$4,408	\$4,677	\$4,963	\$5,265	\$5,586	\$5,927
Moderate	4,483	4,837	5,219	5,632	6,077	6,557
Optimistic	4,558	5,000	5,485	6,017	6,601	7,241
Earnings						
Baseline	\$1,011	\$1,073	\$1,138	\$1,207	\$1,281	\$1,359
Moderate	1,028	1,109	1,197	1,291	1,393	1,504
Optimistic	1,045	1,147	1,258	1,380	1,514	1,660
Employment						
Baseline	46,700	47,494	48,301	49,122	49,957	50,806
Moderate	47,113	48,338	49,595	50,884	52,207	53,564
Optimistic	47,480	49,095	50,764	52,490	54,274	56,120
Fiscal Impact						
Baseline	\$267	\$283	\$300	\$319	\$338	\$359
Moderate	271	293	316	341	368	397
Optimistic	276	303	332	364	399	438

Note: Figures represent total economic and fiscal impacts, including direct, indirect, and induced impacts. Source: Econsult Corporation. (2004)

³ These growth rates all incorporate an assumption of 2.5 percent annual inflation.

Impact of Plan Recommendations: Difference Between Moderate and Optimistic Scenarios, and Baseline Scenario, 2004-2009

<i>(\$ in millions)</i>	2004	2005	2006	2007	2008	2009
Expenditures						
Moderate	\$75	\$160	\$257	\$366	\$490	\$630
Optimistic	150	323	522	752	1,014	1,314
Earnings						
Moderate	\$17	\$37	\$59	\$84	\$112	\$144
Optimistic	34	74	120	172	233	301
Employment						
Moderate	413	844	1,294	1,762	2,250	2,758
Optimistic	781	1,601	2,463	3,368	4,317	5,313
Fiscal Impact						
Moderate	\$5	\$10	\$16	\$22	\$30	\$38
Optimistic	9	20	32	46	61	80

**Note: Figures represent total economic and fiscal impacts, including direct, indirect, and induced impacts. Source: Econsult Corporation. (2004)*

Under the moderate scenario, by 2009, the Plan is projected to result in an additional \$630 million in total expenditures, \$144 million in annual earnings, and over 2,700 jobs in tourism-related industries in the County, and an additional \$38 million in state and local tax revenue. Under the optimistic scenario, by 2009, the Plan is projected to result in an additional \$1.314 billion in total expenditures, \$301 million in annual earnings, and over 5,300 jobs in tourism-related industries in the County, and an additional \$80 million in state and local tax revenues.⁴

⁴These estimates take into account direct, indirect, and induced effects of tourism within the County. The estimates implicitly assume that the relationship between direct, indirect, and induced economic effects of tourism in the County over the forecast period is unchanged from that estimated for 2001 in *The Economic Impacts of Tourism in Lancaster County* (Econsult Corporation and Parter International, Inc., 2004). We believe this is a reasonable assumption. While the linkages between economic activity between tourism and other industries nationally and within Lancaster County are likely to change somewhat over the period, the changes are not likely to be significant.

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Glossary of Terms

Acronyms Used in Plan:

AAA	American Automobile Association	NHPRC	National Historical Publications and Records Commission
DCED	Department of Community and Economic Development	NPS	National Park Service
DID	Lancaster Downtown Investment District	NTHP	National Trust for Historic Preservation
EDC	Economic Development Company	PDCVB	PA Dutch Convention & Visitors Bureau
EPA	Environmental Protection Agency	PPS	Project for Public Spaces
F&M	Franklin & Marshall College	RFP	Request for Proposals
FHWA	Federal Highway Administration	RRTA	Red Rose Transit Authority
FY	Fiscal Year	SWOT Analysis	Strengths, Weaknesses, Opportunities, and Threats
HACC	Harrisburg Area Community College	T&V Partners	Towns & Villages Partners
HPI	Historic Philadelphia, Incorporated	TDA/C's	Tourism Development Areas/Corridors
HPT	Historic Preservation Trust of Lancaster County	TDD	Transportation Development District
IMLS	Institute of Museum and Library Services	TEA-21	Federal Transportation Equity Act for the 21st Century
KOZ	Keystone Opportunity Zone	TIF	Tax Increment Financing
LCBC	Lancaster County Board of Commissioners	TIFGP	Tax Increment Financing Guarantee Program
LCCCA	Lancaster County Convention Center Authority	WTTC	World Travel and Tourism Council
LCCI	Lancaster Chamber of Commerce & Industry	York CVB	York Convention & Visitors Bureau
LCCTC	Lancaster County Career & Technology Center		
LCHRA	Lancaster County Housing & Redevelopment Authority		
LCPC	Lancaster County Planning Commission		
LCTDC	Lancaster County Tourism Development Corporation		
LERTA	Local Economic Revitalization Tax Assistance Act		
LYHR	Lancaster-York Heritage Region		
NEH	National Endowment for the Humanities		

Glossary of Terms:

Geo-tourism – Tourism that sustains or enhances the geographical character of a place—its environment, heritage, aesthetics, culture, and the well-being of its residents.

Eco-tourism – Nature-based tourism that involves education and interpretation of the natural environment and is managed to be ecologically sustainable.

Agri-tourism – Agri-tourism is the act of visiting a working farm or any agricultural, horticultural or agri-business operation, such as wineries and farm markets/stands, for the purpose of enjoyment, education or active involvement in the activities of the farm or operation.

Heritage – Heritage is a legacy passed on from generation to generation. This legacy encompasses physical features and the cultural perspectives that define them. Elements of this inheritance are both tangible and intangible and are valued by or representative of a given culture or place. These elements include natural features, landscapes, historic and archeological sites, architecture, traditional arts, crafts, trades, and foods, dance and music, religion, festivals and events, food, folklore, and other social systems.

Cultural – Of or relating to the arts and manners that a group favors. Denoting or deriving from or distinctive of the ways of living built up by a group of people; influenced by ethnic and cultural ties. Of or relating to the shared knowledge and values of a society; cultural roots.

Urban Tourism – The business of providing services to tourists related to the location of a city.

Wayfinding Lighthouse – Another term for an attraction of regional significance (i.e. Lighthouse Attraction): A commercial or non-commercial attraction that provides definition to the region due to its noteworthiness and name recognition outside of the region. These attractions are typically the most visited and/or most culturally significant in the region.

Tourism Development Area/Corridor – Those areas that are within County-designated Urban or Village Growth Areas and are recognized as having a critical mass of attractions and services necessary for tourism development, or have the potential to become designated as Tourism Development Areas in the future with the appropriate level of support and financial resources.

Rural Resource Based Tourism Areas - Large rural and/or natural landscape areas, outside of designated Urban Growth Areas and identified as Agriculture, Preservation, or Conservation in the Lancaster County Comprehensive Plan. These areas have the greatest potential for sustainable, low-impact Agri-tourism and eco-tourism opportunities. Preservation of the natural, cultural and historic resources of these areas are of the highest priority. Towns and Villages within these designated landscapes could serve as gateways for interpretation and provide limited visitor services and facilities. The types of attractions and services appropriate in this landscape includes B&Bs, Country Inns, Farm Stays, Farm Markets, Wineries, Scenic Roads, Outfitters, Campgrounds, bicycle tours, etc.

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