



EXECUTIVE SUMMARY

**THE STRATEGIC TOURISM  
DEVELOPMENT ELEMENT  
JUNE 2005**



Prepared by

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Lancaster County Planning Commission  
Lancaster County Tourism Task Force

Consultants

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# Introduction

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 many charming 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 rural atmosphere and scenic countryside attract millions of visitors every year, generate billions in annual revenue, and play an integral role in the County’s economic health.

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 the Strategic Tourism Development Plan as an element 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.





# 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 was based on four guiding principles:

- **Stakeholder Involvement** - Continue the County's long tradition of including the public in all of its planning efforts.
- **Sustainability** - Support the strong preservation and stewardship efforts that Lancaster County already has under way to protect its outstanding natural, cultural, and historic resources.
- **Integration Of Supporting Studies and Reports** - 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."
- **Achievable Recommendations** - Ensure that the plan is concise and straightforward and results in "doable" or achievable recommendations.

# Approach

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 was charged with creating a Strategic Tourism Development Plan that would be adopted as an official component of the Lancaster County Comprehensive Plan. The group 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.

# 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.

Consequently, the Research and Assessment process included a review of existing studies, reports, marketing materials and electronic sources; a current attractions and infrastructure audit; a market identification and comparative destinations analysis; and a tourism leadership assessment. Two detailed studies also were conducted: an Economic Impact Study and a Mobility Study.

The Public Involvement Strategy included numerous presentations to organizations interested and involved in tourism; one-on-one interviews; group meetings with Team Lancaster, Destination Downtown and various City-related groups; four focus groups with county bed & breakfast operators, hoteliers, towns and villages representatives, and representatives from funding and financing

## The Planning Process, continued

institutions; meetings with legislators, and surveys of local residents, municipal officials, Pennsylvania Dutch Convention & Visitors Bureau (PDCVB) members and the traveling public.

In the course of the planning process, it became evident that the strengths of Lancaster County far outweigh its weaknesses. Lancaster has been a dynamic tourist destination for half a century, and has paid attention to all facets of the tourism business.

## Strategic Vision and Objective

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.

### **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.



# 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. 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

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

### Infrastructure

- Enhance visitor mobility and access through transportation improvements between proposed Tourism Development Areas.

### Marketing

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

### Outreach/Public Involvement

- Involve the community in tourism planning and development.

### Organization

- 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.
- Develop new and stable sources of funding for product development, infrastructure improvements, and marketing.

# Funding the Plan's Recommendations

Several funding sources are already being pursued by various entities within the County and significant funding is already in place for a variety of projects or programs. In general, funding support for the Strategic Tourism Development Plan 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)**
- **State**
- **Federal**
- **Private foundations or corporate sponsors**
- **Entrepreneurial revenues (revenues generated internally by tourist attractions and tourism industry businesses)**

Please refer to the full Plan document for a detailed list of recommendations and funding options.

## Potential Economic Impact of the Plan's Recommendations

Increased efforts to boost marketing, develop product, and increase the accessibility of Lancaster County attractions are likely to mean that the County's tourism economy will grow significantly.

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.



### ECONOMIC IMPACT SCENARIOS

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.



# Strategic Recommendations

Taking into account the vision, the vast stakeholder involvement, and the extensive research, studies and analyses, five key strategies and corresponding recommendations were crafted:

## Product Development Strategy:

Build on Lancaster County's Strength as a Tourism Destination

### Goal 1:

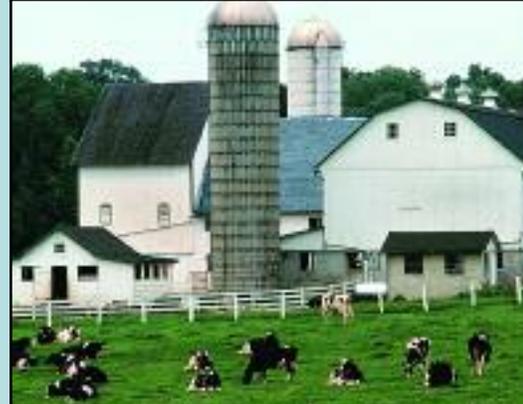
Protect, preserve, and enhance Lancaster County's authentic natural, cultural, historic and architectural heritage assets and distinctive "sense of place" as the foundation for future sustainable tourism development and promotion

### Actions:

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



The overarching product development recommendation for Lancaster County is to build on currently existing foundations. Lancaster County'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 the Plan all identify the County's heritage resources as the "product" and that they must be preserved and protected at all costs to remain a unique and competitive destination. As a result, Lancaster County should enhance, extend, remodel, create add-on products, and package what is already there.



## Strategic Recommendations, continued

### Goal 2:

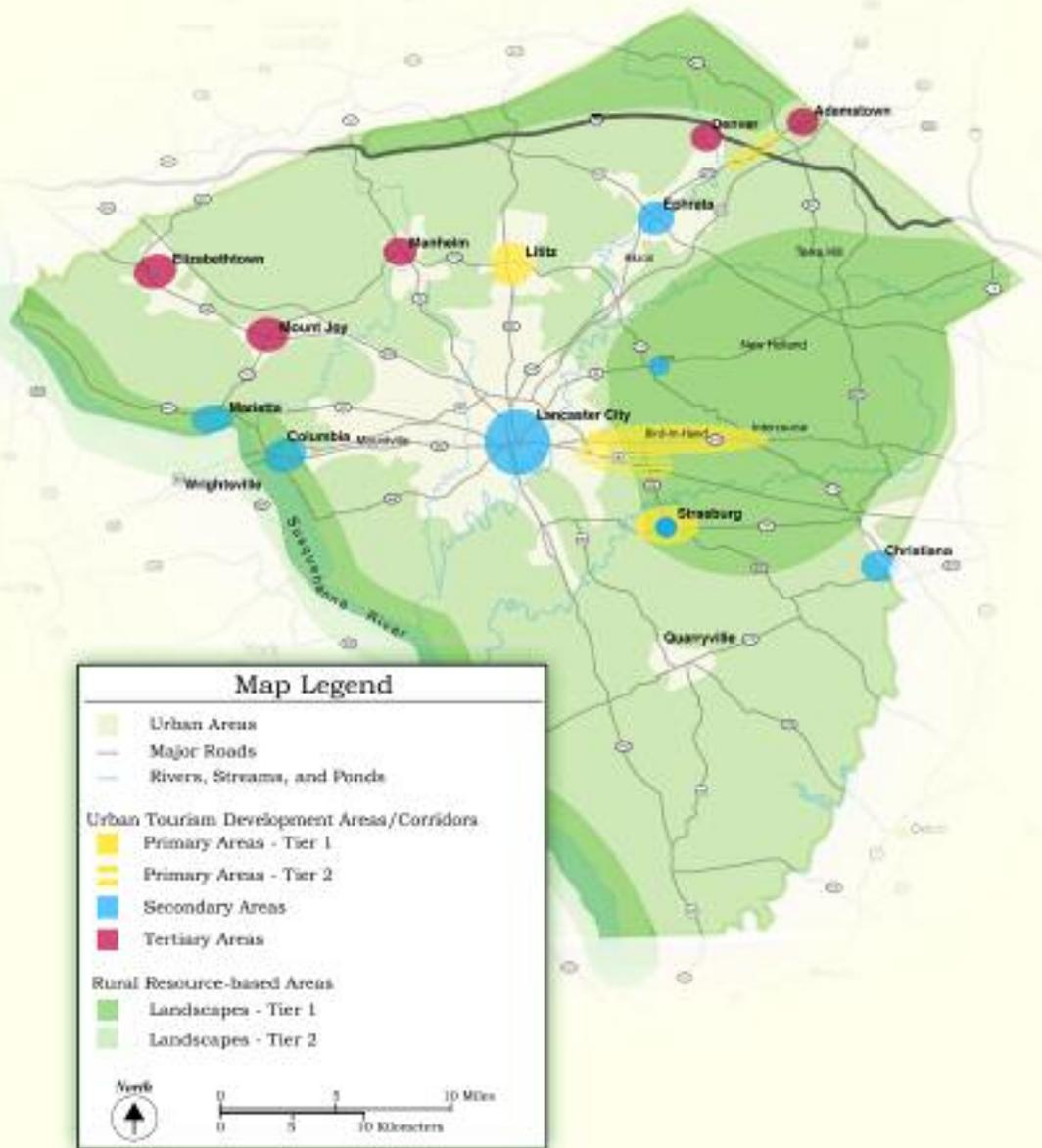
Focus resources on prioritized areas and corridors that have the greatest potential for tourism development

### Actions:

- Working in partnership with local municipalities, develop a system of Tourism Destination Areas/Corridors, within the County's designated Urban and Village Growth Areas
- Establish appropriate Towns and Villages as new and "authentic" heritage products
- Re-invest in existing recognized Tourism Development Areas within Lancaster County
- 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 Resource-Based Tourism Areas
- Create incentive programs for individual businesses and homeowners to restore their historic properties in Designated Tourism Development Areas and Corridors
- Enhance agri-tourism and eco-tourism opportunities in appropriate Rural Resource-Based Tourism Areas



# Lancaster County Proposed Tourism Development Areas/Corridors





## Strategic Recommendations, continued

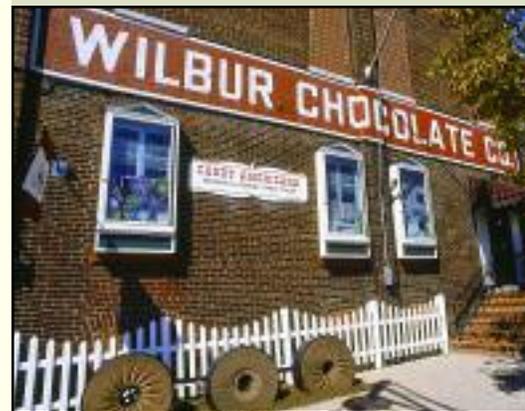
### Goal 3:

Establish the City of Lancaster as a new and exciting tourism product for the County

#### Actions:

- Create connections between the County and City products by providing complementary but different experiences
- Support new product development and partnerships that focus on the arts, culture, and heritage of Lancaster City
- Concentrate new Downtown product development initially on Central Market and surrounding area
- If a Convention Center is constructed, new products that support and enhance the Center should be created
- Explore options for creating a state-of-the-art “Lancaster Experience” Interpretive Center in Downtown Lancaster
- Concentrate on developing a diversity of new evening entertainment opportunities and extend current attractions/services to include evening hours
- Create opportunities for young adults by coordinating with and getting feedback from local institutes of higher education
- Connect multi-purpose stadium and nearby lodging, dining, and entertainment facilities and services in the northwestern part of the City with downtown

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





## Strategic Recommendations, continued

### Infrastructure and Mobility Strategy:

Make it Easy for the Visitor

#### Goal 1:

Enhance visitor mobility and access through transportation improvements actions

#### Actions:

- Create a seamless system of motorized and non-motorized linkage routes between designated Tourism Development Areas within Lancaster County
- Create and enhance transportation linkages and facilities
- Encourage non-fixed route transportation services (private vehicle transport service provided by attractions and accommodations)
- Improve conditions for non-motorized travel in designated Tourism Development Areas and Rural Resource-Based Tourism Areas
- Expand parking facilities in designated Tourism Development Areas
- Support the completion of the Paradise Station and improvements/renovations to the Lancaster, Elizabethtown, and Mount Joy train stations
- Publish a Facilities and Services Guide for bus drivers

#### Goal 2:

Increase the quality of the visitor experience

#### Actions:

- Develop pedestrian wayfinding programs in Designated Tourism Development Areas
- Complete wayfinding program within the Lancaster-York Heritage Region and prioritize wayfinding signage in designated Tourism Development Areas and linkages
- Establish and publicize a Countywide Scenic Byways program
- Utilize “Context Sensitive Design” elements to plan transportation facilities in designated Tourism Development Areas and Rural Resource-Based Tourism Areas in the County

- Create a car-free travel guide
- Create an intermodal (Train/Bus/Taxi) joint ticketing program
- Improve transit- and travel-related information on the PA Dutch Convention & Visitors Bureau and Red Rose Transit Authority websites
- Create visitor information kiosks at high-traffic tourist areas
- Explore the adoption of quality performance standards and tourism product assessment processes within the tourism industry
- Organize a Long-Term Rental Facilities Initiative
- Develop additional visitor services in Lancaster City

## Marketing Strategy:

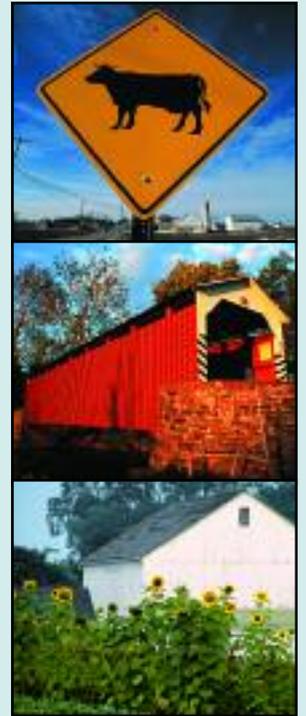
Focus on Brand Equity, Continuity, and Packaging

### Goal 1:

Build on Lancaster County's existing and strong brand awareness and equity

### Actions:

- Aggressively market the City and towns and villages as new and exciting heritage products
- Take advantage of existing and already planned products and services for core marketing of the City
- Build on five established Heritage themes of the Lancaster-York Heritage Region
- Market separately to families and adults
- Engage in niche marketing (e.g. young adults)
- Conduct tourism research on a continual basis that focuses on return on investment and visitor satisfaction
- Further enhance the Pennsylvania Dutch Convention & Visitors Bureau website as a tourism source
- Expand group tour marketing to reach new demographics





## Strategic Recommendations, continued

### Goal 2:

Enhance existing and create new collaborative marketing initiatives and partnerships

#### Actions:

- Develop marketing partnerships between the City and the County, between the City and towns/villages, three state museums, and PDCVB members to create new packages
- Create more and new tourism packages that include the City
- Take the lead in regional marketing to maximize the Pennsylvania Dutch Country brand
- Pursue cooperative marketing with transportation providers including Amtrak and bus operators
- Market already-developed Heritage theme-based regional initiatives, such as the Quest for Freedom product
- Support collaboration of higher education institutions to increase student and visitor spending within Lancaster County

### Goal 3:

Focus on overnight visitors for the greatest economic impact

#### Actions:

- Promote Lancaster-York Heritage Region/Pennsylvania Dutch Country as a multi-day getaway
- Create regional multi-day packaging opportunities
- Create, develop and market multi-day thematic and geographic tours
- Create hub-and-spoke itineraries of towns and villages for overnight stays/daily excursions
- Engage personnel and technical resources to ensure the appropriate mechanisms are in place to “close the sale” on packages

# Outreach and Public Involvement Strategy:

Educate and Involve the Community in Tourism Planning and Promotion

## Goal 1:

Increase recognition of tourism's importance to the economy and to the overall quality of life in Lancaster County

### Actions:

- Educate public and private sector leaders about the positive impact of tourism via workshops and seminars
- Create product development, management and marketing workshops on issues such as agri-tourism related initiatives
- Create a local ambassador program to involve residents in tourism promotion
- Launch an internal public relations campaign
- Support the formation of a Hospitality Center of Excellence to design training programs for new and incumbent workers in the tourism industry
- Support the addition of tourism and hospitality programs and new tourism-related curriculum at local educational institutions

## Goal 2:

Involve the community in the tourism planning process

### Actions:

- Utilize a variety of public involvement processes to engage the community in ongoing planning for tourism at the regional, county and local levels
- Ensure that the organizational structure created implements the plan and draws upon the expertise of the community
- Coordinate and integrate tourism goals with other countywide, regional and community comprehensive and economic plans and initiatives





## Strategic Recommendations, continued

### Organizational/Collaborative Strategy:

Keep it Simple, Focus on Leadership, Identify Resources, and Collaborate for Success

#### 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:

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

#### Goal 2:

Establish a creative, collaborative, and results-oriented organizational structure to support Tourism Development for Lancaster City

#### Actions:

- Work closely with 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

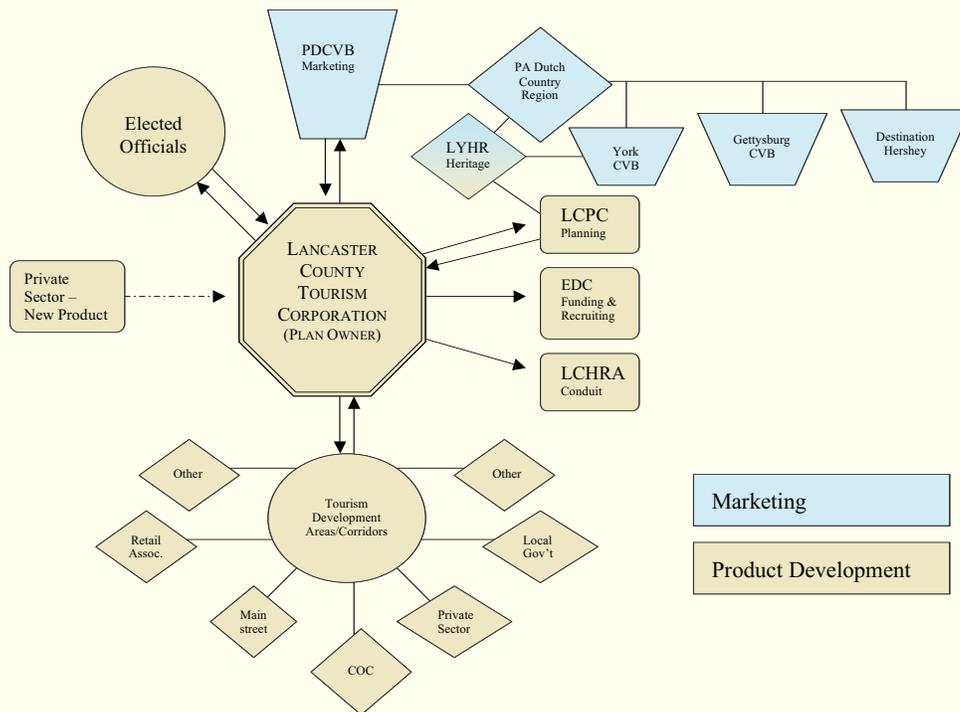
#### Goal 3:

Create strong partnerships and systems to increase cooperation of the public and private sectors in tourism planning and development

#### Actions:

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

# Lancaster County Tourism Plan



## 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





# THE COMPREHENSIVE PLAN FOR LANCASTER COUNTY

## THE STRATEGIC TOURISM DEVELOPMENT ELEMENT EXECUTIVE SUMMARY

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