

The webinar will begin in a few minutes.

2020 HAMILTON COUNTY TOURISM
**ATTRACTIONS
& EVENTS**



THURSDAY, MAY 14, 2020





welcome

Brenda Myers
President/CEO



Agenda

Hamilton County Updates & Plans

- Brenda Myers, *Hamilton County Tourism*

Messaging Strategies

- Whitt Kelly, *Turner Public Relations*

How are We Adapting? Panel & Participant Conversation

- Norman Burns, *Conner Prairie*
- Angie Frazier, *City of Westfield*
- Jeff McDermott, *The Center for the Performing Arts*

Updates: **Bad News**

- Estimated Lodging Tax Decline - **\$2.6M** or **48%**
- Use of Reserves + HCEDC Partnership = **\$3.8M Budget**
- 90-Day Emergency Plan/6-Month Recovery Plan
- 5 Positions Terminated – 7 Positions Furloughed
- 12 Remain: Marketing, Sales, Visitor Experience, Development, Operations

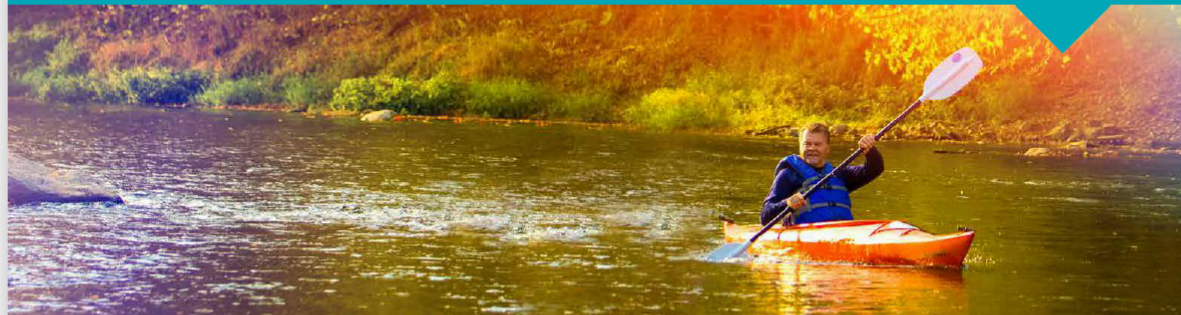
Updates: Hopeful News

- Focused Marketing/Sales/Visitor Experience Goals
 - Preserve (Mini) Marketing Campaigns
 - Leverage High Awareness in Drive Markets
 - Stabilize Sports & Regain Group Business
 - Rebuild Destination Brand
- Focused Development Goals
 - Re-Introduce Grant Program 2021
 - Prioritize White River Vision Plan
 - Support Tourism Economy Recovery
- Focused Operations Goals
 - Streamline Operations
 - Reduce Overhead
 - Support Remaining Staff

GETTING OUT IS CLOSER (AND SAFER) THAN YOU THINK.

Pristine greenways and open waters are waiting for you.
So, full speed ahead (all we ask is that you wear your mask).

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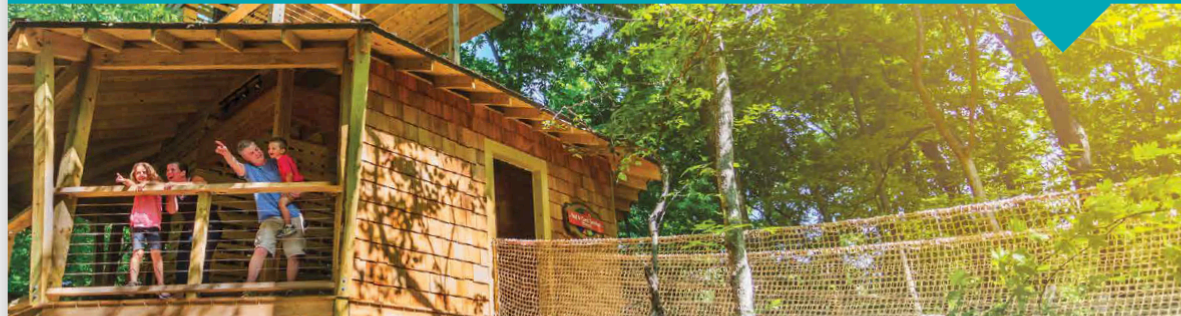
Media Tactics:

- Email
- Earned social
- Paid social
- SEM
- Print

GETTING OUT IS CLOSER (AND SAFER) THAN YOU THINK.

Our open spaces are, well, open. So, feel free to feel free again (all we ask is that you wear your mask).

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Hamilton County Emergency Management Priorities

- Strain of Adequate PPE & Cleaning Supplies Due to Demand
- Sanitation Systems for Bathrooms and Stressing Proper Hygiene
 - Adding Again: Calculating Need for PPE & Cleaning Supplies “Burn Through”
- Adapting Concessions & Food Services to Comply with Guidelines (e.g. nothing self serve)
- Social Distancing in Lines, Activities and Discouraging Hands-On Anything
- Interested in a Training Webinar Hosted by HCEM?

Overview of Hamilton County Reopening Survey Results

- 16 Commercial & Non-Profit Responses
- Please Submit Your Survey Results if Haven't Done So
- All but one had set a re-opening date
- 5 – May to early June
- 6 – Mid-June
- 3 – Mid-July
- 50/50 on Changing Operating Hours (many noted they were going to adjust after opening)
- One noted it would be closed during specific hours for super cleaning

Q & A

Type all questions into the CHAT function at the bottom of your screen.

Whitt Kelly

Senior Account Executive

Turner



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COVID-19
TOURISM
REBOUND:
MESSAGING TACTICS

TURNER

a fahlgren mortine company



SITUATIONAL ANALYSIS

- State of the Travel Industry
- What's Trending with Media
- Tying It All Together

STATE OF THE INDUSTRY



FLATTENING THE (CANCELLATION) CURVE

WHILE IT'S IMPOSSIBLE TO KNOW THE FULL IMPACTS COVID-19 WILL HAVE ON TOURISM, WE ARE STARTING TO SEE TRAVELER SENTIMENT IMPROVE ON THE POSSIBILITY OF TAKING A TRIP THIS SUMMER OR BOOKING FOR LATER IN THE YEAR. THIS BEHAVIOR CHANGE IS A CRITICAL PERIOD FOR DESTINATIONS TO DEVELOP REBOUND MESSAGING, PUT HEALTH PROTOCOLS IN PLACE AND CONSIDER REOPENING INCENTIVES.

82%

of travelers will change their plans in the next six months

57%

of travelers would go on an overnight trip within the next three months with assurances it's safe

47%

of travelers, up from 35% from previous week (Apr 11), are likely to travel by car with a similar number stating they will stick to destinations close to home

Google Trends

Interest over time ?



● Travel
Topic

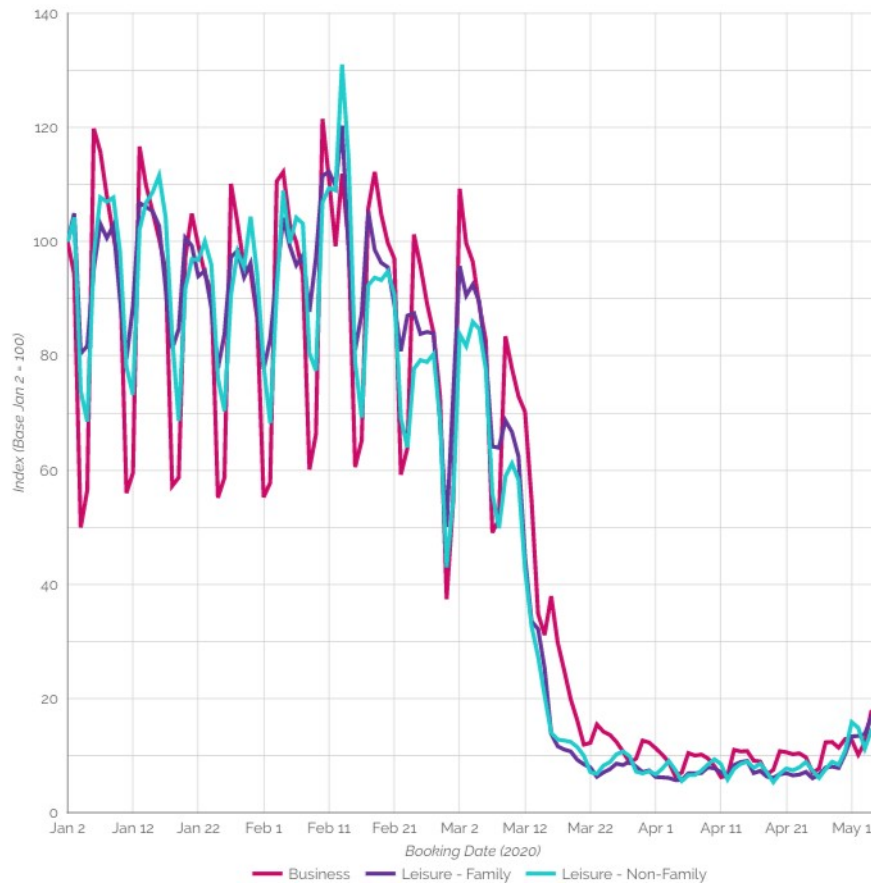


VOLUME OF US DOMESTIC TRIPS: HOTELS & FLIGHTS

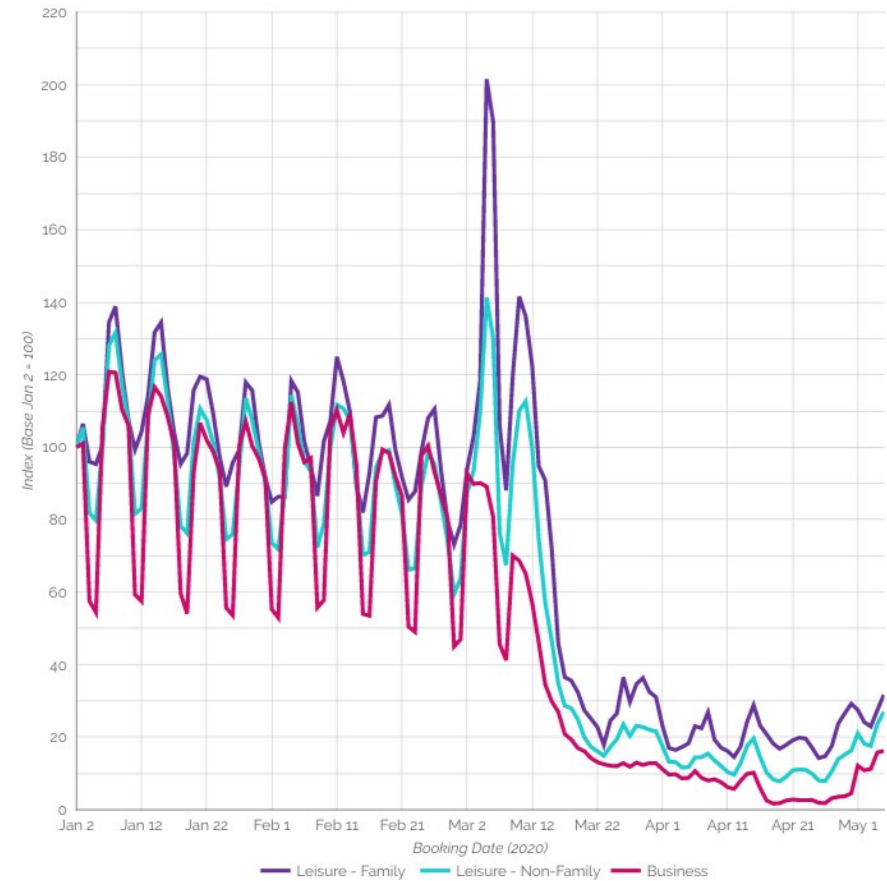
HOTEL & FLIGHT BOOKINGS ARE STARTING TO RISE

Leisure - Family Leisure - Non-Family Business

Hotel Volume by Purpose



Flight Volume by Purpose



A TURN FOR THE BETTER: NATIONWIDE

ROAD TRAVEL SLOWLY RISES NATIONWIDE

ARRIVALIST GPS DATA SHOWS POSITIVE
WEEK-OVER-WEEK CHANGES

Arrivalist US Daily Travel Index

Daily Travel Index

-53.4%

May 4, 2020, Monday

Day of Week Change

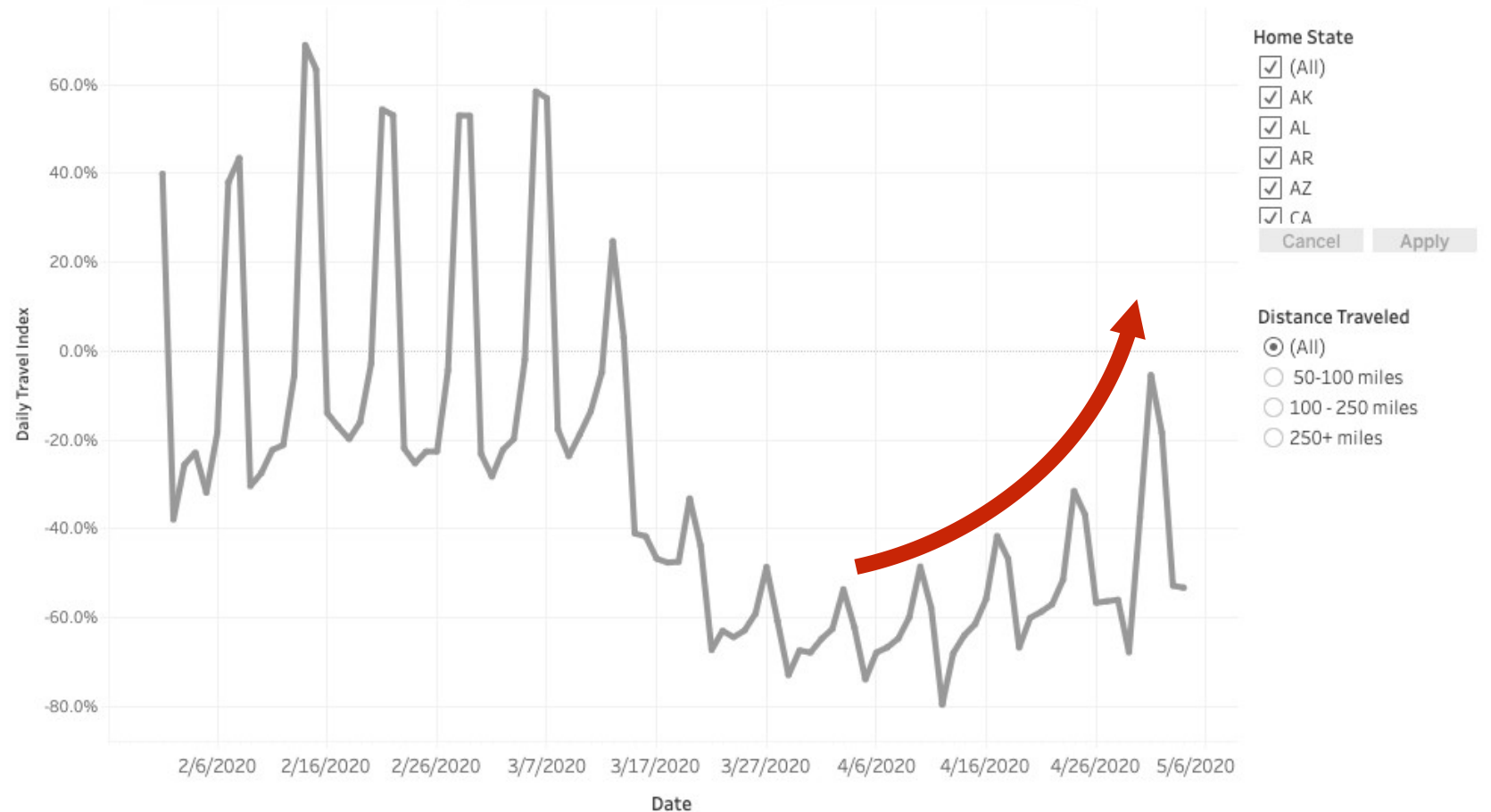
+3.1%

Monday vs Prior Monday

Week over Week Change

+8.2%

Last 7 Days vs Prior 7 Days



Daily drive market index of US travelers who moved at least 50 miles from their home and spent a minimum of 2 hours on their journey. The index is the relative daily volume of travelers compared to the average number of daily travelers in February 2020.

A TURN FOR THE BETTER: INDIANA DRIVE MARKET

INDIANA DRIVE MARKET (IN, IL, KY, OH)

SHOWING WEEK-OVER-WEEK GAIN IN
ROAD TRIPS FOR THOSE TRAVELING 250+
MILES

Arrivalist US Daily Travel Index

Daily Travel Index

-55.2%

May 10, 2020, Sunday

Day of Week Change

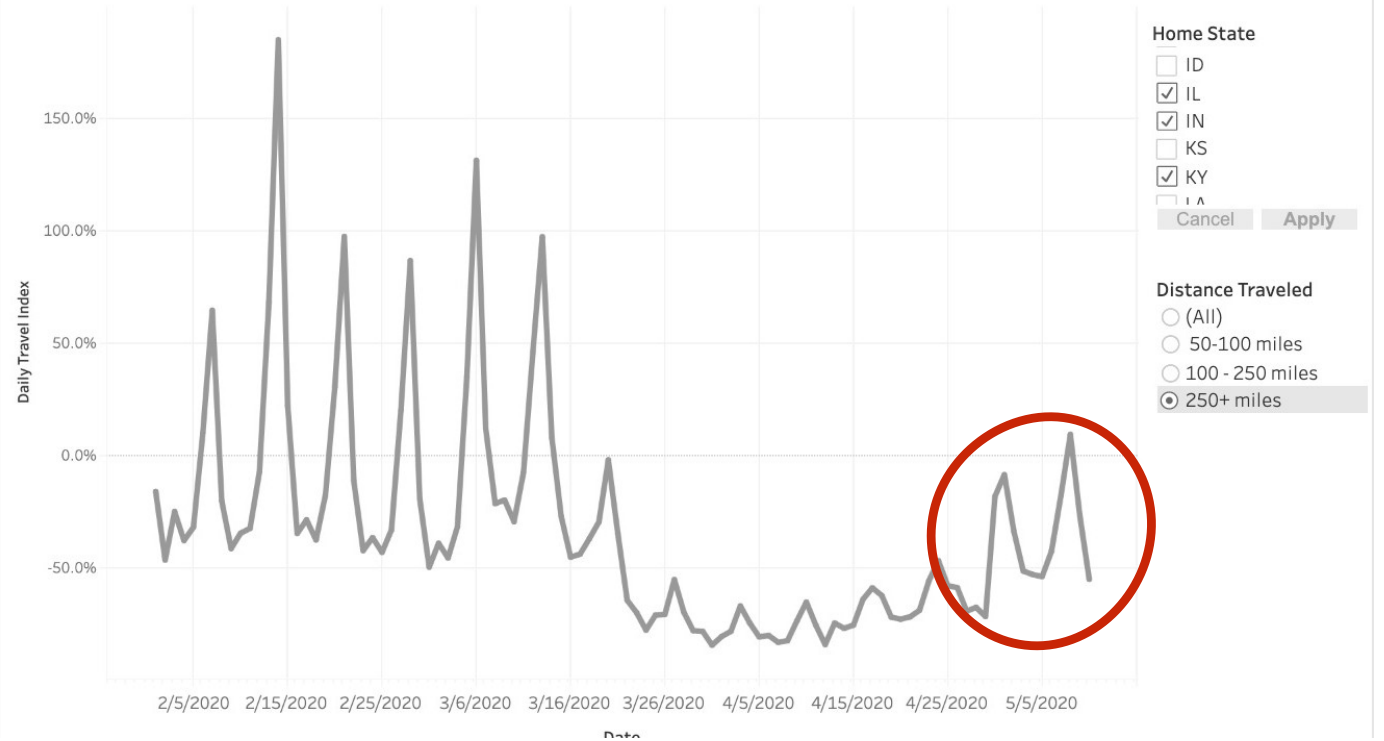
-3.7%

Sunday vs Prior Sunday

Week over Week Change

+11.5%

Last 7 Days vs Prior 7 Days

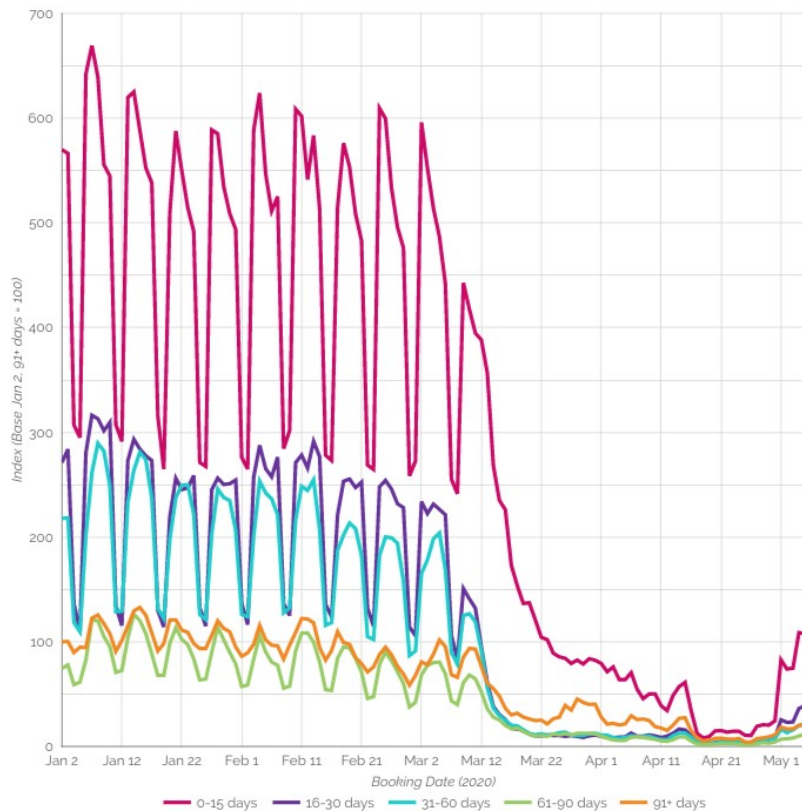


FLIGHT BOOKING LEAD TIME: BY TYPE

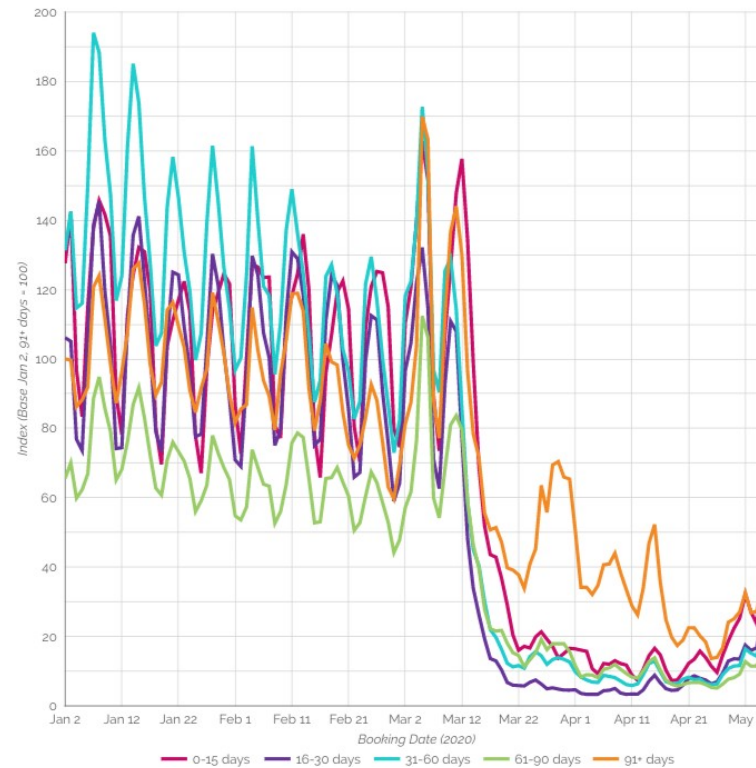
**SPIKE IN 0-15 DAYS BUSINESS BOOKINGS;
SOLO TRAVEL & COUPLES AT 0-15 & 91+ DAYS**



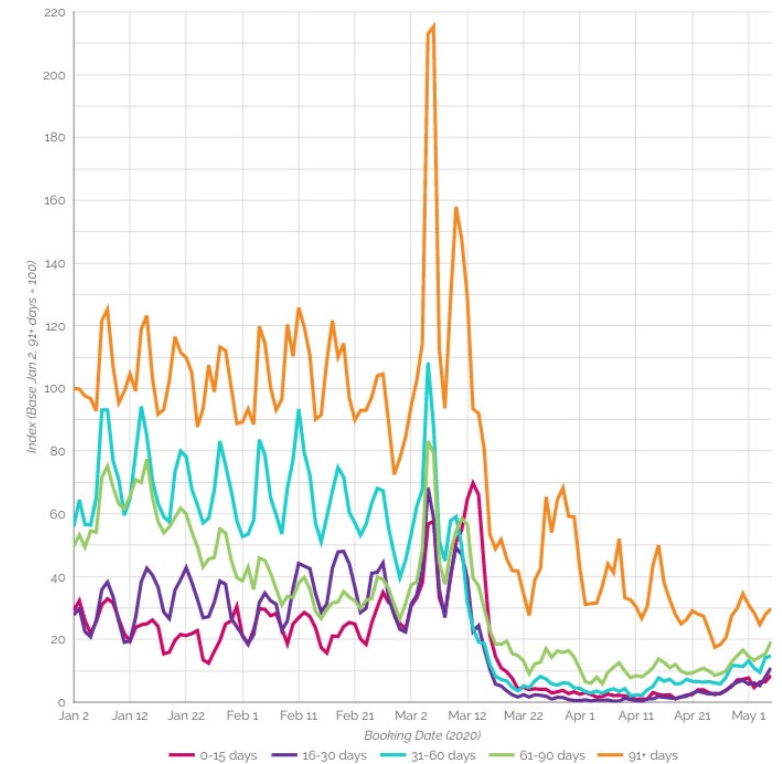
Trip Purpose: Business



Trip Purpose: Leisure – Solo Travelers & Couples



Trip Purpose: Leisure – Family



COVID-19 REBOUND: PREDICTED PHASES



States Begin to Reopen
Travelers Consider Long Weekend Trips
Drivable Destinations
Social Distancing Still in Practice
Adjustment to New Norm:
Heightened Health Screenings



Regional & Direct Flight Market Travel Considered
Domestic Destinations Only
Travel Confidence Begins to Return
Long-Lead Bucket List Trip Planning



International Travel Returns
Longer Trips Considered

MEDIA TRENDS



TRENDS: HEALTH & WELLNESS



HYGIENE & SANITATION

- Ultraviolet Light Cleaning
- Temperature Scanners
- Touchless Technology
- Hospitality + Health Brand Collaborations
- Face Mask & Sanitization Travel Protocols

HOLISTIC HEALTH

- Cognitive & Mental Health Programs
- On-Demand Fitness Programs
- Sleep Therapy: Coaches & Kits



TRENDS: BUILT-IN SOCIAL DISTANCING



ROAD TRIPS

- Rise of RV Travel
- Affordability
- Close-By Destinations
- AirBnBs / Standalone / Boutique Lodging



ESCAPISM

- Smaller Towns / Lesser Known Locales
- Unplug, Unwind
- Drive-In Movies Moment



REMOTE (OFFICE) LOCATIONS

- Brag-Worthy WFH Backdrops
- Digital Nomads
- Work + Leisure Trips



OUTDOOR ADVENTURE

- Camping
- Recreational Activities
- Permitted & Timed Entrances

CONNECTIVITY



EXTENDED FAMILY

- Pet Travel
- Travel “Spouses”
- Gramping



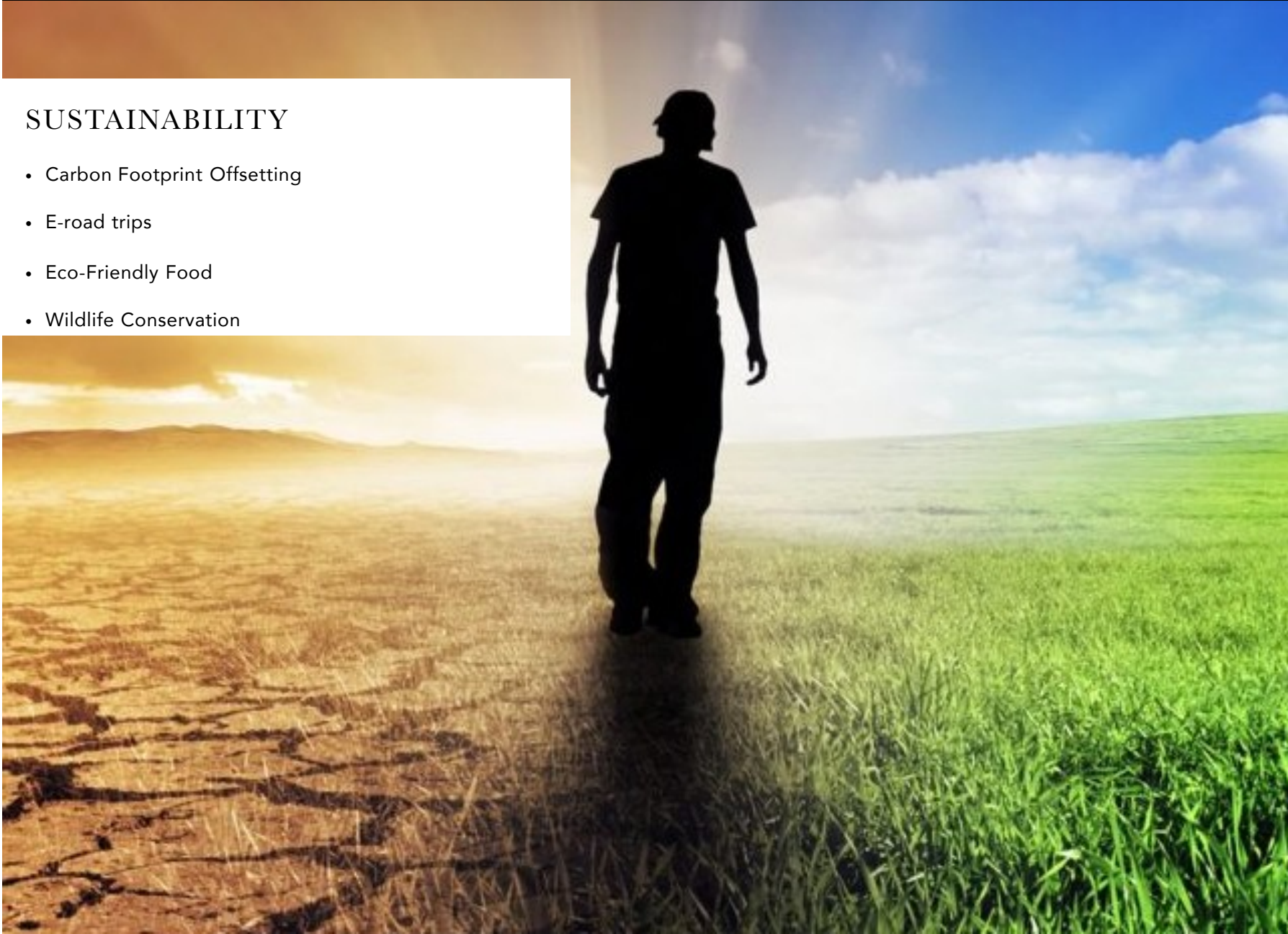
HOBBYIST COMEBACK

- Literary Movement
- DIY Crafts & Skills
- Cooking & Gardening
- Journaling & Lettering

TRENDS: COVID-19 ENVIRONMENTAL IMPACT

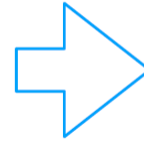
SUSTAINABILITY

- Carbon Footprint Offsetting
- E-road trips
- Eco-Friendly Food
- Wildlife Conservation

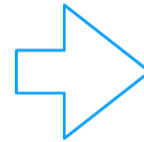


What We Know

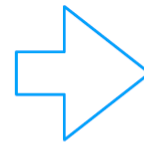
Travel is **slowly ramping** back up



Unknowns in pandemic response mean that travel confidence will still oscillate



Consumer **confusion** in what they can and can't do



What We Can Do About It

Focus on the **local** and **regional** drive markets


Map out and **plan for "Phases"** that we can predict, even if timing changes

Be a **trustworthy** resource with **clear and consistent** policies and information

RECOVERY MESSAGING



TACTICS

- The Essentials
 - Beyond The Basics
 - Looking to the Future
- 

Humanity

Our first and greatest responsibility is to the wellbeing of our fellow humans. We must keep this guiding principle in all that we do.

Sanitation & Health

Consumers will need to be confident that our premises are safely managed and are following the proper protocols. This information needs to be up front on our digital platforms and on the premises.

Clear Operations Information

In these uncertain times, all too often businesses fail to make their operational details clear. Consumer confusion is at an all time high, so the more we can instill certainty, the better chance we have for consumers to chose us.

Anticipate Top Concerns

There are core predictable concerns that businesses can address upfront to instill consumer confidence and reduce help desk calls and emails.



Optimize Across Digital Platforms

- Essential information accessible upfront across all digital platforms.
- Stay consistent and have central location.
- Consumers should know what it expected of them
- Stop Scheduling content
- An FAQ with top concerns is very helpful.

Plan For “Phases”

- Health and safety recommendations to change
- Identify key predictable phases
- Instead of reacting in the moment, phase plans give clear roadmaps for any direction

Reassess Frequently

- Content and policies to change as needed
- Follow local and national guidelines daily
- Anticipate future phases and plan accordingly
- Stop scheduling content



Stay Connected With Existing Audiences

- Existing audiences and return customers = key
- Avoid same old content; get creative
- Utilize virtual content

Focus on Local & Regional

- Communities want to embrace and support their local business and institutions.
- Find ways to make a positive impact locally.
- Connect with local businesses, institutions and consumers.
- Highlight staff and local frequent customers, if possible.

Be Aware of Your Tone

- Consumers are hyper sensitive
- Keep focus on positive and business assets; avoid encouraging travel



Bombarding Followers With Irrelevant Info

Unwittingly Encouraging Unsafe Habits

Appearing Tone Deaf

Lack of Clarity

Producing the Same Old Content

Focusing on Product Over Emotional Connection

Not Showing Off Great Internal Content



Long Lead Opportunities

- Anticipate a slow ramp up of travel opportunities in the media
- Keep an eye on trends and ways you might already fit them
- Send packages and offerings to HCT team

Increased Comfort With Virtual Travel

- The biggest trend in communication over the pandemic will likely get bigger
- Find ways to continue to these offerings in future
- Leverage virtual for groups, weddings, meetings, etc.

A New Era of Travel

- Corona Hangover - consumers will have a continued caution for large groups
- Renewed focus on sustainability
- Focus on meaningful trips and connecting
- International air travel could take 5 years to return to January 2020 levels.

THANK YOU

TURNER

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New York, NY 10018

DENVER

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Fourth Floor
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111 W. Illinois St.
Chicago, IL 60654

LOS ANGELES

WeWork Vine
1601 Vine Street
Los Angeles, CA 90028



Q & A

Type all questions into the CHAT function at the bottom of your screen.

Panel & Participant

Conversation

HAMILTON COUNTY, IN
ROAD TO
RECOVERY

How are We Adapting?

- Norman Burns, *Conner Prairie*
- Angie Frazier, *City of Westfield*
- Jeff McDermott, *The Center for the Performing Arts*

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Q & A

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Thank you!

Thank you for joining us today.

Stay safe and know that we are here for you.

Check out the Hamilton County Tourism Road to Recovery Toolkit:

LoveHC.org

A collection of local, state and national research and resources.



#LOVEHC