



Welcome

The webinar will begin at 9 a.m.

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Kelli Jenkins

Hamilton County Tourism | Creative Services Manager & Co-Owner Spell Sisters



Laura Kelner

Hamilton County Tourism
Director of Sales

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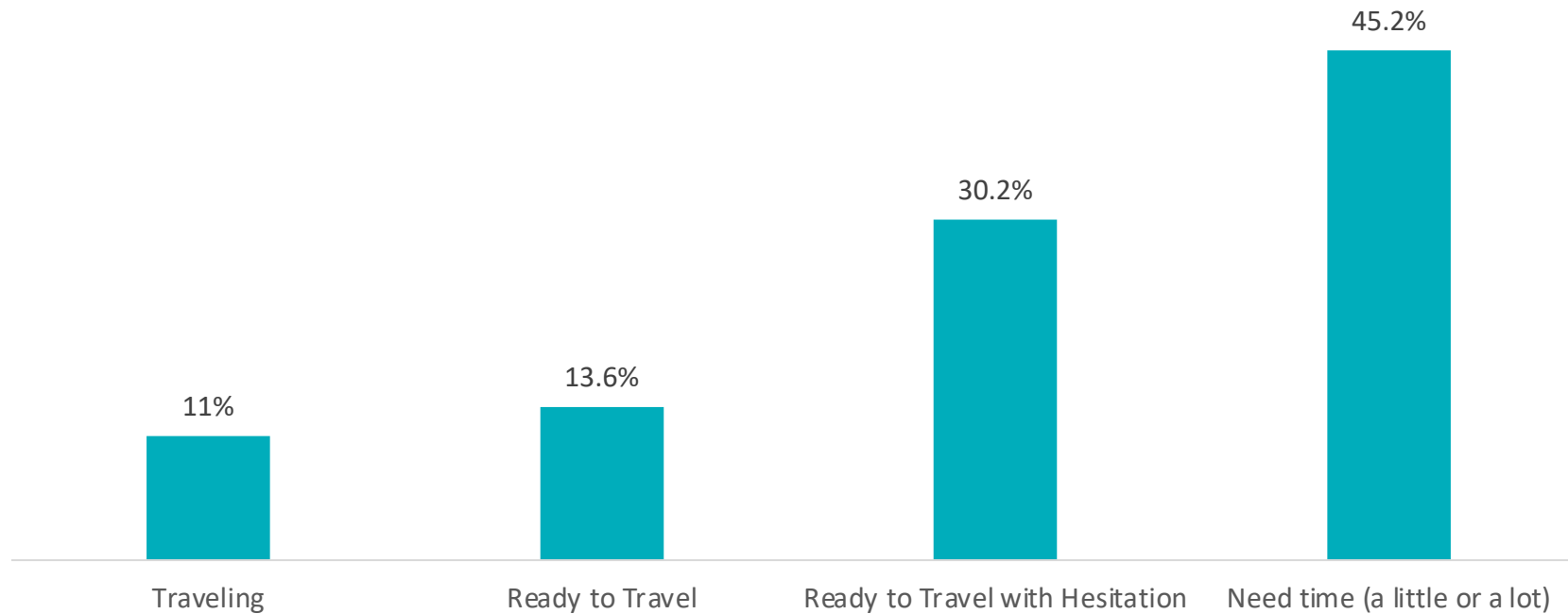
Brenda Myers

Hamilton County Tourism
President / CEO



2020 Leisure Travel

Current Consumer Mindset

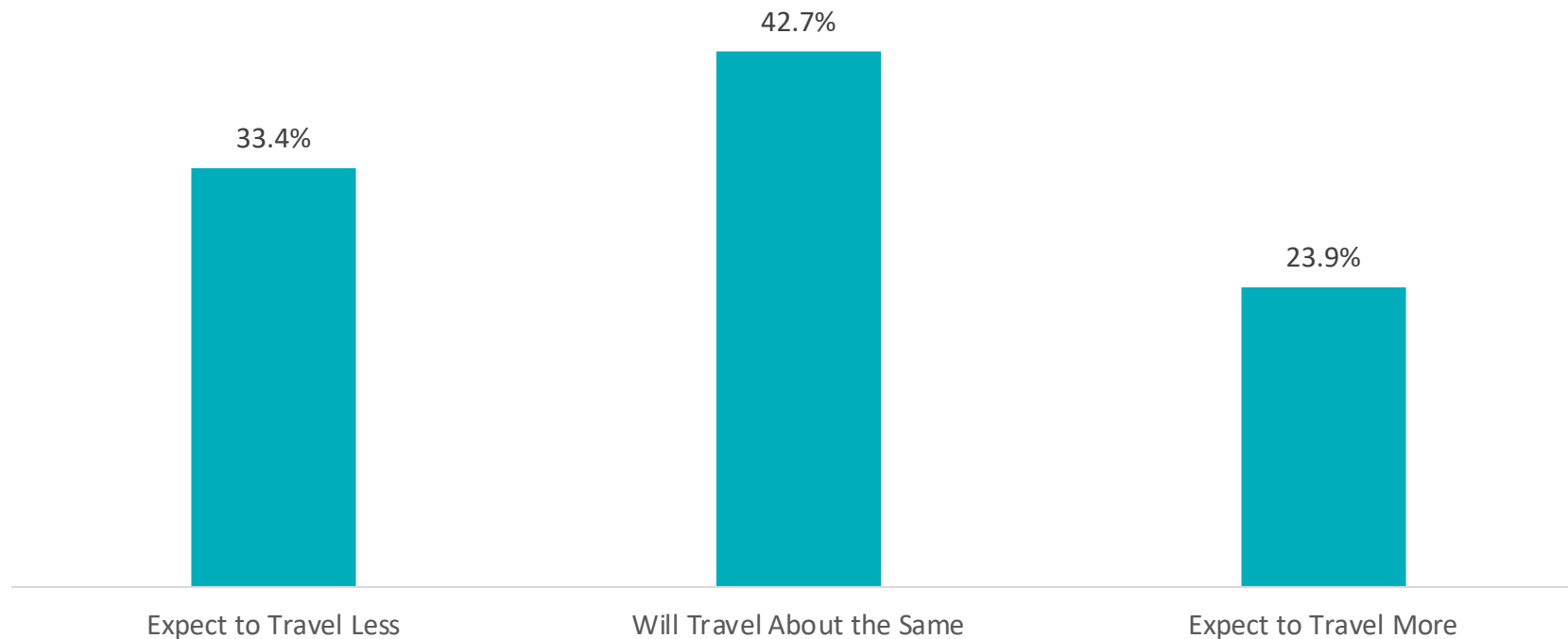


**Source: Destination Analysts*



2021 Future Mindset

Overall Anticipated Travel

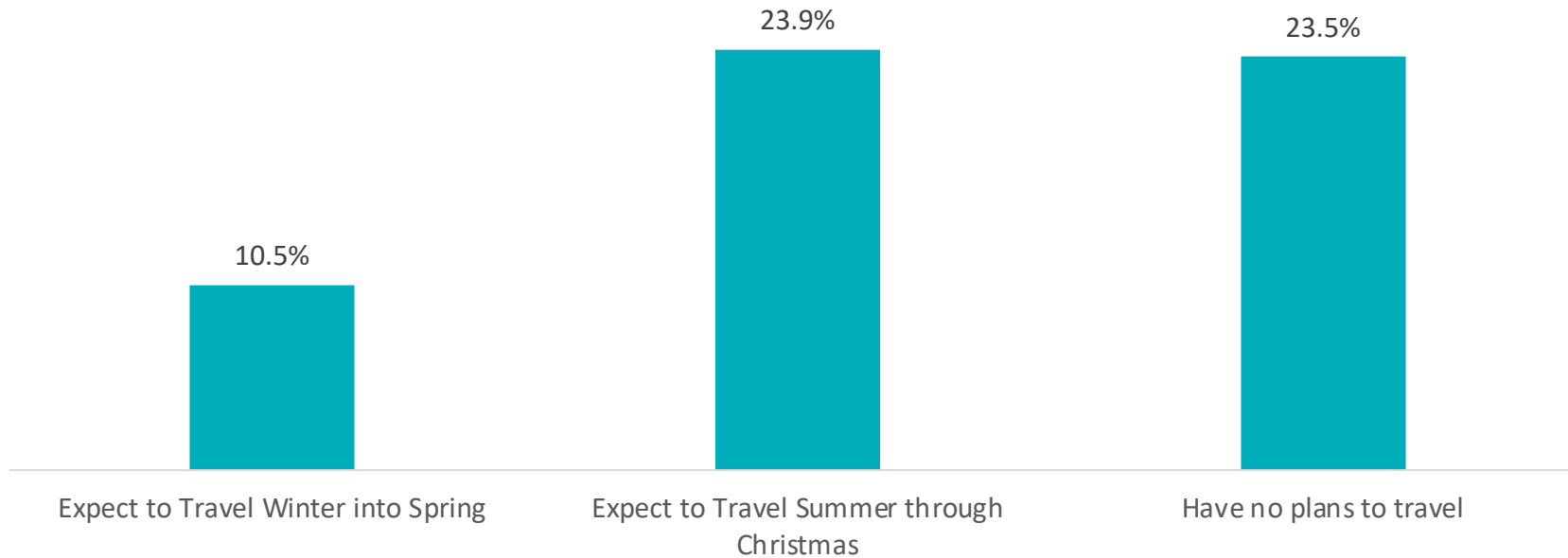


**Source: Destination Analysts*



2021 Future Mindset

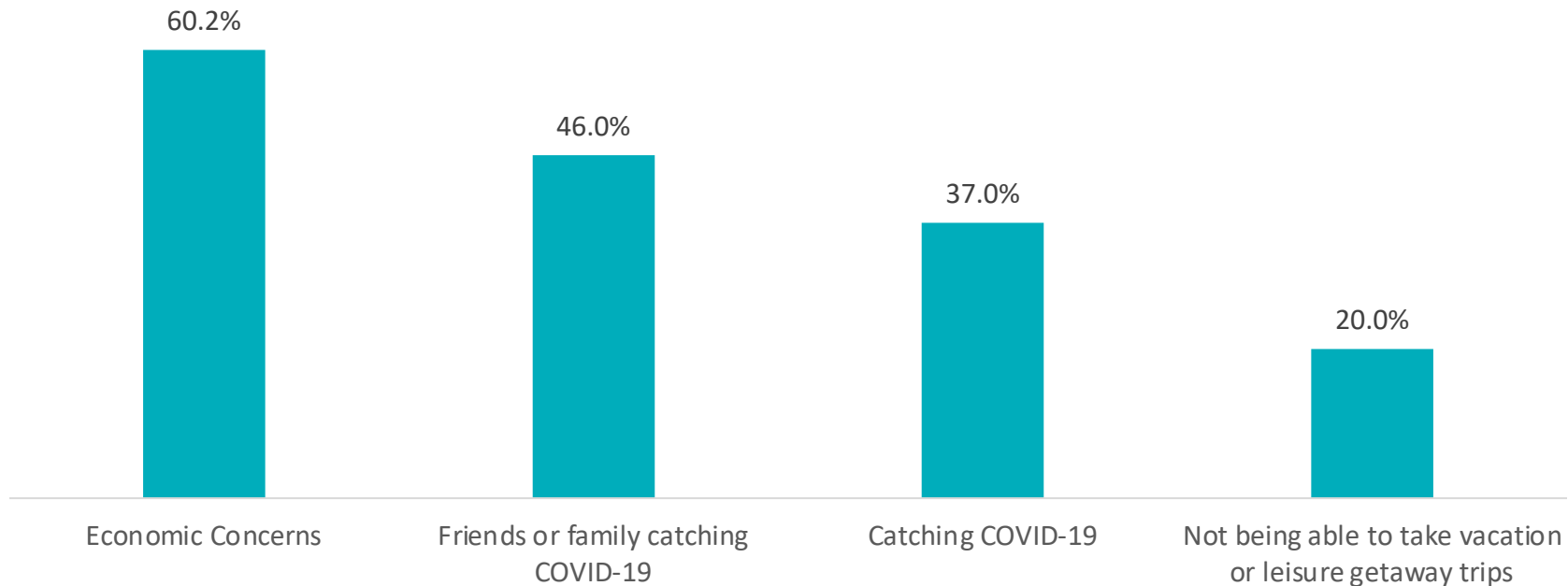
Seasonal Anticipated Travel



**Source: Destination Analysts*



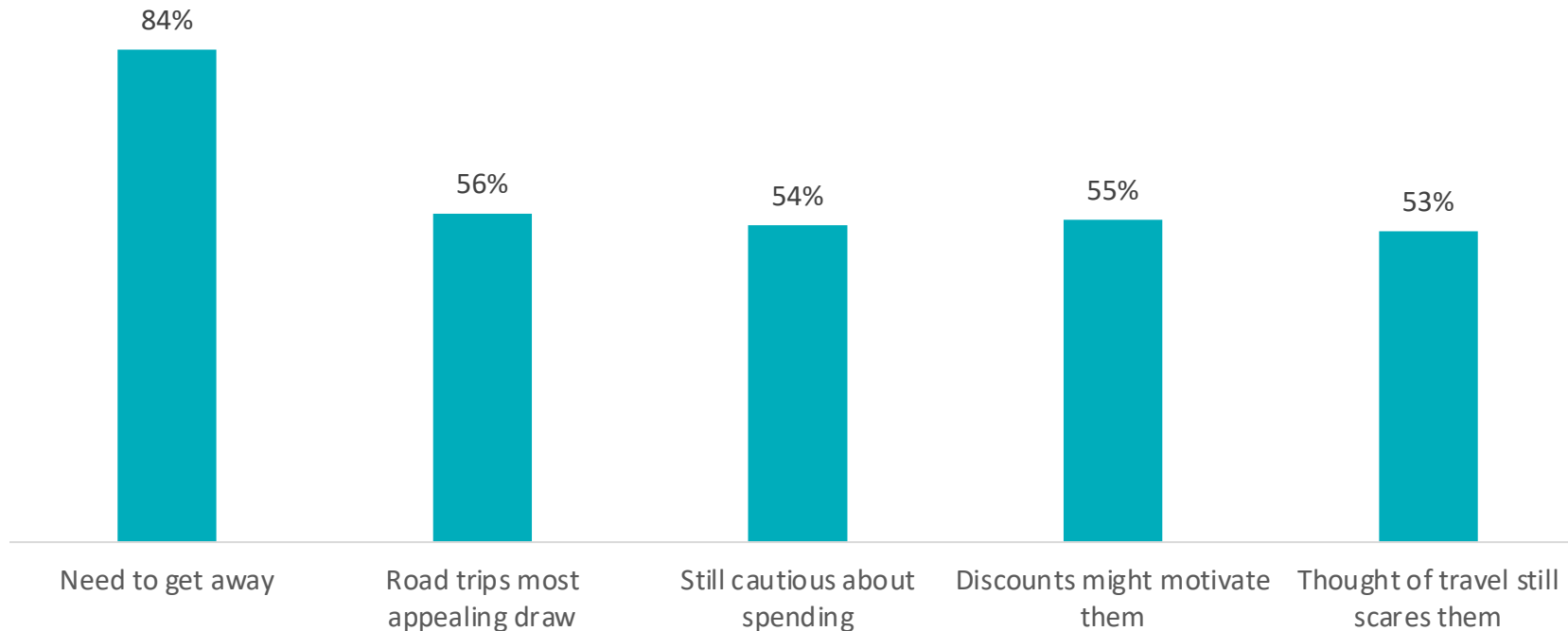
What Worries Travelers?



**Source: Destination Analysts*



Travel Planning Attitudes



**Source: HCT 2020 Ft. Wayne Ad Awareness & Visitation Trends Research, SMARInsights*



Motivating People to Travel

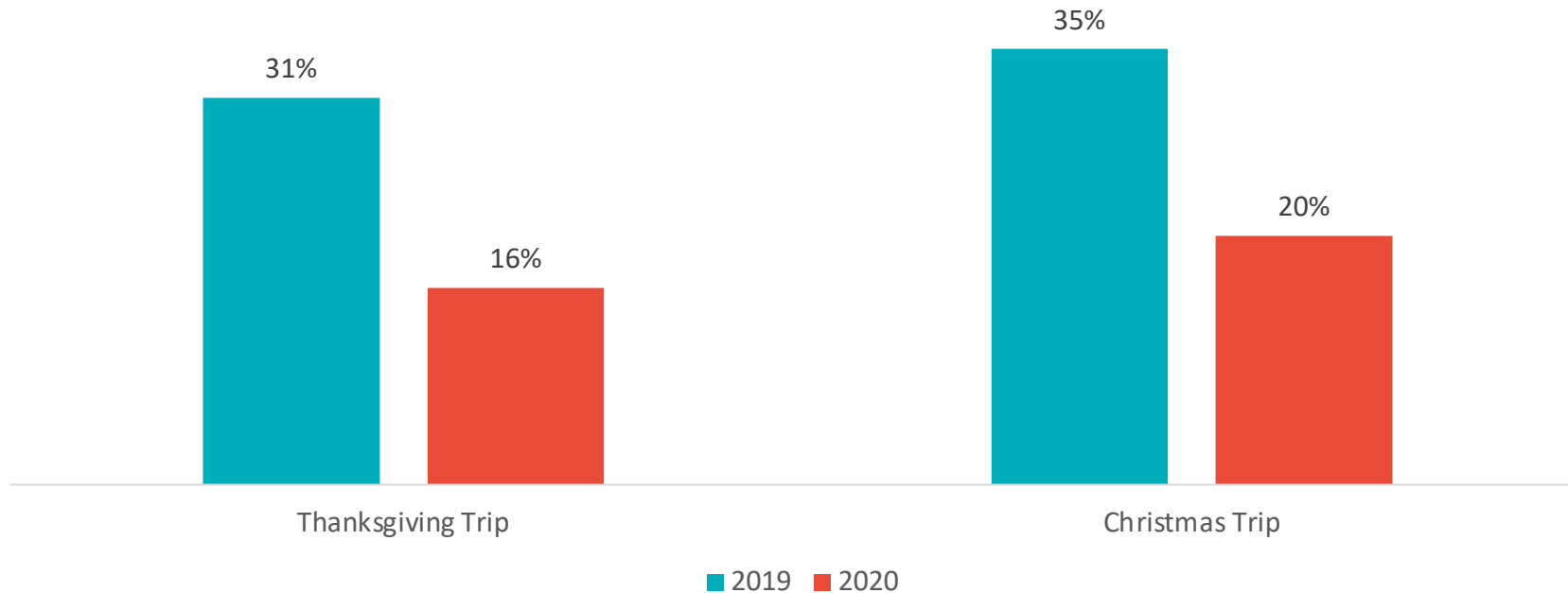
1. Time with loved ones
2. Avoiding crowds
3. Time with nature
4. Opportunities for relaxation and peace

**Source: Destination Analysts*

47% of Americans Want to
Travel to Visit Friends and
Family



Upcoming Holiday Comparisons



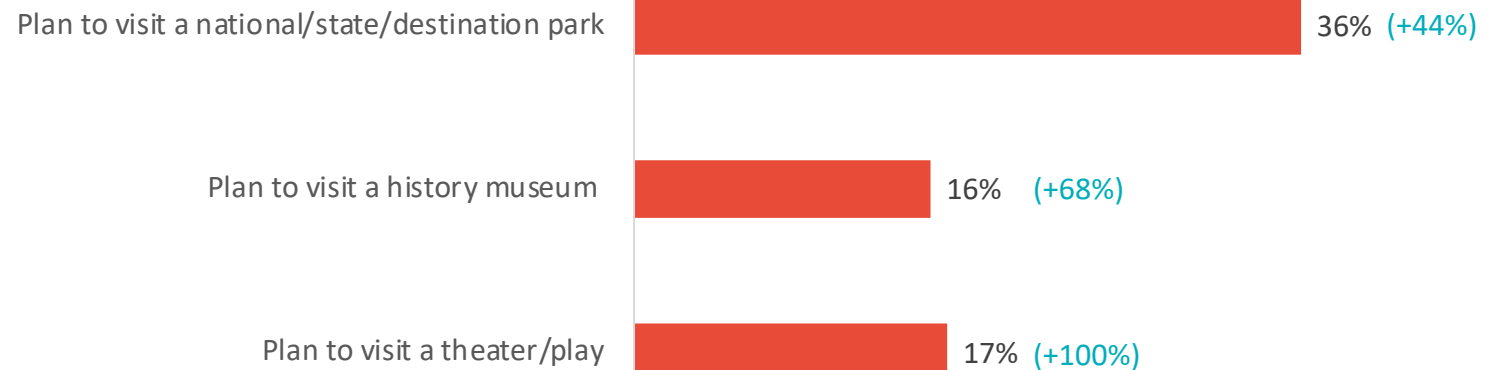
**Source: Destination Analysts*



Specific Travel Trends

18% of
consumers
nationally have
ventured out to
visit an
attraction in
2020

But intent to visit an attraction specifically is growing:

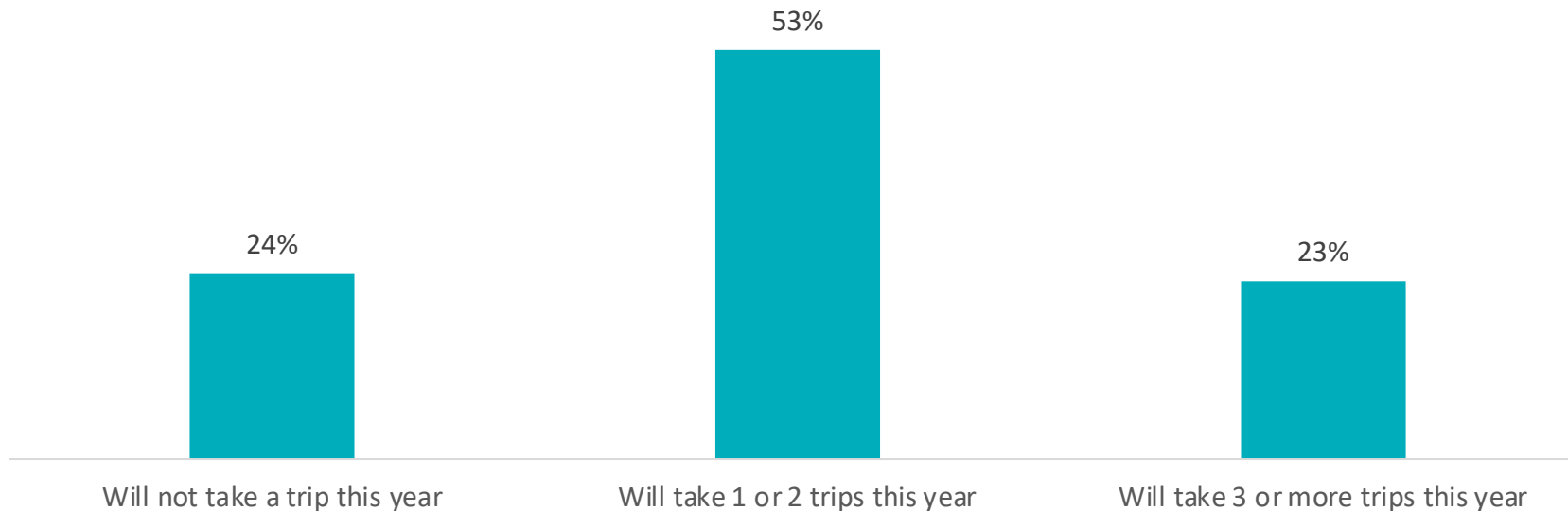


**Source: The Call of the Consumer, H2R Market Research COVID-19 Update, Wave 3*



HCT's Summer Insights on Regional Travel

Near-cations are still possible – especially for fall and spring

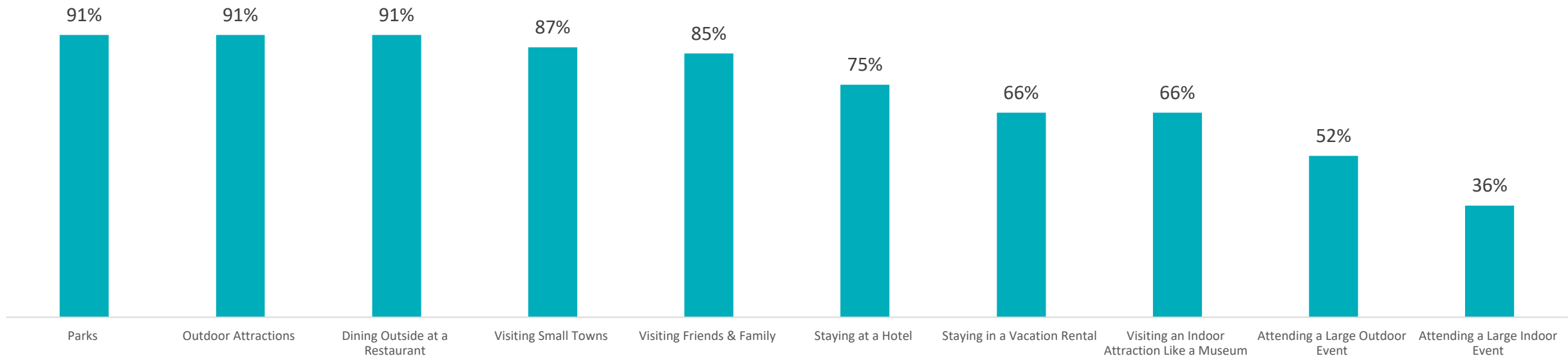


**Source: HCT 2020 Ft. Wayne Ad Awareness & Visitation Trends Research*



Regional View: Comfort vs. Taking Action

Activities

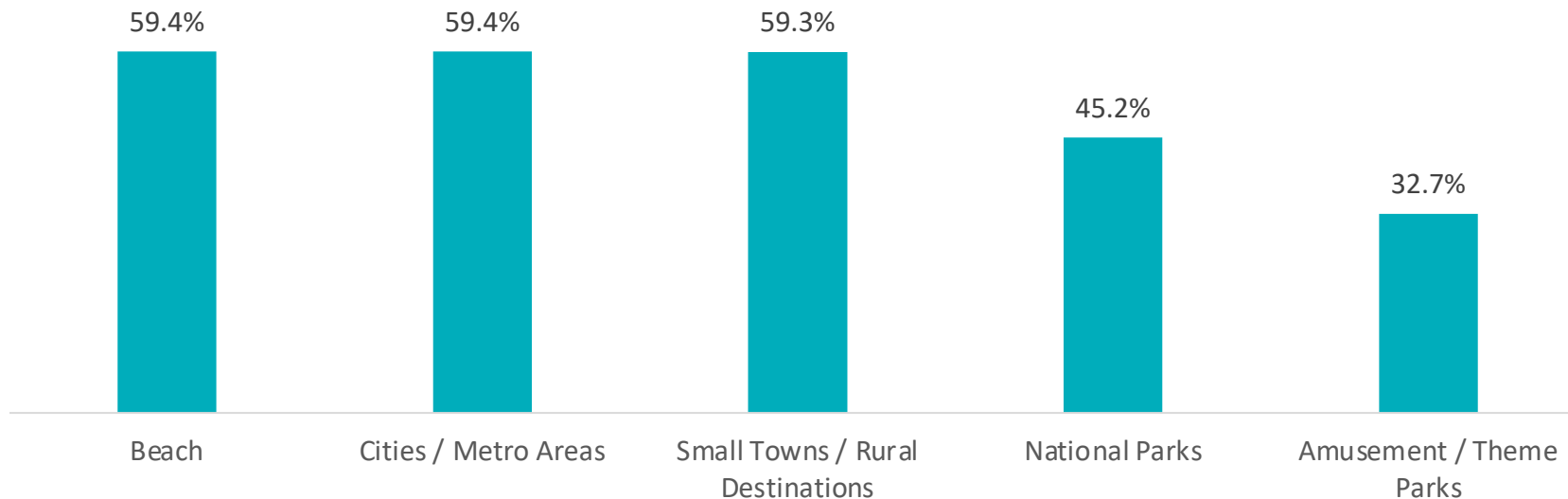


**Source: HCT 2020 Ft. Wayne Ad Awareness & Visitation Trends Research*



National View:

Where are travelers planning to go?



**Source: Destination Analysts*



Insights into Longer-Range Traveler Plans

- 75% of Americans plan to take a leisure trip in the next 16 months, but only half of these are really ready to plan now
- 70.4% of travelers will likely choose a destination familiar to them
- 45.5% will travel regionally as opposed to a longer trip
- 41.7% will enjoy a day trip to area attractions (16.3% museums and attractions)
- 80% say they have visited an outdoor attraction during the pandemic (e.g. park)
- More than half will likely choose “stay-cations” or “near-cations” over distance travel
- Decision window tight – 62% of hotel reservations are made within two weeks of travel

**Source: Destination Analysts*



Marketing During a Pandemic

- Storytelling is more critical than ever to overcome visitor anxieties
- 68% of marketing storytellers indicate emotional resonance is key right now
- 65% say use of locals as the storyteller helps create authenticity
- 75% point to the Unique Selling Proposition (USP) of a destination as critical to the story

**Source: Skift*






Rounding Out the Marketing Message




HCT Marketing Team Message Testing

Fall Campaign




 Visit Hamilton County, Indiana  Sponsored · 




Hit the open road and explore a three-day weekend filled with outdoor fall adventures for the whole family!




VISITHAMILTONCOUNTY.COM
Family Fun Itinerary in Hamilton County, Indiana

LEARN MORE

 Like  Comment  Share




 Visit Hamilton County, Indiana  Sponsored · 




Explore a three-day weekend itinerary that includes art galleries, murals and more!





VISITHAMILTONCOUNTY.COM
Art Lover Weekend in Hamilton County, Indiana

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 Visit Hamilton County, Indiana  Sponsored · 




It's time for a road trip! Click below to see how to spend a weekend exploring the best of fall 




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 Visit Hamilton County, Indiana  Sponsored · 

You're in the driver's seat for your weekend road trip. Choose your itinerary for a fun, safe and affordable getaway!



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Fall Road Trip to Hamilton County, Indiana

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Questions?





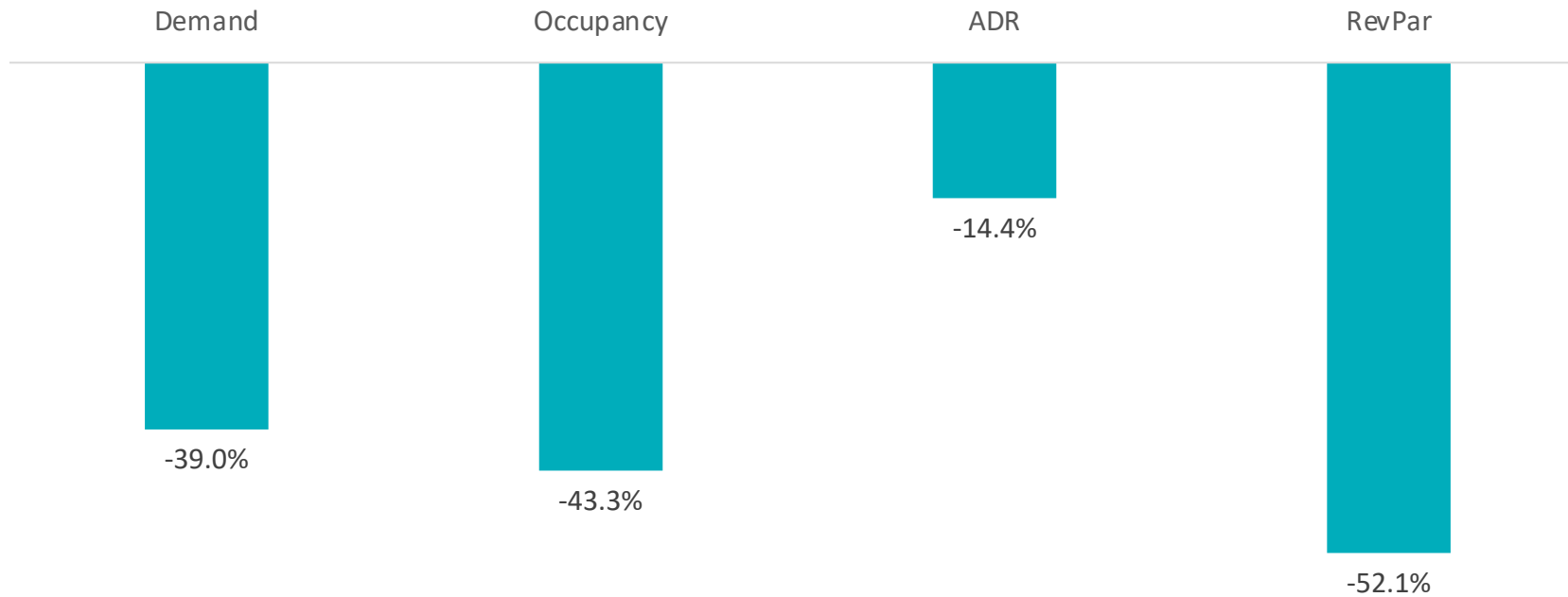
Jordan Musall

Hamilton County Tourism
Data Intelligence Manager



2020 YTD Changes

Jan. 1 – Aug. 29, 2020









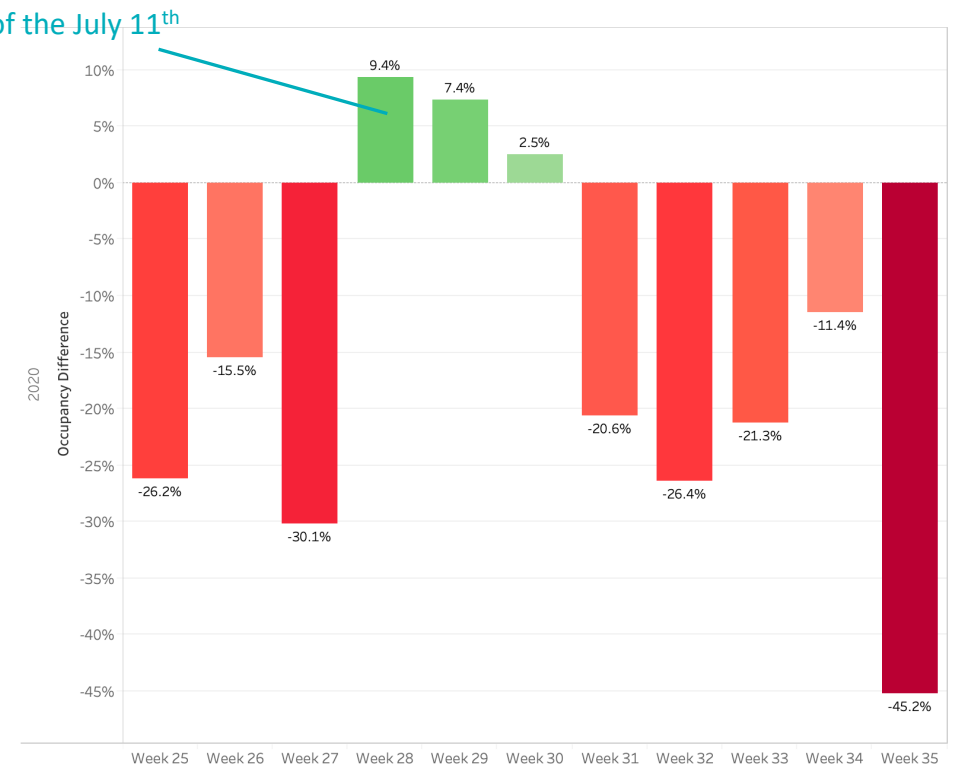
Summer Weekends

Travelers Choice: Wide-Open Spaces, the Beach

Week Ending July 11

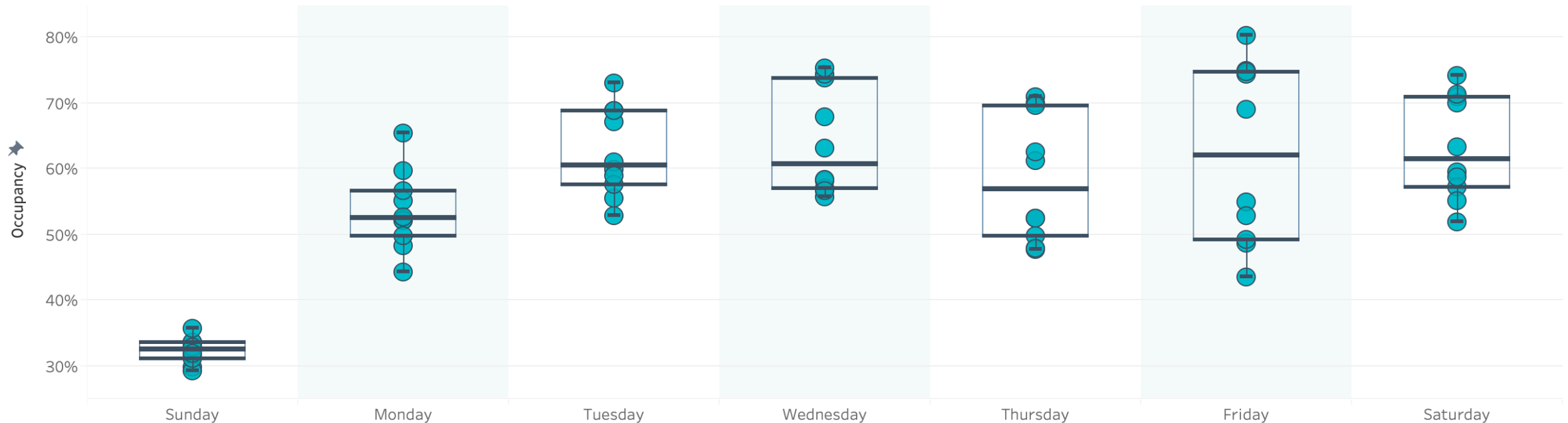
| Market | Weekend Occ % |
|--|---------------|
| Colorado Springs, CO | 81.7 |
|  Mobile, AL | 77.1 |
| South Dakota | 75.0 |
| Idaho | 74.5 |
| Michigan North | 74.4 |
|  Daytona Beach, FL | 73.9 |
|  Florida Keys | 73.8 |
| Indianapolis, IN | 73.5 |
| Des Moines, IA | 72.3 |
|  Norfolk/Virginia Beach, VA | 71.6 |

Weekend Occupancy Difference from Previous Year





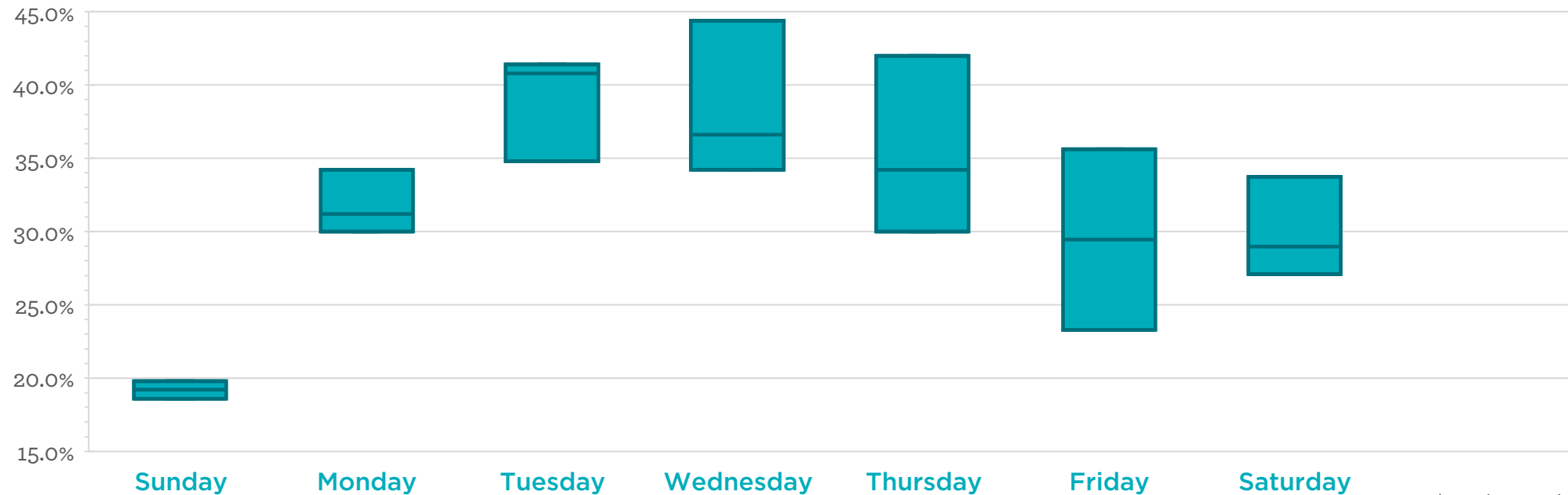
Historical Occupancy: November - December



*Source: STR



Projected Occupancy: November - December



**Based on post-lockdown,
slower Grand Park weeks in
2020 as percent change YOY*



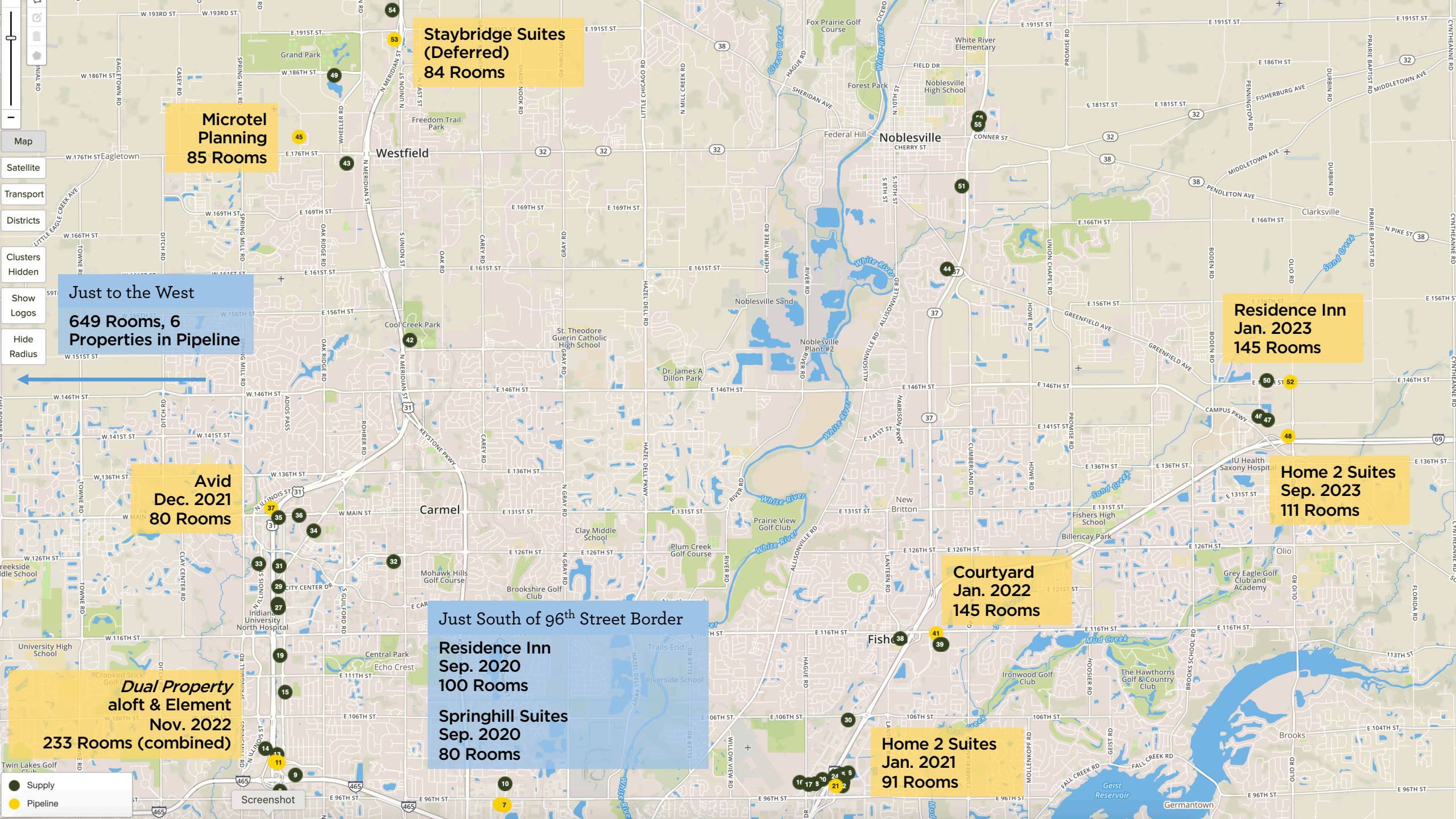
2021 Forecast Comparisons

| | STR US | CBRE US | Ham. Co. Early* | Ham. Co. Sep, 2020 |
|---------------|----------|----------|-----------------|--------------------|
| Supply Change | 1.3% | -0.5% | 6% | 2% |
| Demand | 32.2% | 30.6% | 17% | 42% |
| Occupancy | 52.0% | 52.3% | 44% | 48% |
| ADR | \$109.56 | \$111.89 | \$89.00 | \$100 |
| RevPAR | \$56.95 | \$61.83 | \$36.60 | \$42 |

**Hamilton County Early includes November/December 2020 Performance*



Hotel Pipeline Data



**Staybridge Suites
(Deferred)
84 Rooms**

**Microtel
Planning
85 Rooms**

**Just to the West
649 Rooms, 6
Properties in Pipeline**

**Residence Inn
Jan. 2023
145 Rooms**

**Home 2 Suites
Sep. 2023
111 Rooms**

**Courtyard
Jan. 2022
145 Rooms**

**Home 2 Suites
Jan. 2021
91 Rooms**

**Just South of 96th Street Border
Residence Inn
Sep. 2020
100 Rooms
Springhill Suites
Sep. 2020
80 Rooms**

**Dual Property
aloft & Element
Nov. 2022
233 Rooms (combined)**

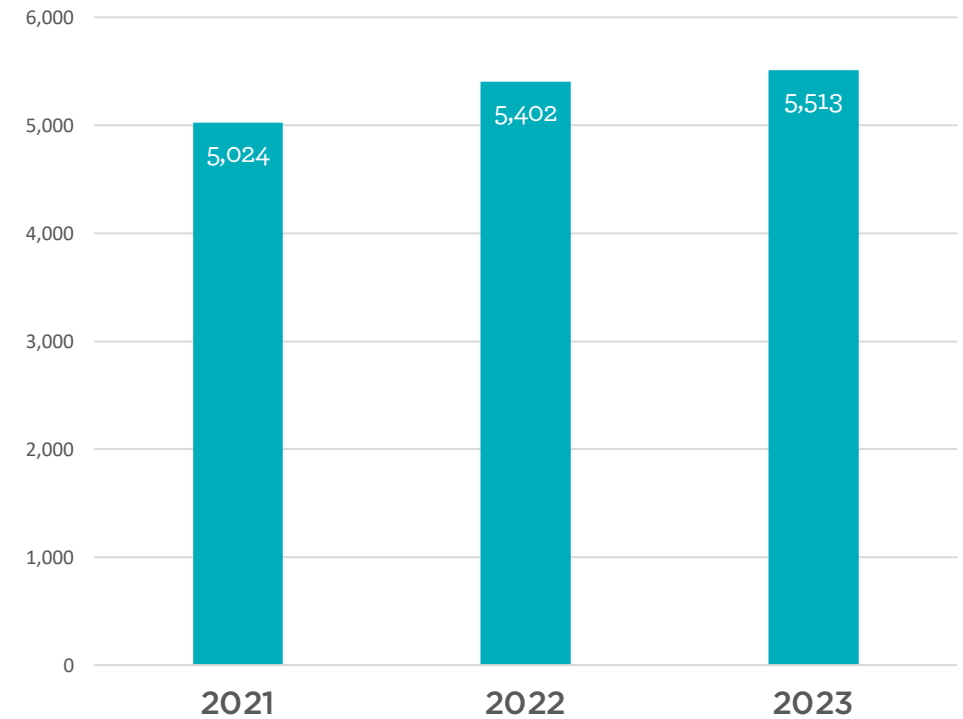
**Avid
Dec. 2021
80 Rooms**



Hotel Pipeline Data

| City | Hotel Name | Brand | Opening | Phase | Bedrooms |
|-------------|---|----------------------------------|----------|-----------------|----------|
| Carmel | aloft Hotel Indianapolis Carmel | aloft Hotel | Nov 2022 | Final Planning | 120 |
| Carmel | Avid Carmel | Avid | Dec 2021 | Final Planning | 80 |
| Carmel | element Indianapolis Carmel | element | Nov 2022 | Final Planning | 113 |
| Fishers | Courtyard Indianapolis Fishers | Courtyard | Jan 2022 | In Construction | 145 |
| Fishers | Home2 Suites by Hilton Fishers Indianapolis NE | Home2 Suites by Hilton | Jan 2021 | In Construction | 91 |
| Noblesville | Home2 Suites by Hilton Indianapolis Noblesville | Home2 Suites by Hilton | Sep 2023 | Planning | 111 |
| Noblesville | Residence Inn Indianapolis Noblesville | Residence Inn | Jan 2023 | Planning | 105 |
| Westfield | Microtel Westfield | Microtel Inn & Suites by Wyndham | | Planning | 85 |
| Westfield | Staybridge Suites Westfield | Staybridge Suites | | Deferred | 84 |

Total Rooms in Hamilton County





Other Data Sources

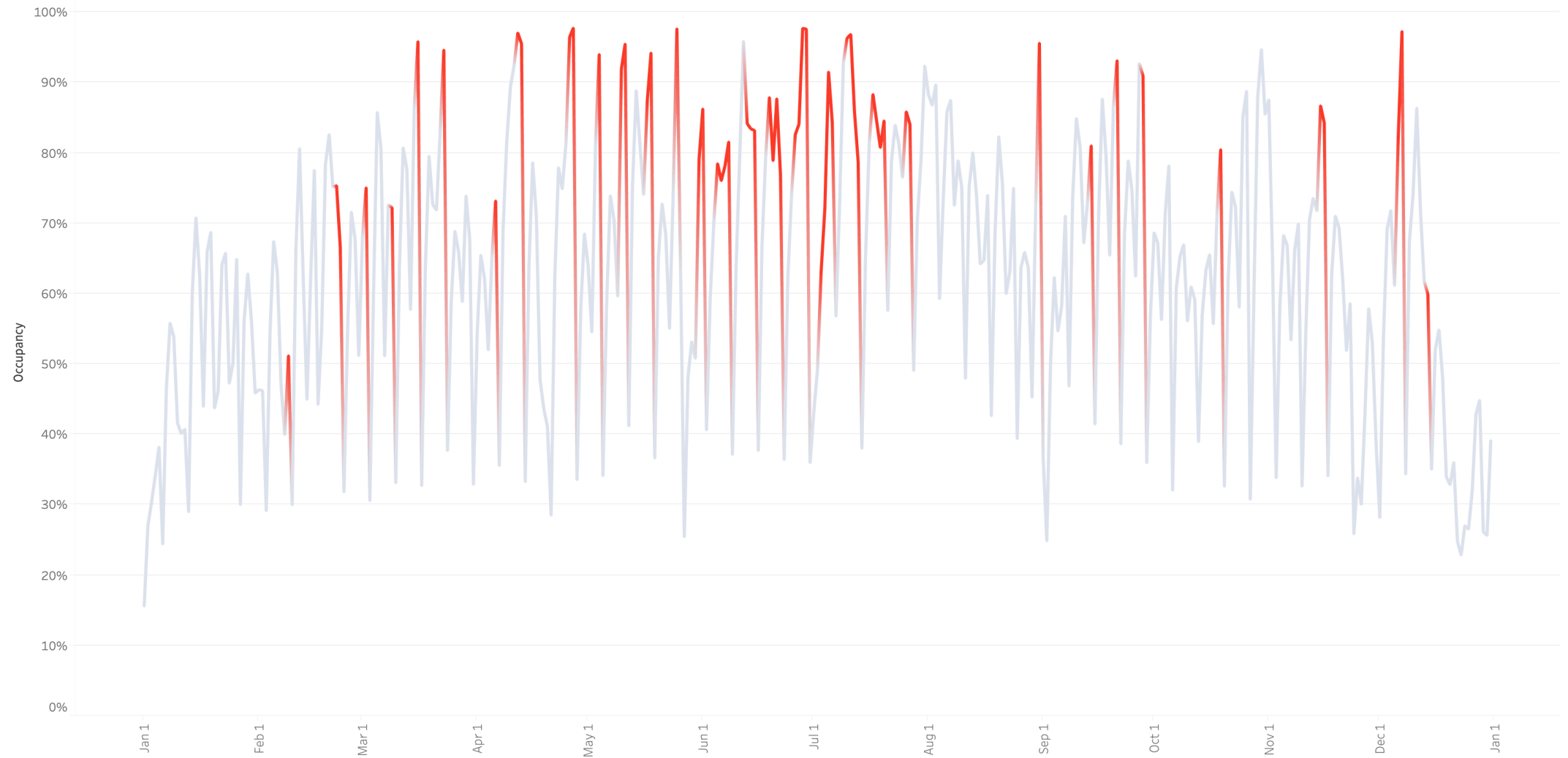
- airbnb data seems to follow the trends we are seeing in the hotel data
- UberMedia monthly data
 - Geofenced 50 locations in and around Hamilton County
 - Sample includes locals, visitors, visitors to the airport, and Hamilton County hotel stays



What does Grand Park mean to our tourism economy?

2019 Occupancy Timeline

The red coloring denotes significant cellphone IDs pinging with the Grand Park geofence.



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Questions?





Thank You for joining us today!
If you have any further questions, feel free to reach out to:

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