WELCOME!
THE WEBINAR WILL BEGIN SHORTLY.

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HAMILTON COUNTY TOURISM

SUMMIT SERIES

2021

HOTEL DATA SUMMIT

WELCOME TO THE HOTEL DATA SUMMIT!

Brenda Myers, President & CEO

hamilton county tourism inc

JORDAN MUSALL

Data Intelligence Manager

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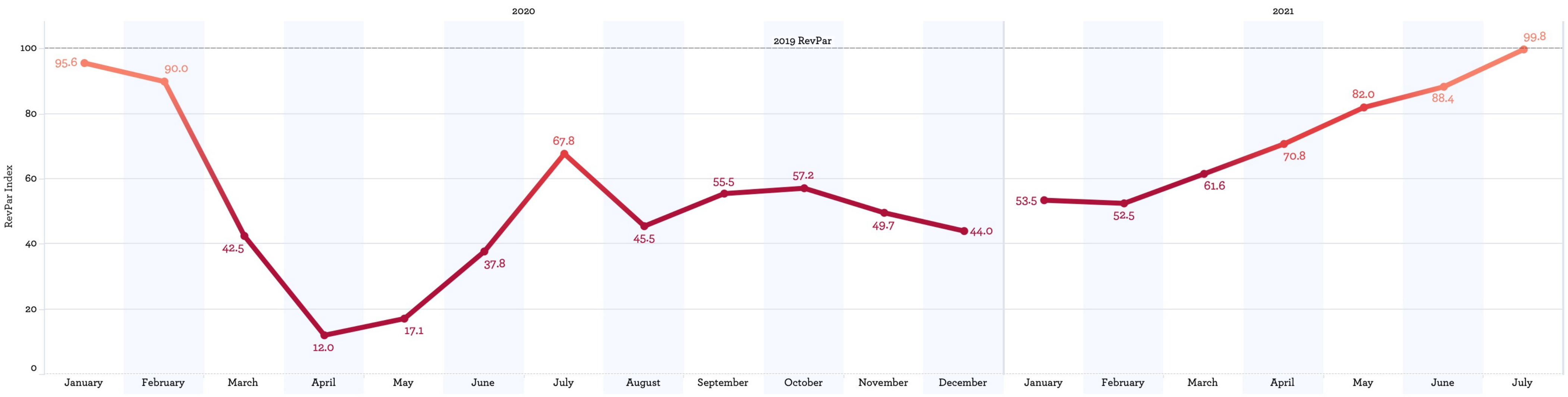
1. Hotel Trends and the COVID Recovery
2. Labor Shortage
3. Pipeline
4. Sales Successes

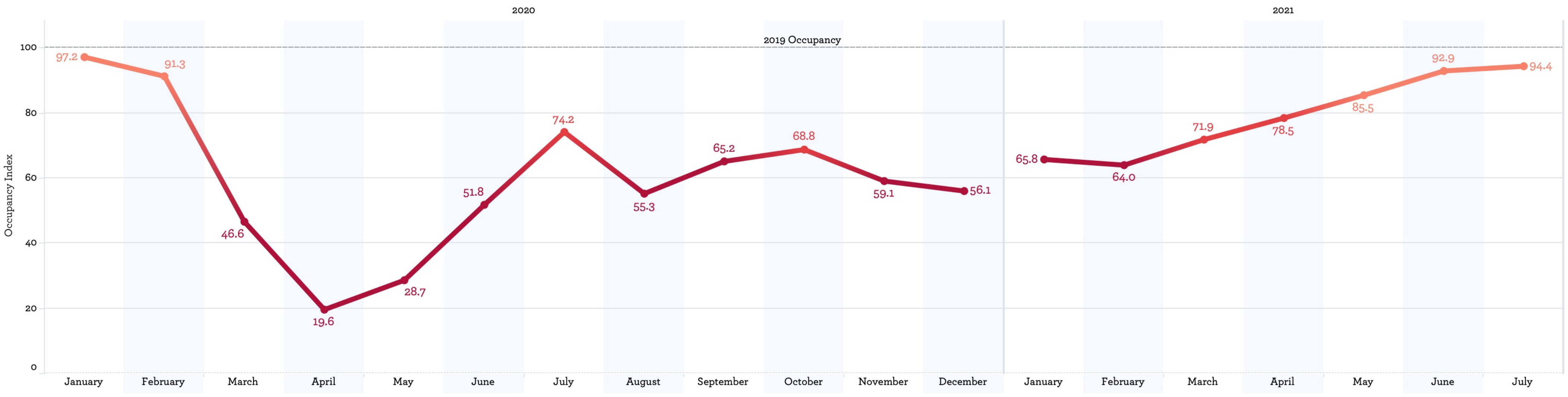
HOTEL DATA

1. Recovery
2. Weekend vs. Weekday
3. Demand Index

RevPar Index



Occupancy Index



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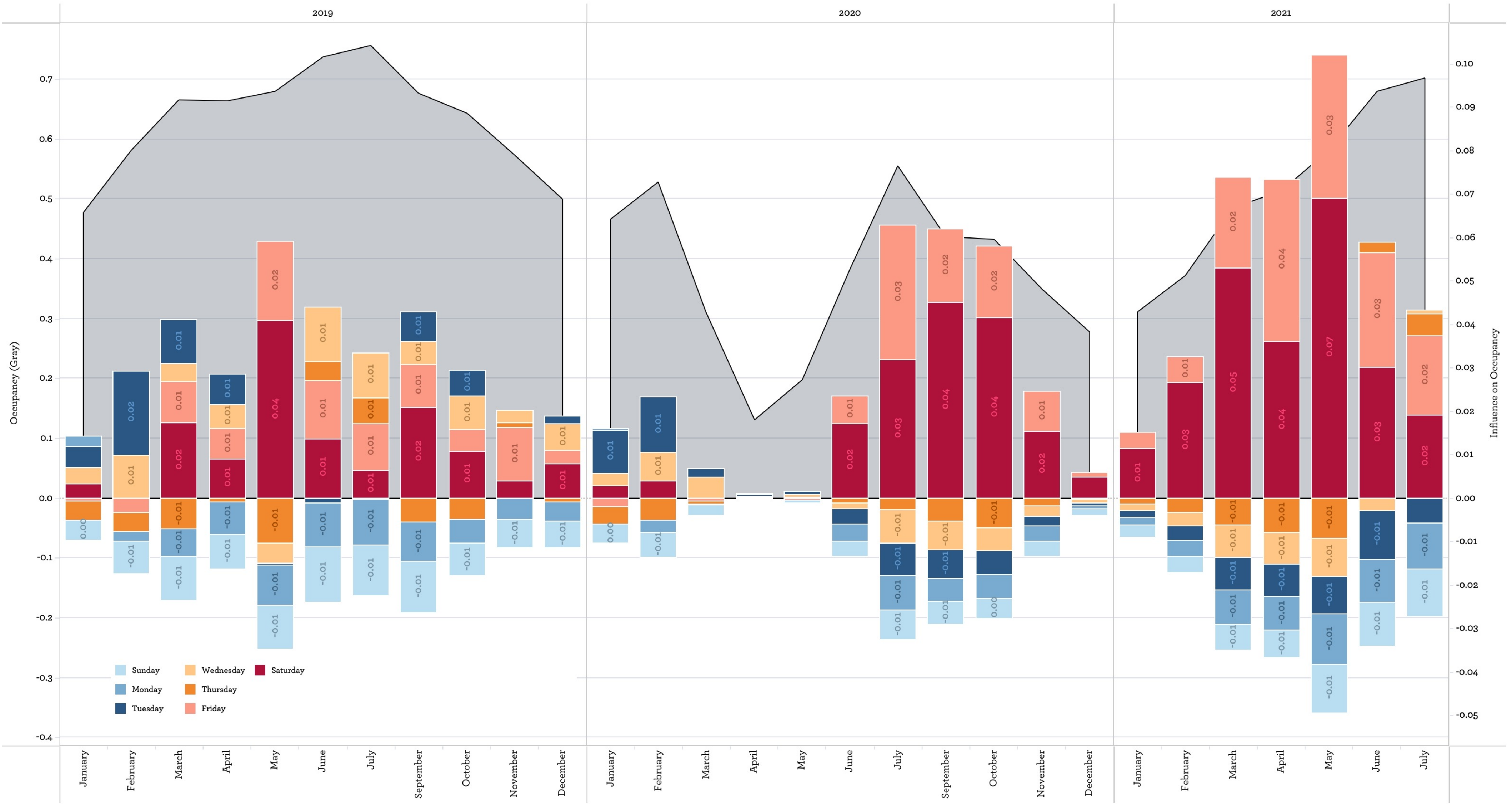
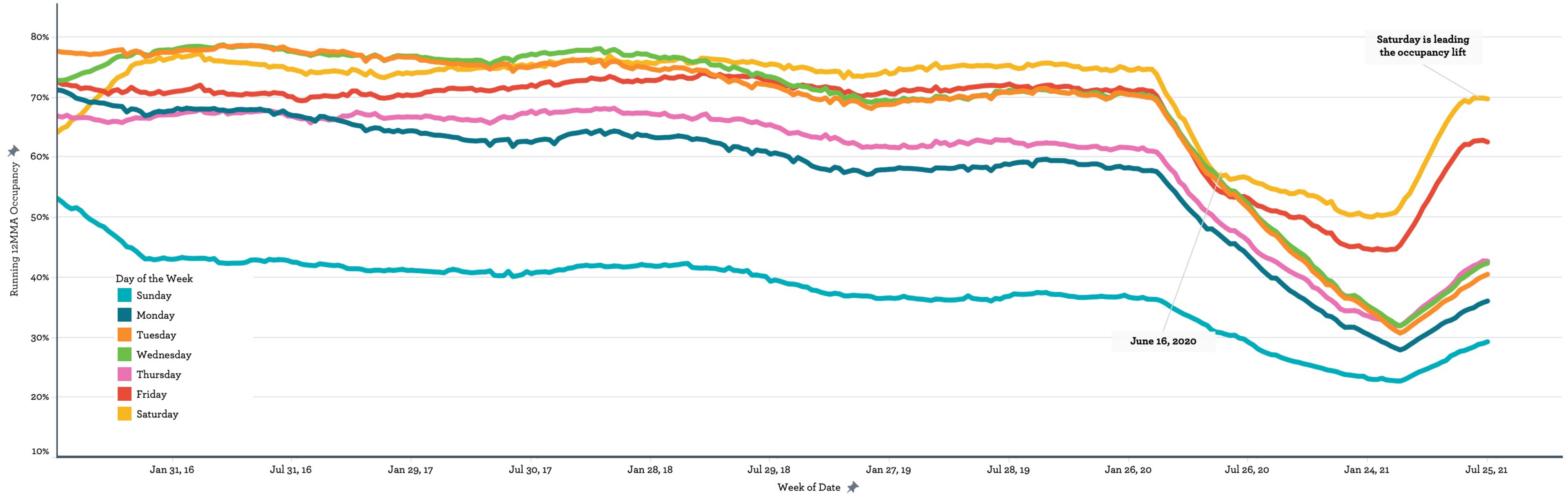
Day Part Occupancy Influence



Recovery by Weekday



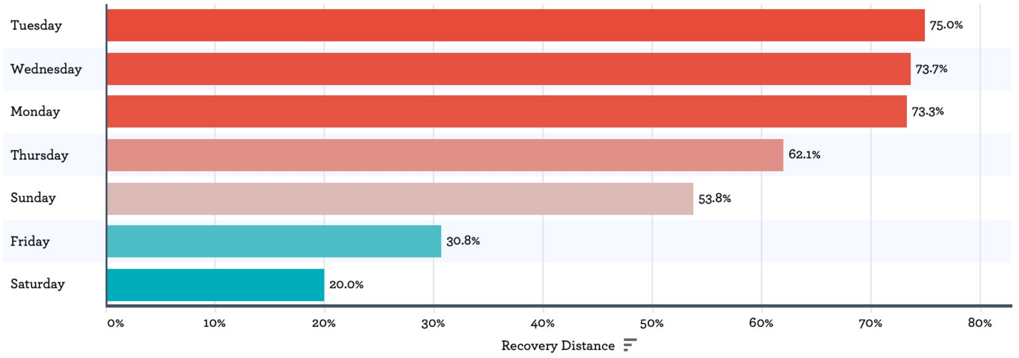
Weekday Recovery

In terms of occupancy

	Peak	Bottom	Current
Sunday	36%	23%	29%
Monday	58%	28%	36%
Tuesday	71%	31%	41%
Wednesday	70%	32%	42%
Thursday	61%	32%	43%
Friday	71%	45%	63%
Saturday	75%	50%	70%

Weekday Road Ahead

In terms of the difference in average occupancy now and the last peak before the pandemic



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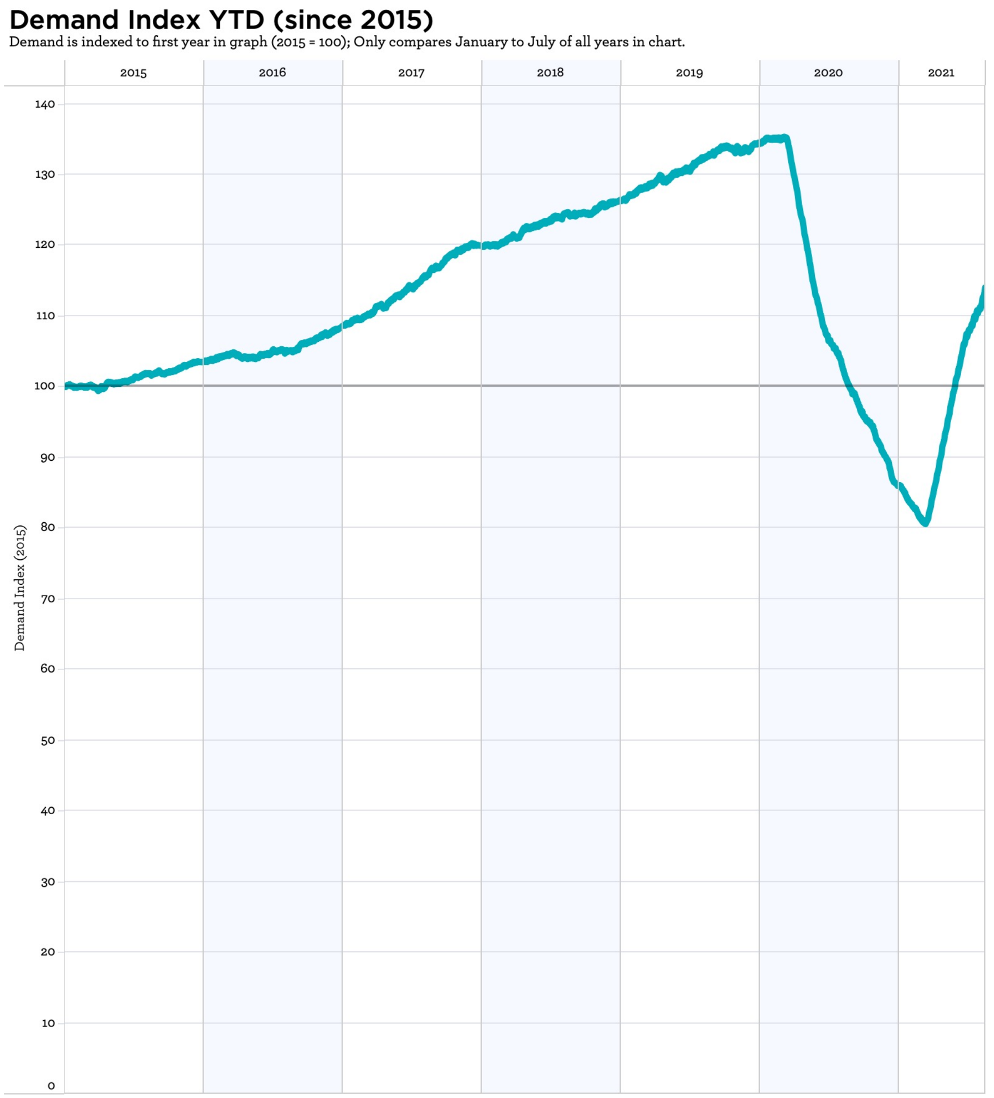

2022 Forecasts based on a few potential scenarios

*Forecast based on STR calculations

	Worst Case Scenario	Median Case Scenario	Best Case Scenario
Demand (Rooms sold)	7%	14%	20%
Occupancy (Rooms filled %)	2%	10%	13%
ADR (Average Room Rate)	5%	7%	8%
RevPar (Revenue / Supply)	7%	18%	20%

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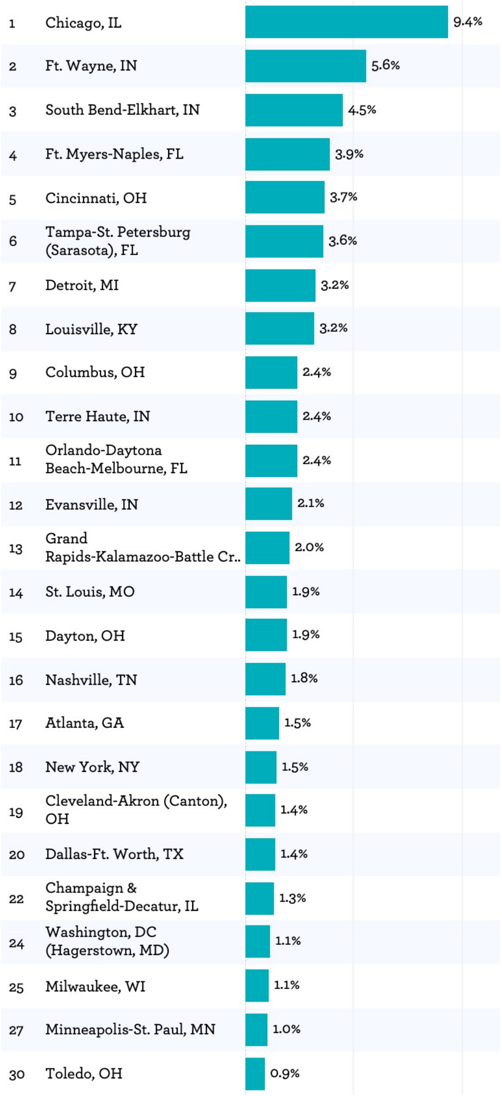
KEY TAKEAWAYS

1. The recovery is asymmetrical. Weekends will recover first. Weekday, particularly days earlier in the week will recover last as group business is slow to recover.
2. Our market is more fragile than ever.
3. Demand is recovering quickly.
4. Forecasting in a pandemic is very tricky.

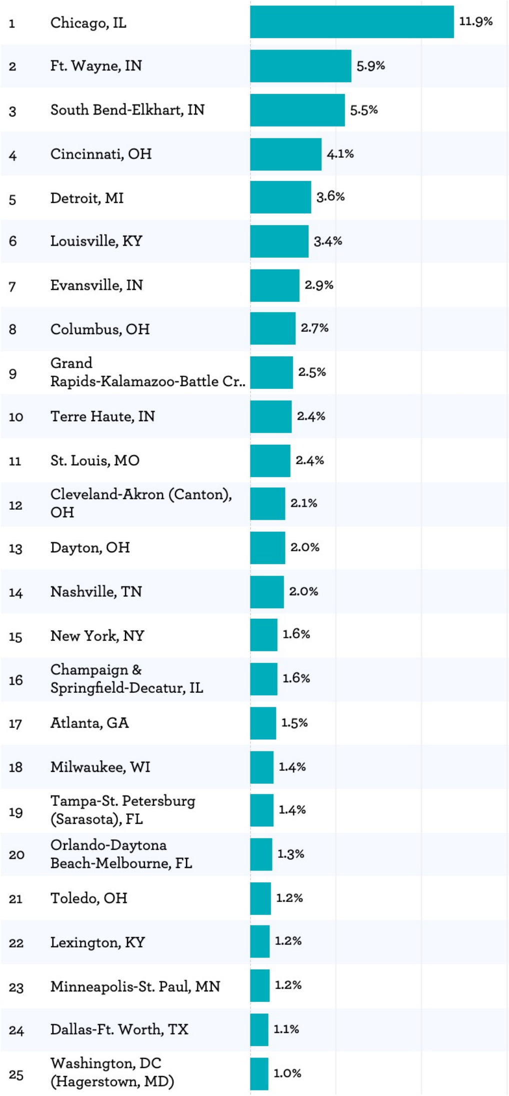
GEOLOCATION DATA

1. Top Origin Markets
2. Pandemic Shift

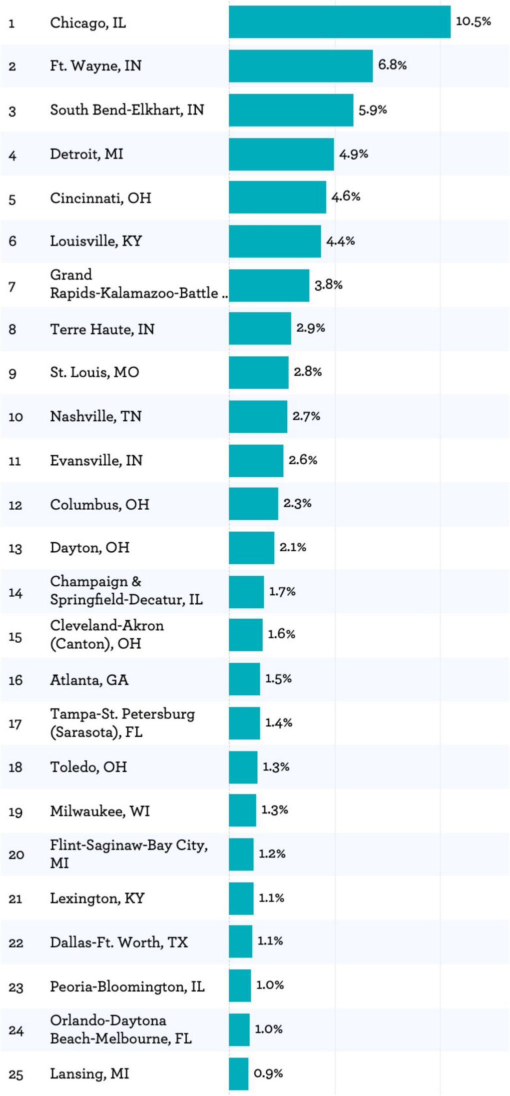
2018 Overnight Visitor Origins



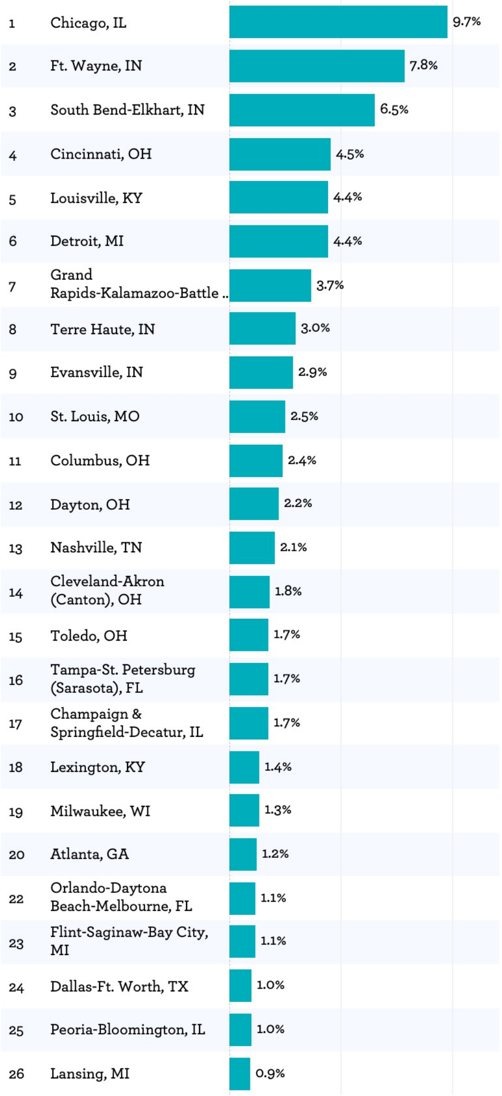
2019 Overnight Visitor Origins



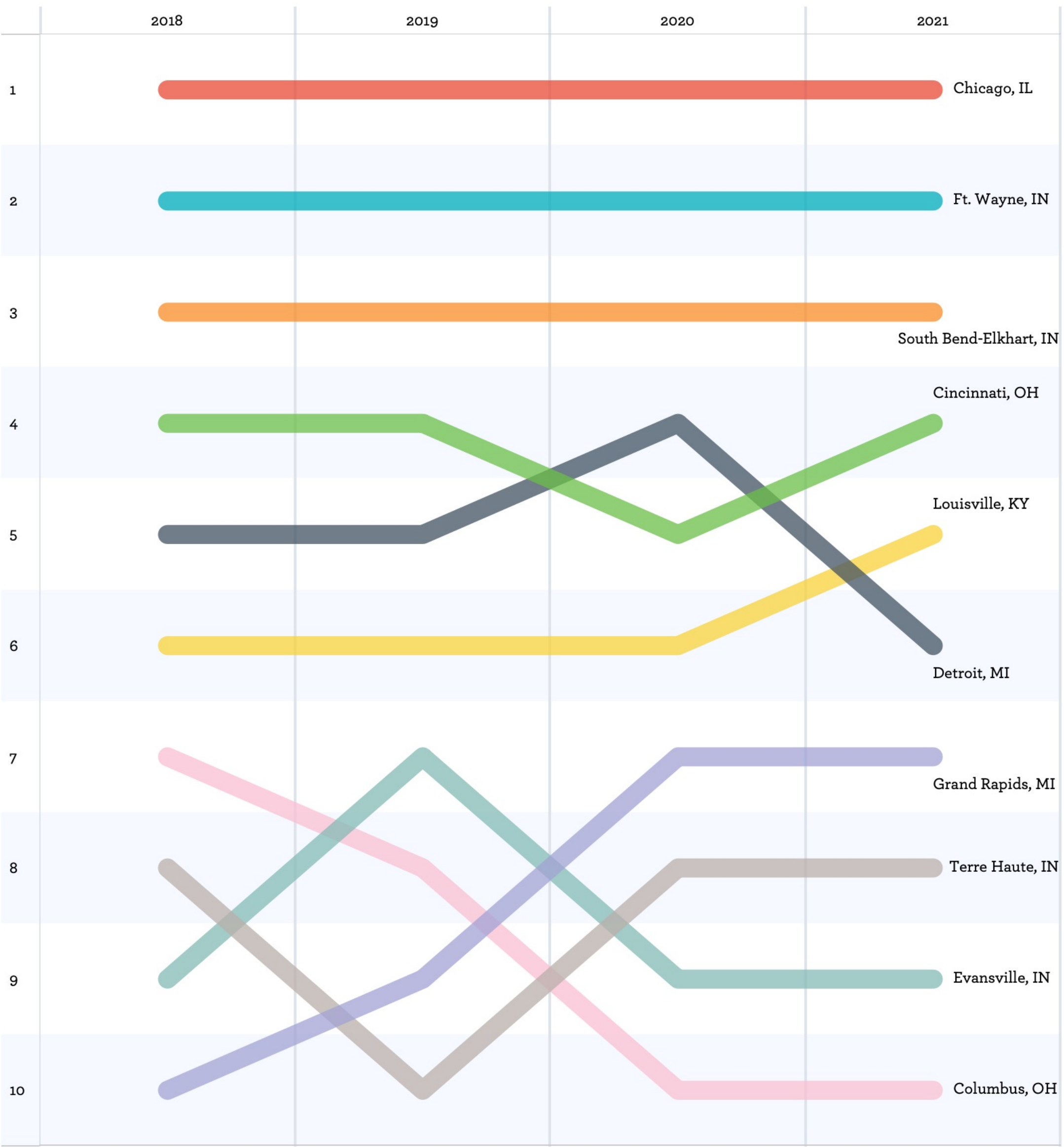
2020 Overnight Visitor Origins



2021 YTD Overnight Visitor Origins

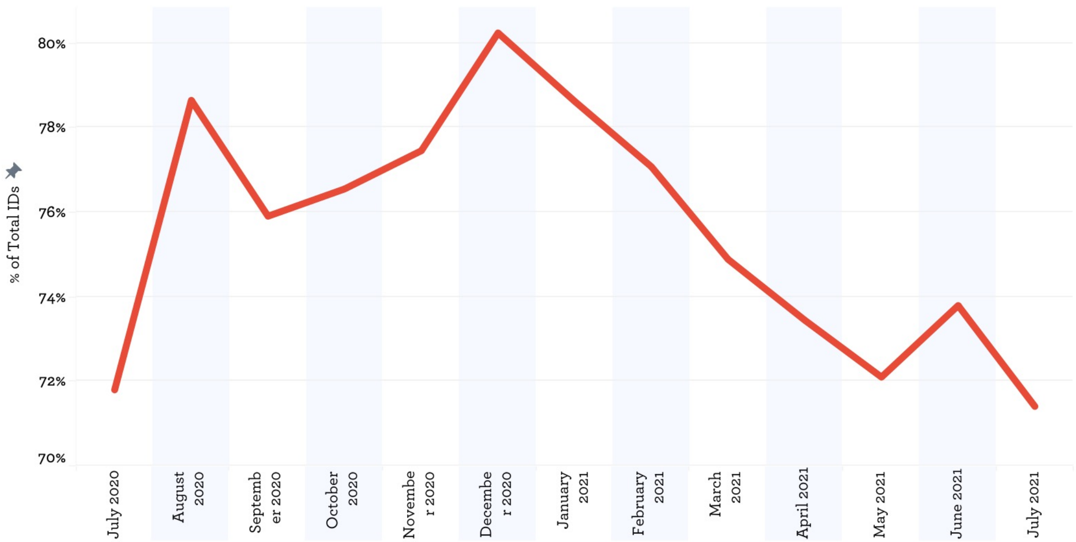


Year to Year Change



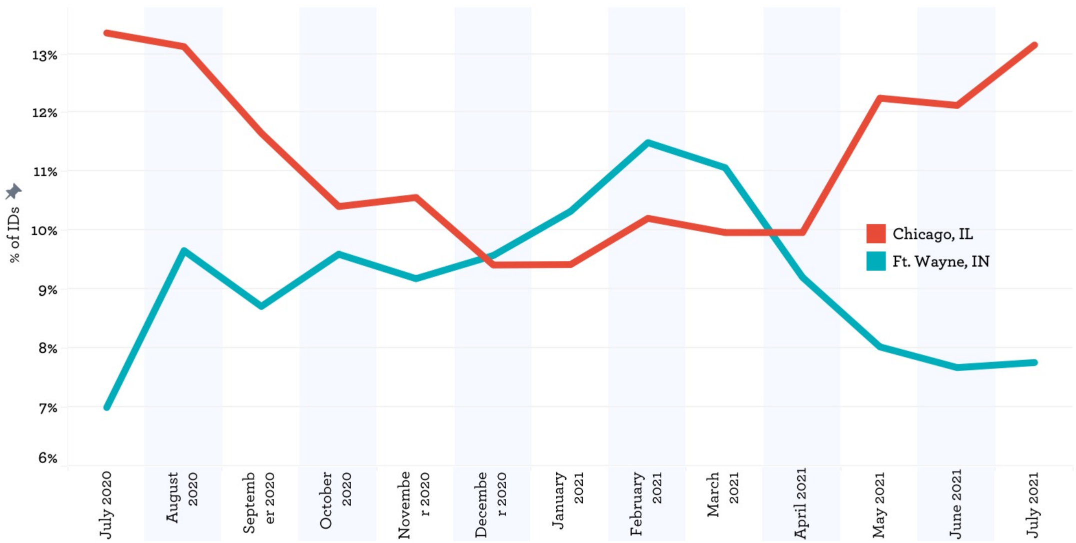
Indianapolis Overnighters

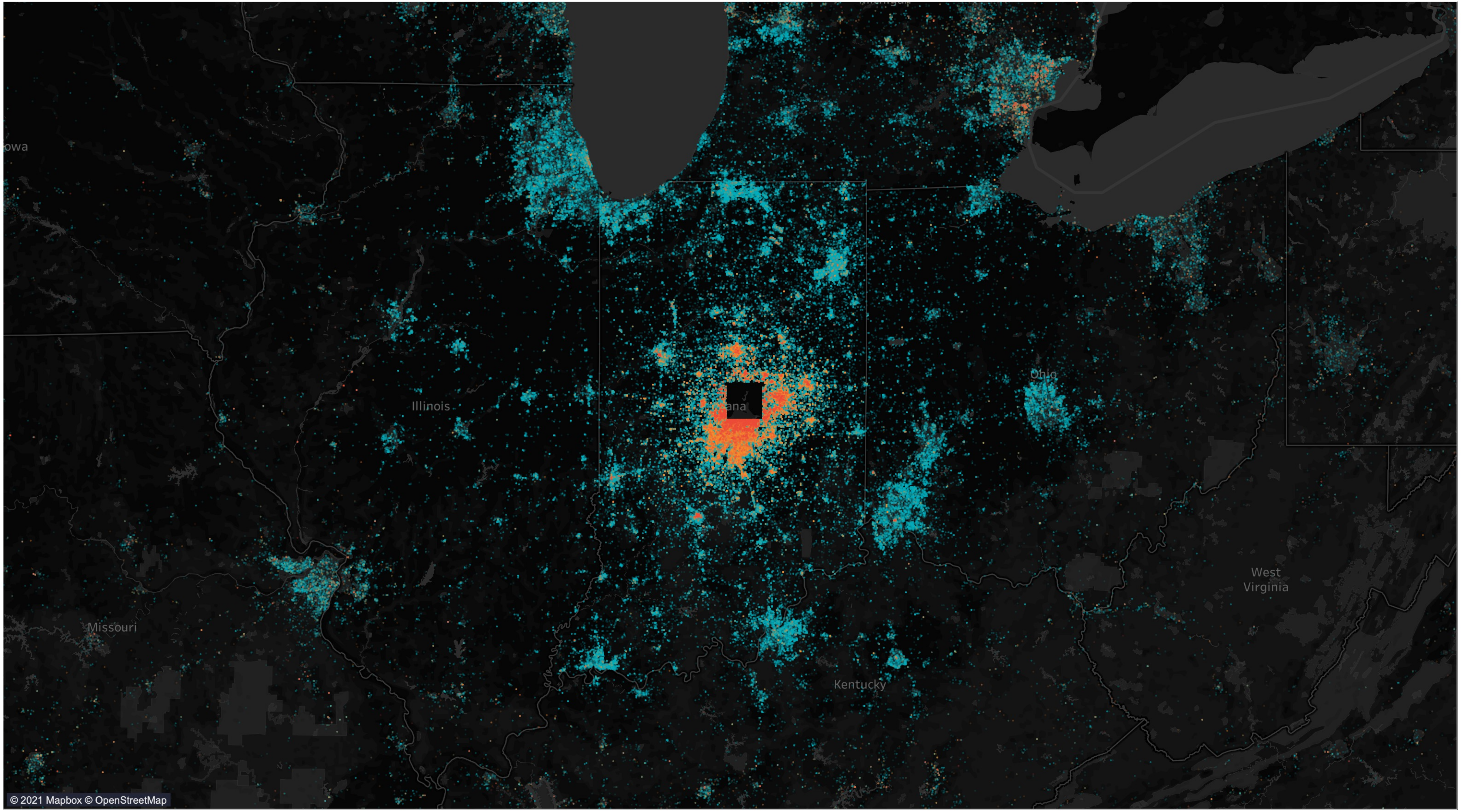
% of overnighters from Indianapolis when compared to other markets within 500 miles



Markets with 500 Miles

Overnighter % by Market (Chicago and Ft. Wayne)




Illinois
Ohio
West
Virginia
Missouri
Kentucky
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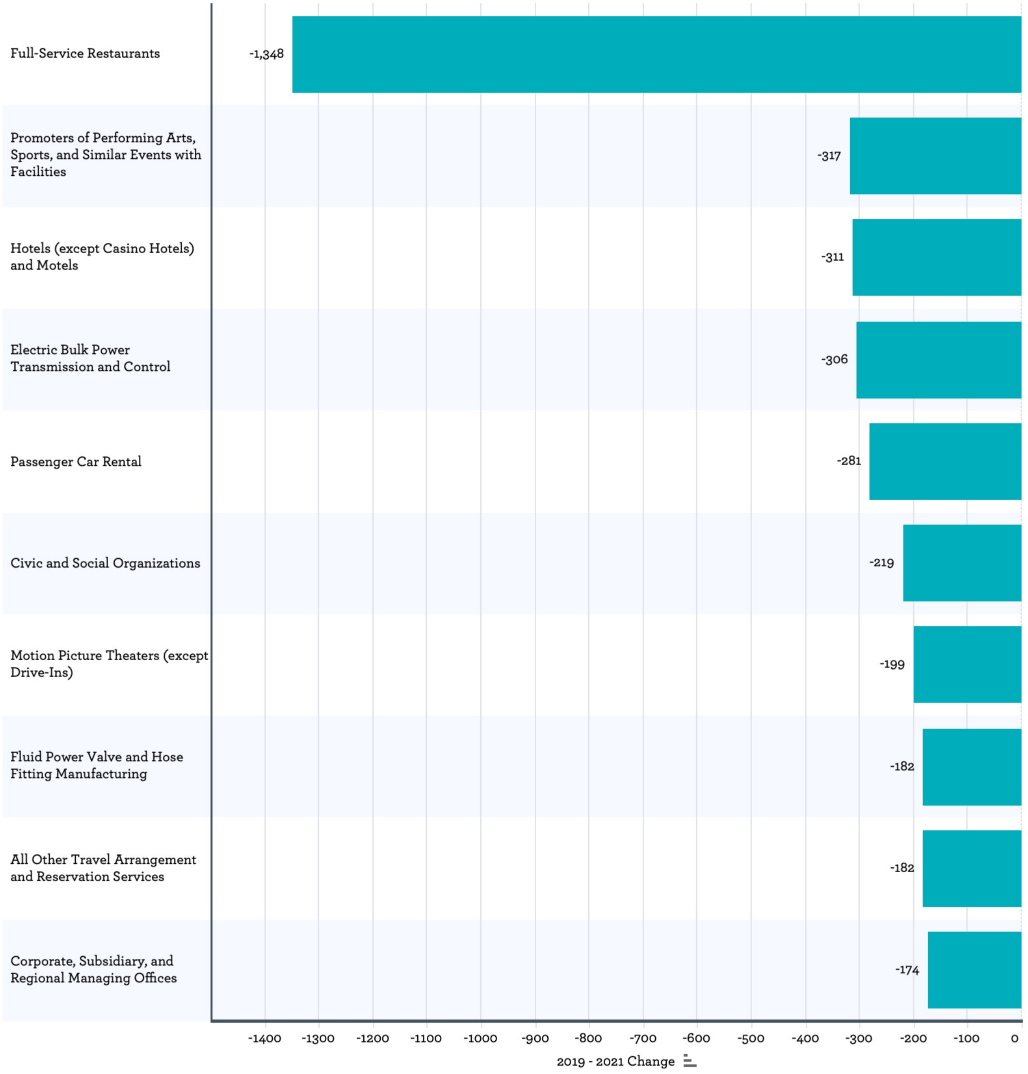
KEY TAKEAWAYS

1. Our top visitor origin markets have been steady for the past 4 years.
2. Ft. Wayne and South Bend-Elkhart visitors have been gaining share.
3. Visitors are more likely to stay in Hamilton County at a higher percentage if they originate from a more northern area.

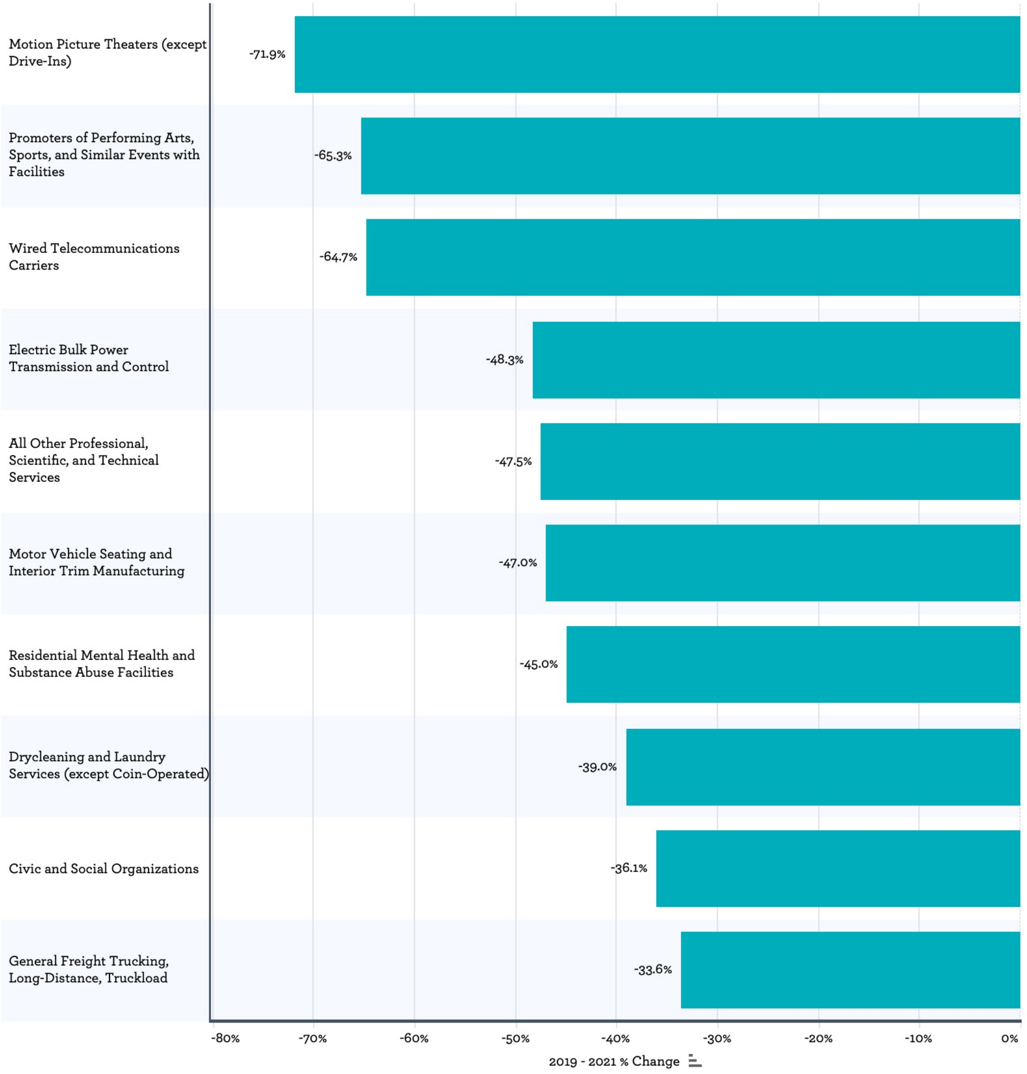
LABOR MARKET CHANGES

- Industry and Career Impact
- Wages
- Age Group Population Change
- Hours
- Net Commute

Industries Most Affected by Pandemic
In terms of jobs lost from 2019 to 2021



Industries Most Affected by Pandemic (%)
In terms of percent jobs lost from 2019 to 2021



TOP 10 OCCUPATIONS IN THOSE DECLINING INDUSTRIES

Description	Employed in Industry (2021)	Change (2019 - 2021)	% Change (2019 - 2021)	Median Hourly Earnings	Typical Entry Level Education	Typical On-The-Job Training
Waiters and Waitresses	2,376	-526	-18.1%	$ 9.58	No formal educational credential	Short-term on-the-job training
Cooks, Restaurant	1,504	-228	-13.2%	$ 12.83	No formal educational credential	Moderate-term on-the-job training
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	598	-134	-18.3%	$ 9.48	No formal educational credential	Short-term on-the-job training
First-Line Supervisors of Food Preparation and Serving Workers	356	-111	-23.9%	$ 16.66	High school diploma or equivalent	None
Bartenders	331	-91	-21.5%	$ 10.41	No formal educational credential	Short-term on-the-job training
Dishwashers	320	-90	-22.0%	$ 9.55	No formal educational credential	Short-term on-the-job training
Dining Room and Cafeteria Attendants and Bartender Helpers	315	-80	-20.3%	$ 9.77	No formal educational credential	Short-term on-the-job training
Food Preparation Workers	310	-44	-12.5%	$ 11.62	No formal educational credential	Short-term on-the-job training
Customer Service Representatives	280	-89	-24.1%	$ 18.57	High school diploma or equivalent	Short-term on-the-job training
Fast Food and Counter Workers	251	-151	-37.5%	$ 10.44	No formal educational credential	Short-term on-the-job training

**Highlighted wages are not enough to make minimum requirements to "get by" in Indiana*

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HAMILTON COUNTY, INDIANA

Hospitality & Tourism Industry Cluster Jobs

Year	Jobs	Earnings per Job
2012	15,148	$ 22,566
2013	15,596	$ 22,255
2014	16,517	$ 22,989
2015	17,323	$ 23,306
2016	18,244	$ 24,089
2017	19,355	$ 23,965
2018	20,263	$ 24,679
2019	20,762	$ 25,089
2020	17,841	$ 26,691
2021	18,462	

Part-time workers are included in data

**Clusters include the Harvard Tourism Cluster and Local Tourism Cluster*

EARN

How much money a single person needs to earn to get by in every U.S. state

Published Tue, Aug 17 2021·9:00 AM EDT • Updated Wed, Aug 18 2021·1:28 PM EDT

Francisco Velasquez
@_FRANVELA

SHARE

Indiana

- **Total required income before taxes: $27,955**
- Estimated housing costs: $7,072
- Estimated food costs: $3,246

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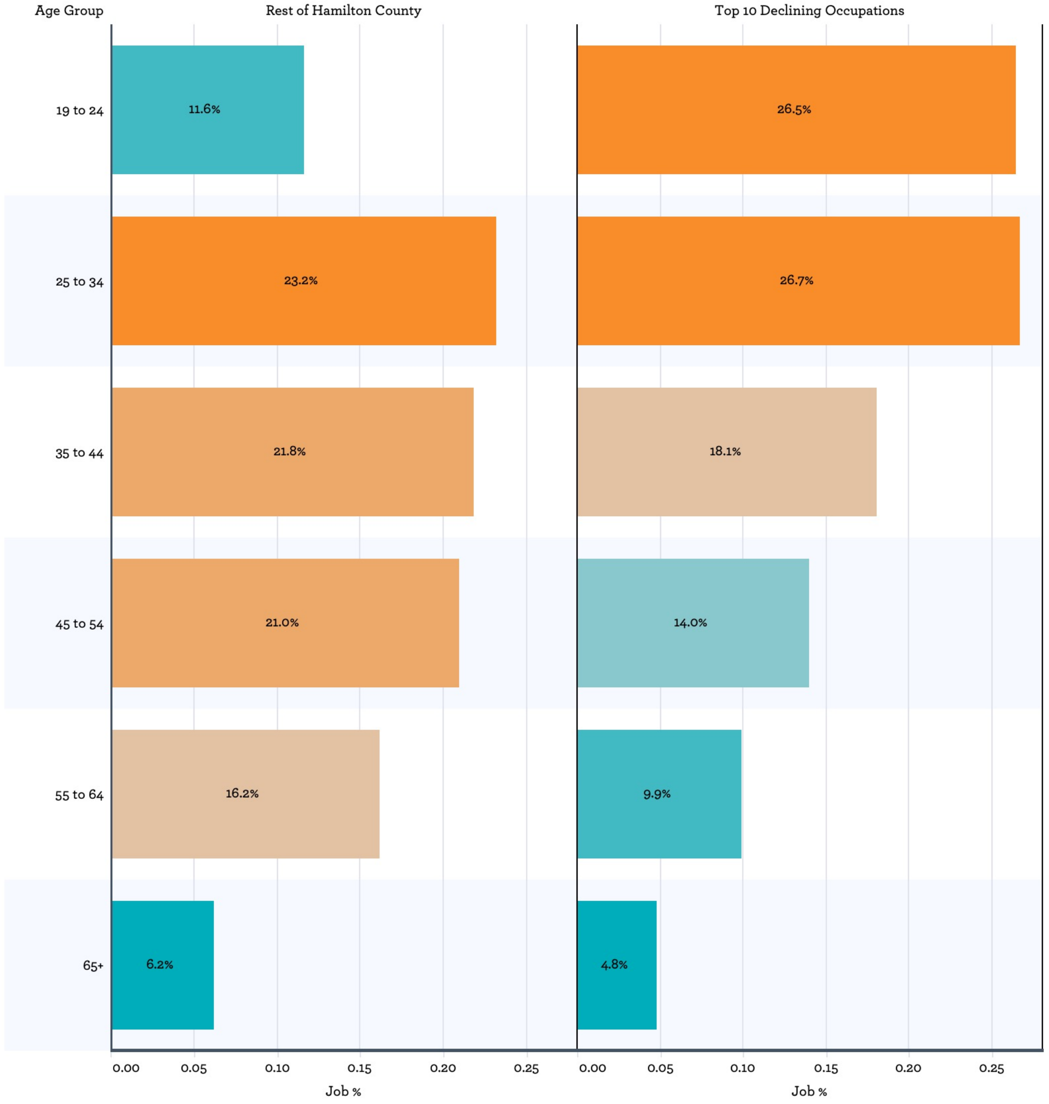
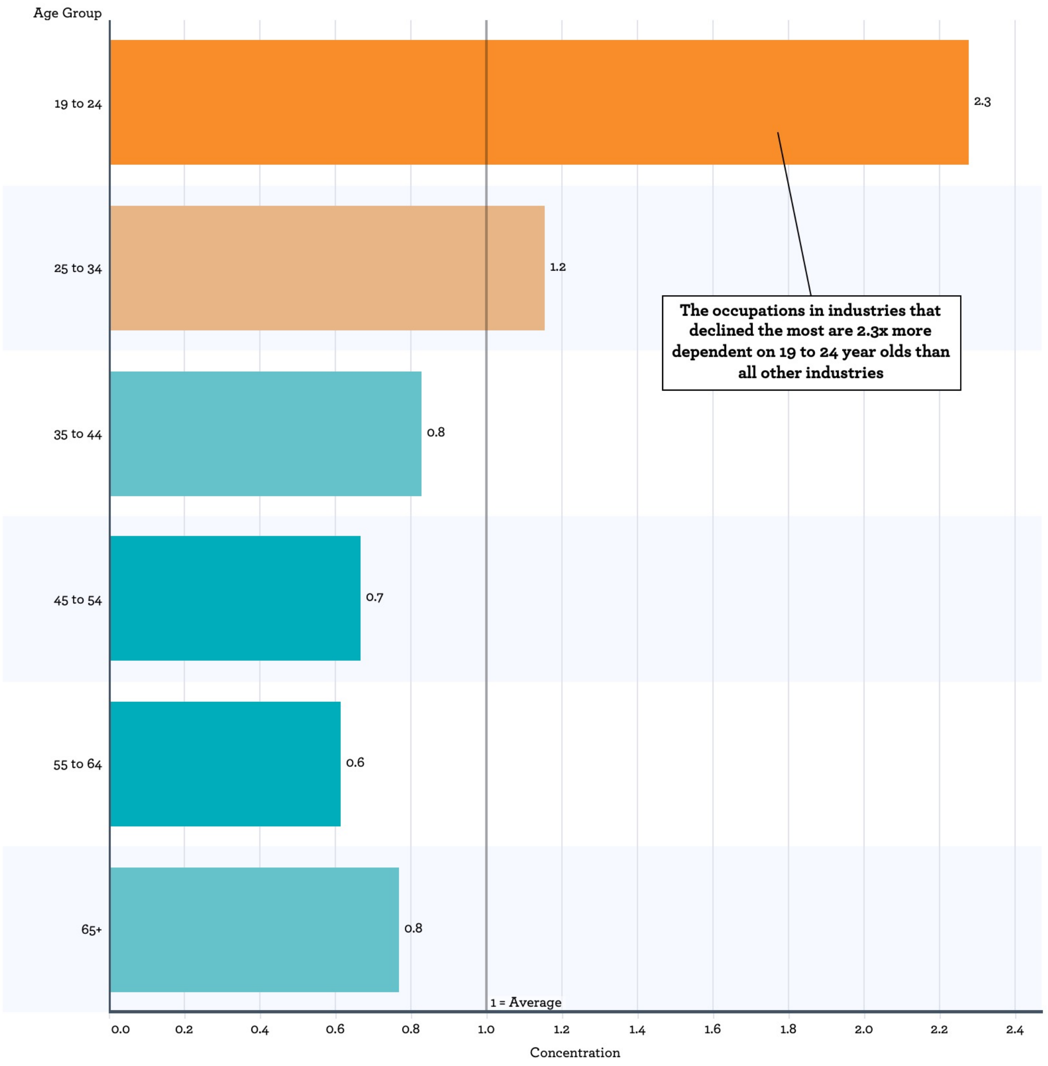
Labor Demographics



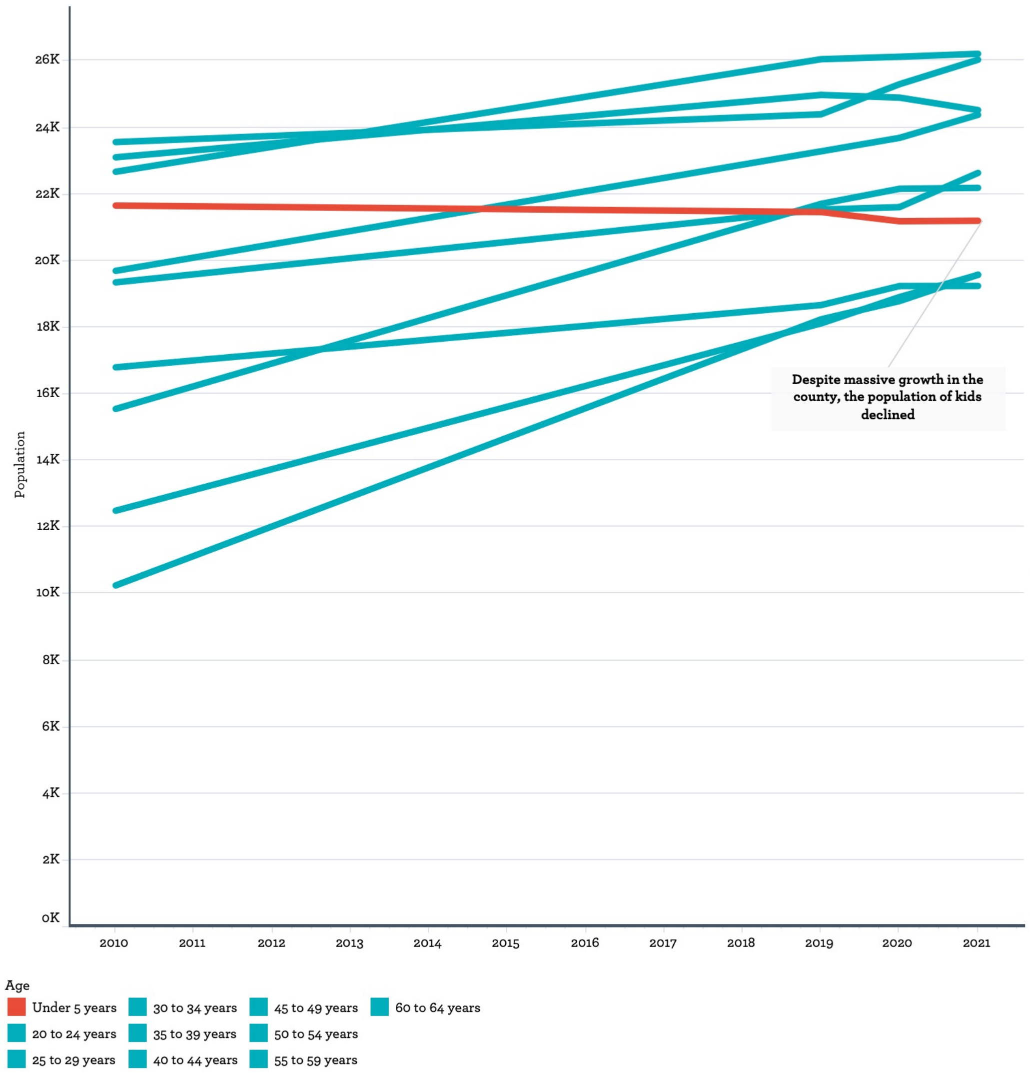
Labor Demographic Concentration

Declining industry concentration of certain age groups. This is determined by % of total for the group divided by the overall % of total for the county per age group.



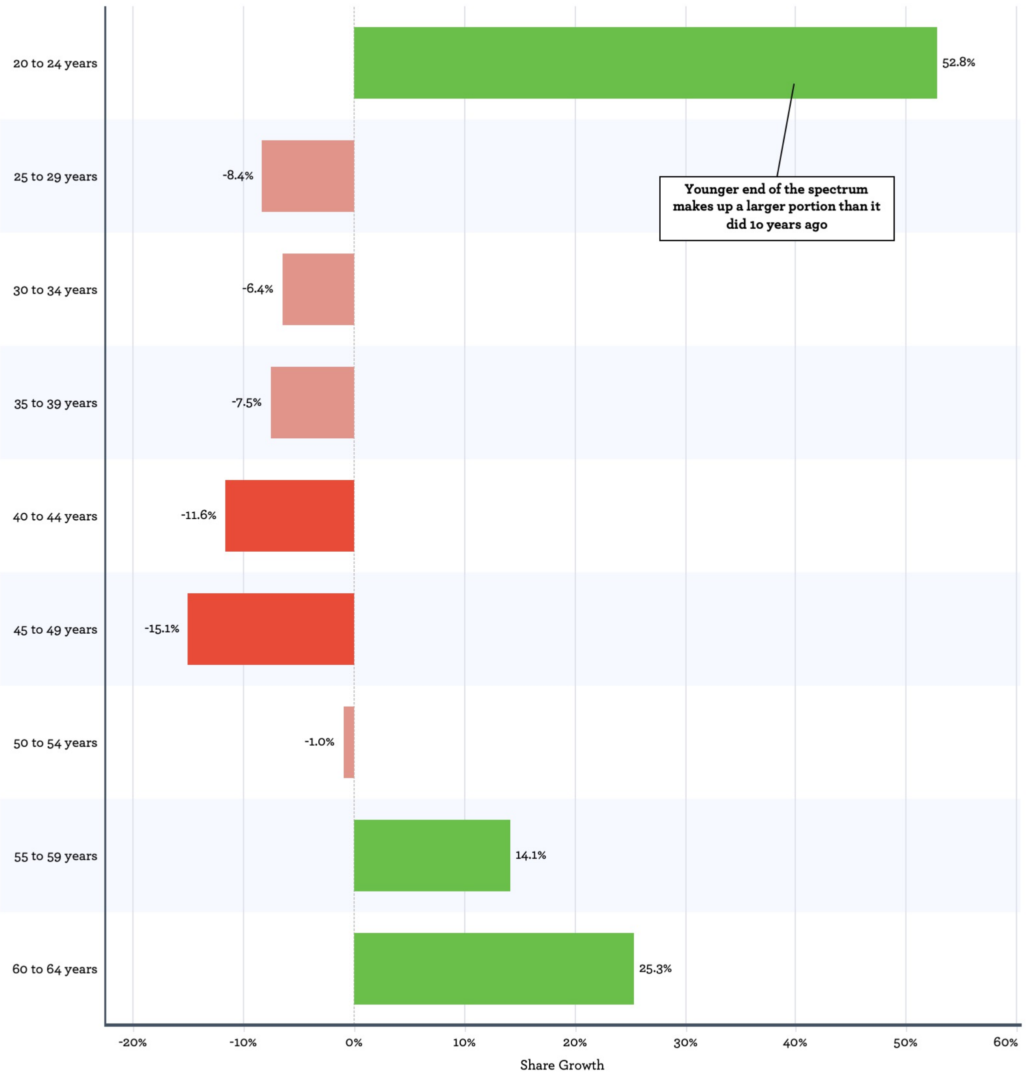
Age Group Growth

Growth in Population in Hamilton County



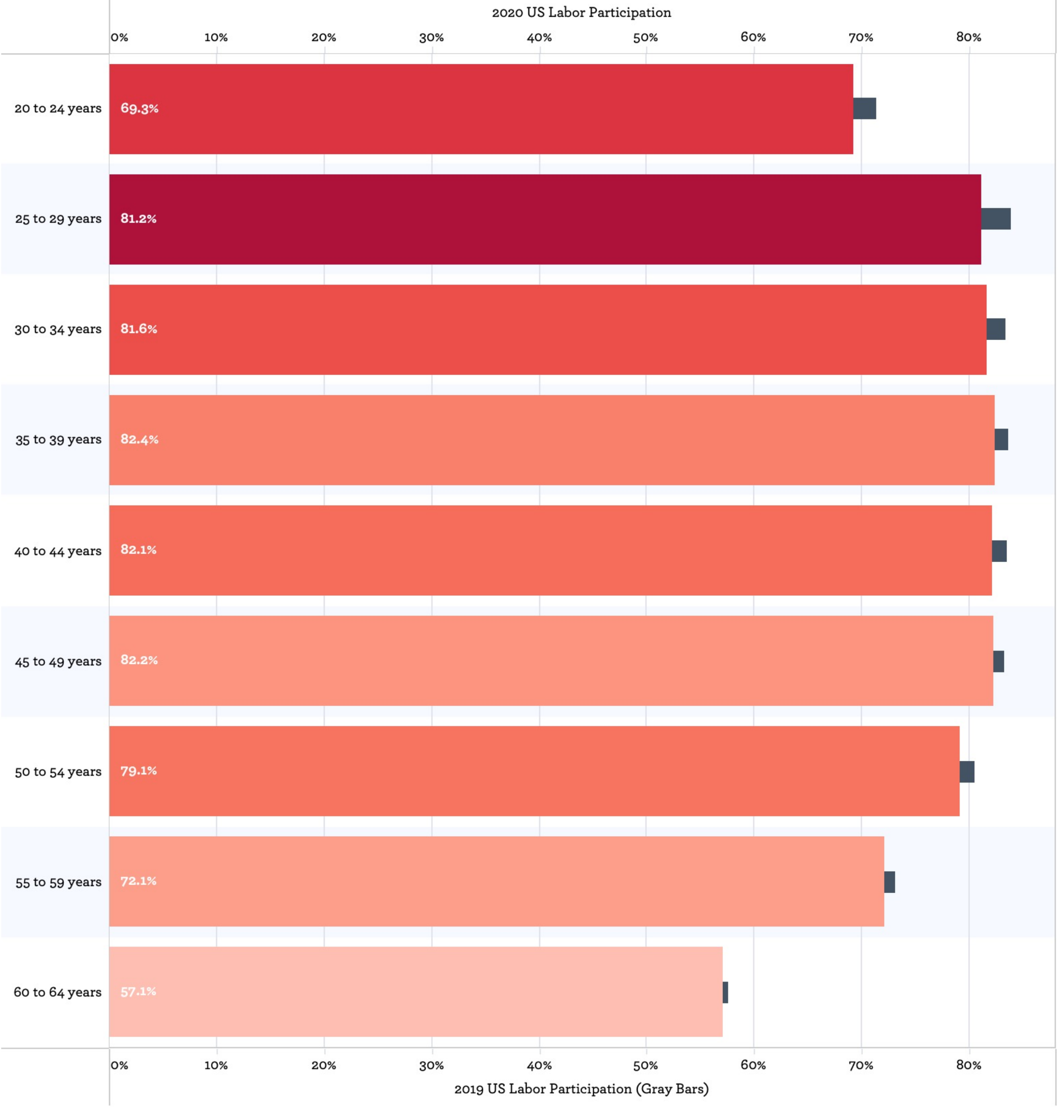
Working Population Percent of Share Change (2010 to 2021)

Ages 20 to 65



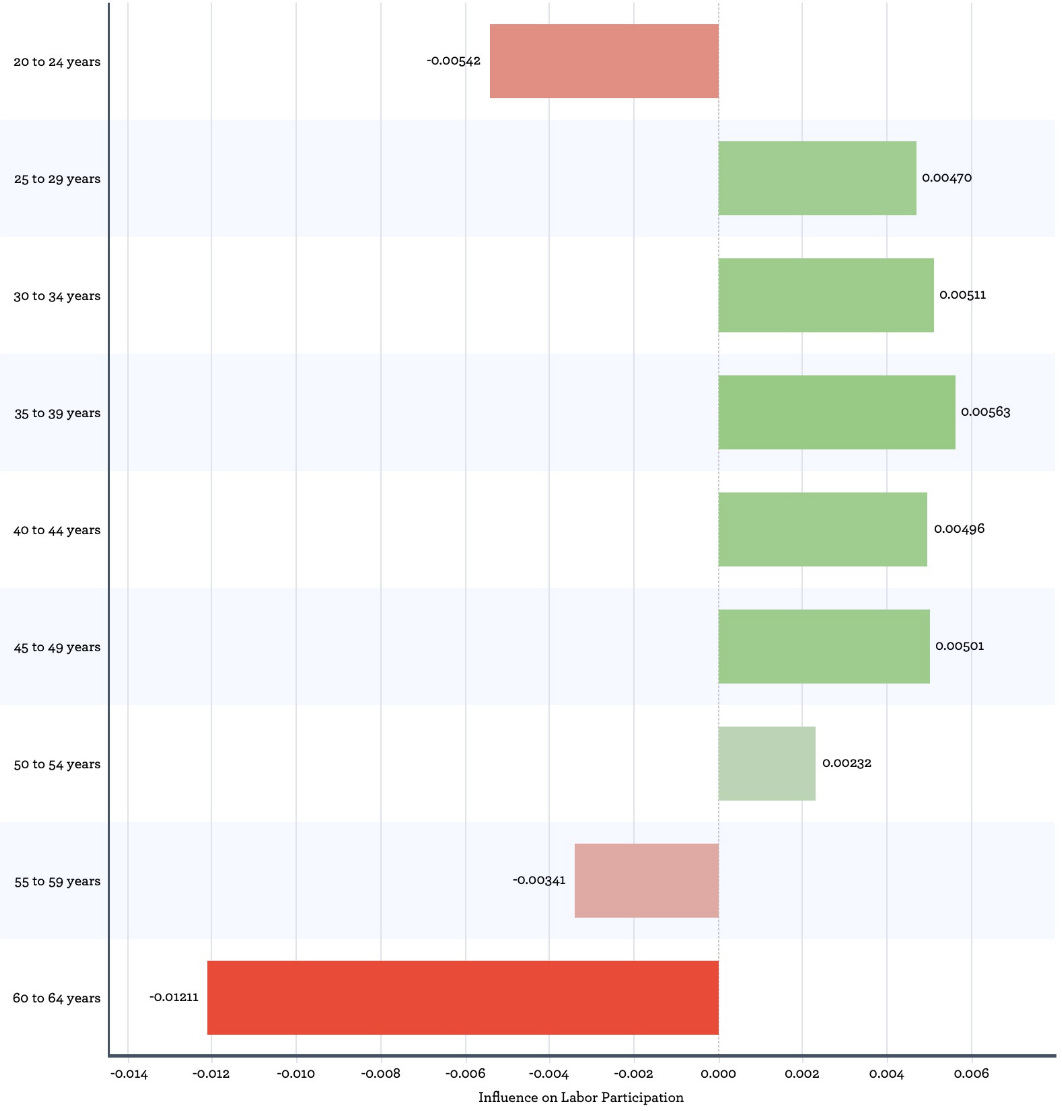
US Labor Participation Rate

Ages 20 to 65; The gray bar indicate 2019 participation levels and the color indicates the difference from that rate



Influence on Labor Participation Rate

The weight the current rate has on the overall labor participation rate; *BLS data



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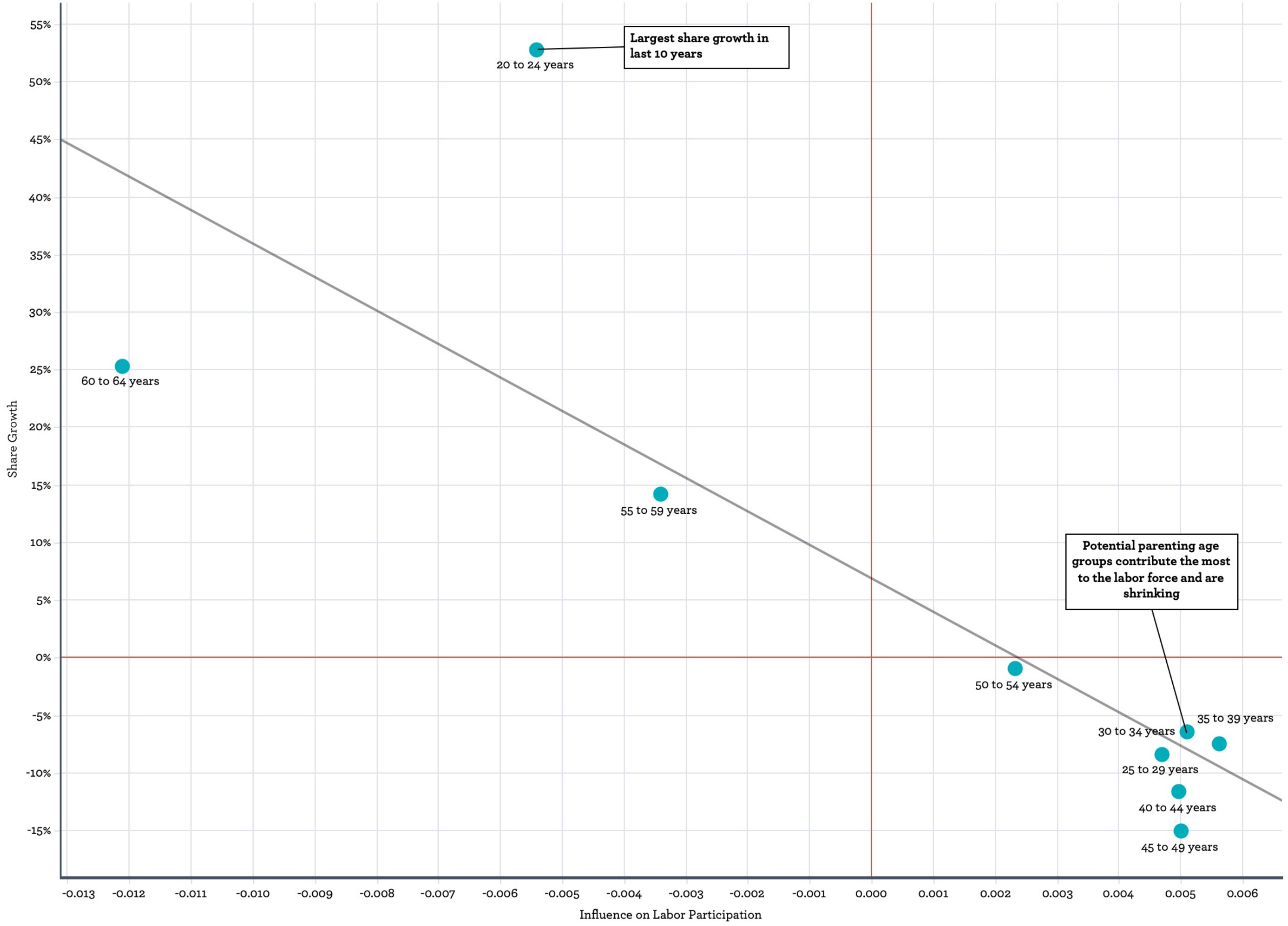
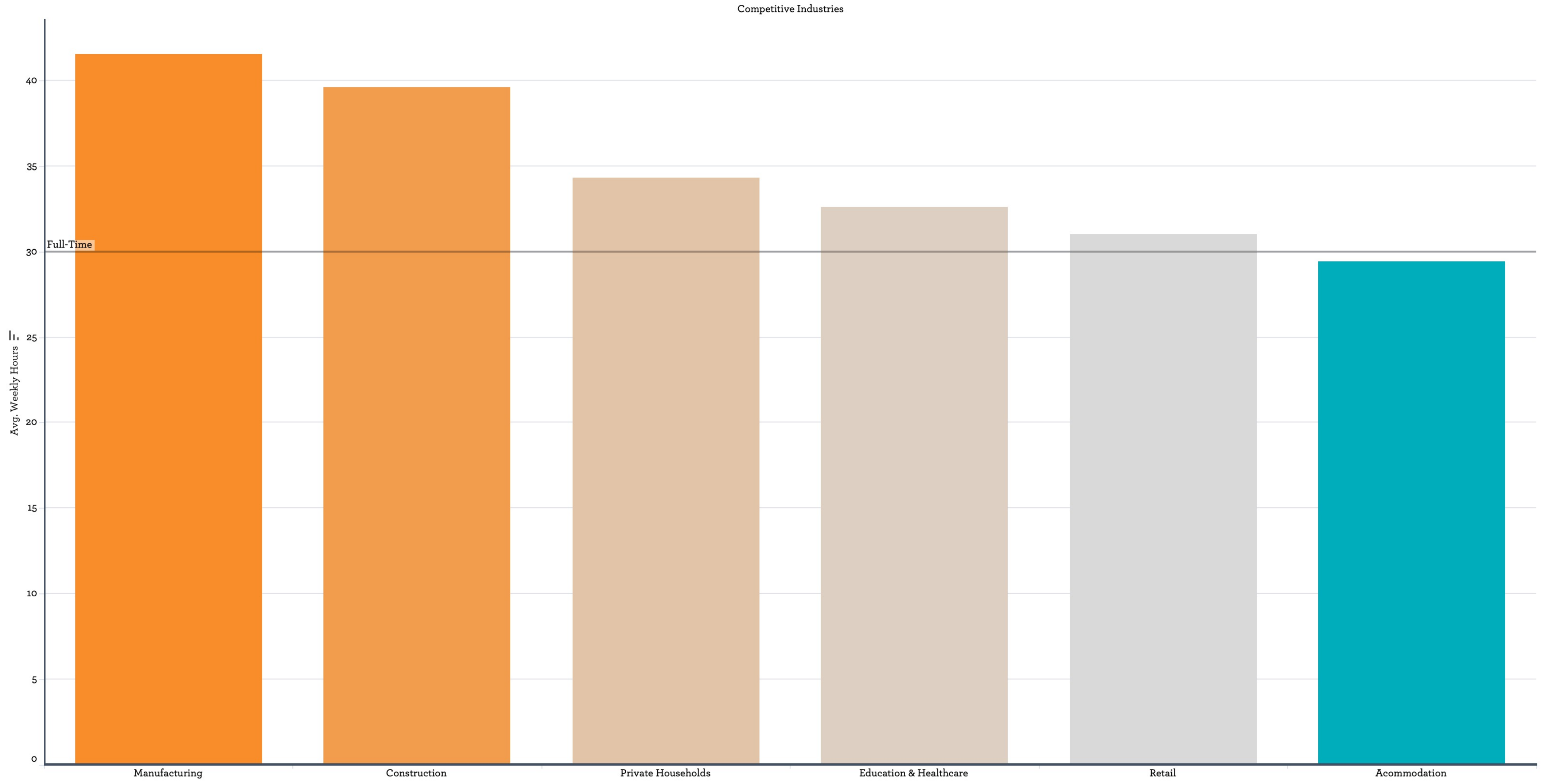
Labor Force Influence and Share Growth

There is a fairly good correlation between of share growth of working age group populations and labor participation rate. R^2 = 0.67



Average Weekly Hours Worked

Color-coded by difference from 30 hours; National data from CES; Competitive industries are determined by J2J dataset that measures industries unsupervised accommodations workers leave to and come from.



NET COMMUTER % (2020)

= Resident Workers / Out-of-County Workers in Hamilton County

17%

Occupations in Declining Industries

-9%

Occupations in Hamilton County

(Negative indicates we export more than we import)

HOSPITALITY WORKFORCE RECOVERY

- Hamilton County lost one-quarter of its tourism hospitality workforce between 2019-2020 – a huge barrier to market recovery.

- Working with partners at Invest Hamilton County on a pipeline program to grow interest in hospitality careers

- Also working on training and technology initiatives to re-imagine service delivery with fewer employees for the long-term.

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KEY TAKEAWAYS

1. Hamilton County has a complicated labor shortage, but we are not alone.
2. Industries more dependent on 20 to 30 year-olds are hurting disproportional as a result of the pandemic.
3. Wages, average weekly hours, labor force participation and commuting needs are all factors that hurt the industries most affected by the pandemic.

QUESTIONS?

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JORDAN MUSALL

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HOTEL SALES DATA

Laura Kelner, Director of Sales

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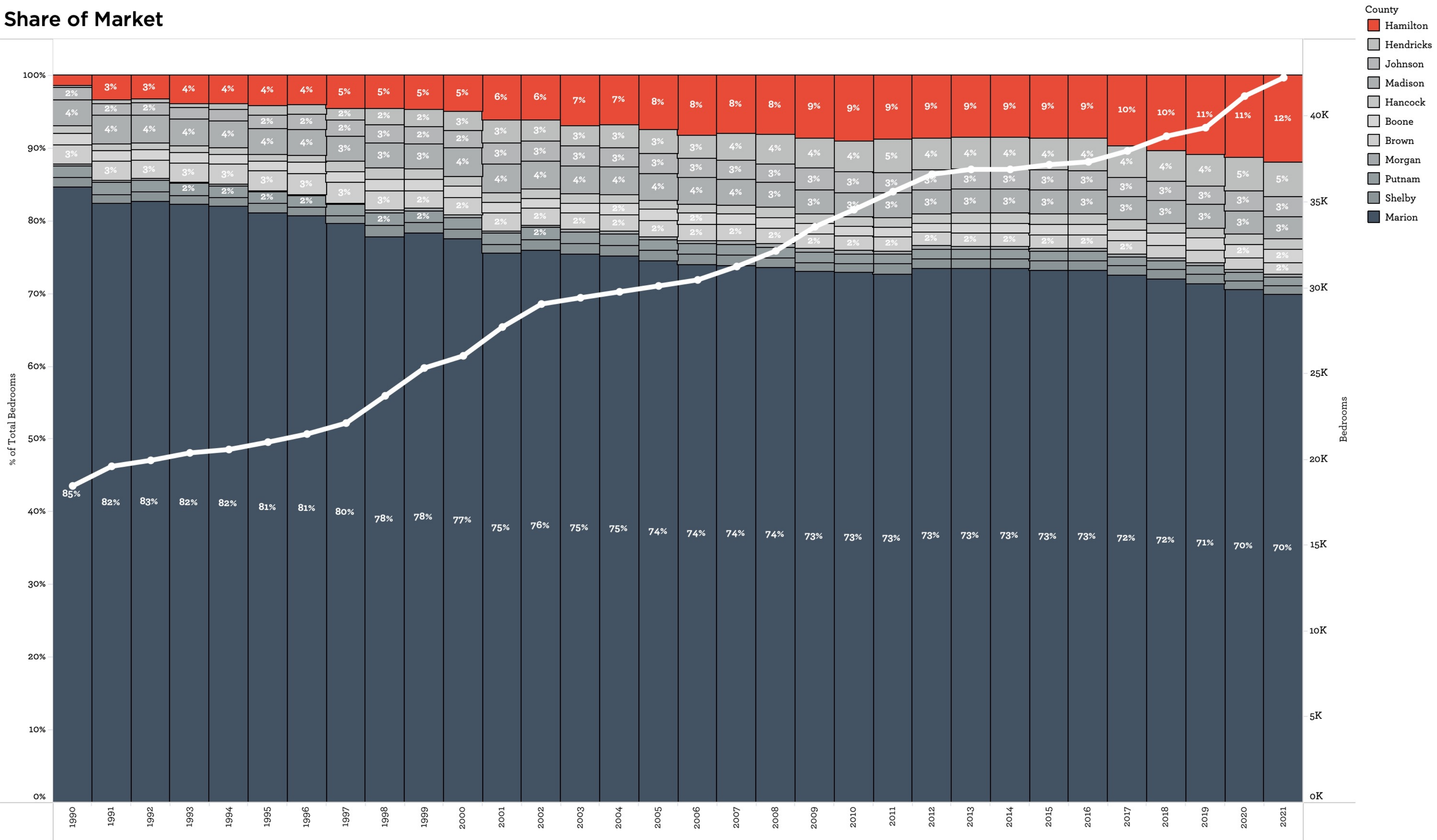
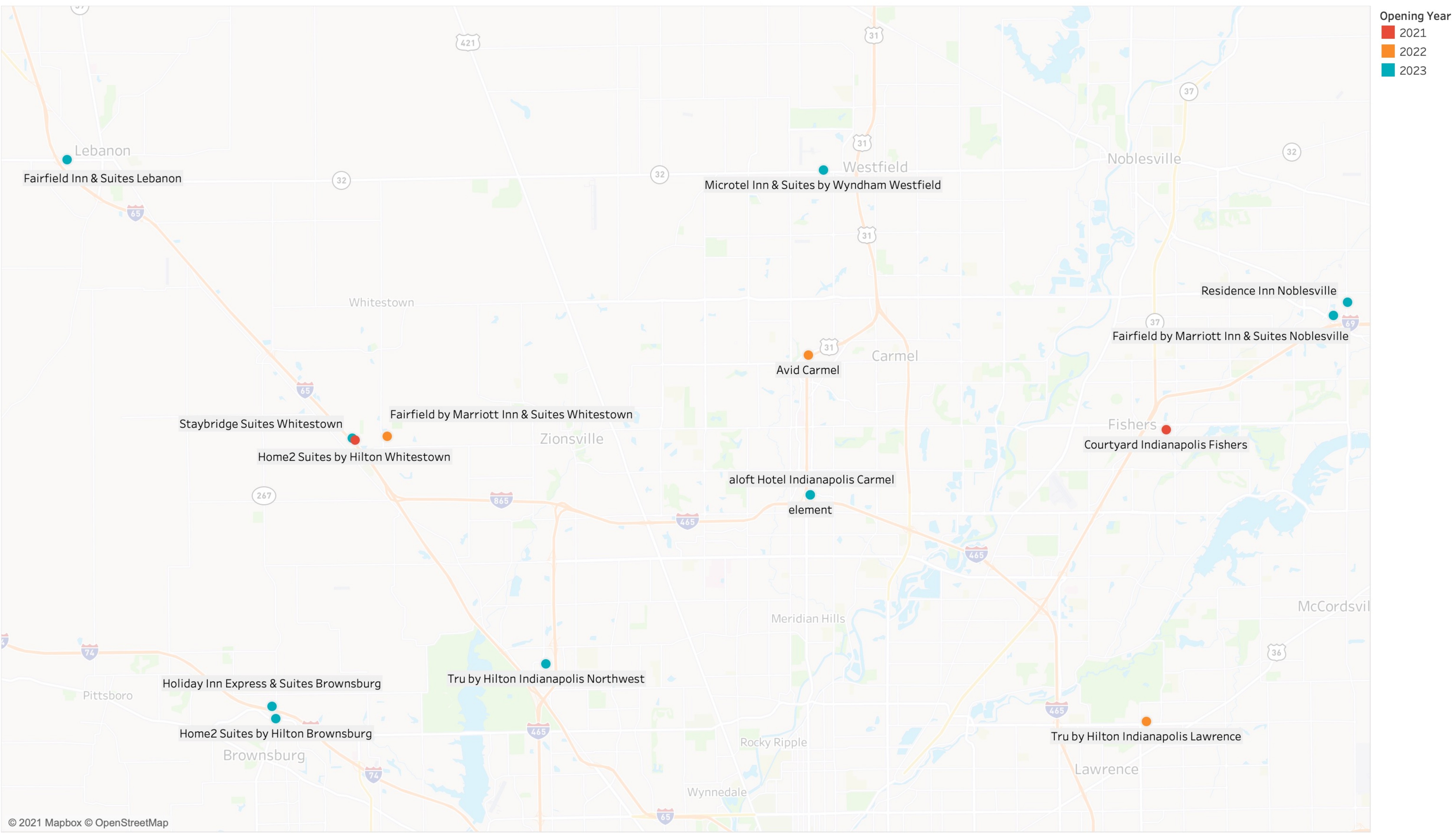
PIPELINE

1. Market Share Shift
2. What’s in the Pipeline?

Share of Market





Opening Year
2021
2022
2023
Lebanon
Fairfield Inn & Suites Lebanon
Westfield
Microtel Inn & Suites by Wyndham Westfield
Noblesville
Residence Inn Noblesville
Fairfield by Marriott Inn & Suites Noblesville
Whitestown
Avid Carmel
Carmel
Fairfield by Marriott Inn & Suites Whitestown
Staybridge Suites Whitestown
Zionsville
Home2 Suites by Hilton Whitestown
Fishers
Courtyard Indianapolis Fishers
aloft Hotel Indianapolis Carmel
element
Meridian Hills
McCordsvil
Holiday Inn Express & Suites Brownsburg
Pittsboro
Tru by Hilton Indianapolis Northwest
Home2 Suites by Hilton Brownsburg
Brownsburg
Rocky Ripple
Tru by Hilton Indianapolis Lawrence
Lawrence
Wynnedale
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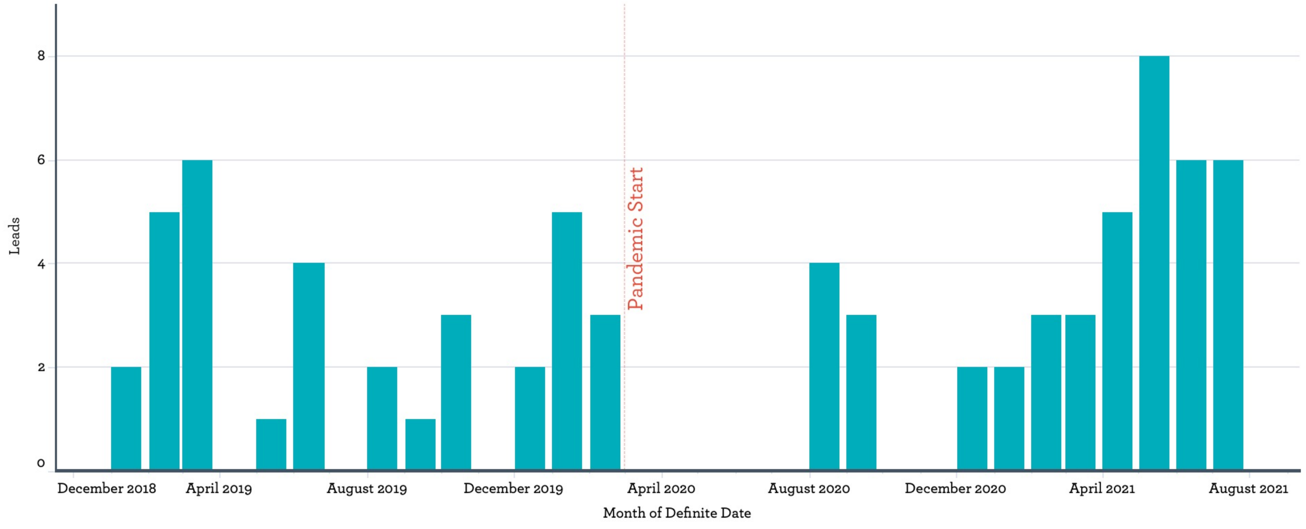
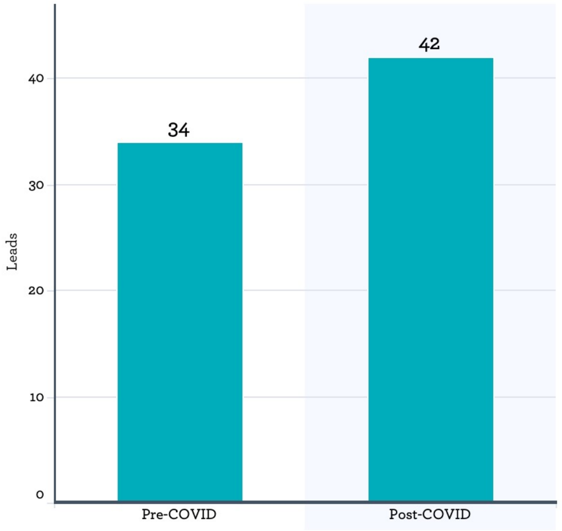
Timeline of Meetings/Groups Leads by Definite Date
Jan. 1 2019 to July 31, 2021

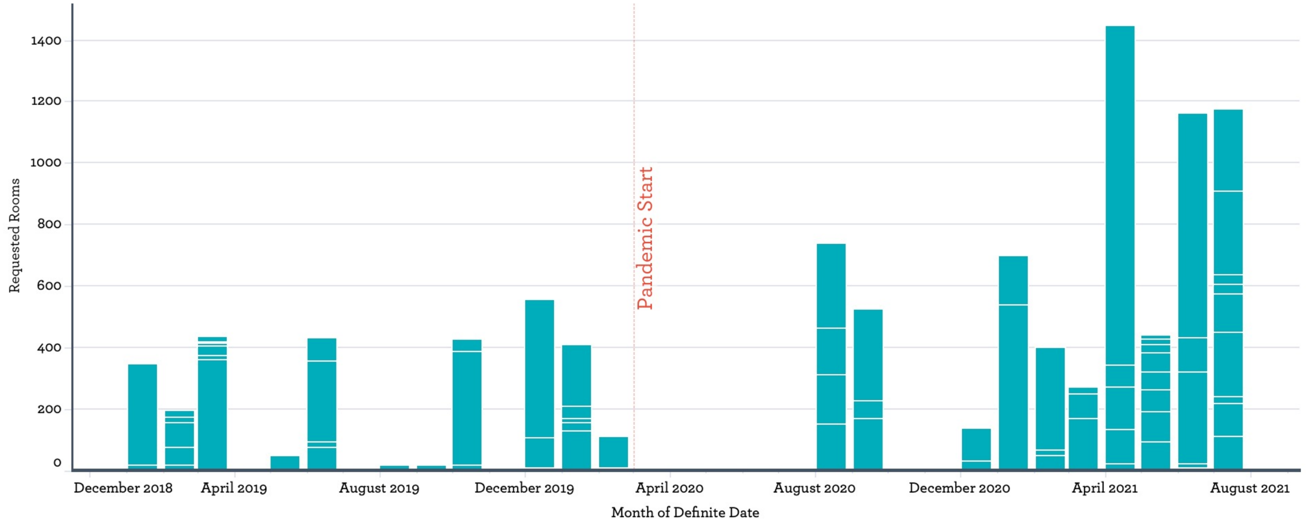


Lead Difference Meetings/Groups
Jan. 1 2019 to July 31, 2021

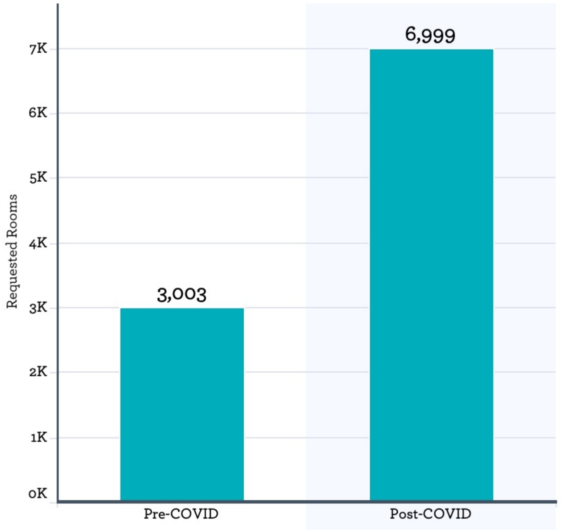


24%
Increase in definite leads

Timeline of Rooms by Definite Date (Meetings/Groups)
Jan. 1 2019 to July 31, 2021



Room Difference Meetings/Groups
Jan. 1 2019 to July 31, 2021



133%
Increase in rooms for those definite leads

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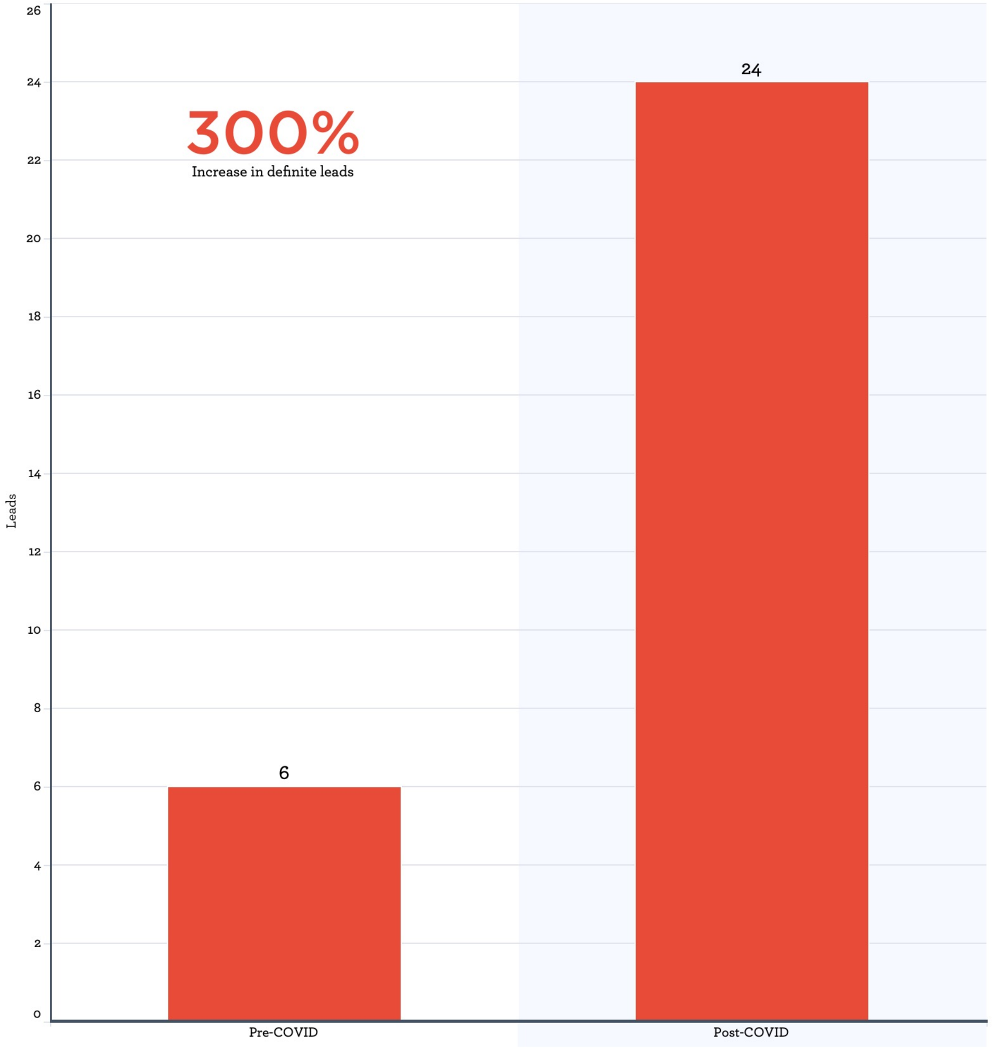
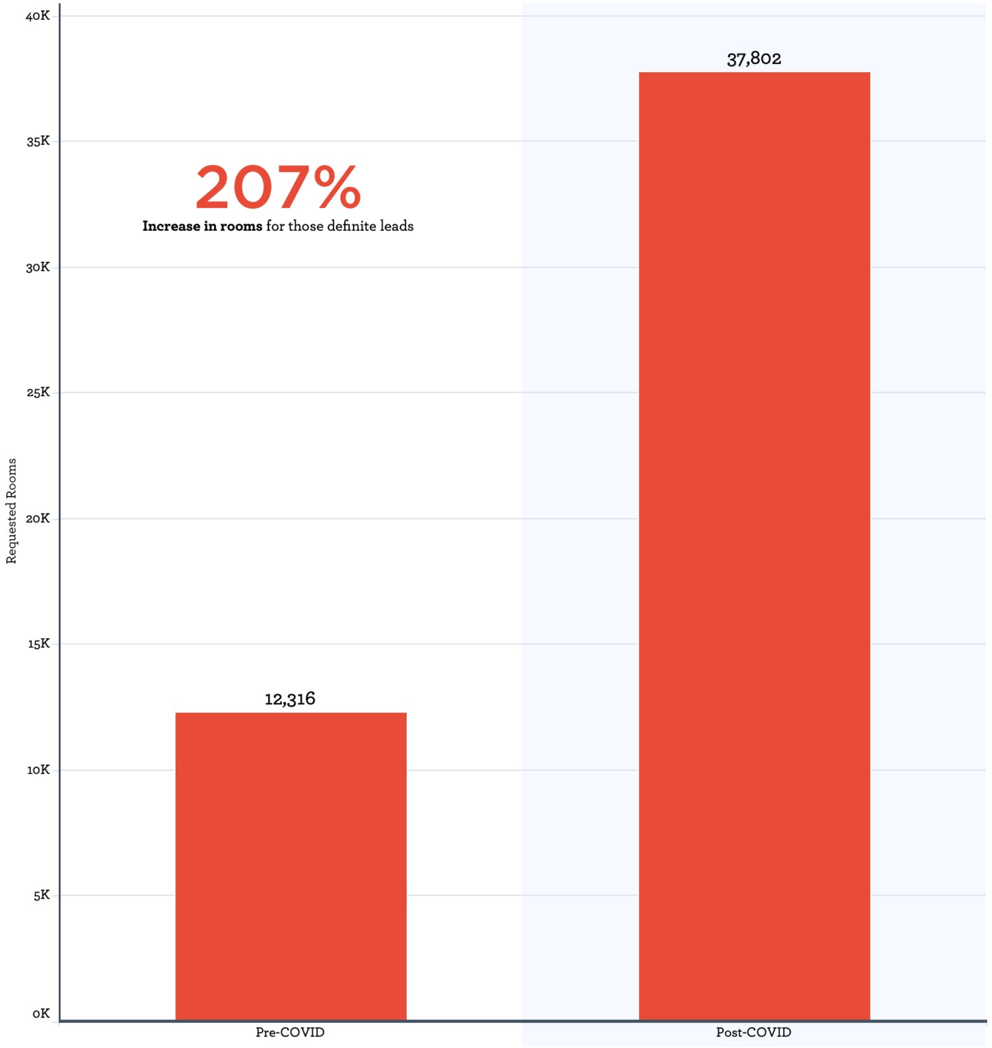
Lead Difference Sports
Jan. 1 2019 to July 31, 2021



Room Difference Sports
Jan. 1 2019 to July 31, 2021



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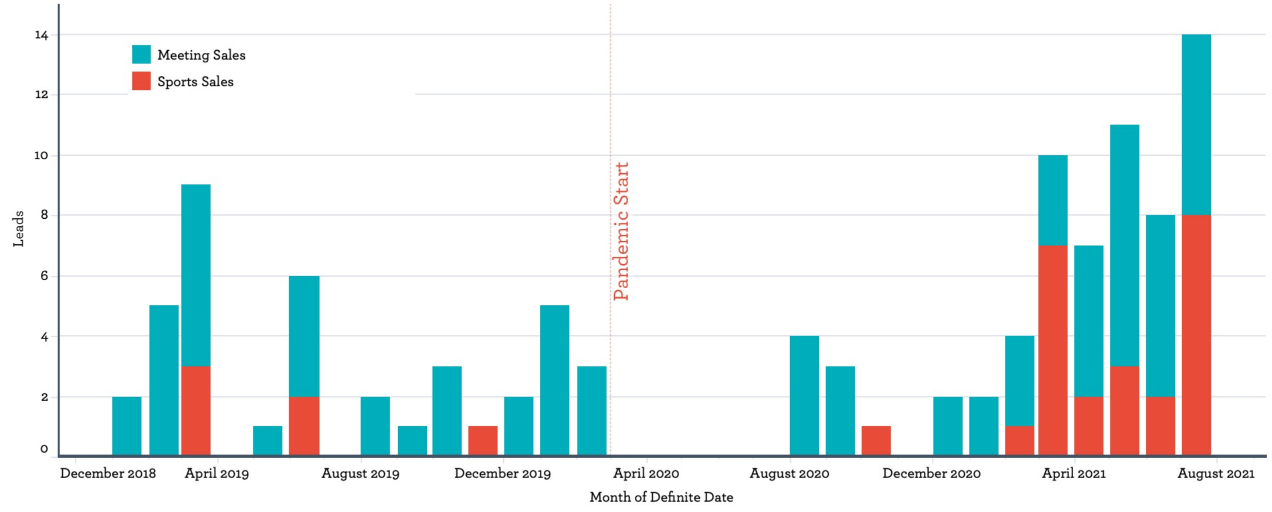
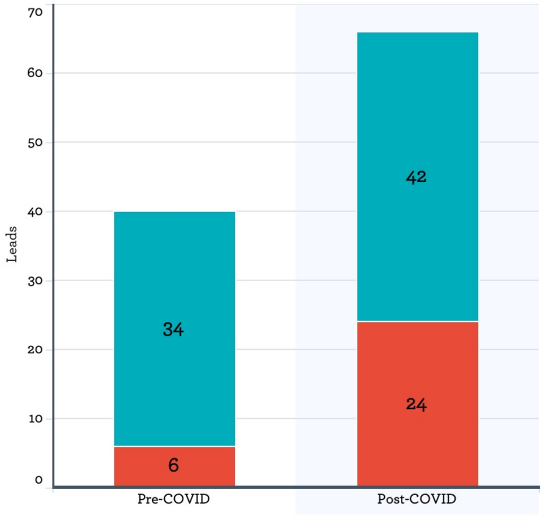
Timeline of Leads by Definite Date
Jan. 1 2019 to July 31, 2021

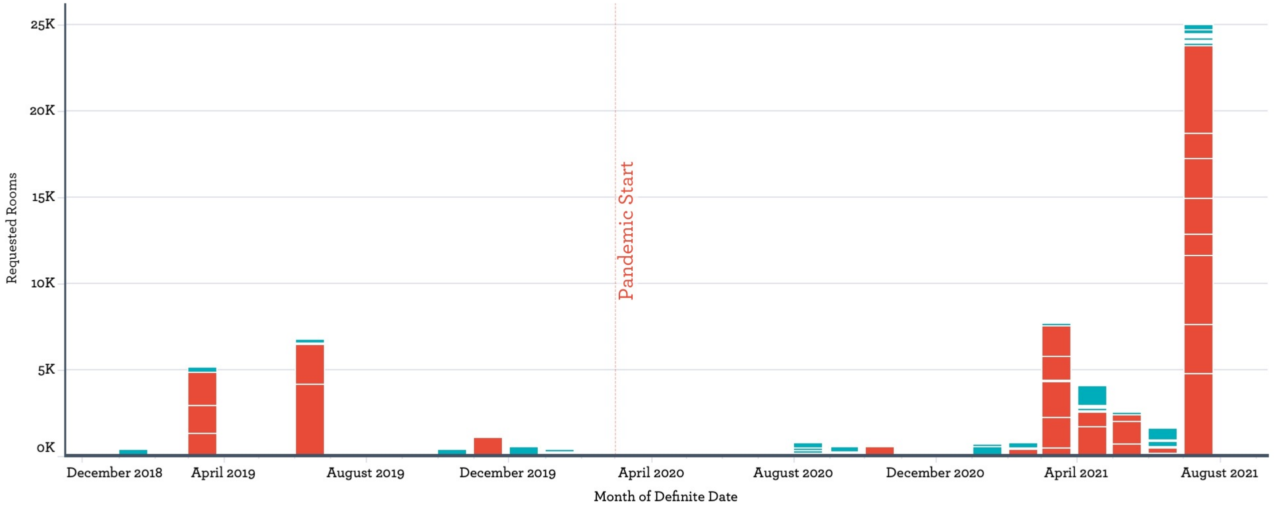


Lead Difference
Jan. 1 2019 to July 31, 2021

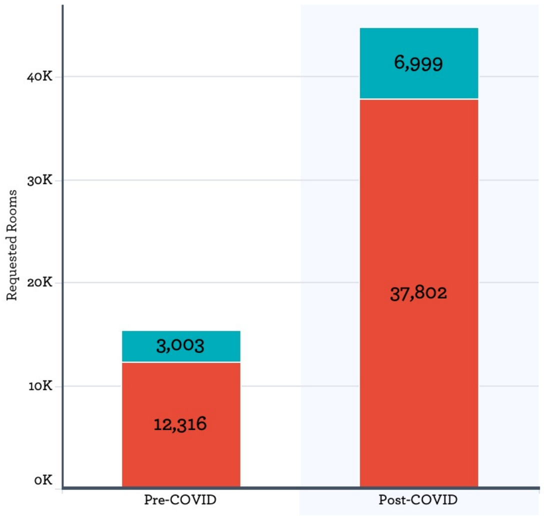


65%
Increase in definite leads

Timeline of Rooms by Definite Date
Jan. 1 2019 to July 31, 2021



Room Difference
Jan. 1 2019 to July 31, 2021



192%
Increase in rooms for those definite leads

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SALES PLANS FOR Q4 & 2022

- Activations
- Tradeshows
- Sponsorships

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QUESTIONS?

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LAURA KELNER

lkelner@hamiltoncountytourism.com

THANK YOU FOR ATTENDING!

Questions? Reach out to Sarah at sbillman@hamiltoncountytourism.com

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