

Laurel Highlands Visitors Bureau®

Tourism Promotional Outlook



Our Mission

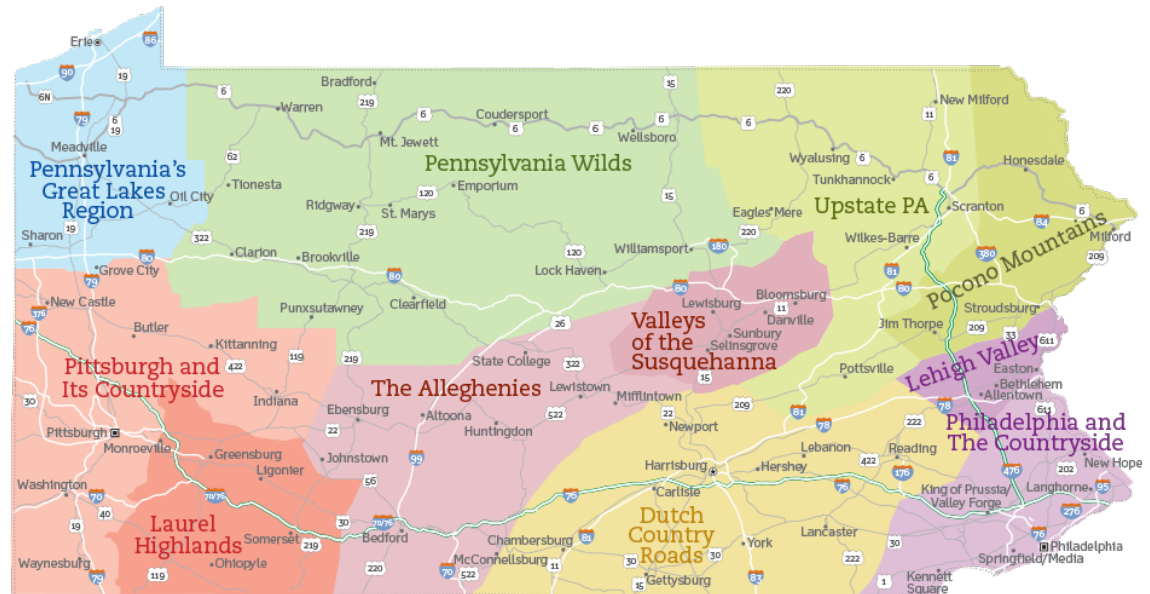
To promote and support tourism, tourism development, and the interests of the travel and hospitality industries in Pennsylvania's Laurel Highlands region generally comprising Fayette, Somerset and Westmoreland counties, thereby contributing to the economic growth and quality of life for the area.



Brand Recognition



Laurel Highlands Region



- 11 Regions in the Commonwealth of Pennsylvania
- Laurel Highlands region is one of only 3 regions in the state to maintain its brand identity



Who visits the Laurel Highlands?

A Sampling of Visitor Demographics

2016 Research



Red House Communications: *Brand Audit/Integrated Marketing Plan*

- In 2016, the LHVB launched a Brand Audit and Integrated Marketing Plan project in partnership with Red House Communications, an agency located in Pittsburgh, PA.
- The Brand Audit portion of the project was a research study aimed at identifying perceptions, realities, and opportunities for growth through marketing.
- The project not only looked at these same measures for the region, but for each individual county as well.
- The research was then used to establish a long-term marketing plan for the LHVB.

Who is our Visitor?

- Over 2.8 Million Annual Overnight Visitors
- 6.5 Million Day Guests Annually
- 94% are between the ages of 30-65
- 71% Travel with a spouse, partner or family
- 68% are college graduates
- Annual household income exceeds \$75,000
- 70% report spending avg \$100-400 per day

Who is our Visitor?



- 76% Plan trips lasting between 1-5 days
- 50% are looking for an outdoor experience
- 75% Plan to travel a distance up to 200 miles
- Visitors to the Laurel Highlands travel from:
 - ✓ Pennsylvania
 - ✓ Ohio
 - ✓ Maryland/D.C.
 - ✓ New York
 - ✓ Virginia

LHVB Independent Survey, 2015

Where do
they come
from?

The Laurel Highlands is a Drive-to Destination.

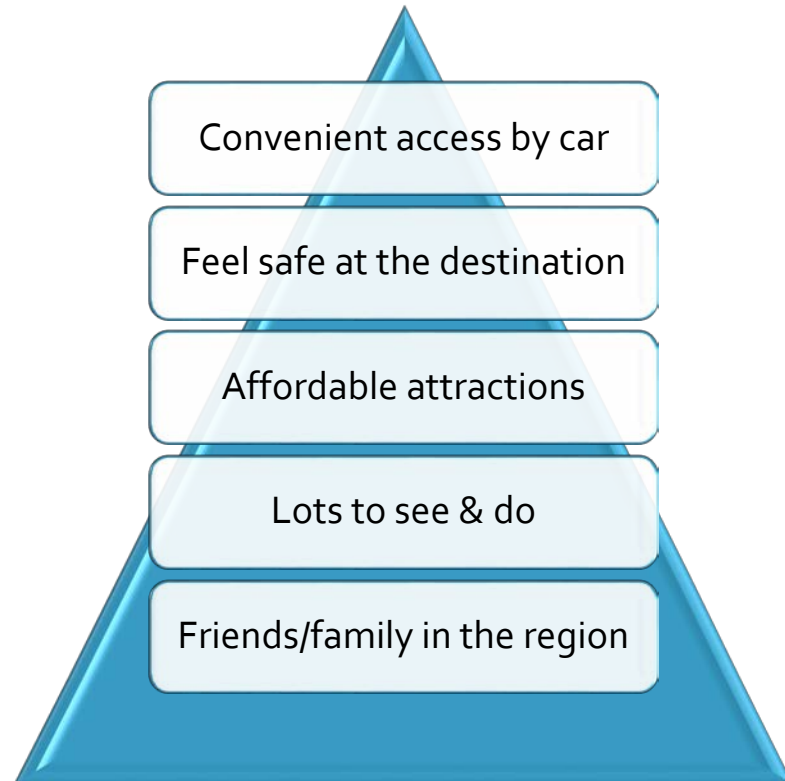
- **23%** of the US population is within driving distance of the Laurel Highlands.
- **8** major metro areas are within a 5 hour drive distance.



And why
do they
come here?



Top 5 factors influential in choosing the Laurel Highlands



Source: Campos Hotel Survey 2016



Dominant Perceptions

- **Fayette County:** Traditional; Rural; Peace & Quiet; Outdoor Activities
- **Somerset County:** Welcoming; Rich in Culture; Place to Retire
- **Westmoreland County:** Great Place to Raise a Family; Great Cost of Living; Up and Coming Region



Travel Motivators

- **U.S. travelers seek**
 - Adventure, authentic experiences (millennials)
 - Relaxation/rejuvenation (Gen X, boomers)
- **PA travelers seek**
 - Excitement
 - Relaxation
 - Escape from day-to-day
- **Travelers say they visit the Laurel Highlands to**
 - Relax and enjoy myself (66%)
 - Simply enjoy nature (53%)
 - Enjoy the outdoors (45%)*
 - Time with friends and family (44%)

**Respondents cite physically recreating outdoors.*



Economic Impact

Facts and Figures

Regional Impact



Laurel Highlands Impact:

- \$1.82 billion spent in the Laurel Highlands in 2015
 - Westmoreland – more than \$753 million
 - Fayette – \$667 million
 - Somerset – nearly \$400 million
- 14,817 tourism-related jobs in the Laurel Highlands
 - 1 in 13 jobs in region are supported by tourism

Tourism Economics – Economic Impact of Travel in Pennsylvania, 2015

Regional Impact

Laurel Highlands Impact:

- \$510 saved annually per household in taxes because of tourism*
- \$89 million in federal taxes generated by tourism**
- \$99 million in state and local taxes generated by tourism**

**Tourism Economics – Economic Impact of Tourism in the Laurel Highlands, 2015*

***Tourism Economics – Economic Impact of Travel in Pennsylvania, 2015*



Marketing Strategy

How do we get the word out & attract visitors?

Red House Communications



Key Research Insights

- Brand awareness is strong
- Visitors come for varied, high-quality attractions
- Visitors associate most heavily with “Beauty” and “Outdoors”
- Outdoors, Beauty and Culture outscore the competition



Marketing Objectives

- Increase visitation across LH assets and destinations
- Increase overnight visits throughout LH
- Support county-level economic development programs



Brand Positioningfor the Laurel Highlands

*For potential travelers
within a 200-mile drive,
the Laurel Highlands
region offers a uniquely idyllic escape,
with an exceptional collection of authentic
experiences that satisfy body, mind and spirit.*

Positioning
Statement

Escape

Adventure

Connection

Emotional
Drivers

Outdoors

Culture

Health &
Wellness

Classic
Amusement

Product
Pillars



Year 1

Message and geographic segmentation

Audience segmentation

Budget realignment towards digital

Year 2

Expand media mix

Advanced tactics for 2017 vehicles

Introduce county level co-op program

Year 3

Further media investment

Expand co-op program



Year One Media Strategy

- Increase digital presence everywhere
- Build awareness in Travel markets based on seasonality and opportunity
- Realign media mix and spending in Home markets
- Measure impact of product messaging segmentation

200-mile radius
surrounding the
Laurel Highlands

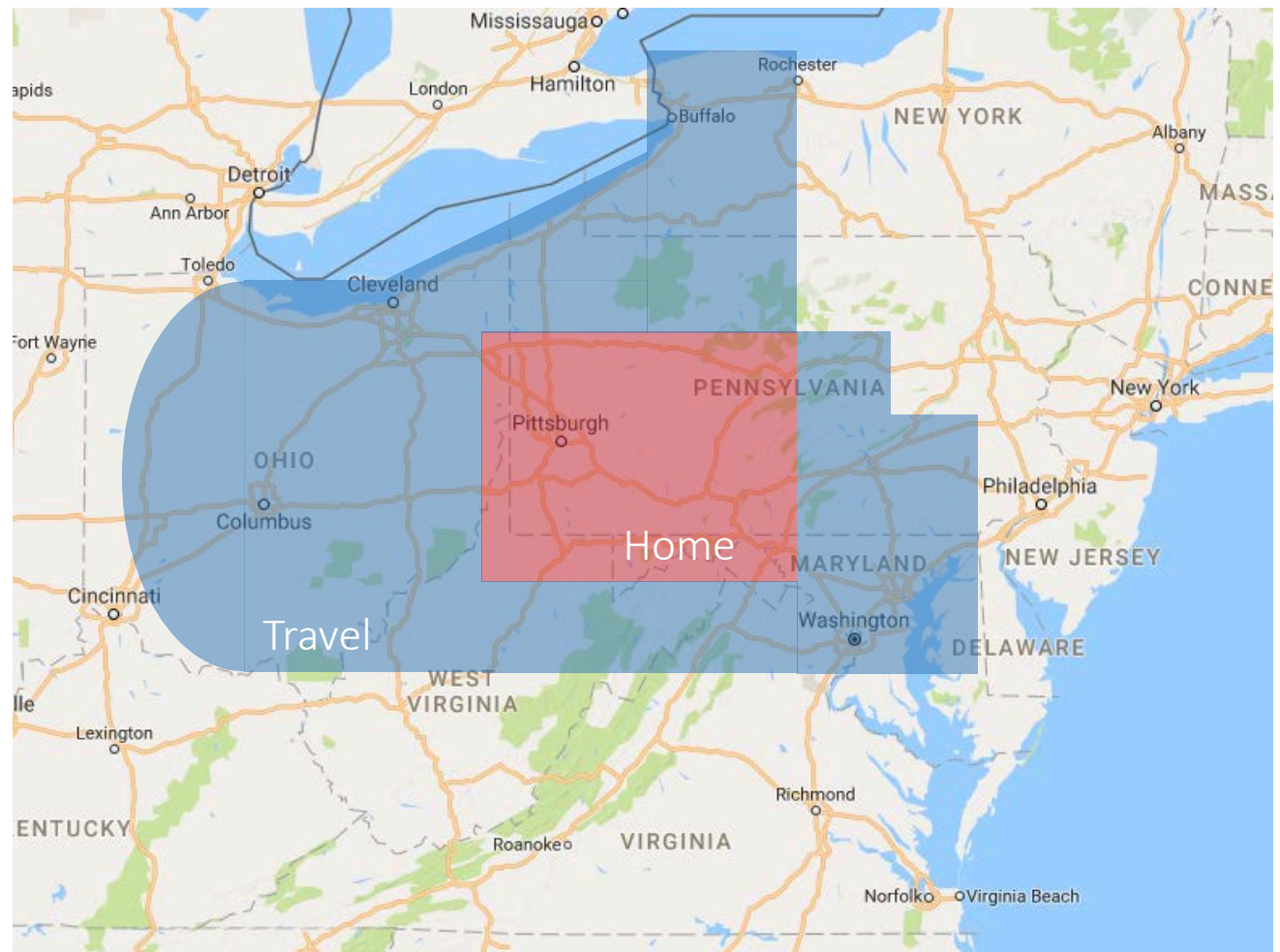


Pittsburgh, Cleveland, Columbus, Washington, D.C., Baltimore



Travel

- Home
- Travel



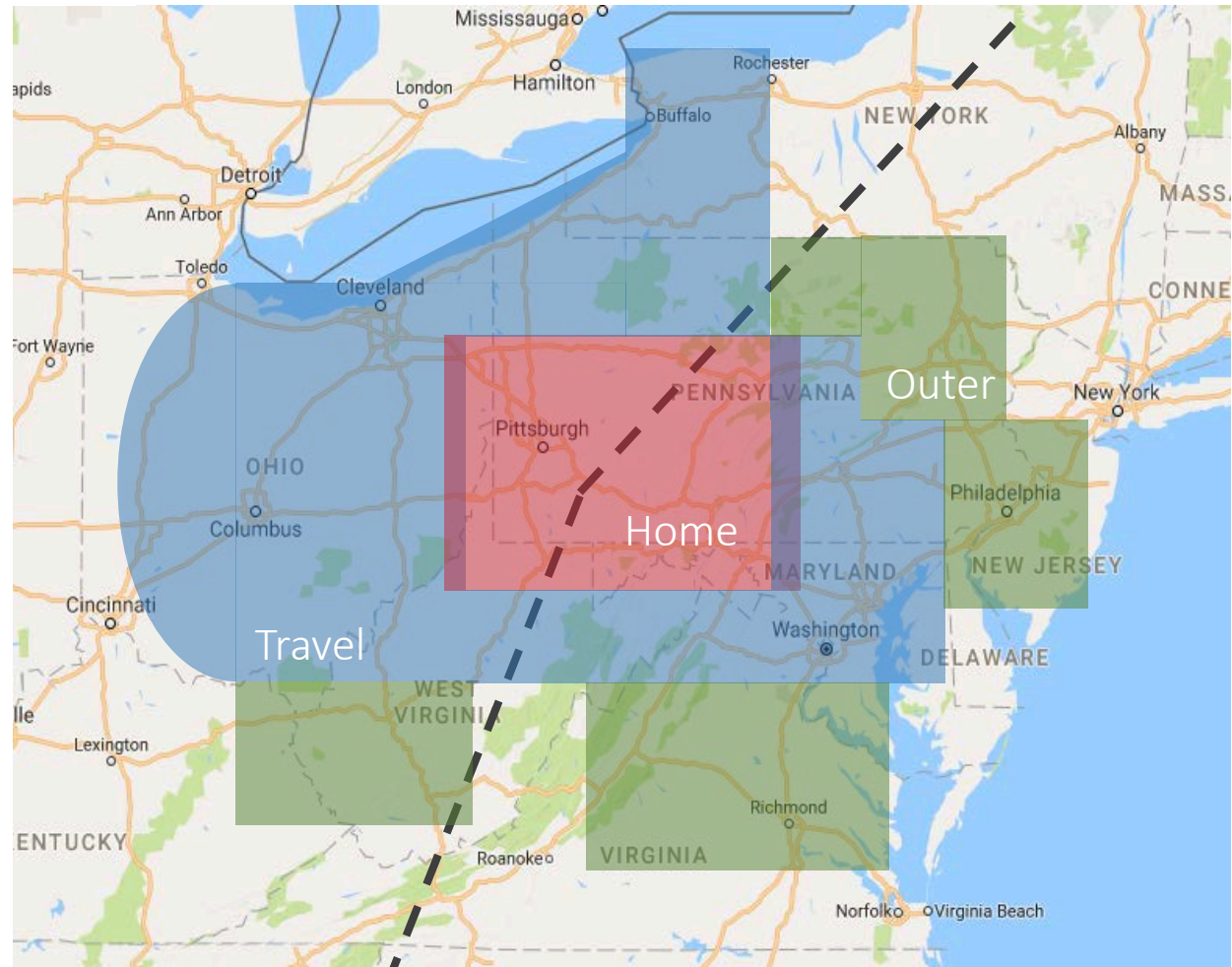
Home year 1, expand to Travel years 2-3

Divided Travel Markets

- Western vs. eastern
- Differences in terms of demographics, behaviors/attitudes, triggers
- What's accessible nearby vs. what isn't



Tiered Market Approach





LH Product Messaging Focus Matrix

	LH Product Messaging Focus Matrix				
	Home	Travel		Outer	
		West	East	North	South
Millennial	High impact outdoor adventure	High impact outdoor adventure		Cultural	Cultural (Summer) & Skiing (Winter)
Gen-X	Family Fun	Cultural & historical exploration	Outdoor Adventure	Family Fun	
Baby Boomer	Low impact premium escape	High-end spas, cultural & historical site seeing		Low impact premium escape	

