Laurel Highlands Visitors Bureau®

Tourism Promotional Outlook
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.
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
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.
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

- Convenient access by car
- Feel safe at the destination
- Affordable attractions
- Lots to see & do
- Friends/family in the region

Source: Campos Hotel Survey 2016
• **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**
  
  o Adventure, authentic experiences (millennials)
  o Relaxation/rejuvenation (Gen X, boomers)

• **PA travelers seek**
  
  o Excitement
  o Relaxation
  o Escape from day-to-day

• **Travelers say they visit the Laurel Highlands to**
  
  o Relax and enjoy myself (66%)
  o Simply enjoy nature (53%)
  o Enjoy the outdoors (45%)*
  o Time with friends and family (44%)

*Respondents cite physically recreating outdoors.*
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?
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
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.
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
• 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
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
### LH Product Messaging Focus Matrix

<table>
<thead>
<tr>
<th></th>
<th>Home</th>
<th>Travel</th>
<th>Outer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Millennial</strong></td>
<td>High impact outdoor adventure</td>
<td>High impact outdoor adventure</td>
<td>Cultural &amp; Skiing (Winter)</td>
</tr>
<tr>
<td><strong>Gen-X</strong></td>
<td>Family Fun</td>
<td>Cultural &amp; historical exploration</td>
<td>Outdoor Adventure</td>
</tr>
<tr>
<td><strong>Baby Boomer</strong></td>
<td>Low impact premium escape</td>
<td>High-end spas, cultural &amp; historical site seeing</td>
<td>Low impact premium escape</td>
</tr>
</tbody>
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Millennial (25-34)

- $75k+ Annual Household Income
- 27% of Targeted Population (Largest Segment)
- DC, Richmond, Charlottesville, Pittsburgh, Morgantown, Columbus
- Travel Partners: other adult groups and/or families
- Travel Interests
  - Moderate to High Impact Outdoor Activities: Rafting, Skiing, road/trail and mountain biking, etc.
  - Cultural: live music/performances, sporting events, museums, Civil War Battlefields

- Media Usage:
  - on demand streaming services
  - on demand streaming services

- Social:
  - Instagram, Snapchat, Twitter

- Lifestyle:
  - Pandora, Vine, YouTube Music, Hulu, Amazon, Netflix

- Travel:
  - Yelp, Waze, Airbnb, TripAdvisor, UBER, Thrillist, OpenTable
Gen-X (35-54)

Travel: Yelp, UBER, Bedandbreakfast, Frommers, Travelocity, Rentalcars, Fodors, Orbitz, Hotwire, Expedia, TripAdvisor

Media Usage: Online-savvy
Social: Facebook, Instagram, Twitter, Pinterest
Lifestyle: Pandora, Spotify, Amazon

Cultural: regional festivals, museums, national heritage/historic sites, sporting events
Moderate Impact Outdoor Activities: Hiking, Skiing, Camping, etc.

Travel Interests

$100k+ Annual Household Income
25% of Targeted Population
Laurel Highlands, Cleveland, Pittsburgh, Charleston, Wheeling
Travel Partners: Families with children under 18

Travel Interests
Baby Boomer (55+)

- Travel: Smartertravel, Flightview, Bookingbuddy, Frommers, Cheapflights, Travelzoo, Fodors, Kayak
- Social: Facebook, Twitter
- Lifestyle: Pandora, Pinterest
- Media Usage: Destination Magazines and sites, WOM
- Travel Interests: Low Impact Outdoor Activities: Sightseeing
- Cultural: festivals, gardens, national heritage/historic sights, regional & nationally-known attractions
- Travel Partners: Spouse or Partner and no kids
- Laurel Highlands, Cleveland, Pittsburgh, Charleston, Wheeling
- $150k+ Annual Household Income
- 18% of Targeted Population

Travel Interests:
- Low Impact Outdoor Activities: Sightseeing

Media Usage:
- Destination Magazines and sites, WOM

Social:
- Facebook, Twitter

Lifestyle:
- Pandora, Pinterest