



Lancaster Convention District Futures Study

APRIL 7, 2023





April 7, 2023

Mr. Kevin R. Molloy
Executive Director
Lancaster County Convention Center Authority
25 South Queen Street
Lancaster, Pennsylvania 17603

Dear Mr. Molloy,

CSL has completed the study process and preparation of this draft report Lancaster Convention District Strategic Plan. This Plan is designed to guide and coordinate community efforts around initiatives that will elevate the Lancaster County Convention Center (LCCC) and its surrounding environment as a convention destination. Organizations and individuals throughout the Lancaster market have contributed significantly to this process.

This Strategic Plan will serve as a valuable tool in helping to shape a vision for future development in downtown Lancaster, identify opportunities to best maintain the area around the LCCC, prioritize LCCC investments that will position it for long-term success in the convention marketplace, and highlight sales and marketing initiatives that will best sell the venue and downtown Lancaster convention experience. The recommendations presented herein cannot be implemented by a single entity or agency. In fact, participation from a variety of public and private sector entities will be necessary to realize the potential of Lancaster in the convention industry economy. This Plan can serve as a roadmap for the diverse organizations that will be relied on to help implement key recommendations.

The participation of you and your staff has been integral to the success of the study process. We greatly appreciate your professionalism in all respects during the preparation of this Plan.

Very truly yours,

A handwritten signature in cursive script that reads "CSL International".

CSL International

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1. Introduction: Project Overview

As the competition to attract regionally and nationally rotating conventions and conferences has become increasingly intense, many destinations have begun to position portions of their cities as “convention districts”. In this way, the value proposition for an event planner broadens beyond traditional event space and hotel criteria to include restaurant, retail, entertainment and transportation within walking distance of a convention facility. At the same time, demands for convention facilities themselves have changed, with generational shifts taking place in the convention marketplace that have significantly influenced the way successful event venues must be designed and programmed.

Founded in 1999 to lead the planning for a convention center in Lancaster, the Lancaster County Convention Center Authority (LCCCA) contributes to the economic vitality of Lancaster by providing an inviting, world-class business and event destination for guests. CSL has been engaged by the LCCCA to update the CSL Convention District study that was completed in 2016 by providing a broad vision document for further developing a convention center district in downtown Lancaster, Pennsylvania. Recommendations herein include a focus on the 0.3-mile radius surrounding the LCCCA, which as envisioned will include dining, retail, and entertainment, tied together by public art, wayfinding and other placemaking initiatives that help create an engaging and seamless experience before, after, and between events at the Lancaster County Convention Center (LCCC).

Recommendations presented herein are designed to maximize the collective effectiveness and impact of the community's assets and efforts around the enhancement and marketing of the area surrounding the LCCC. These ideas stem from input provided by local stakeholders and non-local convention planners, a review of comparable district destinations nationally, an evaluation of ongoing trends in the convention industry, and CSL's experience with more than 500 convention projects over the last 30 years. This effort is an update to the CSL study that was completed in 2016.

Areas of focus for this Lancaster Convention District Strategic Plan include real estate development priorities at the Swan Hotel site and other areas near the LCCC, creating linkages between the LCCC and nearby attractions and restaurants, evaluating opportunities to further enhance the Lancaster Downtown Investment District Authority, providing ideas to improve the appeal and usability of Commons on Vine and other areas throughout the LCCC, and recommending sales and marketing initiatives to best promote the LCCC and develop the Lancaster Convention District going forward. The full report should be read in its entirety to gain a fuller understanding of the research and analysis supporting the study.



2. Comparable Analysis: Overview

As with any strategic planning effort, it is important to benchmark with similar-sized peers to evaluate strengths and potential “gaps” in downtown Lancaster’s Convention District.

The adjacent graphic highlights the various comparable markets that were chosen to be analyzed as part of the study effort. Each market shares some similarities with Lancaster as convention destinations, including population level, downtown geographic area, and convention center size. Facility sizes range from the 24,400 square feet of exhibit space offered at the Boise Centre to the 99,400 square feet housed within the recently redeveloped Central Bank Center in Lexington, Kentucky. Market sizes range from Little Rock’s population of 202,000 to Lexington’s 321,800. These compare with 46,500 square feet of exhibit space within the Lancaster County Convention Center and Lancaster’s City population of 57,500 and County population of 553,700.

Each of these downtowns have undergone significant development since CSL’s previous study in 2016. Key projects include the redevelopment of Lexington’s convention center and arena, a riverfront development and transformation of an electrical plant into a mixed-use entertainment district in Fort Wayne, and significant hotel development in Little Rock. Many of these changes are further detailed later herein.

The following pages present in-depth overviews of the retail, dining and entertainment environments within 0.3-mile radii of the convention facilities in each of these markets, followed by a comparison with the area surrounding Lancaster County Convention Center. The findings from this exercise provide helpful data to inform recommendations for real estate and infrastructure development that would enhance downtown Lancaster as a convention destination.

Little Rock, Arkansas

City Population: 202,000
Exhibit Space: 80,200 sf



Fort Wayne, Indiana

City Population: 266,000
Exhibit Space: 50,000 sf



Lexington, Kentucky

City Population: 321,800
Exhibit Space: 99,400 sf



Boise, Idaho

City Population: 237,400
Exhibit Space: 24,000 sf *



* - carpeted multi-purpose room

2A. Comparable Analysis: Little Rock, AR

We begin with an overview of the 0.3-mile district surrounding the Statehouse Convention Center in downtown Little Rock, Arkansas. As shown, the area offers nearly 1,300 hotel rooms, over 3,100 parking spaces, and 56 restaurants. The Center is within a very short walking distance of the River Market District, which houses a majority of restaurants in the area. A summary of key changes that have happened in the area since 2016 is provided on the following page.



Note: Amenity count includes only those within 0.3-mile radius from the SCC. Positive reviews indicates number of 4- and 5-star reviews on TripAdvisor.
Source: Little Rock Convention and Visitors Bureau, CSL, Parkopedia, Google Maps, 2022.

Key	Hotel	Rooms
1	Little Rock Marriott	418
2	DoubleTree Little Rock	280
3	Hilton Garden Inn Little Rock Downtown	140
4	Hampton Inn and Suites Little Rock	119
5	Homewood Suites by Hilton	116
6	Residence Inn by Marriott	107
7	Capital Hotel	94

TOTAL 1,274

Key	Attractions/Entertainment	Positive Reviews
1	Arkansas Repertory Theater	74
2	H.U. Lee International Gate and Garden	64
3	Historic Arkansas Museum	160
4	Junction Bridge	146
5	Museum of Discovery	307
6	Old State House Museum	366
7	Riverfest Amphitheater	n/a
8	River Market District	522
9	Robinson Center	81

Key	Amenity	Total
●	Restaurant	25
○	Fast Food/Carry-Out	13
●	Café/Bakery	9
●	Bar/Lounge/Nightlife	9

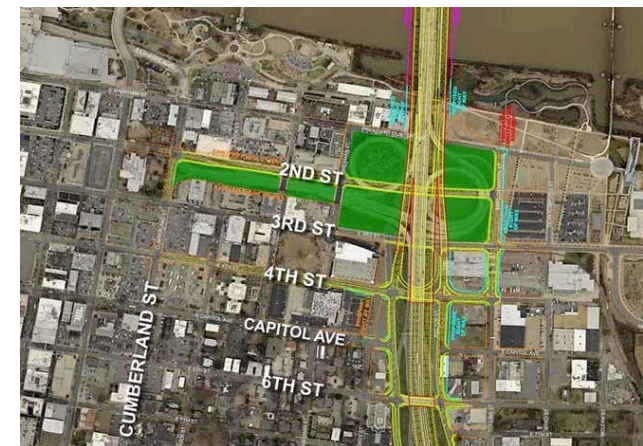
Key	Parking	Spaces
1	6th at Scott Public Deck	670
2	Convention District Public Parking	650
3	River Market Deck	600
4	Mann Parking Deck	440
5	471 Scott St	186
6	209 W 6th St	160
7	Riverfront Park	108
8	Main Lot	100
9	465 W 4th St	68
10	604 Main St Lot	48
11	138 Scott St	46
12	220 S Center Lot	28
13	556 Scott St	23
TOTAL		3,127

Key	Venue	Capacity
1	First Security Amphitheater	8,375
2	Robinson Center	2,222
3	Revolution Music Room	550
TOTAL		11,147

2A. Comparable Analysis: Little Rock Development Summary

The following highlight key developments that have taken place in the Little Rock market since CSL's study in 2016.

- A trio of new hotels were constructed north of the River Market District (near the Hampton Inn and Suites) since our previous study. This has increased the ½-mile inventory by a total of 363 rooms, which has helped the Center accommodate more regional convention and tradeshow activity. New hotel properties include the Homewood Suites (opened in 2016 with 116 rooms), Hilton Garden Inn (opened in 2017 with 140 rooms), and the Residence Inn by Marriott (opened in 2019 with 107 rooms).
- With a 2.0 percent hotel tax increase, the city funded a \$70 million renovation of Robinson Center, which re-opened in November of 2016 after nearly 28 months of construction. The Center is a 2,200-capacity performing arts hall that hosts Broadway, the local symphony, comedy acts, and some touring performing artist activity. The Center is occasionally used as an off-site event facility for events that take place at the Statehouse Convention Center.
- The city is undertaking a \$1.0 billion “30 Crossing” project, which involves reconstructing and widening parts of the I-30 thoroughfare to improve Downtown/North Little Rock access and open potential green spaces. This will greatly improve the walkable environment in the downtown and will provide opportunities for additional hospitality-related infill within proximity of the Statehouse Convention Center.
- CVB leads regular discussions on development with the Downtown Economic Partnership (DEP), Chamber of Commerce, small business owners, the city and other stakeholders. The CVB regularly hosts luncheons, seminars and other events to convey the importance of convention industry-related investment throughout the downtown.
- According to local officials, Little Rock's hotel and residential inventories have both experienced significant growth since 2016. As noted above, the downtown area near the Statehouse Convention Center now offers 363 additional hotel rooms. Meanwhile, the downtown's residential population exceeded 8,100 in 2021. Officials hope to grow this figure to 10,000 within the next two to three years. Other key goals for the City include improving the downtown area's nightlife and retail environment.



2B. Comparable Analysis: Lexington, Kentucky

As noted, Lexington’s Central Bank Center (formerly Lexington Convention Center) and adjacent Rupp Arena underwent a combined redevelopment that now gives the market two state-of-the-industry public assembly facilities. This transformation will likely spur continued growth in restaurant and retail inventory in the downtown. Today, the Convention Center’s immediate area includes just over 1,200 hotel rooms, 56 restaurants, and over 5,700 parking spaces. Key attractions include the Mary Todd Lincoln House and LexLive. Additional detail regarding the growth of the market is provided on the following page.



Note: Amenity count includes only those within 0.3-mile radius from the SCC. Positive reviews indicates number of 4- and 5-star reviews on TripAdvisor.
Source: Lexington Convention and Visitors Bureau, CSL, Parkopedia, Google Maps 2022.

Key	Hotel	Rooms
1	Hilton Lexington/Downtown	369
2	Hyatt Regency Lexington	366
3	Marriott Lexington City Center	218
4	Residence Inn By Marriott	119
5	21c Museum Hotel Lexington	88
6	The Sire Hotel Lexington	42

TOTAL 1,202

Key	Attractions/Entertainment	Positive Reviews
1	Downtown Arts Center	7
2	Explorium of Lexington	66
3	Gratz Park	n/a
4	Lexington Opera House	48
5	LexLive	2
6	Mary Todd Lincoln House	708
7	Rupp Arena	407
8	The Square	n/a
9	Triangle Park	13

Key	Amenity	Total
●	Restaurant	20
○	Fast Food/Carry-Out	8
●	Café/Bakery	8
●	Bar/Lounge/Nightlife	20

Key	Parking	Spaces
1	Rupp Arena	1,720
2	Transit Center Garage	777
3	Hilton Lexington	530
4	Courthouse Garage	518
5	Lexington Public Library Garage	428
6	Victorian Square Garage	381
7	Helix Garage	380
8	Fifth Third Bank	357
9	Central Bank Lower Garage	275
10	Short Street Lot	182
11	Market Street Lot	90
12	169 N Mill St	60
13	308 S Broadway	25

TOTAL 5,723

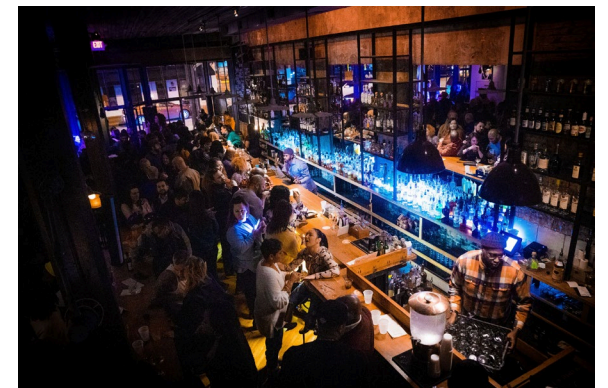
Key	Venue	Capacity
1	Rupp Arena	23,500
2	Lexington Opera House	1,000
3	Red Radio Barn	250

TOTAL 24,750

2B. Comparable Analysis: Lexington Development Summary

The following bullets highlight key developments that have taken place in the Lexington market since CSL's study in 2016.

- LexLive, a new entertainment center, opened in March 2021. Located a block from Rupp Arena, the venue features movie theaters, bowling, full-service bars, arcades, and meeting/event spaces. The venue was developed to serve as both a nightlife hub for the downtown area's growing resident base while also providing a pre- and post-event recreation option for the Arena and Convention Center.
- The City Center development, which was a multi-block construction zone in the heart of downtown Lexington during the study effort in 2016, was completed in 2020. The Center offers significant amounts of residential and office square footage, in addition to a pair of new hotel developments, and has greatly contributed to higher foot traffic levels in the downtown on non-event days.
- Two new hotels were constructed as part of the City Center mixed-use development project in downtown. These properties include the Marriott Lexington City Center and Residence Inn by Marriott (both opened in January 2020), which added a total of 337 new hotel rooms to the market.
- The Central Bank Center is also adjacent to the to soon-to-be completed Town Branch Park, a signature amphitheater and urban park with bike trails that connect to a network of regional trails. Groundbreaking for the Park will begin in 2023, with plans for its completion by 2025. The 9+ acre park will also connect the Center with the area's highly popular Distillery District to the west of downtown, creating a pedestrian connection for visiting convention attendees.
- There has been a material increase in the number of nightlife options since the 2016 study, with the number of bars and clubs in the area growing from 11 to 20. The increase in downtown residential units and addition of LexLive have contributed to this increase.
- The area has experienced a decrease in restaurants since 2016, from 29 to 20. Market officials attribute this to "over-saturation" of the dining market back in 2016 but hope that recent developments will support a substantial increase in dining options over the next five years.
- Visit Lex works regularly with Downtown Lexington Partnership (DLP), a downtown organization dedicated to developing, marketing and managing downtown, and the city to enhance "traveler's experience". The groups work together to develop "show your badge" programs, tailor destination experiences for incoming convention groups, coordinate temporary wayfinding or activation programs during major event weeks, and other similar initiatives.



2C. Comparable Analysis: Fort Wayne, Indiana

The 0.3-mile area surrounding the Grand Wayne Convention Center in downtown Fort Wayne offers 646 total hotel rooms, 31 total restaurants, and nearly 5,100 parking spaces. Key attractions within a block as the Center include Parkview Field, a AAA Minor League Baseball stadium, Embassy Theatre, a 2,500-capacity performing arts center, and the Foellinger-Freimann Botanical Conservatory. Though the downtown core area immediately surrounding the Convention Center has not undergone significant changes since 2016, there have been several major development projects elsewhere in the downtown area that will likely impact the future convention attendee experience. These are further detailed on the following page.



Note: Amenity count includes only those within 0.3-mile radius from the GWCC. Positive reviews indicates number of 4- and 5-star reviews on TripAdvisor.
Source: Visit Fort Wayne, CSL, Google, TripAdvisor, 2022.

Key	Hotel	Rooms
1	Courtyard Fort Wayne Downtown at GWCC	249
2	Hampton Inn & Suites Fort Wayne Downtown	136
3	Hilton Fort Wayne at GWCC	246
4	LaSalle	15

TOTAL **646**

Key	Attractions/Entertainment	Positive Reviews
1	Cathedral of the Immaculate Conception	52
2	Embassy Theatre	194
3	Foellinger-Freimann Botanical Conservatory	199
4	Fort Wayne Firefighter's Museum	30
5	Parkview Field	676

Key	Amenity	Total
●	Restaurant	12
○	Fast Food/Carry-Out	11
●	Café/Bakery	5
●	Bar/Lounge/Nightlife	3

Key	Parking	Spaces
1	Civic Garage	1,250
2	Skyline Garage	1,077
3	Harrison Square Parking Garage	883
4	Town Center Garage	464
5	City Center Garage	388
6	PNC Building Garage	306
7	ACPL Parking Lot	130
8	Main & Harrison Gated Lot	94
9	Gated Surface Lot	74
10	First Presbyterian Lot	65
11	First Presbyterian Lot	65
12	124 W Washington Street Garage	58
13	Surface Lot	45
14	Surface Lot	45
15	Surface Lot	45
16	ACPL Surface Lot	33
17	ACPL Surface Lot	33

TOTAL **5,055**

Key	Venue	Capacity
1	Embassy Theater	2,471
2	USF Performing Arts Center	1,937
3	Baker Street Centre	400

TOTAL **4,808**

2C. Comparable Analysis: Fort Wayne Development Summary

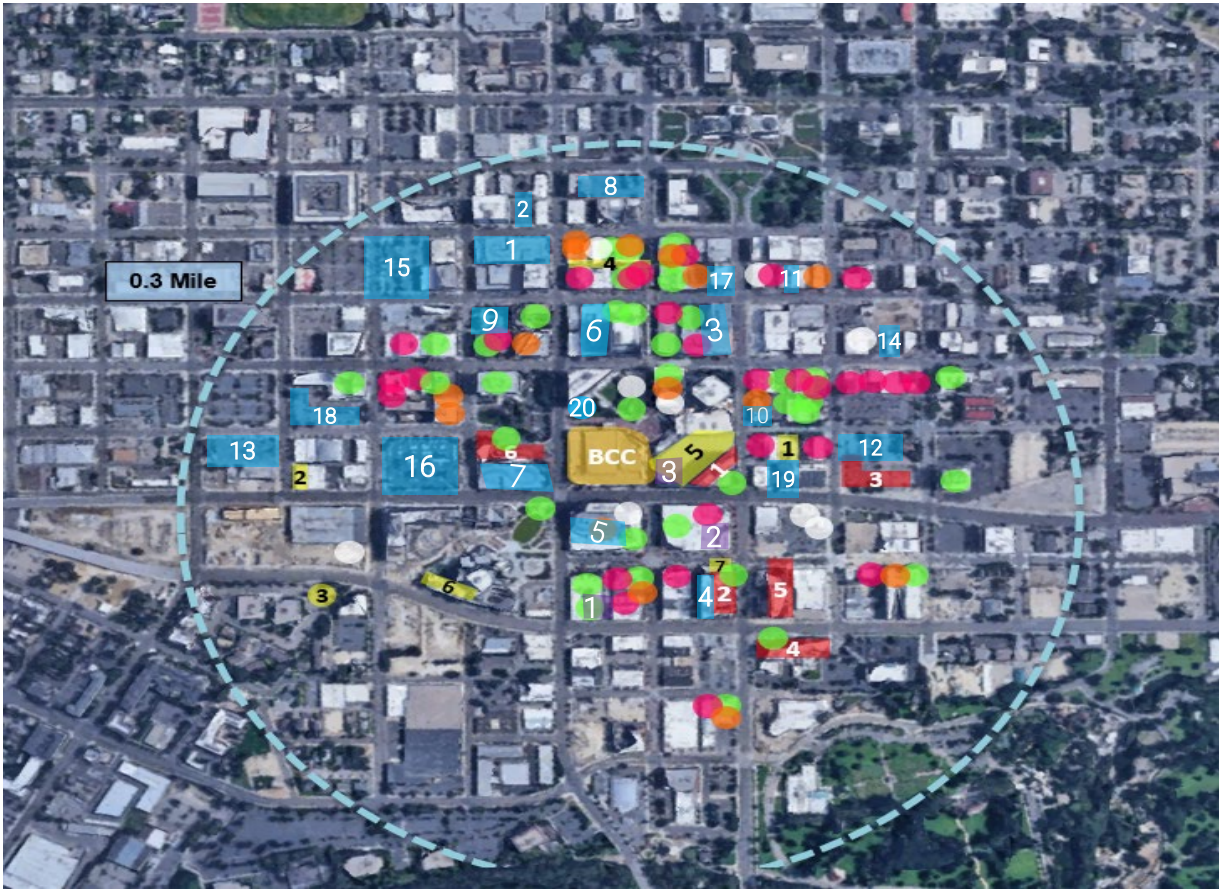
The following bullets highlight key developments that have taken place in the Fort Wayne market since CSL's study in 2016.

- The total number of dining options within the 0.3-mile radius dropped slightly from 2016 due to the COVID-19 pandemic, decreasing from 34 to 28. Local officials noted that COVID-19 reduced this figure, and hope that recently developed residential units and hotel rooms in the market will attract additional restaurants, bars, cafes and other food & beverage outlets.
- The newly developed Electric Works Project, located just south of downtown, offers 700,000 square feet of contemporary tech-ready mixed-use space. The campus is a redeveloped General Electric plant and will offer a food hall and public market, outdoor event and gathering space, innovation centers, and a significant amount of residential and office space, among other elements. The \$260 million, private sector-led development is just under a mile from the Grand Wayne Convention Center.
- The 136-room Hampton Inn and Suites opened across the street from the Convention Center in 2018, which moderately improved the Center's "headquarter" hotel room base. Just beyond the 0.3-mile radius to the north, the 124-room Bradley opened within the downtown's emerging historic district.
- Located just over 0.6 miles to the north, Fort Wayne's Riverfront has received significant private and public sector investment. Still within walking distance of the Grand Wayne Convention Center, key improvements include a Riverwalk, outdoor event plazas, significant residential development, an indoor/outdoor food & beverage pavilion, and kayak and canoe entry stations.
- To create a strong convention district experience for the attendee, City leadership is currently planning a unique new indoor/outdoor event space adjacent to the Convention Center that could serve as a venue for both general sessions and networking events, along with an indoor/outdoor food truck park.
- The expansion of the Civic Center Parking Garage in downtown in 2019 increased the number of parking spaces available by over 1,000. This greatly benefits the Convention Center, which primarily hosts state association events that have high levels of drive-in traffic.



2D. Comparable Analysis: Boise, Idaho

Downtown Boise, Idaho is often lauded by planners of small national events as an ideal urban location for small to mid-sized conventions and tradeshow. As shown below, the 0.3-mile radius surrounding the Boise Centre includes 980 hotel rooms, 94 total dining options (including 40 full-service restaurants), and nearly 4,400 parking spaces. Popular attractions within walking distance include the Boise River Greenbelt, Freak Alley Gallery, and Basque Museum & Cultural Center. Additional detail regarding the development of downtown Boise is provided on the following page.



Note: Amenity count includes only those within 0.3-mile radius from the BC. Positive reviews indicates number of 4- and 5-star reviews on TripAdvisor.
Source: Visit Boise, CSL, Google, TripAdvisor, 2022

Key	Hotel	Rooms
1	The Grove Hotel	250
2	Hampton Inn & Suites Boise Downtown	186
3	Home2Suites	138
4	Inn at 500	109
5	Residence Inn by Marriott Boise Downtown	185
6	Hotel 43	112

TOTAL		980
Key	Attractions/Entertainment	TA Reviews
1	Basque Museum & Cultural Center	196
2	Boise Art Glass	80
3	Boise River Greenbelt	1,431
4	Freak Alley Gallery	204
5	Idaho Central Arena	39
6	JUMP Boise Spiral Slide	37
7	VR1 Arcade	86

Key	Amenity	Total
●	Restaurant	40
○	Fast Food/Carry-Out	9
●	Café/Bakery	15
●	Bar/Lounge/Nightlife	30

Key	Parking	Spaces
1	9th and Bannock Garage	630
2	Banner Bank	28
3	Capitol & Main Garage	600
4	Capitol & Myrtle Garage	450
5	City Center Parking Garage	710
6	Eastman Garage	525
7	Grove Street Parking Garage	550
8	Hoff Lot	64
9	Republic Parking Northwest	63
10	Surface Lot	27
11	Surface Lot	22
12	Surface Lot	24
13	Surface Lot	111
14	Surface Lot	17
15	Surface Lot	19
16	Surface Lot	230
17	The Car Park, LLC	17
18	The Owyhee	103
19	U.S. Bank	104
20	Wells Fargo Center Garage	75
TOTAL		4,369

Key	Venue	Capacity
1	Knitting Factory Boise	1,000
2	Treefort Music Hall	700
3	Boise Central Arena	6,800
TOTAL		8,500

2D. Comparable Analysis: Boise Development Summary

The following bullets highlight key developments that have spurred much of Boise's growth. Note that Boise was not included as part of the initial study in 2016 but was selected for this update to provide an example of a more "mature" urban environment surrounding a convention facility.

- Local officials anticipate a 100 percent increase in downtown housing between 2009 and 2025. Thus far, housing has increased by approximately 80 percent, which has greatly supported downtown's growing scene of restaurants, bars and entertainment options. The bar scene in particular has significantly grown in recent years, providing convention attendees an array of options during the evening hours of their stays.
- The Boise Centre's outdoor plaza is central to downtown public events and festivals that take place throughout year. The retail and dining storefronts located throughout the Plaza provide convention attendees with nearby hospitality amenities and attract local foot traffic throughout the week. The plaza also serves as an outdoor event space for some of the Centre's largest conventions and tradeshow.
- Multiple mixed-use and lifestyle centers have been developed on blocks adjacent to the Boise Centre, contributing to a significant growth in office and restaurant space in the downtown. A local developer is also planning a new 28-story tower with 372 total residential units.
- Local officials reported that many convention attendees will often note the downtown area's inventory of public art. Managed by the City's Department of Arts & History, Boise features more than \$6.5 million in public art in its downtown. Much of the new development downtown has included earmarked funds for public art on or near the development sites.
- Downtown Boise can be segmented into broad "districts" for the convention attendee. Walking north and east, attendees can reach the downtown's central business district, while a more industrial brewery and arts district is located west, and the area's urban park area (featuring both Julia Davis Park and Zoo Boise) is to the south.



2E. Comparable Analysis: Lancaster, Pennsylvania

As shown, the 0.3-mile area around the LCCC offers 631 hotel rooms between the Marriott and Holiday Inn. Popular attractions include the Lancaster Central Market, Fulton Theater, and the Southern Market. There are a total of 56 dining options, including 24 full-service restaurants, and the area also features nearly 4,300 parking spaces.



Note: Amenity count includes only those within 0.3-mile radius from the LCCC.

Source: Discover Lancaster, CSL, Parkopedia, Lancaster Parking Authority, Google Maps, TripAdvisor, 2022.

Key	Hotel	Rooms
1	Lancaster Marriott at Penn Square	416
2	Holiday Inn Lancaster	215
<u>TOTAL</u>		<u>631</u>

Key	Attractions/Entertainment	Positive Reviews
1	Demuth Museum	17
2	Fulton Theater	633
3	Gallery Row	n/a
4	Lancaster Central Market	920
5	Lancaster Museum of Art	4
6	Southern Market Lancaster	n/a

Key	Amenity	Total
●	Restaurant	24
○	Fast Food/Carry-Out	11
●	Café/Bakery	10
●	Bar/Lounge/Nightlife	11

Key	Parking	Spaces
1	Prince Street Garage	1,126
2	Penn Square Garage	756
3	Central Parking Garge	730
4	Duke Street Garage	499
5	East King Garage	448
6	Christian Street Garage	367
7	Hager Lot	181
8	North Queen Street Garage	110
9	Mifflin Lot	39
	TOTAL	4,256

Key	Venue	Capacity
1	Freedom Hall - LCCC	3,000
2	The Village	700
3	The Trust Performing Arts Center	525
4	The Ware Center	350
5	Excelsior	275
	TOTAL	4,850

2E. Comparable Analysis: Lancaster Changes Since 2016

Since the issuance of the 2016 study, many of the development opportunities highlighted have been undertaken, and several other relevant development initiatives have taken place.

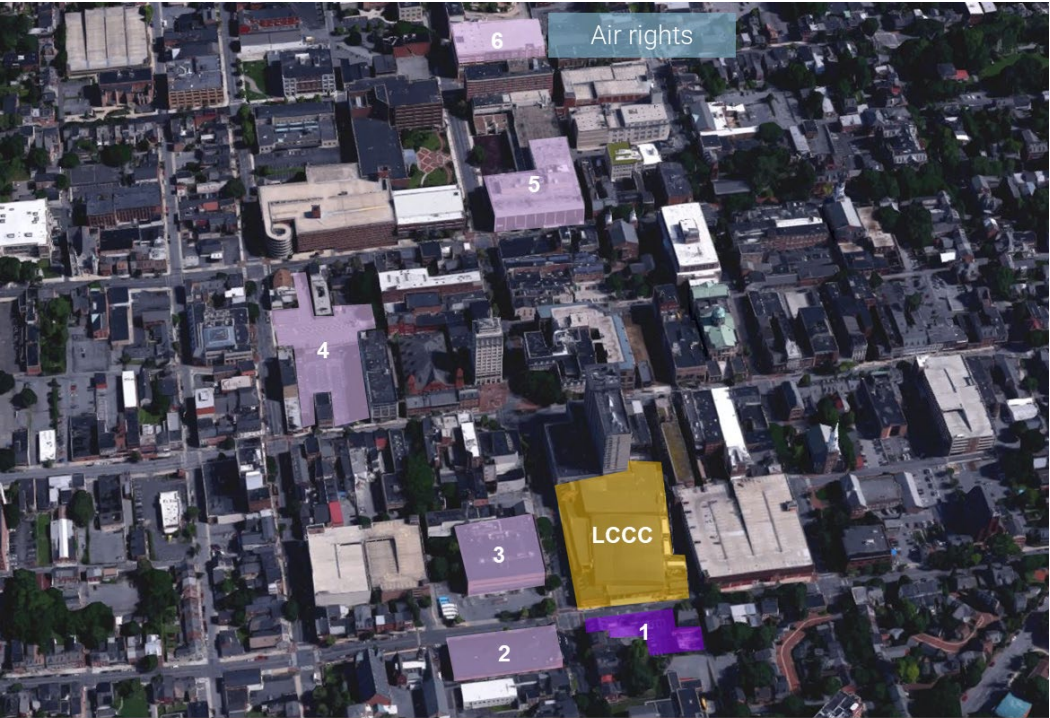
Southern Market – 36 years as a shuttered historic venue have given way to a reinvention of the space, now including unique restaurants surrounding a large cocktail bar. The trend forward, unique and authentic food hall concept brings very beneficial assets to the convention and visitor industry.

Mosaic – located on the old LNP site, Mosaic will include a 20-story tower housing residential units and street-level restaurants and retail. Residents of the 146-unit development will create demand for area restaurants and retail, which in turn creates a more vibrant environment for convention attendees, visitors and residents.

Bulova to 101 North Queen Transformation – A highly transformational \$28.5 million project that will house 150,000 square feet of residential, retail, office, restaurant and other mixed-use developments. The fact that the project replaces what was a ten-year vacant negative influence on downtown vibrancy into a high-energy project creates a significant benefit for the convention and visitor industry, as well as area residents. Further, the recently developed Ewell Plaza is situated in between this development and the Holiday Inn and could serve as outdoor event space for LCCC events.

Growing Restaurant Inventory, But Challenges Remain – Growth in downtown Lancaster restaurants, including numerous high-end establishments that typically cater to the convention industry. The Pandemic slightly reduced this number, but local stakeholders anticipate a relatively swift rebound to 2019’s restaurant inventory. At the same time, their hours of operation remain a concern. Due to lower employee counts downtown, many establishments no longer serve during lunch hours, which are typically times of peak need for visiting conventions.

Continuing Additions to Residential – Between Mosaic (146 units), the development at Hager Building parking lot (130 units), and the development at the RRTA Garage (90 units), the residential foot traffic in downtown Lancaster will continue to grow. This should help supplant foot traffic normally provided by the temporarily diminished office worker base in the area following COVID-19.



Source: Lancaster City Alliance, 2022.

Key	Development Site
1	Swan Hotel
2	Southern Market
3	LNP Building
4	Hager Parking Lot
5	Bulova Building
6	RRTA Garage
	Developed
	Developable

2F. Comparable Analysis: Restaurants in a 0.3-Mile Radius

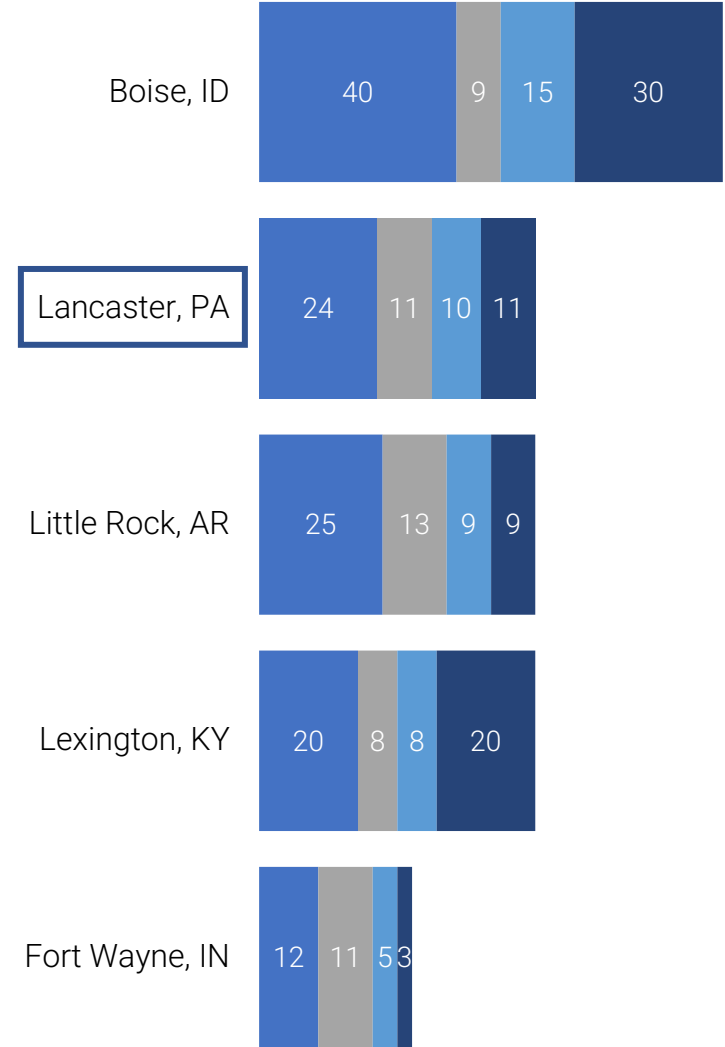
The adjacent bar chart provides a comparison of the existing restaurant inventory surrounding the Lancaster County Convention Center with those surrounding the comparable convention facilities in Boise, Little Rock, Lexington, and Fort Wayne. As presented on previous pages, restaurants have been segmented into four categories: full-service (sit-down establishments), fast food, cafes, and nightlife/bar options.

Lancaster's restaurant options within its convention facility's 0.3-mile radius ties for second in the comparison set with Little Rock and Lexington. The area offers the third most full-service properties, third most fast-food options, third most cafes, and third most nightlife/bar businesses. A variety of options is typically desired by convention planners and attendees, and the 0.3-mile area surrounding the LCCC offers a balanced mix the four business types.

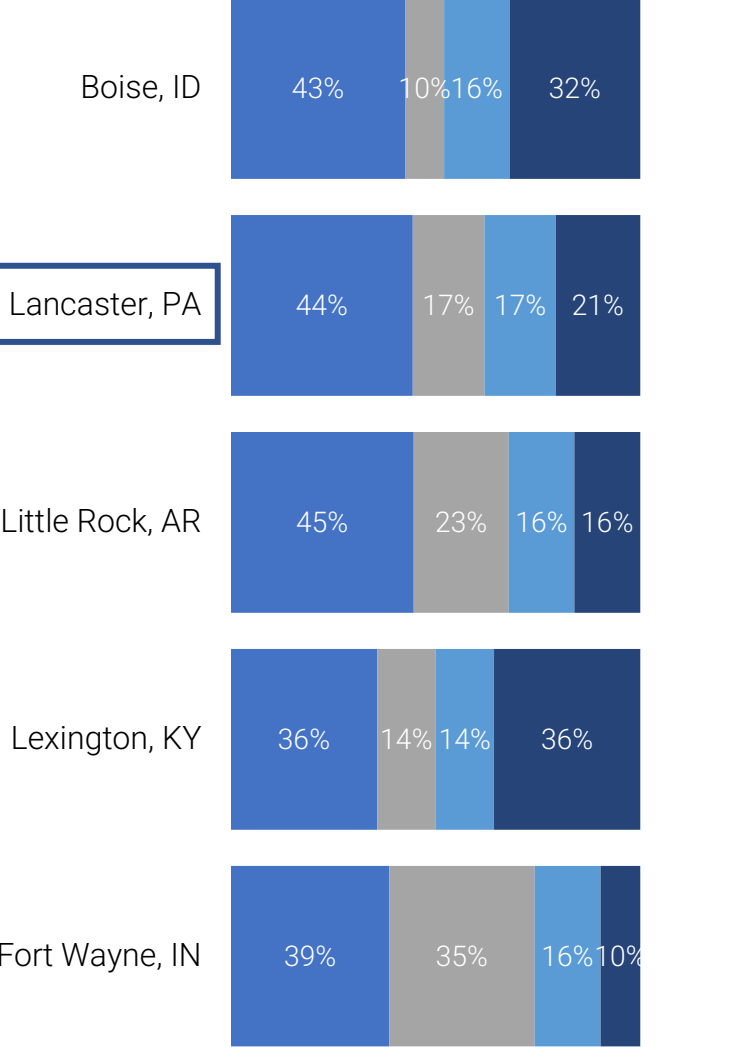
Opportunity still likely exists to further improve Lancaster as a convention district. In considering input provided by local stakeholders, Lancaster could benefit from one or two additional nightlife options within close proximity of the Convention Center. This need is further considered as part of recommendations herein.



Dining Options by Type



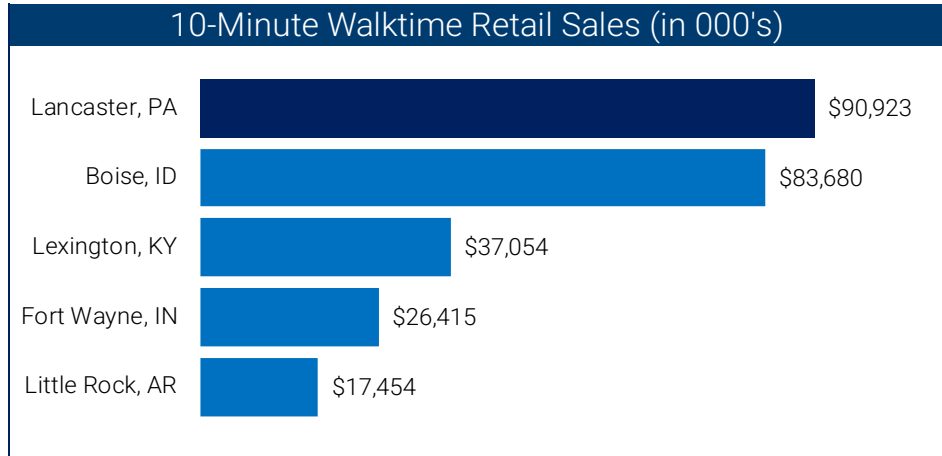
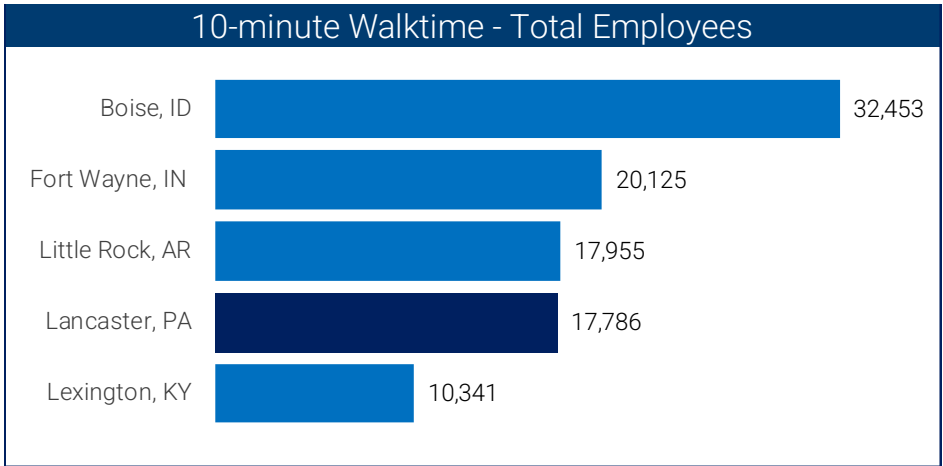
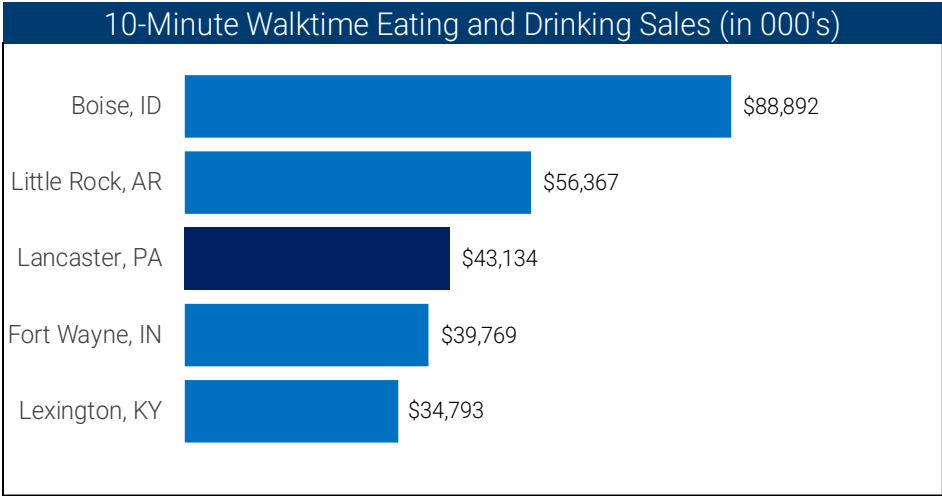
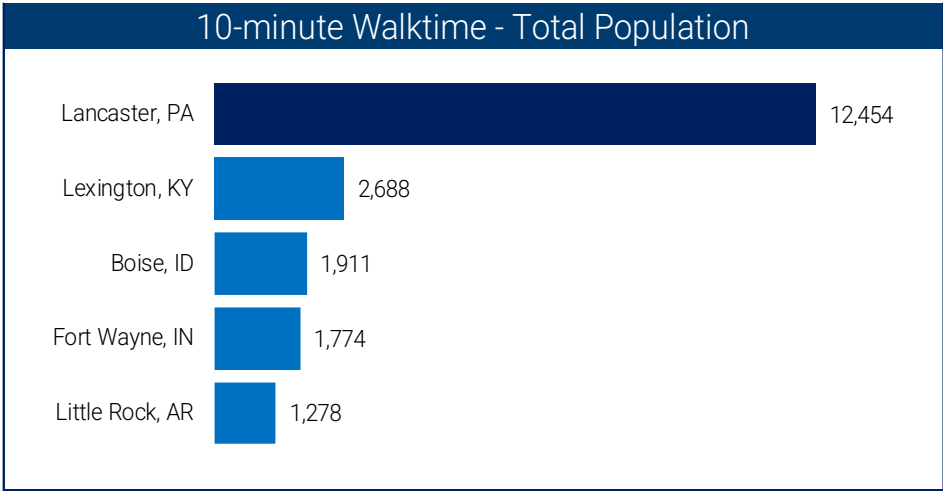
Dining Options by %



Source: esri, 2022.

2F. Comparable Analysis: 10-minute Walk Time Foot Traffic

The charts below provide further comparable analyses of downtown Lancaster with the other downtowns reviewed, with a focus on the ten-minute walk time surrounding each facility. The residential areas just south of the LCCC drives much of the high population figure relative to other markets, which helps support its eating, drinking, and retail sales. Meanwhile, the area’s employee base ranks below the median, a relative shortage that has been compounded by employees working from home following the Pandemic. Meanwhile, the area’s retail sales are the highest, but eating and drinking sales fall within the median of the comparison set. Note that these are 2021 data points, a time period during which the LCCC hosted little event activity. In speaking with local officials, the downtown experienced lower eating and drinking sales due to the smaller employee base and lack of convention activity downtown.



2G. Comparable Analysis: Takeaways for Lancaster

Based on the comparable analysis on the previous pages, six primary takeaways have been highlighted in the adjacent graphic that have been used to develop real estate planning and pedestrian infrastructure recommendations herein. These key points are briefly summarized below.

- **Center-Adjacent Real Estate Planning:** Many of the comparable convention facilities reviewed have significant developments that are occurring or have recently occurred within the same one-to-two city blocks. LexLive in Lexington adds a nightlife entertainment component to the destination, while Fort Wayne is planning a highly unique indoor/outdoor event venue and food truck park next to its center. These types of hospitality-related projects should be considered as part of any similar urban real estate opportunities in Lancaster.
- **Opportunity for More Nightlife and Live Music:** Though several bars exist within 0.3 miles of the LCCC, the area falls well short of nightlife/bar inventories in Lexington and Boise and has the second lowest total music venue capacity of the comparison set. This ties to many comments from stakeholders regarding potential demand for additional nightlife to the area, with many suggesting the development of spaces for live music.
- **Investment in Parks and Riverfronts:** The Centers in Fort Wayne and Boise are within close walking distance of popular parks and riverfronts, while public sector leadership in Little Rock and Lexington are planning urban park spaces within one to two blocks of their Centers. Creating linkages to outdoor areas such as the nearby Ewell Plaza or the planned outdoor Mosaic project will be important for the Lancaster Convention District. Working with the Downtown Investment District, it will also be important to maintain the cleanliness and sense of safety of these areas.
- **Evolving Districts:** As previously shown, the markets reviewed have experienced significant real estate development, particularly in the form of residential and hotel projects that will grow downtown foot traffic. This enhanced activity will support additional restaurants and retail, thereby making these markets more competitive convention destinations. At the same time, significant progress has also been made in downtown Lancaster, and it will be critical for this to continue in the 0.3-mile area surrounding the LCCC.
- **High in Residential but Need for Affordable Options:** Lancaster currently has the highest downtown population of all markets analyzed, a figure that will growth further with the completion of residential projects described previously. However, some interviewed stakeholders noted that there is still a need for service and hospitality worker housing in or near downtown.
- **Low in Employee Base:** Office space vacancies in downtown Lancaster leave the commercial sector in question following the COVID-19 Pandemic. Without downtown workers, the success of the restaurant industry will rely even more on the downtown population and event activity at the LCCC.



Center-Adjacent
Real Estate Planning



Investment in
Parks and Riverfronts



Evolving Districts



High in Residential



Opportunity for
More Nightlife?



Low in Employee Base

3. Development Opportunities: Swan Site Opportunities

With the significant development that has and will take place surrounding the LCCC, the Swan Hotel property represents an important opportunity to continue positive development momentum. This momentum supports a vibrant and successful convention industry centered on the LCCC.

In developing the Swan Hotel site, there are several key principles that should be incorporated into the Request for Proposal (RFP) process:

- Retain the historic Swan Hotel structure. The structure offers an opportunity to create a unique and authentic environment as part of a larger development.
- The air rights to the adjacent lot and 106 Christian Street property will be included in the developable parcel. This creates an opportunity to continue to offer parking for LCCC event suppliers and vendors at the street level.
- The street level development should include unique and authentic assets that can benefit both the convention industry and the residential neighborhood. These assets could include:
 - Destination brewery offering unique event and activity space
 - Active entertainment
 - Live music event space
 - Immersive arts exhibits
 - Cultural/historical exhibits, such as sculptures or interactive pieces that tie to the Stevens and Smith Historic site, Lancaster's brewery history, or other elements of the broader destination's rich history
- The larger footprint of the development should support both developer ROI as well as district vibrancy. This could include a variety of projects, such as:
 - Boutique hotel
 - Creative placemaking, including outdoor event space, landscaping, lighting, public art, and other elements
 - Other elements that enhance the return-on-investment for the developer



3. Development Opportunities: Traditional Placemaking Investments

As discussed by interviewed stakeholders, downtown Lancaster offers a number of visitor industry assets that should be leveraged more toward the Convention Center attendee. Guiding convention attendees to/from the Center to other areas of downtown is a critical part of this Plan. Opportunity exists to complement key downtown assets through wayfinding, public art, lighting, technology, landscaping and other elements.

Specific recommendations are presented below and on the following pages, alongside illustrations of examples that have been successfully implemented in other markets. These are followed by overview maps showing how each recommended element could be used to enhance the walking experience throughout a Lancaster Convention District. We begin with more traditional placemaking investments below, followed by more trend forward initiatives.

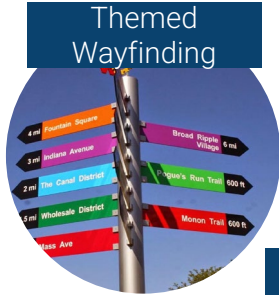
Themed Wayfinding – Pedestrian navigability would be enhanced with the development of Convention District-based wayfinding signs. Hotel concierge staff could, for example, direct the visitor to a landmark piece, at which point the more specific directional signage would be located. The example pictured to the left reflects elements of simple directional cues that reference the direction of key points of interest.

Convention Center Marquee – Many stakeholders suggested that the Center’s activity should be advertised to the local community. A large digital LED board, potentially based on the façade of the facility and maintains downtown’s aesthetic/character standards, could serve as both an informational resource that showcases the major events that are in-destination as well as a placemaking enhancement at night. However, opportunity may also exist to display information regarding events at the LCCC within LED-activated nighttime installations (described further herein).

Street Performances – The Lancaster Office of Promotion (LOOP) already organizes an array of highly engaging downtown programming throughout the year. For some of the LCCC’s largest citywide events, potential may exist for the LCCCA to work with LOOP to organize a “trail” of performers to lead visitors to key areas of downtown. A modest budget could be prepared to support these types of periodic performances.

Monumental Public Art – One or more large-scale installations could serve as landmarks that would guide convention attendees toward downtown areas of interest, particularly in the developing area just south of the Center. For example, a large-scale art piece located near the soon-to-be-opened Thaddeus Stevens & Lydia Hamilton Smith Center for History and Democracy could act as a defining component for a historic district at the intersection of Queen St. and Vine St.

Outdoor Event Space – Outdoor plazas, pocket parks, and rooftop terraces at surrounding developments, such as Ewell Plaza or the Holiday Inn’s recently added Imperial Terrace, could be leveraged as offsite event spaces for LCCC events. This opportunity will be further explored as part of the SWOT analysis later herein.



3. Development Opportunities: Locations for Traditional Placemaking

Recommended locations for the previous initiatives are shown in the adjacent map.

In addition to their typical location at the Central Market site, street performances could take place along pedestrian routes throughout the map during large citywide conventions. The LCCCA, City and City Alliance should work together to establish a convention-focused program.

The recently developed Ewell Plaza in front of the Bulova development, Holiday Inn's recently added Imperial Terrace and other existing and future outdoor spaces in downtown Lancaster should be targeted by the LCCC and other stakeholders as "outdoor off-site spaces" for future events. In the long term, opportunity may exist to develop a rooftop event space at the LCCC, which was originally designed to support an eventual above-roof structure.

A monumental public art piece would help define the area south of the LCCC as an historic district with significant visitor appeal. Lancaster Public Art, LOOP and the LCCCA should collaborate to plan for such an installation. The developer of the Swan Hotel site could also be encouraged or required to provide funding for a larger installation.

A simple, stylistic wayfinding sign could be added to the intersections of Queen St. and Vine St. as well as Queen St. and King St.

A Convention Center marquee could be added to the western, northwestern or southern façade of the facility to maximize visibility of the information on the sign and contribute to nighttime placemaking along the key visitor corridors of King St. and Queen St.



Street Performances



Outdoor Event Space



Monumental Public Art



Themed Wayfinding



3. Development Opportunities: Trend Forward Initiatives

Interactive Kiosks



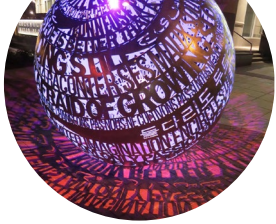
Projection Mapping



Pedestrian Lighting



Nighttime Installations



Augmented Reality



Interactive Kiosks – Several strategically placed kiosks could be added at highly visible points within the Convention District. These could be located near new public art elements and placed in settings that make the kiosks easily visible to the pedestrian. These new wayfinding structures should feature Convention District branding, décor or other elements unique to the destination, as well as information regarding the LCCC and attractions in the immediate area.

Projection Mapping – Historic structures internationally have been activated at night using advanced projection mapping technology. In Lancaster, this type of public art investment would create a signature nighttime ambiance, leaving a convention attendee and local resident with a lasting impression of the Lancaster Convention District. The adjacent image shows a façade activation implemented at the New Orleans Lafayette Square during Luna Fete. This type of application could be used to decorate the LCCC and other nearby locations at night. A rotating array of graphic designs could be used on a nightly, weekly, or monthly basis, and more extravagant light shows could be planned for special events throughout the year.

Pedestrian Lighting – Stakeholders commented on the lack of lighting along Vine St. and Queen St. and other areas surrounding the LCCC. This creates an opportunity not only to introduce nighttime lighting, but to treat the installation as a directional, public art and aesthetic asset. LED technology could include a vast array of color options, fluctuating lighting patterns and other attraction elements in areas throughout the Convention District.

Nighttime Installations – A trail of interactive and eye-catching installations could be developed to guide convention visitors throughout downtown. These could be permanent or temporary public art pieces. Light-up installations could also partially address the lighting and safety issues raised by stakeholders. Minneapolis’s Nicollet Mall, for example, features the adjacent “nighttime beacons” along the avenue to both provide lighting for pedestrians and a unique ambiance. Further, opportunity may also exist to display information regarding events at the LCCC within these installations.

Augmented Reality – Mobile app developers have created augmented reality (A/R) wayfinding programs designed to guide pedestrians through convention centers, malls, urban neighborhoods and other areas. These systems can “gamify” the walking experience, while providing an intuitive direction interface for users with mobile devices. As shown in the adjacent image, virtual “beacons” can be added to mark specific landmarks, street corners, or venues, while floating arrows in a heads-up display (HUD) can point users toward sites of interest.

3. Development Opportunities: Locations for Trend Forward Initiatives

Recommended locations for the previous initiatives are shown in the adjacent map.

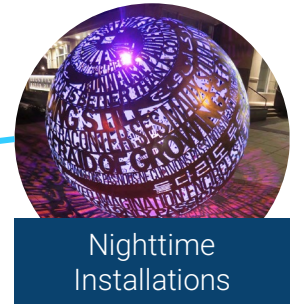
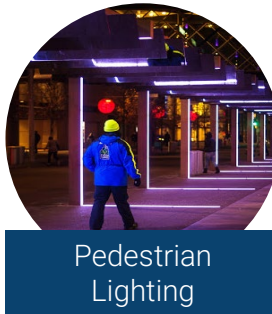
An informational, interactive kiosk with local, stylistic elements would be best located either near the front of the LCCC or across the street at the Central Market.

Projection mapping technology could be used to occasionally create multi-story visuals along the LCCC or existing/future nearby structures.

Stylized pedestrian lighting could provide convention attendees with ambiance and a sense of safety along Queen St. leading to Vine St. Working with the City Alliance, the LCCCA and City could develop strategies to create a creative vision for unique installations. Lighting that accentuates the distinct architecture in the area should also be considered.

A pedestrian-focused augmented reality app could be offered to help guide convention attendees throughout the LCCC as well as to/from key locations throughout downtown. LOOP is currently working on such an application for downtown, and the LCCCA could offer input as to its functionality for visiting LCCC event attendees. LCCC staff could also become a partner with LOOP in marketing the app to convention attendees.

Public art installations that light up at night should be added to key areas throughout the area south of the LCCC to best define it as an historic district, and a trail of such installations could be developed northward to guide convention attendees to popular businesses and landmarks.



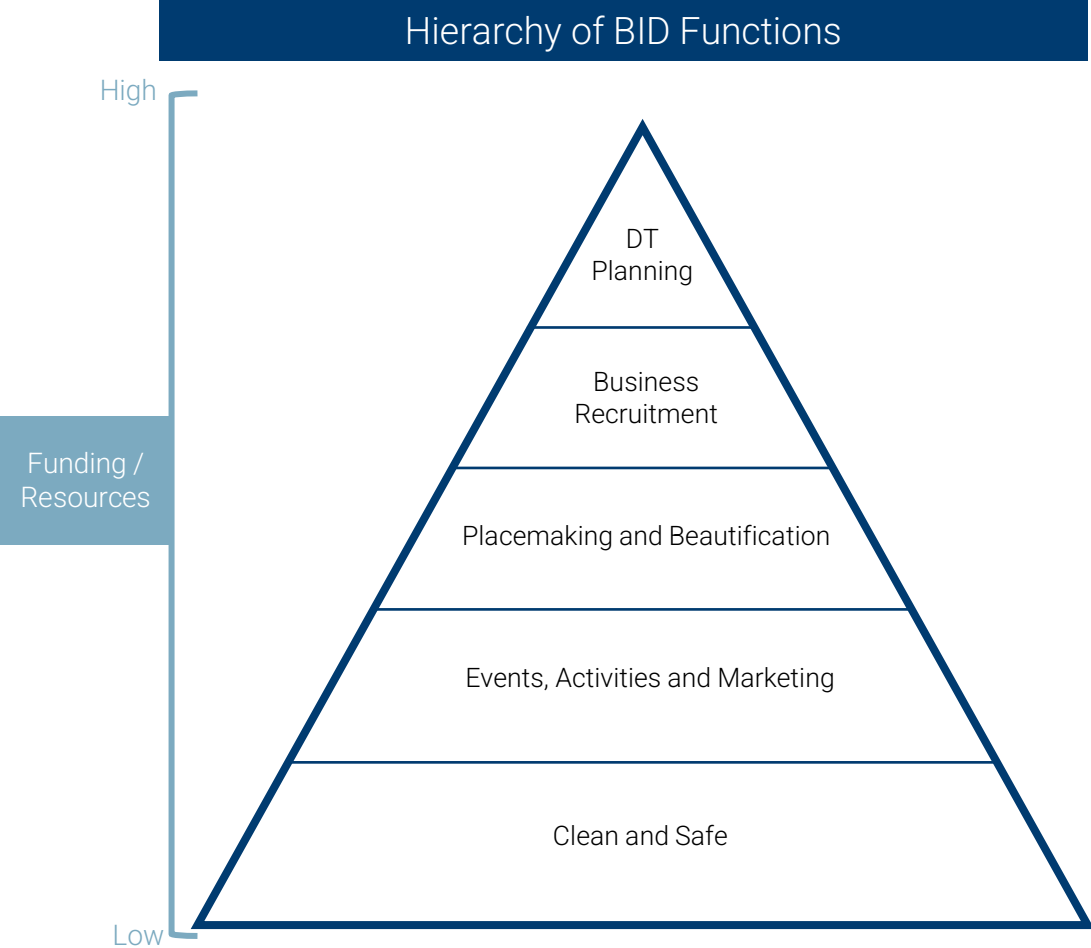
4. DID Analysis: Overview

As part of the Strategic Planning effort, CSL also conducted a review of the mission, focus and funding for the Lancaster Downtown Investment District Authority, and prepared a high-level comparative analysis of the business improvement districts of several markets nationally. Markets contacted as part of this outreach included Fort Wayne, IN, Boise, ID, Lexington, KY, and Little Rock, AR.

Funded by an assessment of property owners in the heart of downtown Lancaster, the Downtown Investment District (DID) is made up of an executive director and an 11-member Board of Directors consisting of residents, business owners, and other stakeholders. The Lancaster City Alliance, a larger organization with a broader focus on ensuring the City of Lancaster is clean, safe, and vibrant, manages the Downtown Investment District (DID).

The combination of the DID, City Alliance, Lancaster Office of Promotion (LOOP), Lancaster’s Economic Action for Downtown’s Success (LEADS) and other City services provides downtown Lancaster with services typically fulfilled by singular downtown business improvement districts (BID’s). BID’s are defined areas within which businesses are required to pay an additional tax (or levy) in order to fund various projects and programs that occur within the district’s boundaries. The adjacent graphic highlights the typical services provided by these organizations, depending on their funding and resources. Providing ambassadors who clean and ensure safety is typically the most basic and primary service provided by these entities, while additional funding can support the promotion of downtown areas through events, marketing and banner programs. Functions with a higher degree of engagement include placemaking and beautification services (such as the providing of planters, landscaping or public art), business recruitment services (façade improvement programs, build out grants, and offering of other incentives), and broader downtown strategic planning (paying for/leading downtown master plans, having a significant voice as part of downtown development, using a revolving loan fund to pay for property acquisition and/or development, etc.)

In Lancaster, the DID serves as the “clean and safe” entity and shares some of the event, activities and marketing duties with the City Alliance and LOOP. Events and other downtown programming is also organized by LOOP. Meanwhile, services such as placemaking and beautification in downtown are handled by the City and LEADS, while business recruitment and downtown planning are typically led by the City Alliance. This decentralized approach to these downtown services is somewhat unique nationally and is considered as part of budgetary recommendations later herein.

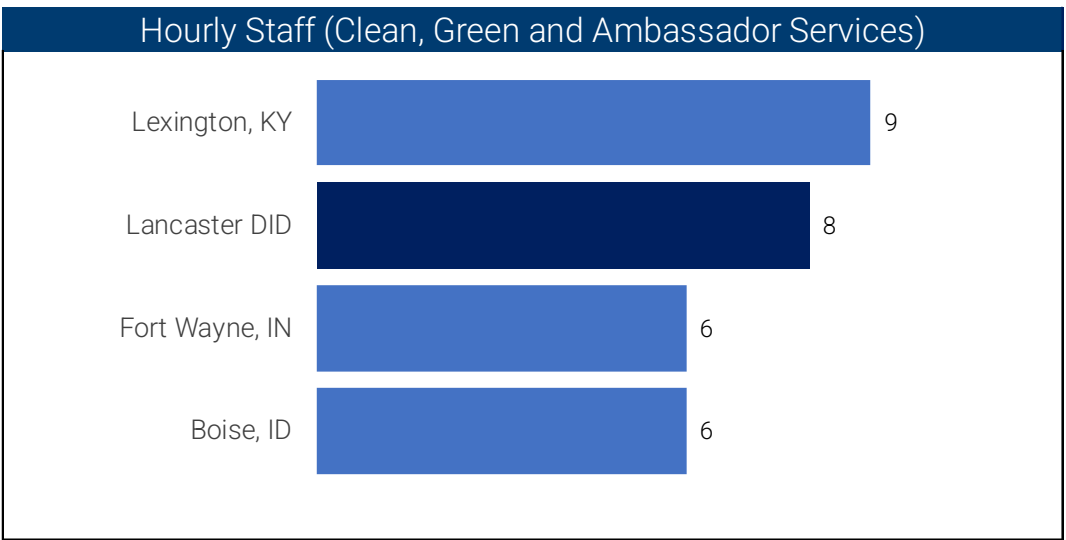
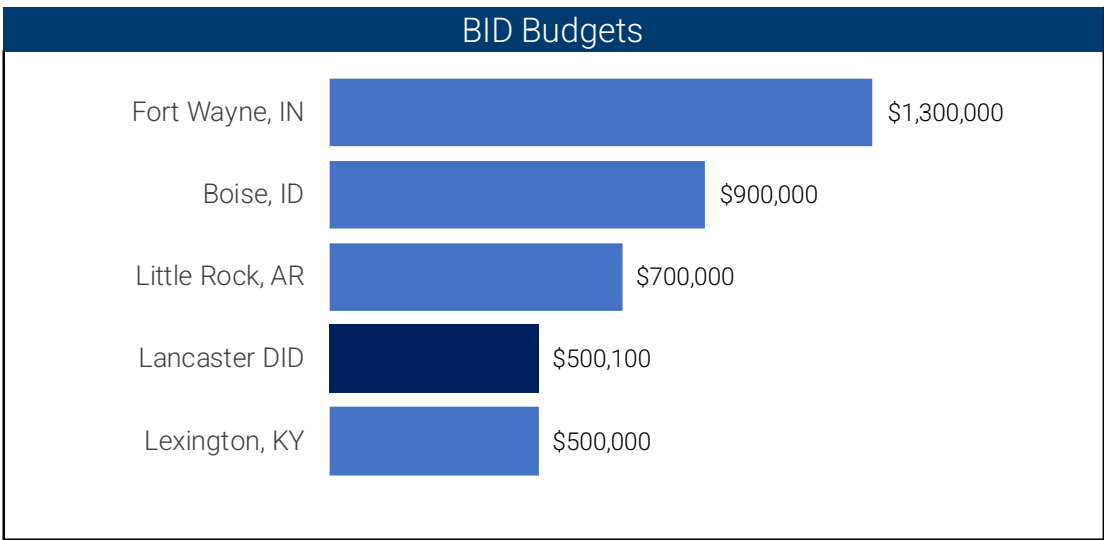


4. DID Analysis: Comparable Budget Analysis

The exhibits below compare the approximate budget and staffing levels of the Lancaster DID with those in Lexington, Fort Wayne, and Boise. As shown, though the organization can employ eight hourly staff for clean, green and ambassador services, it has significantly less funding than other BID's. It is important to note that the \$1.3 million for Fort Wayne's BID (The Fort Wayne Downtown Improvement District) enables the organization to lead beautification initiatives and business recruitment programs, two services typically carried out by the City of Lancaster and the City Alliance. However, the \$900,000 for the BID in Boise (Downtown Boise Association) only funds cleaning/safety and marketing/events services, the same initiatives typically led by the DID.

The DID's recently developed Five-Year Plan suggests mechanisms to increase its annual funding, including the additional support from non-profits that are exempt from paying the annual assessment. This is fairly common nationally; in Fort Wayne, Boise, and Lexington, non-profit entities such as convention centers are exempt from paying BID assessments. However, the Boise Centre will often voluntarily contribute approximately one-third of the value of their assessment to the Downtown Boise Association.

In addition, DID leadership noted that downtown Lancaster provides services for approximately 0.5 square miles, which can be challenging with eight staff and makes it difficult to provide focused services for the Convention District. At the same time, the comparable markets reviewed have smaller service areas that range between 0.25 and 0.3 square miles. These data suggest that at least a modest increase in DID funding and staffing may be warranted to better support enhanced DID services for the Convention District.



Source: Comparable BID leadership, 2022.

4. DID Analysis: Notable Comparable Practices

Conversations with comparable BID’s included a focus on how their organizations commonly align or coordinate with activity at their local convention centers. These are listed in the graphic below. Initiatives already practiced in downtown Lancaster are shown in gray below, while those utilized only by other destinations are in black.

Convention-Focused Initiatives	Other Visitor-Related Initiatives
<ul style="list-style-type: none">• Show your badge programs• Spotify/streaming services• Event programming in coordination w/ conventions• Ambassador focus on convention attendees• Mitigating construction impacts on attendee experience• Street stickers• Social media coverage• Informing local businesses	<ul style="list-style-type: none">• Public art programs• Periodic festivals• Downtown stage management

Many initiatives that were cited are already implemented by the Lancaster DID and/or City Alliance, such as applying street stickers on lamp posts that promote major LCCC events or providing social media coverage for convention-related announcements. Five unique practices were identified that are not currently employed by the DID, City Alliance, LOOP, Leads or other local entities. These are summarized below.

- **Show your badge programs:** The Downtown Boise Association will frequently work with Visit Boise on various “show your badge” programs throughout the year, wherein attendees of major conventions are given badges or passports that grant them discounts at various restaurants and attractions.
- **Spotify/streaming service:** The Downtown Boise Association uses Spotify to advertise major events happening in the downtown, which allows them to target Boise residents, travelers coming to Boise, and other individuals considering purchasing travel arrangements to the destination. In this way, convention attendees planning their visits to Lancaster can learn about downtown activity prior to arriving in the destination, as the ads can target those who used online services to book travel. Ads for events would be played between songs for those with non-premium subscriptions.
- **Ambassador focus on convention attendees:** The Downtown Lexington Management District (DLMD) coordinates with Visit Lex on upcoming convention dates on an online shared calendar and plans for temporary ambassador increases during days with major convention events. The organization works with a local temp agency to ensure they have the proper staffing for higher foot traffic levels in the downtown area.

4. DID Analysis: Notable Comparable Practices

- **Mitigating construction impacts on attendee experience:** The Downtown Improvement District in Fort Wayne works with developers and the City to develop wayfinding and beautification programs that guide pedestrians around major construction projects, many of which are located near the Grand Wayne Convention Center. Wayfinding signs and installations also often educate passersby's about the future transformation of the area. Further, the District plans many special events and activations throughout the year in areas of downtown that help guide convention attendees and other visitors away from key construction zones, including street performances, mural paintings, and small food truck events.
- **Public art development:** Fort Wayne's Downtown Improvement District recently allotted \$40,000 in their annual budget to lead signature public art projects throughout downtown Fort Wayne. This program provides matching grants to developers to encourage the funding of murals on large and highly visible facades as well as the beautification of alleyways. For example, one alleyway now features hanging, programmable light bars and has become a nighttime landmark for the city that attracts significant visitation and generates social media exposure.

Key Takeaways and Recommendations

In considering the data above, we have made the following time-based recommendations.

- **Short-Term (1-2 years):** We support the initiatives described within the DID's recently developed 5-Year Plan, including: strengthening engagement among tax exempt property owners and continuing to encourage their financial support in lieu of paying the DID assessment; allocating future budget increases (from assessments paid by new developments) toward beautification services; and, increasing the millage rate incrementally over the next five years to support cleaning and safety services in an increasingly dense and trafficked downtown. With added resources, the DID will be able to provide more focused ambassador, clean/green, and beautification services for the Convention District.
- **Mid-Term (2-4 years):** Evaluate the approaches of comparable BID's nationally and identify those opportunities that the DID, LOOP, LEADS and other downtown stakeholders could lead that would provide a greater destination experience to LCCC convention attendees. Considered initiatives should include developing convention-focused ambassador response programs; initiating a "show your badge" or similar program; advertising the downtown on Spotify via the creation of a custom playlist and advertisements; providing ramped up ambassador services during major citywide events; providing placemaking solutions that mitigate the negative impacts of construction on the pedestrian experience; and, assisting Lancaster Public Art with the development and maintenance of public art installations, both permanent and temporary, throughout downtown.
- **Long-Term (4+ years):** Continue to evaluate the approach to downtown management initiatives that are separately handled by the City, LOOP, LEADS, City Alliance and the DID, and consider a strategic planning effort that would clearly delineate the objectives and tasks for each entity, as well as identify potential opportunities for them to partner on special projects such as public art programs, beautification efforts, and events and festivals. These efforts should help the organizations work together and avoid siloed approaches to downtown- and event-related communications and management. This collaboration could lead to a formalized "events council" that could also include representatives from the City's Fire and Police Bureaus.

5. SWOT Analysis: Overview

In-depth interviews were conducted with the LCCC and Discover Lancaster sales teams, in addition to other stakeholders with key insights regarding the conditions of the LCCC, to discuss the strengths and weaknesses of the existing LCCC and surrounding area product. These conversations were used to support a SWOT analysis of the LCCC and Lancaster area as a convention destination.

As with any product in any industry, continual investment is required to respond to evolving customer and industry demands. Planning convention center improvements requires a future-focused approach to market-supported design and technology investments in an evolving and highly competitive environment.

Even prior to the COVID-19 Pandemic, CSL’s research had shown that the increasing Millennial and Gen-Z conference and convention attendee base was creating new demands and expectations of event facility design and programming. The next generation of event attendees will require greater flexibility in how meetings are conducted, how information is delivered, and how technology is used. Greater emphasis is being placed on the ability of a destination to offer a unique, authentic and productive experience.

At the same time, the COVID-19 Pandemic has greatly accelerated the demand for specific convention facility elements, including broadcast and hybrid event capabilities, space for outdoor functions, and safe and walkable environments in desirable (but not overcrowded) urban locations. It is critical to consider how planner preferences and attendee behavior may be impacted in the short- and long-term as the event industry “returns to normal”.

Stakeholder feedback and CSL’s independent research regarding industry trends has informed much of the SWOT analysis on the following pages.



5. SWOT Analysis: Key Strengths and Weaknesses

S

Strengths of the LCCC and Lancaster Convention Destination

- **Exhibit Hall:** LCCC's Freedom Hall's 46,500 square feet of exhibit space is well-sized for events that frequent the LCCC, and is multipurpose enough to host conventions, tradeshow and sporting events.
- **Downtown Lancaster:** The downtown area continues to evolve with a growing housing base, and its historic look and nature creates an irreplicable environment for event attendees.
- **Nearby Restaurants:** The quantity and quality of restaurants in downtown is highly desirable to event planners and attendees.
- **Lobby/Pre-Function:** The scale and style of the pre-function spaces throughout the LCCC and connected Marriott are frequently lauded by both local stakeholders and visiting event attendees.
- **Facility Aesthetic:** The unique and authentic finish inside and outside the facility are iconic features that greatly assist with selling and marketing the facility to prospective convention and event planners.
- **Connected Hotel:** Planners strongly prefer to have their events under one roof; the hotel base, amount of meeting space and in-house food & beverage make the LCCC a convenient turnkey option.
- **Drive-In Market:** With its location near Philadelphia and East Coast, Lancaster is well-situated as a convention host market for state and regional association with significant drive-in audiences.

W

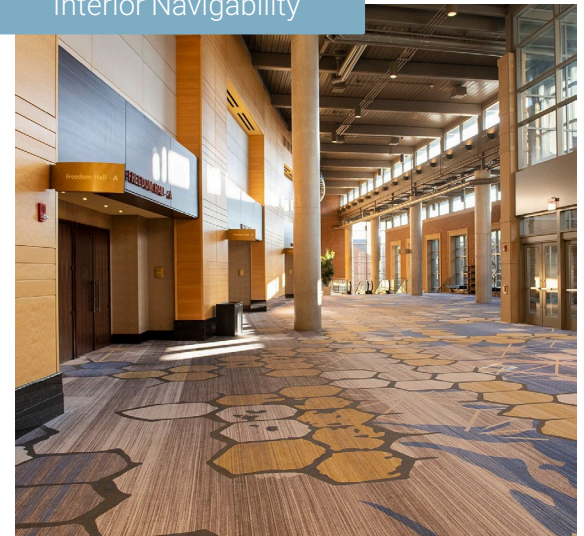
Weaknesses of the LCCC and Lancaster Convention Destination

- **Interior Navigation:** Attendees often face difficulty with finding their events' smaller breakout sessions. Opportunities to more efficiently communicate the location of meeting rooms should be considered.
- **Breakout Space:** Sales team officials noted that meeting space can occasionally be an issue for events with significant breakout needs, but the use of Commons on Vine is increasingly addressing this issue.
- **Parking Wayfinding:** Finding the LCCC's parking garage can be difficult due to multiple turns required and one-way streets. Added or more visible signage could help address this issue.
- **Nighttime Walking Experience:** Some stakeholders noted that walking south of the LCCC at night can feel unsafe. Added pedestrian lighting in this area should be considered.
- **Airlift/Market Accessibility:** The driving distance to/from other nearby major population centers can sometimes present an issue with attracting larger state and regional conventions.

Facility Aesthetic



Interior Navigability



5. SWOT Analysis: Key Opportunities



Opportunities for the LCCC and Lancaster Convention Destination

- **Southern District Development:** The Thaddeus Stevens and Lydia Hamilton Smith Center for History and Democracy and Mosaic development will transform the district surrounding the LCCC, the Southern Market provides a unique dining option, and the Swan Hotel site has the potential to serve as a key asset for the convention industry. Having a vision for this area as a nationally leading Convention District will be paramount. Previously discussed initiatives should be prioritized in order to best guide the development of this area.
- **Digital Signage:** To address the issue of navigability within the LCCC, while also providing a platform for potential sponsorships, we recommend the development of a digital signage program throughout the facility. Two-to-three large, potentially interactive LED boards should be added to highly visible areas of pre-function space. Consideration could be given to also installing a controllable digital sign at each individual meeting room.
- **Pre-Function Activation Opportunities:** To better leverage the LCCC's unique and spacious pre-function areas, we recommend LCCC sales staff continue to work with event planners to envision creative and dynamic uses of the pre-function for their events. Further, the purchase of trend forward furnishings could support an "open space learning" environment. Portable furniture, wall-mounted smart boards, and charging stations have been offered at comparable convention centers. Examples are provided on the following page. These types of pieces could be deployed during targeted conventions and will require ample storage, which could be included within the previously discussed Swan Hotel-adjacent lot across the street.
- **Selective "Downsizing" of Convention Events:** In CSL's independent research of the convention industry and interview outreach to convention planners, nearly half of today's planners are increasingly seeking smaller/mid-sized, urban destinations. Lancaster aligns with this profile, and opportunity likely exists to further leverage the downtown as a convention destination asset.
- **Emerging Event Segments:** In recent years, there have been several event types that have experienced significant growth due to advancements in technology and turnover in attendee demographics. These include esports, drone racing, advanced robotics competitions, hackathons, and immersive experiences. Much of this event activity is supported by robust fiber internet access, strong and accessible Wi-Fi, and high-end A/V capabilities. Over the next five years, LCCCA leadership should consider investment in improving access to fiber ports throughout the LCCC and upgrading access to Wi-Fi.
- **Off-Site Event Locations:** With a significant quantity of spacious restaurants, the Fulton Theatre, and unique venues such as Rock Lititz, we recommend ramping up efforts to identify "off-site convention experience" plans for events attending the LCCC. Rock Lititz is a private establishment that does not offer access to third-party usage, but opportunities should be discussed to do so in the future in collaboration with Discover Lancaster.
- **Rooftop Event Space in Long-Term:** The LCCC was structurally designed to support an eventual rooftop event space. Considering the increasing demand for outdoor event space among event planners, planning for the development of a rentable rooftop terrace, pavilion, or indoor/outdoor event space could likely take place within the next ten years.

5. SWOT Analysis: Opportunity Case Studies

INDUSTRY TRENDS: Tier 1 Facility Trends – The Most Important Trends Accelerated by Pandemic



Virtual/Hybrid Events

Event planners interviewed by CSL in recent months suggest a significant interest in permanent turnkey production and broadcast facilities onsite at event venues to stream and produce content for events in real-time.

Some facilities have already invested in technologies to accommodate virtual attendees. Huntington Place in Detroit includes a 5,000-square foot broadcast studio that offers the technologies and services needed to create programming, live event webcasting, and large-scale program distribution, among other offerings. Centers in Baltimore and Houston are also being outfitted with enhanced broadcast/production capabilities.



Outdoor Event Space

Even prior to the pandemic, event planners indicated an increasing demand for unique outdoor event space at their host sites. Popular conference/convention facilities throughout the country offer terraces, patios, lawns, and pavilions to events for networking functions or general sessions.

Outdoor event space provides attendees with the opportunity to connect with the culture and feeling of a destination in a unique event setting while creating an additional selling point and source of revenue for centers.



Walkable Destinations

As the competition to attract nationally rotating conferences has become increasingly intense, many facilities have begun to position themselves as “conference districts”. In this way, the value proposition for an event planner broadens beyond traditional event space and hotel criteria to include restaurant, retail, entertainment and transportation within walking distance of a convention or conference facility.

Convention and conference facilities located within vibrant mixed-use districts cater to this emerging event planner demand, and those that integrate with their surrounding dining, retail and entertainment environments are positioned to succeed in the post-COVID conference industry.

5. SWOT Analysis: Opportunity Case Studies

INDUSTRY TRENDS: Tier 2 Facility Trends – Amenities Increasingly Preferred by Event Planners



Dynamic/Interactive Meeting Spaces

Planners are increasingly using larger, more versatile spaces for breakout sessions. These rooms range anywhere between 3,000 and 10,000 square feet and feature portable and modular furniture to accommodate a variety of programs. The Cantilever Room at the Henry B. Gonzalez Convention Center in San Antonio (TX) is often cited by event planners as an exemplary multipurpose space, and the Room's built-in A/V, movable furniture, and dual-purpose window/whiteboard help create a flexible and open environment for workshops, brainstorm sessions, and strategy meetings.



Unique and Authentic F&B

Recent trends in the food and beverage sector are more reflective of changing demographics and how conventions and meetings are being produced. The balance between standard sit-down banquets and more formal food options may be shifting towards the informal, and the ability of a center to offer more convenient "grab & go" or "pop-up" dining opportunities could become much more important in the future. Planners and attendees today are also preferring more trend-forward amenities such as food trucks, and locally sourced offerings at pop-ups within a center.



Engaging Pre-Function Areas

The Open Space Learning (OSL) concept challenges the traditional lecture or seminar-based formats that tend to draw attendees off the main show floor during events and instead provides unique and creative learning environments that can be constructed in lobbies, pre-function areas, atriums, etc. Facilities such as the Renasant Convention Center in Memphis, the Vancouver Convention Centre, and the Grand Wayne Convention Center in Fort Wayne have invested in portable and versatile furniture to create environments for small meetings and lectures, podcasts, and informal networking events.

5. SWOT Analysis: Opportunity Case Studies

INDUSTRY TRENDS: Tier 3 Facility Trends – Other Trends to Monitor



Augmented and Virtual Reality

Augmented reality technologies allow for “shared experiences” among attendees. By using headsets or mobile technologies, attendees can be alerted by the same statistics or goals/waypoints in the real world while they attempt to complete a shared task. Beyond A/R, virtual reality enables medical professionals to share experiences in completely simulated environments by wearing headsets or other currently available technologies. These technologies and their applications are still evolving, but many conference and convention industry leaders envision multipurpose “black box” rooms that will host completely immersive environments rendered as lifelike to its observers.



On Demand Micro Meetings

As Millennials and Gen-Z make up an increasing share of the convention and conference attendee base, event booking technologies have emerged that allow for app-based scheduling of breakout meeting spaces in a venue.

ZenSpace has developed private, tech-enabled Smart Pods that can be rented on demand using an integrated mobile app. These spaces are outfitted with comfortable booth seating, tabletops, whiteboards, monitors, HDMI cables and phone charging stations. This allows planners to schedule their own impromptu, private meeting sessions.



Other Trends

Other conference facility building program and technology trends increasingly noted by event planners during interviews include:

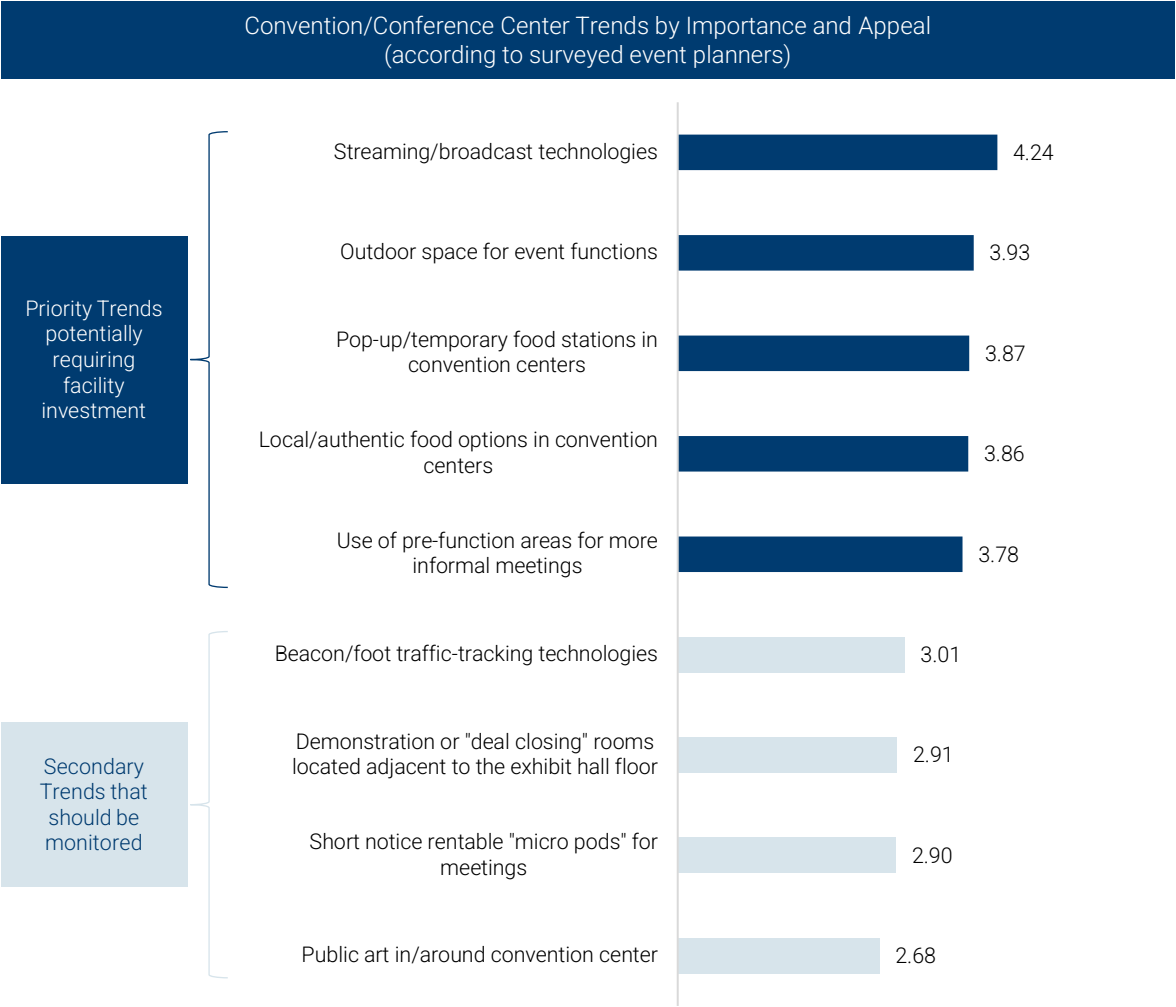
- Public art
- Internet
- Cyber cafes
- Digital signage and monitors
- Charging stations
- Natural lighting
- Casual furniture

5. SWOT Analysis: Planner Input on Emerging Trends

To test the demand for each of the concepts presented on the previous pages, CSL collected survey input from nearly 90 planners of major national and regional conventions and conferences. Participating planners were asked to rate the importance and appeal of several different event facility trends on a scale of “1” to “5”, with “5” being the highest score. Their feedback is summarized in the above chart.

Trends that should be considered a high priority by the convention industry garnered scores of 3.75 or higher. As shown, streaming and broadcast technologies received a significantly high rating from planners, followed by outdoor event spaces, pop-up/temporary food stations, local and authentic food stations, and the use of pre-function areas for informal meetings. It will be important to consider each of these trends as part of any conference center development.

Trends that scored lower may not be a near-term priority but should still be considered important as part of any convention center development or expansion project. These include demonstration rooms adjacent to the exhibit hall or ballroom, rentable micro pods, and public art in and around a conference or convention center.



Source: CSL national meeting planner survey, 2022.

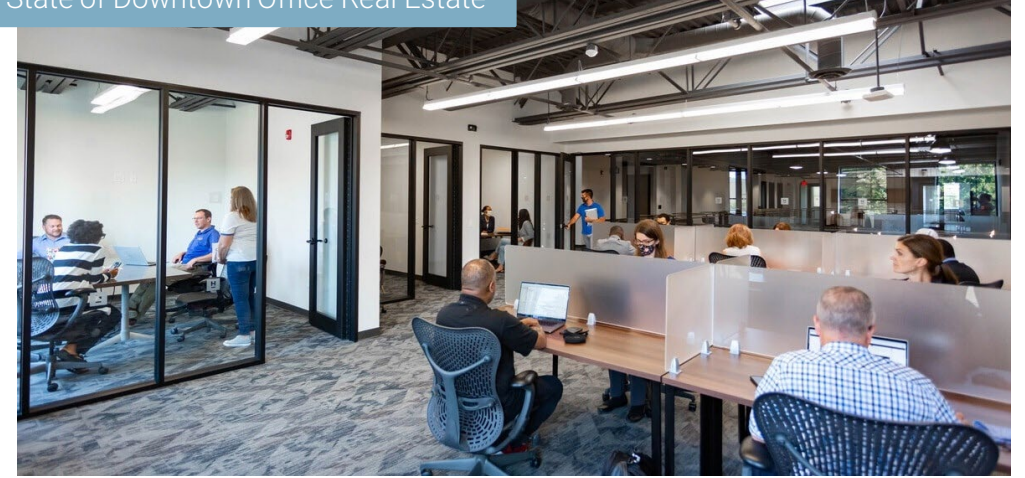
5. SWOT Analysis: Key Threats

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Threats to the LCCC
and Lancaster
Convention
Destination

- **State of Downtown Office Real Estate:** Some City officials expressed concerns regarding the future of office space in downtown following the Pandemic and the ongoing work-from-home trend. Without a sufficient, consistent employee base, it will be difficult for downtown to maintain the same number of restaurants, retail stores and other hospitality amenities.
- **Downtown Restaurant Hours:** With a limited employee base and the convention industry still gradually rebounding, many of the restaurants in downtown Lancaster have limited days and hours that they are open. It will be critical to support these businesses and encourage longer hours of operation as the LCCC continues to regain its pre-Pandemic convention and event levels.
- **Competitive Destinations:** Leadership in other regional and similar-sized convention destinations will continue to invest in their convention facilities, districts and other assets. A continual effort to plan and improve the LCCC and the surrounding Convention District is required in order for the destination to both remain competitive in the convention industry and gradually grow its market share of regional and national conventions, tradeshow, and other economically impactful activity.
- **Maintaining Downtown Authenticity:** Downtown Lancaster's historic nature is an invaluable asset to growing LCCC's convention business and is a critical part of the City's identity as a popular visitor destination. The LCCCA, Discover Lancaster and other stakeholders need to prioritize character protection and carefully guided planning efforts to ensure that its growth and evolution always maintains its highly unique brand.

State of Downtown Office Real Estate



Maintaining Downtown Authenticity



6. COMMONS ON VINE: Recommendations

The existing Commons on Vine is not highly utilized, hosting occasional banquets, registrations and civic events. The space currently encompasses approximately 8,000 square feet with 12-foot ceiling heights. Existing administrative offices are located directly adjacent to the Commons, and consideration is being given to removing the office space and creating a larger Commons area, potentially creating a total of 10,000 to 11,000 square feet of contiguous space.

Based on stakeholder conversations, industry trends with respect to use of public spaces, and changes to event attendee demographics, we have developed several concepts for consideration as part of a refocused Commons area.

- **Open Space Learning** – Events are increasingly using public lobbies and other spaces for open space learning, or informal gatherings of event attendees to hold topic-specific conversations, networking functions and social gatherings. To accommodate these activities, many centers have invested in furniture, A/V and other technology to create small learning spaces throughout lobby areas. The Commons space is well suited to accommodate these areas, and an expansion of the space to more than 10,000 square feet would improve its marketability for these uses. Further, to support a higher-end banquet environment, the underutilized public restrooms in Commons could be converted into individual restrooms with a shared washing area.
- **Swan Hotel/Southern Market Coordination** – Opportunity exists to utilize Commons space, in conjunction with the adjacent Swan Holt site/project and Southern Market, as a “destination launch zone”. Festivals, music events, food functions, cultural or other events could be jointly hosted in Commons space and space developed as part of the Swan Hotel site and the Southern Market. LCCC sales staff, Discover Lancaster and the City Alliance should participate in a teamed effort to develop a list of immersive, highly unique experience “packages” for major conventions.
- **Entertainment Space** – As the event attendee demographic changes, it may be appropriate for the Commons area to be adapted on occasion to include interactive entertainment activities such as bean bag toss, esports, immersive AR/VR exhibits and other participatory functions. These could be tied to an event hosted at the LCCC or stand-alone community events. LCCC sales personnel should frequently work with event planners to imagine this space.
- **Local Vendor Kiosks** – The Commons space could be used on occasion to host local food and merchandise vendors, particularly when events are being held in the LCCC. A permanent or portable, trend forward kiosk structure could help host an array of rotating local vendors. These spaces could be supported by the area’s nearby kitchen space, which could be used as a warming/prep area.

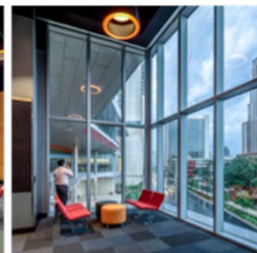
Expand for
Larger Banquets



Games and
Activities



Open Space
Learning



Destination
Launch Zone



7. SALES/MARKETING ANALYSIS: Overview

With an improving Convention District that will be undergoing significant commercial development, it is important to consider how the LCCC and its vibrant urban environment are marketed to planners of conventions, meetings, sports and other events. This Chapter summarizes CSL's evaluation of current marketing and sales strategies employed by Discover Lancaster and the Marketing Consortium with respect to the LCCC, and provides recommendations for how various elements of the sales and marketing process could be improved.

Today, the LCCC's sales team is made up of five sales staff that specialize in various event segments (i.e., corporate, small meetings, SMERF, etc.), and who represent the integrated facility (hotel/convention center). One full-time sales and marketing position, and limited support from two other staff positions, are funded by the Marketing Consortium. The Marketing Consortium efforts are focused on large scale events that provide overflow rooms beyond the Lancaster Marriott. The LCCC's allocation or payroll expense of those five staff members is calculated at 2.4 FTEs (Full Time Equivalents). Sales personnel are supported by a marketing manager at the building, who focuses on social media, website and other content management for the integrated facility.

The team receives support from Discover Lancaster, the tourism marketing entity for Lancaster County. Discover Lancaster features a group sales team of two who are supported by three marketing personnel. The Discover Lancaster sales team focuses on attracting group business throughout the calendar year to increase business across the Lancaster County, PA hotel community.

High-level summaries of the sales and marketing practices of the teams in Fort Wayne, IN, Sioux Falls, SD, and Winston-Salem, NC are presented on the subsequent page, followed by research-supported recommendations for improving the sales and marketing of the LCCC and the Convention District.



7. SALES/MARKETING ANALYSIS: CVB and Convention Center Marketing



The Grand Wayne Convention Center (GWCC) is sold and marketed by both Visit Fort Wayne (VFW) and the GWCC sales and marketing team. VFW employs four full-time group sales personnel along with five marketing personnel, and they estimate that approximately 45 percent of their efforts are focused on booking business at the GWCC. The organization's group marketing budget of \$175,000 is also proportioned 45/55, with 45 percent of these funds allocated toward marketing the Center.

The GWCC sales and marketing team is made up of four sales personnel, including a director of sales and three sales managers.

The GWCC and VFW are now evaluating approaches to formalize their working relationship, with VFW potentially taking a leading role in booking events outside of 12 months and the GWCC focusing on short-term booking cycles.



Experience Sioux Falls, the market's DMO, employs six sales personnel, two of which are focused on conventions and meetings. Approximately \$300,000 is spent on group marketing per year. Only 25 percent of their focus is booking events at the Sioux Falls Convention Center (SFCC) due to its distance from other hotel properties. Center management also used to be more willing to offer discounts to valuable events, but a management change has made this less common. This has made it more difficult to book economically impactful conventions at the SFCC.

The SFCC features a sales team of three and two marketing personnel. According to local officials, the team focuses more on revenue-generating events than those with high hotel room night yields.



The Benton Convention Center (BCC) is overseen by a similar management model to the LCCC. The City-owned facility is managed by its adjoined Marriott.

Visit Winston Salem (VWS) employs a group sales team of six people and five marketing personnel. Representatives estimate that 60 percent of their sales efforts are dedicated toward booking the BCC, along with 40 percent of marketing efforts. VWS acts as the lead marketer for the facility and led the rebranding of the facility's website. The BCC employs four people on its sales team.

VWS and the BCC sales team work closely to sell the BCC, with the goal of leveraging the facility to fill the 319-room Marriott as well as the additional 900 rooms that are within close walking distance of the Center. The BCC sales team focuses on national and regional events, while the Marriott focuses more on state and local events.

7. SALES/MARKETING ANALYSIS: Takeaways and Recommendations

The sales and marketing of the Lancaster convention product is unique. With a hotel and convention facility that is managed by a hotel group and heavily staffed for convention sales and marketing, the facility relies less on CVB support for retaining convention business relative to peer destinations. At the same time, in reviewing comparable markets and considering stakeholder feedback, opportunity exists to moderately improve the sales and marketing approach of Lancaster’s convention industry. Several key observations and recommendations are summarized below.

Comparison of Convention Facility Sales and Marketing Personnel				
	Fort Wayne, IN	Sioux Falls, SD	Winston-Salem, NC	Average
CC Sales	4.0	3.0	4.0	3.7
CVB Sales	2.0	1.5	3.5	2.3
Total	6.0	4.5	7.5	6.0
CC Marketing	0.0	2.0	0.0	0.7
CVB Marketing	2.0	0.5	2.0	1.5
Total	2.0	2.5	2.0	2.2

- **Enhanced Marketing for the LCCC:** The graphic on the top-right summarizes the sales and marketing staff dedicated to each comparable convention center. As shown, the three markets average 6.0 full-time equivalent personnel who sell their primary convention facility, and 2.2 full-time marketing/support roles. Considering the 2.4 full-time equivalent staff positions selling the LCCC and Discover Lancaster’s focus on the broader destination, the Lancaster convention product could be considered “short” on group sales/marketing resources. Due to the differences in convention facility operating models and DMO structures, it is important to note that this is not an “apples-to-apples” comparison. Still, we recommend consideration be given to evaluating opportunities to devote greater sales resources to supporting the LCCC, as well as creating an additional marketing role within Discover Lancaster or the LCCC team who focuses on the marketing the LCCC and the surrounding Convention District.
- **Destination Experience Manager:** A new sales or marketing role within the LCCC or Discover Lancaster sales and marketing teams could serve as a “destination experience manager”. This increasingly common role at DMO’s nationally oversees the managing of tours, off-site events and experiences, partnerships, and nearby activations for visiting events. For Lancaster, a role could be created within the LCCC or Discover Lancaster who could support the convention sales staff at the LCCC and serve as a liaison with other nearby hotels for overnight bookings, as well as work with the DID and/or City Alliance to implement many of the previously discussed initiatives such as the “show your badge” programs, special street performances, and the previously discussed experiences and tours leading from the Commons on Vine.
- **Continue Strengthening LCCC and Discover Lancaster Partnership:** Interviewed sales team members from both the LCCC and Discover Lancaster indicated that new leadership has led to stronger and more frequent collaboration between the two groups. Discover Lancaster continues to pursue large citywide convention business and refer them to the LCCC, and informal regular calls to discuss leads have been more common. The two groups have also been coordinating the attendance of tradeshow, with a “divide and conquer” approach wherein each team frequents different shows to ensure Lancaster’s destination brand receives maximum visibility. We recommend continuing the growth of this partnership, and consideration should be given to further formalizing its structure in the mid- to long-term.

8. IMPLEMENTATION: Summary

To provide guidance on project implementation, we have considered the timing of each of the primary recommendations presented herein and have identified local organizations that should be involved in the planning and implementation for each of these initiatives. The graphic below provides a high-level summary of these elements as they relate to each recommended initiative.

Lancaster Convention District Futures Study		
Schedule of Recommended Initiatives		
Recommendation	Project Timing	Key Local Implementors
1 Issue RFP for Swan Hotel site and air rights adjacent parcels, using best practices	1-2 years	LCCCA, City Economic Development
2 Prioritize and pursue nightlife, entertainment and live music development	2-3 years	City, City Alliance, LCCCA
3 Installation of digital signage throughout LCCC	2-3 years	LCCCA, LCCC
4 Continue to establish relationships with off-site group venues for LCCC events	2-3 years	Discover Lancaster, LCCCA, Fulton Theatre, other local event venues
6 Convention district-focused strategies enacted by DID	2-4 years	LCCCA, LCCC, DID, City Alliance
7 Redevelopment of Commons on Vine	4-5 years	LCCCA, LCCC, Discover Lancaster, Lancaster History
8 Stakeholders collaborate to create a Lancaster City Events Council	4-5 years	LCCCA, LOOP, City Alliance, LEADS, Discover Lancaster, City, Police, Fire, Venues
9 Develop outdoor rooftop event space at the LCCC	10+ years	LCCCA
10 Evaluate and implement strategies to strengthen sales and marketing support of LCCC	ongoing	LCCCA, LCCC, Discover Lancaster
11 Implement pedestrian experience enhancements throughout downtown	ongoing	LOOP, City Traffic, City Alliance, City Public Art, City Alliance, State, Lancaster History, LCCCA
12 Identify outdoor event spaces for LCCC events	ongoing	LCCCA, LCCC, Discover Lancaster, DID, City
13 Development of augmented reality wayfinding app	ongoing	LOOP, City Alliance, City Traffic, LCCCA