



HVS Economic Impact Study & 2026 LCA/LCCC Survey Results

For

Lancaster City Alliance Merchant Meeting

October 21, 2026





- ✓ HVS Economic LCCC Impact Study Economic Impact Study Update Results
- ✓ 2026 Lancaster County Convention Center Freedom Hall Activity
- ✓ LCCCA Year in review





Economic Impact Study Update Results

Lancaster County Convention Center

Tom Hazinski, President and Managing Director

HVS Convention, Sports & Entertainment

September 15, 2026



Hotel Market Compression Analysis

LCCC events “compress” the hotel market by increasing room occupancy and the price of rooms.

Approaches to Lodging Impact Analysis

Typical Approach

- Count or estimate room nights associated with convention events
- Estimate average daily room rates (ADR)
- Multiply room nights by ADR

HVS Method

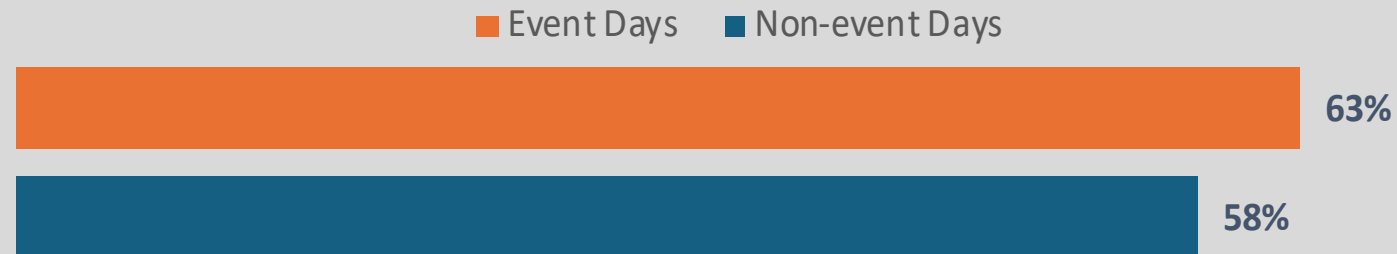
- Analyze daily changes in hotel occupancy and ADR on LCCC event days (two years of data)
- Measure changes:
 - In the entire county
 - By day-of-week
 - By month-of-year
 - By market segment
- Provide statistical measurements of the level of confidence in our estimates



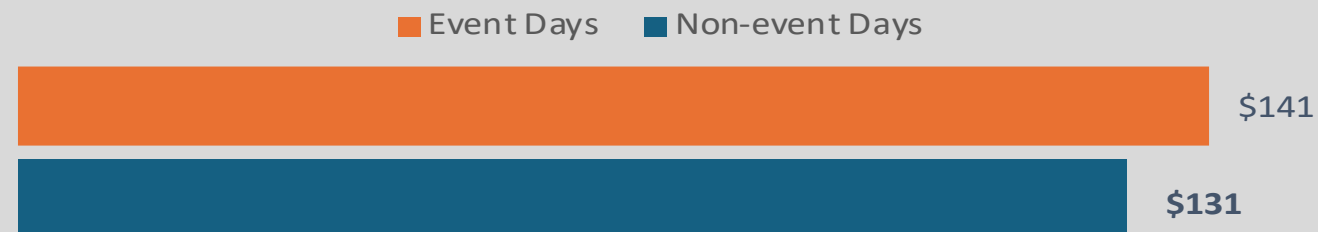
Lodging Market Impact (2024-2025)

Statistically significant occupancy and ADR boosts in the market on LCCC event days.

Occupancy Compression (5% increase on event days)



ADR Compression (\$10 increase on event days)





\$14.2 Million of Annual Room Revenue Impacts

Occupancy compression generates slightly more impact than ADR compression.

Annual Hotel Room Revenue Impact of LCCC Events (\$ millions)

ADR Compression

\$6.5

Occupancy Compression

\$7.7

Total Revenue

\$14.2

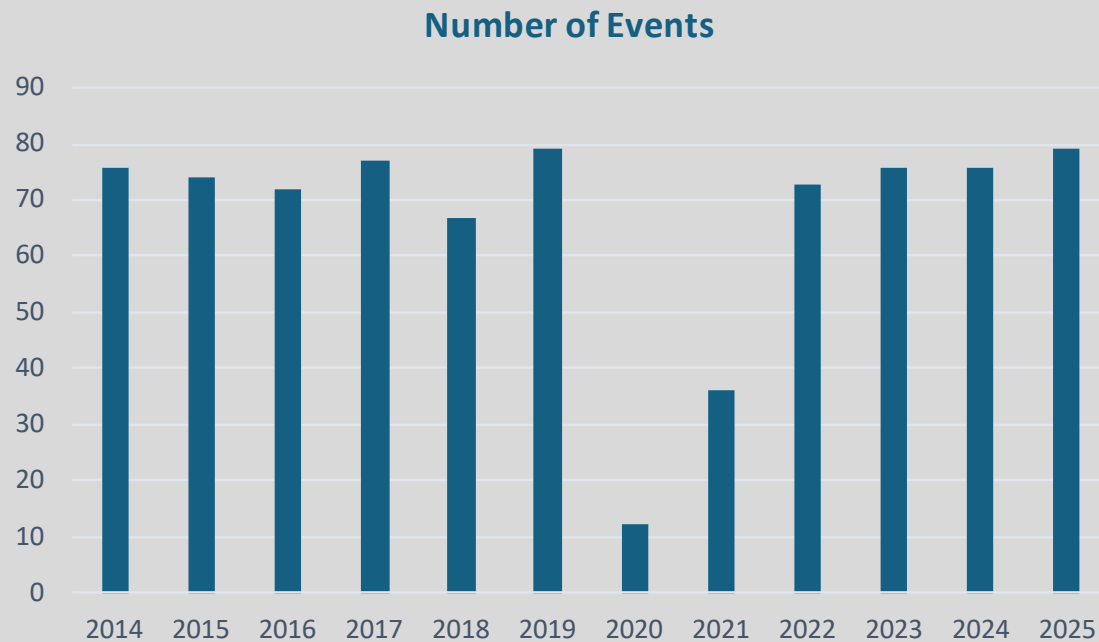
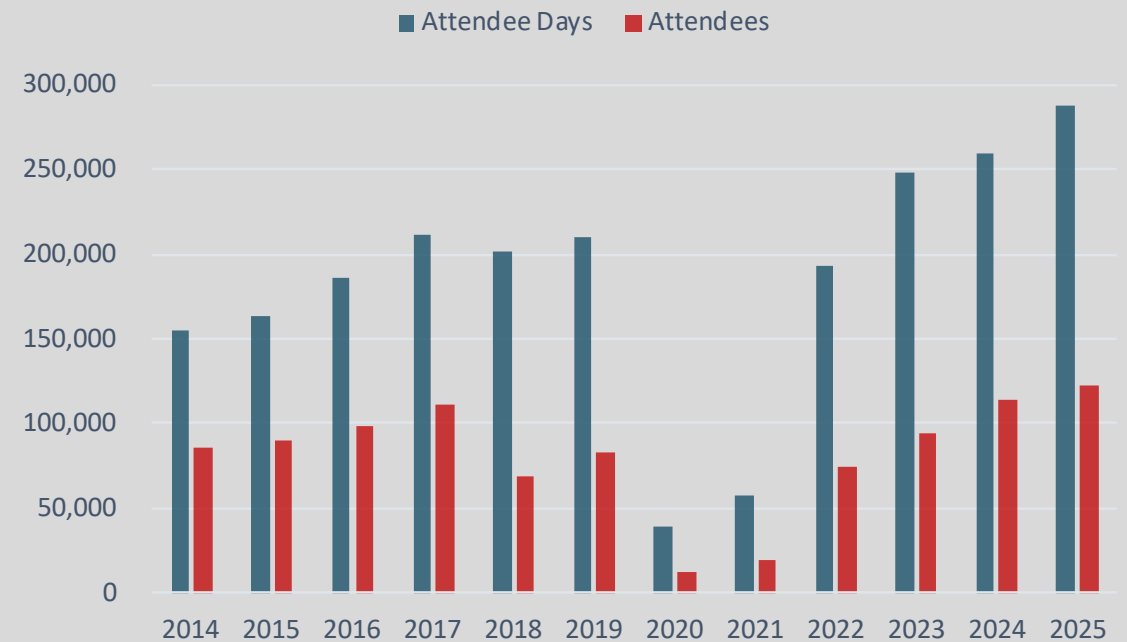
ADR Compression Revenue = Change in ADR X Pre-compression Room Night Demand

Occupancy Compression = Event Day ADR X Number of LCCC Net New Room Nights



Historical Event Demand

2025 marked a record year for attendance at the LCCC





Impact Summary

Summary of Economic and Fiscal Impacts (\$ uninflated Dollars)

	2024	2025	Total
City of Lancaster			
Economic Impact (millions)	\$53.5	\$56.3	\$109.9
Fiscal Impact (thousands)	157.2	166.5	323.7
Full-time Equivalent Jobs	445	455	
Lancaster County			
Economic Impact (millions)	\$62.1	\$67.6	\$129.8
Fiscal Impact (thousands)	609.2	642.3	1,251.5
Full-time Equivalent Jobs	485	515	
Commonwealth of Pennsylvania			
Economic Impact (millions)	\$6.7	\$7.2	\$13.9
Fiscal Impact (thousands)	476.8	513.7	990.5
Full-time Equivalent Jobs	45	45	



Business Impact Survey Results

Lancaster Merchant Survey

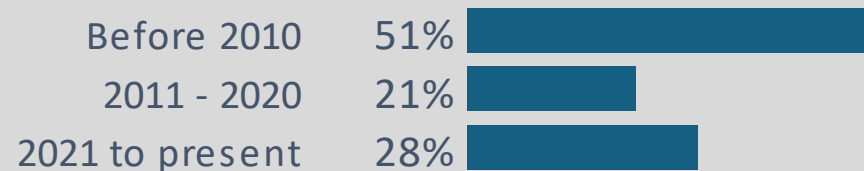


We asked Lancaster Merchants about their businesses.

Type of Business Owned



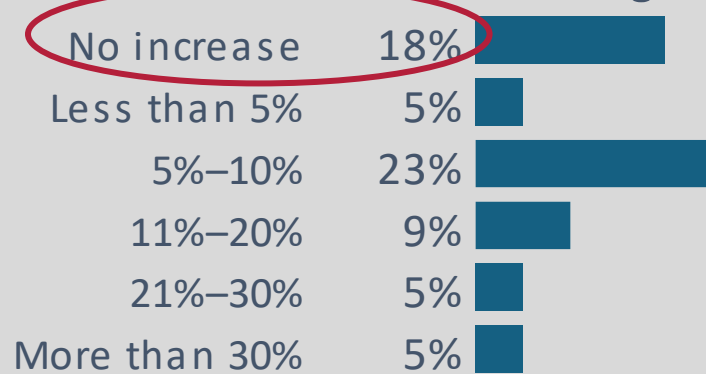
Year Opened



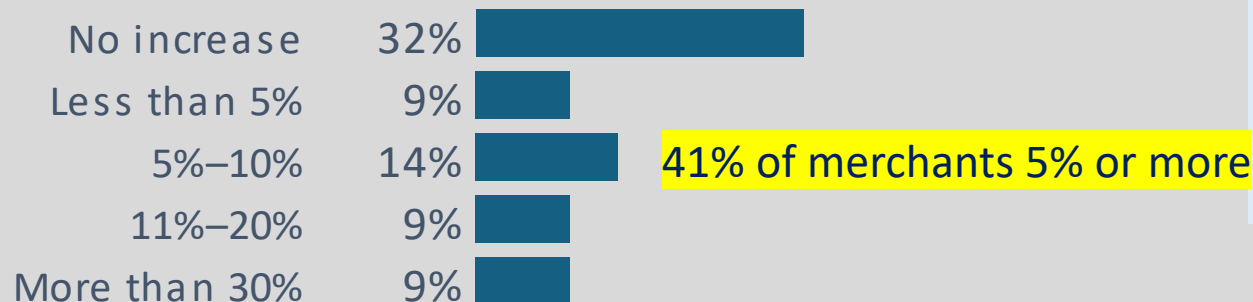
Amount of Business Activity

Most downtown merchants see noticeable activity from LCCC events

How Much Does Traffic Increase During Events at LCCC?*



How Much Does Business Increase During Events at LCCC?*



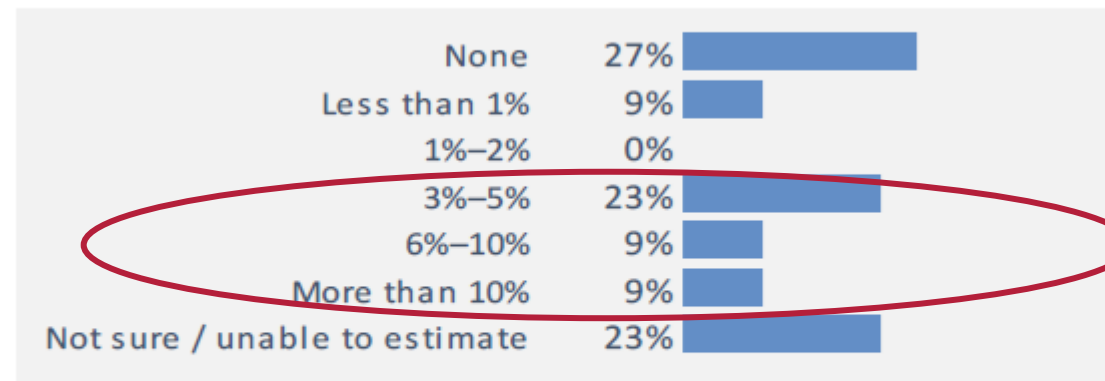
- On a scale of 1 to 10, downtown merchants rate the LCCC's importance to their business as a 5.4.
- Parking and traffic noted as occasional challenges, but the majority of respondents reported no significant challenges from LCCC events.

*Responses do not sum to 100%, because we excluded responses choosing "Not sure / unable to estimate."

Percentage of Annual Sales Attributed to LCCC

A significant number of downtown merchants see noticeable activity from LCCC events 41%

FIGURE 4-4
PERCENTAGE ANNUAL SALES ATTRIBUTED TO LCCC



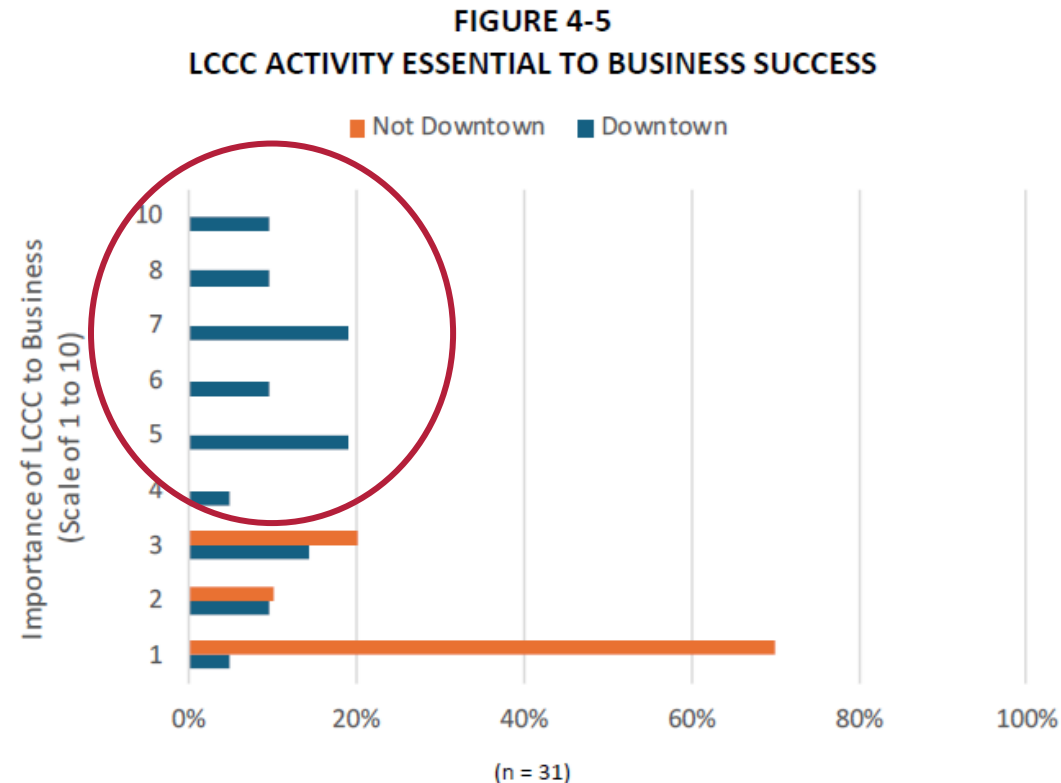
(n = 22, Downtown Lancaster only)

While some respondents do not attribute a significant amount of their annual sales to LCCC activity, at least 40% of downtown respondents said the LCCC is directly or indirectly responsible for at least 3% of their annual sales.

LCCC Activity Essential to Business Success

On a scale of 1 to 10, with 1 meaning nonessential.

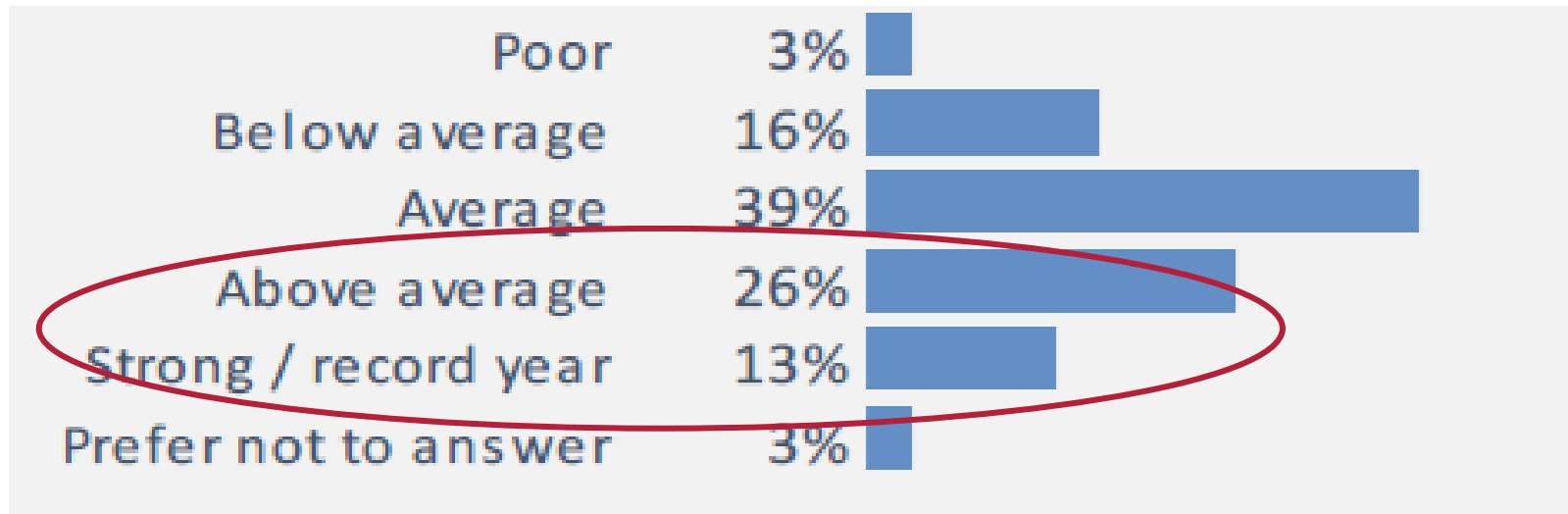
We asked respondents to rate how essential LCCC activity is to their business's profitability on a scale of one to ten, with one meaning not essential and ten meaning incredibly essential. The distribution of responses is shown in the following figure.



How is business is currently performing

39% rated their current performance as average, while another 39% rated strong to record year.

FIGURE 4-6
BUSINESS PERFORMANCE COMPARED TO YEARS PAST

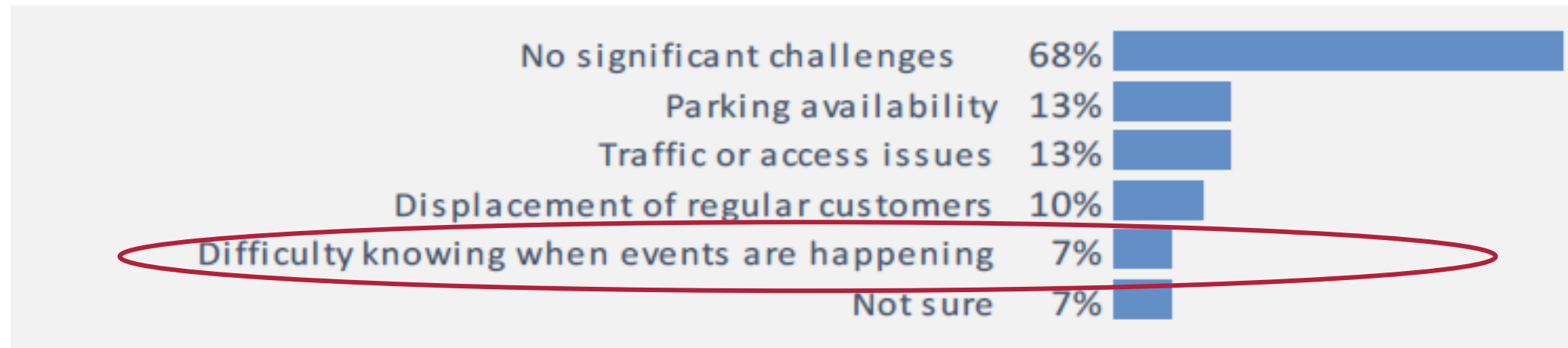


(n = 31)

LCCC Events ever create a challenge for their Business

Most respondents reported not significant challenges arising from events at the LCCC

FIGURE 4-7
CHALLENGES RELATED TO LCCC ACTIVITY



(n = 31)

We asked respondents to describe their thoughts on the impact of the LCCC on their business and on downtown Lancaster, what could be done to help local businesses benefit from events, and what businesses or amenities are missing in Downtown Lancaster.

Transformation of Downtown Lancaster

- “Overall I would say the convention center is critical. I remember Lancaster of the '90s. Ghost town. The center brings people who would have otherwise kept assuming that Lancaster is all corn fields.”
- “The convention venture was the spark that led to the revitalization of downtown.”
- “It has revitalized downtown in a way that was deeply needed, though the revitalization has inevitably driven the price of residential and commercial space up significantly.”
- “The LCCC is great for getting people to discover how wonderful Downtown Lancaster is. It definitely brings in business that we wouldn't otherwise see.”
- “I believe it's led to some restaurants, decent jobs for city residents, and made it safer.”

We asked respondents to describe their thoughts on the impact of the LCCC on their business and on downtown Lancaster, what could be done to help local businesses benefit from events, and what businesses or amenities are missing in Downtown Lancaster.

Effect on Surrounding Businesses

- “We opened on a Zenkaikon weekend; it literally jumpstarted the business.”
- “We see the most business from multi-day conferences where the meals are not in house.”
- “Advertising in the lobby digital kiosk has helped to give us more visibility. I think all businesses downtown benefit from the convention center being in its current location.”
- “It seems to impact those restaurants that are immediately around the Center.”
- “I believe the convention center has made no difference on the room nights sold at my hotels.”

We asked respondents to describe their thoughts on the impact of the LCCC on their business and on downtown Lancaster, what could be done to help local businesses benefit from events, and what businesses or amenities are missing in Downtown Lancaster.

Areas for improvement and concerns

- “Collaboration. Working with businesses in the immediate vicinity to increase foot traffic to their establishments. Help market Downtown as a destination apart from their business interests.”
- “Convention center attendees are generally not aware that we are in downtown Lancaster.”
- “Making sure local businesses are highlighted in ‘places to go’”
- “Because of its place in the downtown, its employees are key to getting the word out to guests.”
- “Adhere to the intended purpose of building the center by making sure large events that require overflow rooms are the first groups pursued.”



Contact Information



Thomas Hazinski
Managing Director
HVS Convention, Sports & Entertainment
Facilities Consulting
312-371-0566
thazinski@hvs.com

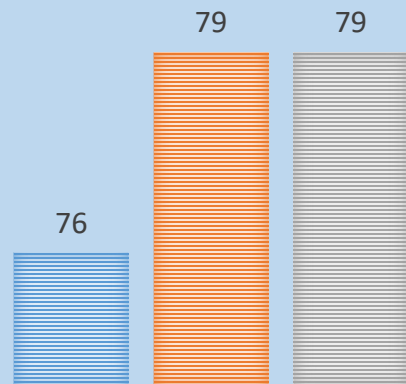
Lancaster County Convention Center

Freedom Hall Activity



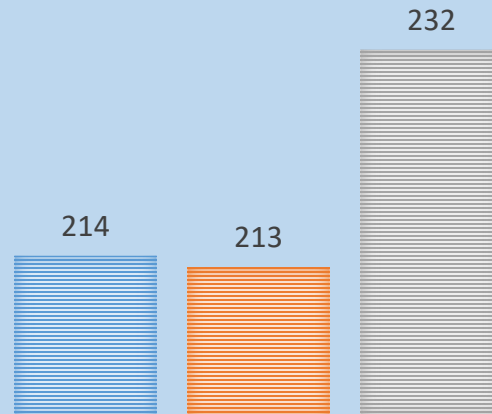
NUMBER OF EVENTS

2024 2025 2026



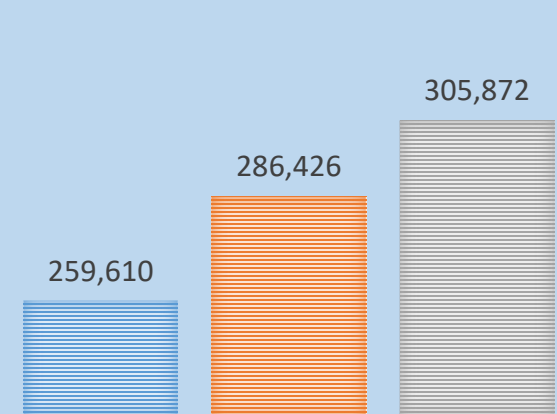
NUMBER OF EVENT DAYS

2024 2025 2026



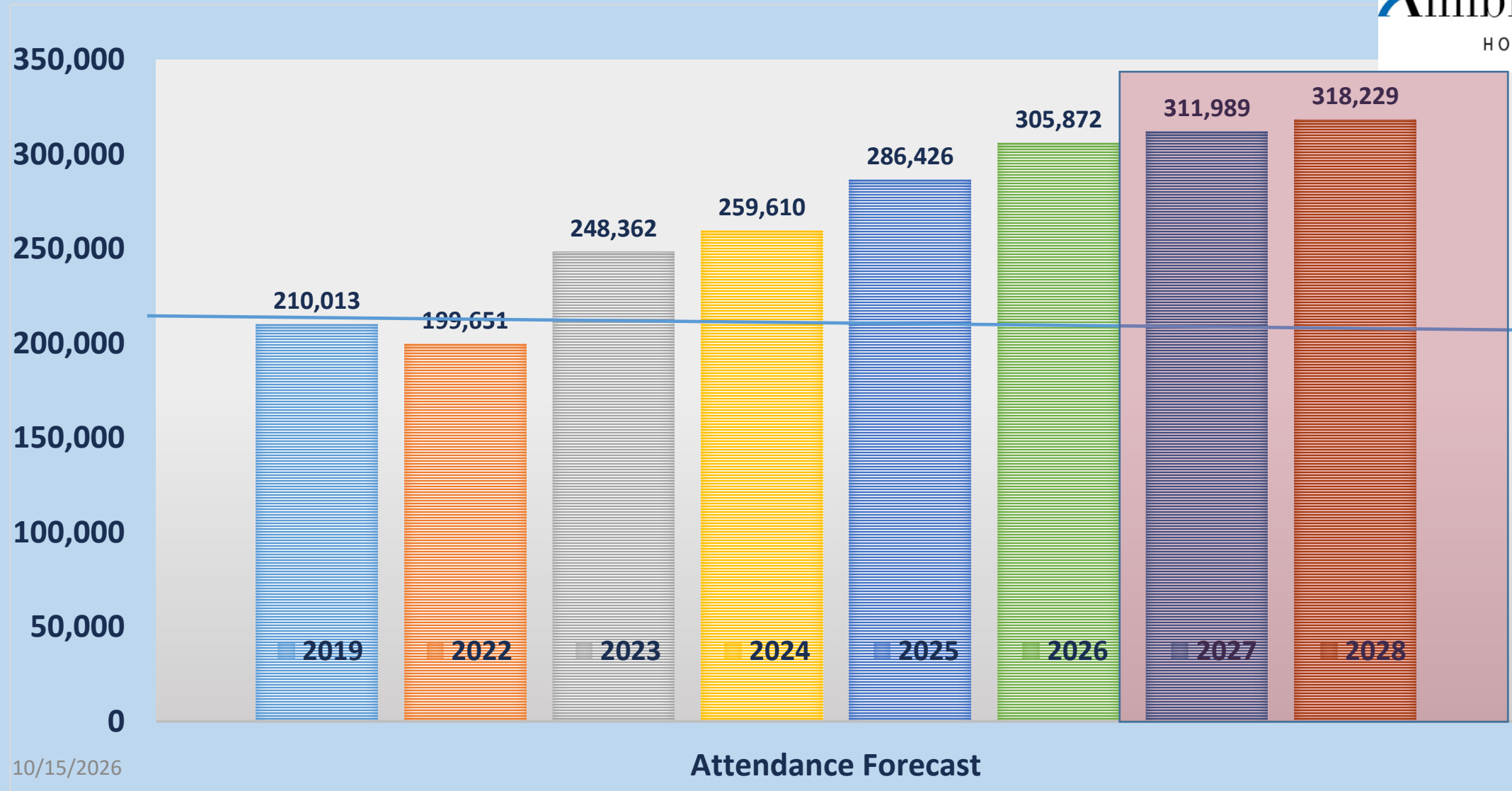
YEARLY ATTENDANCE

2024 2025 2026



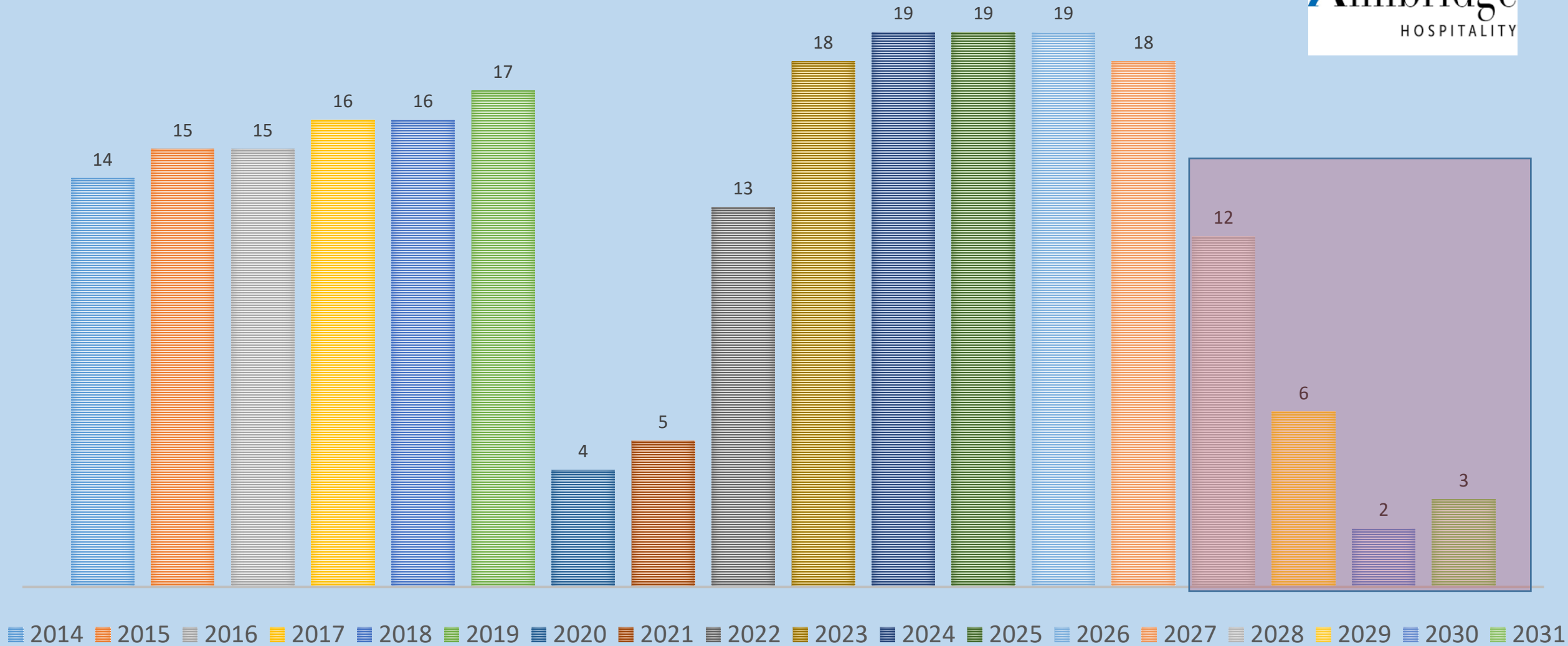
Lancaster County Convention Center

Freedom Hall Activity Attendance with 2 Year Projection (2027 - 2028)



Lancaster County Convention Center

Priority Events by year (events that create overflow lodging room nights)



LANCASTER

COUNTY

CONVENTION

CENTER

Lancaster County Convention Center											
Freedom Hall Events	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	
Event Data	Yr Total	Yr Total	Yr Total	Yr Total	Yr Total	Yr Total	Yr Total	Yr Total	Yr Total	Yr Total	Growth
											Yr over Yr
Freedom Hall Events	→ 77	69	79	16	38	76	76	76	79	→ 79	100.00%
Event Days	201	205	222	53	105	208	205	214	213	232	108.92%
Set Up / Tear Down	68	75	77	19	37	72	61	65	65	66	101.54%
Attendance	211,386	201,309	210,013	37,476	60,167	198,742	248,362	259,610	286,423	305,872	106.79%
New Events	28	18	27	4		22	26	19	22	23	104.55%
Priority 1 Events	5	6	5	2	2	4	6	6	7	7	100.00%
Priority 1 Event days	23	35	26	9	9	17	25	28	30	39	130.00%
New Priority 1 Events	2	1	2	-	-	-	2	2	2	2	100.00%
Priority 2 Events	11	10	11	2	2	9	12	13	12	12	100.00%
Priority 2 Event days	35	36	41	8	8	30	42	48	45	45	100.00%
New Priority 2 Events	3	3	1	-	1	3	6	5	3	4	133.33%
Total Priority 1 & 2 Priority Events	16	16	16	4	4	13	18	19	19	19	100.00%
Hotel Room Overflow: Beyond HQ Hotel	17	21	17	4	2	8	18	19	19	19	100.00%

Lancaster County Convention Center has operated by Aimbridge Hospitality since day 1

Josh Nowak, General Manager
 Jason Gabany, Director of Sales & Marketing
 Jacyn Thompson, Director of Convention Sales



10/15/2026

Lancaster County Convention Center 2025 Priority Events

Name of the Event	Hotels
Gold Peak Media Bead Convention	Doubletree Holiday Inn
Reach Cyber School	Holiday Inn
PACHC	Residence Inn
Voice of the Apostles	Holiday Inn Cork Factory Lancaster Arts Hotel Residence Inn Double Tree Lancaster Hampton Inn Courtyard
Spanish Eastern Conference	Holiday Inn
Women of God Lifegivers Retreat	Hampton Inn

Not included 10 Dance & Cheer events: attendees are on their own for lodging; each dance & cheer event uses multiple hotels each.

From: Joe Howanski
Sent: Monday, September 14, 2026 12:57 PM
To: Kevin R Molloy
Cc: Xavier Warchol
Subject: Zenkaikon 2025 & 2026



Hi Kevin,

Our internal reporting shows that in 2025 and 2026, Zenkaikon attendees stayed at 20 named lodging properties. We also found 38 additional lodging reports involving Airbnbs and other short-term rentals, unnamed hotels, motels, and bed-and-breakfasts, and one college residence.

The 20 named lodging properties are:

Lancaster Marriott at Penn Square	Holiday Inn Lancaster
Hampton Inn Lancaster	Lancaster Arts Hotel
Dutch Wonderland Inn	The Lancaster Bed & Breakfast
Residence Inn by Marriott Lancaster	Courtyard by Marriott Lancaster
Spark by Hilton Lancaster Dutch Country	Cork Factory Hotel
The Country Inn of Lancaster	Home2 Suites by Hilton Lancaster
Tru by Hilton Lancaster East	Hawthorn Suites by Wyndham Lancaster
Econo Lodge Amish Country	Smoketown Inn
Dutchland Motel	Motel 6 Lancaster
Red Carpet Inn Lancaster	DoubleTree Resort by Hilton Hotel Lancaster

Please let me know if you have any questions!

Thanks,
Joe Howanski
Convention Chair

Join us at Zenkaikon
March 18 - 21, 2027
www.zenkaikon.com
10/15/2026

Commons on Vine - September 2026



Commons On Vine 2026 Stats

(March 1st through December 31, 2026)

47	Events (not including LCCCA Meetings)
97	Event days*

*includes 21 set up/Tear Down/Rehearsal or walkthrough program



116th Association of Fish and Wildlife Agencies Annual Meeting:
**THE POWER OF PARTNERSHIP: HOW FISH HABITAT
PARTNERSHIPS HELP STATES SCALE CONSERVATION SUCCESS**





FYI:
LCCC / Hotel
main Lobby new
furniture plan





Thank you!