



**Visit Loudoun Strategic Plan 2014-2017**



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## Executive Summary

Welcome to the **Visit Loudoun Strategic Plan**, which outlines the strategic direction for the organization for 2014-2017. Visit Loudoun is charged with the integrated management and marketing of the Loudoun visitor experience.

The primary function of Visit Loudoun is **to increase the revenues, employment and taxes generated by tourism** for the county and its stakeholder partners. The primary elements of Visit Loudoun's efforts include visitor services, marketing communications, promotions, tourism related advocacy and economic development.

This plan was developed to respond to **the changing marketplace and addresses both the needs of the visitors as well as stakeholders.**

The following plan outlines the core elements of Visit Loudoun strategic direction in guiding its marketing efforts. **The plan is inclusive** as it is based on stakeholder participation. **It is also results focused** as it is intent on increasing the overall competitiveness of the destination.

*Visit Loudoun*



## Project Overview

The Loudoun County Convention and Visitors Association (Visit Loudoun) is charged with generating economic benefits for Loudoun County and its jurisdictions through marketing Loudoun as a visitor destination.

To that end Visit Loudoun facilitated a two-day strategic planning session for its stakeholders, board of directors and senior staff (a list of attendees can be found in the Appendix) for the purpose of reviewing and revising its three-year strategic plan. This plan serves as a blueprint for the organization to achieve specific goals related to board governance, tourism infrastructure, public awareness and other issues.

### Planning Session Goal

Develop a vision and strategic direction for Visit Loudoun.

### Planning Session Objectives

1. To provide an opportunity for both board members, staff and stakeholders **to develop a mutual vision and strategic direction that will effectively guide the organization** and the tourism community over the next three years.
2. **To create an opportunity to define both short and long term directions and strategies** as well as identify potential challenges.
3. To assist participants in understanding a range of organizational perspectives and **to determine a common one.**

## Methodology

The methodology included a three phase process identified below:

### Phase 1 – Information Collection

This phase included a review of relevant material provided by Visit Loudoun pertinent to the organization and the market. A list of reviewed documents can be found in the Appendix of this report.

Additionally MSG interviewed the Executive director regarding key issues facing the destination and the organization.

### Phase 2 – Strategic Planning Facilitation

SMG facilitate a two day strategic planning session that included the following:

**Stakeholder Groups** –SMG met with a cross section of stakeholder groups that represented the following areas:

- Attractions
- Sports
- Weddings
- Accommodations
- Wineries

**Board of Directors** – SMG met with the Board of Directors

**Senior Staff** – SMG met with the Visit Loudoun senior staff

**Phase 3 – Information review, analysis and plan development**

SMG then reviewed and analyzed the collected information from the first two phases, and based on the information developed the following Strategic Plan.

**Strategic Planning Agenda Summary**

**Part 1** - Understanding the Situation: Stakeholder Input

**Part 2** - Visit Loudoun Board of Directors: The Big Picture

**Part 3** - Visit Loudoun Senior Staff: Implementation, Integration and Making it Work



## Loudoun County – An Overview

**Loudoun County** is located in the United States Commonwealth of Virginia, and is part of the Washington Metropolitan Area.

Loudoun County has a storied history. It was established in 1757. By the time the American Revolution started, it was the most populated county in Virginia.

Loudoun County is approximately 520 square miles, and is located between the Potomac River and the Blue Ridge Mountains. Its geography, soil conditions and temperate climate have resulted in it becoming a leading Virginia wine producing area. As a result, it's considered Washington D.C.'s Wine Country

Loudoun County currently provides approximately 5,700 lodging rooms and offers visitors a variety of experiences including wine tasting, youth sports, history, culture and special events.

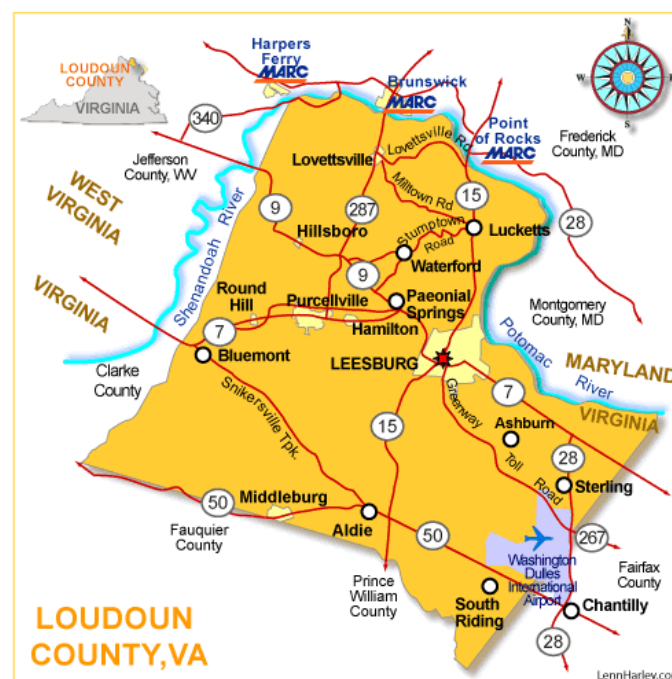
The area has excellent year round access via Dulles International Airport and all weather highways. Looking ahead the areas is poised for some exciting changes:

- Epicurience Virginia- a three year commitment to feature the wine and culinary assets of Loudoun County.
- Salamander resort- A major new resort opening scheduled for 2013.
- Loudoun One Development- exciting new entertainment area with Alamo Drafthouse movie theatre, Loudoun Hounds ballpark, restaurants and other amenities.

- Metro Silver Line to Dulles and two stops into Loudoun County to be completed (2017-18).
- Loudoun County rural economic business strategy

The **Loudoun Convention & Visitors Association (Visit Loudoun)** is the destination management organization for Loudoun County and its incorporated towns. The primary mission of Visit Loudoun is **to develop and implement comprehensive destination management programs designed to increase revenues, employment and taxes for the County.**

### Area Map



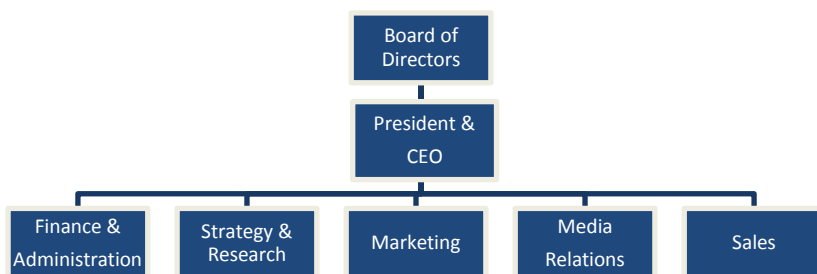
## The Organization

### Structure

Visit Loudoun is the destination marketing organization (DMO) for Loudoun County and its incorporated towns. The organization is charged with developing and implementing a comprehensive destination marketing program designed to attract visitors to the region who in turn generate economic, employment taxes for the region.

The organization, managed by a diverse board of directors, employs a professional staff that designs and implements marketing programs. The organization leads the Loudoun County tourism industry **by working together as a destination to generate visitor spending.**

#### Visit Loudoun Organizational Structure



The organization is also supported by a number of community based advisory groups including the following:

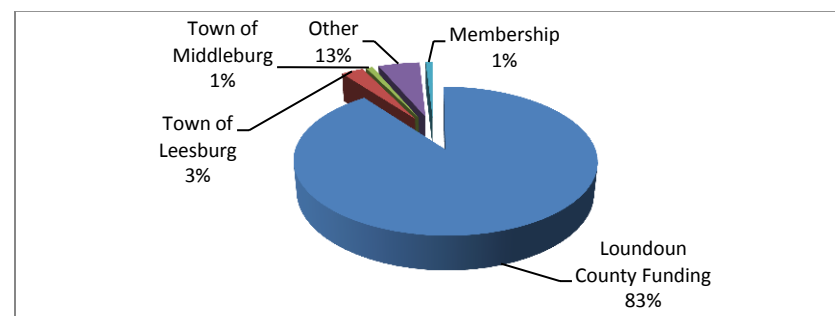
- Destination Development Committee
- Sales and Marketing Committee
- Annual Meeting/Awards Committee
- Marketing Leverage Funds Committee
- Sports and Events Committee
- Loudoun Destination Foundation

These advisory committees, combined with the professional staff and the board of directors, provide leadership for the tourism industry.

### Funding

Visit Loudoun is \$2.9 million funded by several different sources with the majority of funding from Loudoun County.

**Figure 1: Loudoun County Funding Sources**



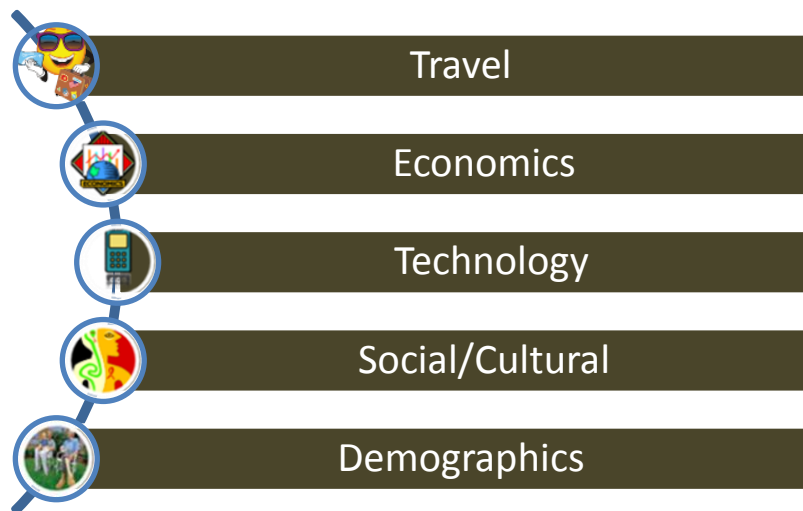
Source: Visit Loudoun

## Part 1: Key Trends

There can be no doubt that Loudoun County, like every tourism destination, does not operate in a vacuum, but rather is subject to a variety of market influences, including **travel, economics, technology, social/cultural and demographics**. As such, it is important to understand the changing environment in which the organization is operating.

Significant changes are occurring in the marketplace that impact tourism destinations like Loudoun County, which Visit Loudoun has responded to with new programs and efforts. These shifts are primarily the result of a dramatically changed economic environment, though there are also changes in demographics, travel, socio-cultural and consumer value trends that tourism decision makers should be aware of. For the purposes of background and context, the following is a summary of the key tourism, economic and demographic trends that will help to provide a comprehensive context for the development of the Loudoun County strategic direction.

### Key Macro Trends Impacting Loudoun County

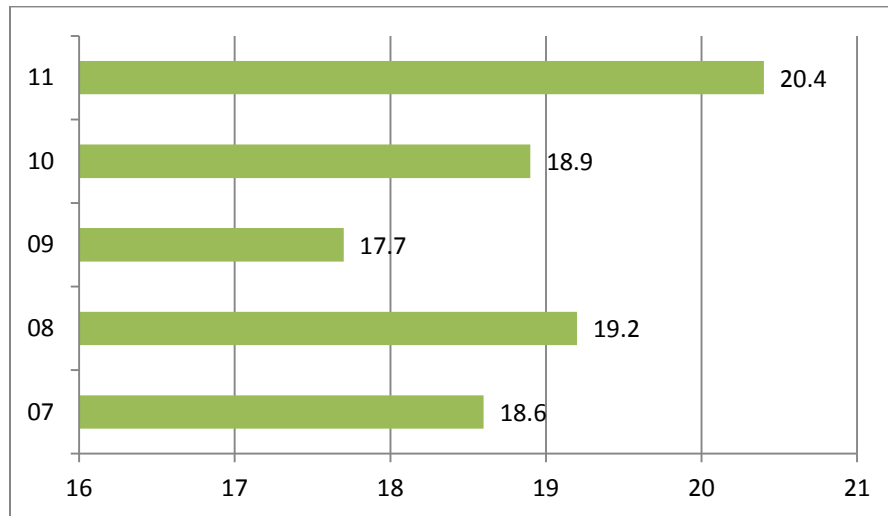




### A. Virginia Travel Trends

Each year, Virginia residents and visitors travel within the state to experience its variety of attractions, history, scenic beauty and local culture. According to the most recently released data by the Virginia Tourism Corporation, **the state generated over \$20 billion in direct travel spending in 2011**, a first, translating into a 8% increase over the preceding year.

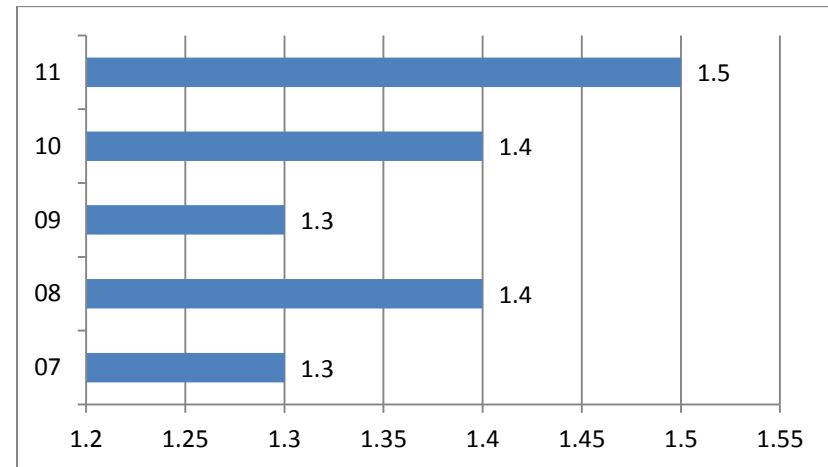
Figure 2: Virginia Travel Spending 2007-2011 (\$ Billions)



Source: Virginia Tourism Corporation

For perspective, Loudoun County generated approximately **\$1.5 billion in travel spending during 2011**.

Figure 3: Loudoun County Travel Spending 2007-2011 (\$ Billions)



Source: Virginia Tourism Corporation

This overall travel spending helps to generate both employment and tax receipts within the county.

Table 1: Loudoun County Employment and Tax

	2007	2008	2009	2010	2011
Employment	15,870	16,184	15,529	15,581	15,789
Local Tax	\$22,371	\$23,629	\$21,952	\$22,894	\$23,337

Source: Virginia Tourism Corporation Travel Economic Impacts 2011

## B. Economic Trends – Improving

As can be seen in Table 2 below, recession is giving way to an improved economic picture. National economic indicators are **showing signs of improvement.**

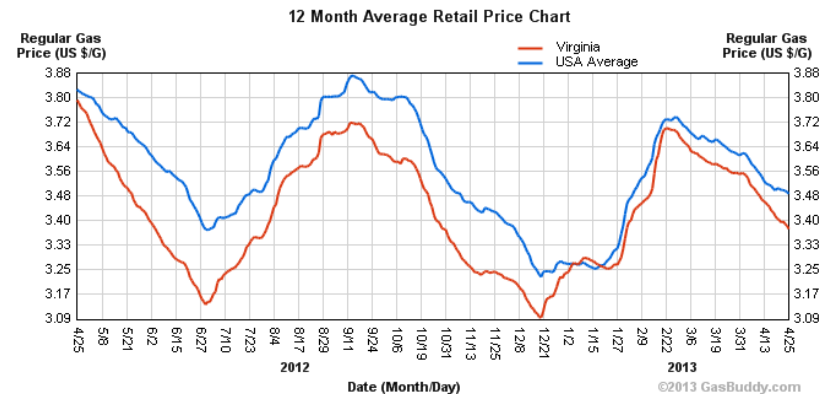
**Table 2: Key U.S. Economic Indicators**

	2013	2014
U.S. Gross Domestic Product	2.4	3.4
Unemployment U.S.	7.9	7.3
Personal Income Growth U.S.	4.2	5.0
Consumer Price Index US	2.0	2.1

Source: Department of Commerce

One important economic issue that has been an ongoing concern is the price of fuel **which can impact the travel decisions of price sensitive consumers.** The price of gas in Virginia has trended below the U.S. average. The favorable gas prices combined with Loudoun County's air access through Dulles International Airport provide visitors with excellent access to the destination.

**Figure 4: Gas Prices**



Source: Gas Buddy.com



### C. Social and Cultural Trends – Consumers Keep Changing

In addition to the changing economic and demographic situation (which will be addressed in an upcoming section), several social trends are also impacting travel and tourism throughout the country, as identified by the Travel Industry Association. Below are the primary trends having the most significant strategic impact on tourism to Loudoun County.

#### Changing Consumer Tastes

- **Consumers as destination brand ambassadors**

Social media + mobile technology = empowered visitors.

Visitors are now brand ambassadors for destinations.

Constant updates about the experience (both good and bad), along with posted photographs can make the

**consumer an ever more important promoter and potential influencer of a destination.**

- **Outdoor recreation**

According to the recently published Outdoor Recreation Economy Report, **outdoor recreation spending is approximately \$646 billion in the United States and generates 6.1 million American jobs.** Of that \$646 billion fully \$524 billion was spent on trips and travel related spending.<sup>1</sup>

- **Health and wellness**

Consumers are increasingly integrating health and wellness into their lifestyles and in so doing look for destinations that enhance those opportunities through wellness vacations and wellness travel. A **wellness vacation** is about being proactive in discovering new ways to promote a healthier, less stressful lifestyle. **Wellness Travel** is the pause that reenergizes and rejuvenates each traveler. The **wellness vacation** is considered an occasional break for the body, mind and soul.

- **Purpose driven travel**

As consumers continually see vacation time reduced, there is a heightened need for purpose driven travel e.g. a specific special event, hiking a specific a specific location, etc. These trips are also driven by consumers who self- identify with a particular event or activity. For example, certain consumers may see themselves as foodies, wine aficionados, or are avid cyclists or golfers. **As such, the ability to reach and communicate with niches based on activities is increasingly important for a destination.**

- **Culinary tourism**

Many consumers today are looking for expanded culinary experiences while on vacation. In interacting with the local food, Loudoun County visitors are dipping into the area's agricultural history.

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<sup>1</sup> The Outdoor Recreation Economy Report, Outdoor Industry Association, [http://www.outdoorindustry.org/images/researchfiles/OIA\\_OutdoorRecEconomyReport2012.pdf](http://www.outdoorindustry.org/images/researchfiles/OIA_OutdoorRecEconomyReport2012.pdf)

- **Cultural tourism**

Cultural offerings and experiences continue to provide destination visitors with an opportunity to access the authenticity of a destination through such offerings as art, entertainment, architecture, history, events and food.

**Those experiences available in Loudoun County provide visitors with an excellent opportunity to understand the cultural interests of the area.**

- **Environmental issues remain a priority**

Environmental issues continue to play an important role in the selection of a destination as well as the selection of activities while on vacation. **Those destinations like Santa Barbara that place a strong emphasis on the environment will have a competitive advantage over those that do not.**

- **Despite increases in travel – value still prevails**

There can be no doubt about the shift in the marketplace towards value, and this trend continues throughout all aspects of the industry. As such it is critical for Loudoun County **to effectively communicate the value it offers.**

## Marketing and Communications

- **Traveler flexibility and control – research everything**

With the continued growth of online and mobile resources, **consumers looking for flexibility and control of their vacation decisions have the ability to research everything**

and often do it not only in pre-trip planning but once a trip is underway.

- **Social media more important as travelers resist more formal marketing.**

As consumers continue to resist traditional marketing efforts they are **relying more and more on social media to research destinations and activities.** As such Visit Loudoun needs to ensure it provides updated content and information to meet those needs.

- **Greater degree of personalization**

Facilitated by increased data mining capabilities, marketing efforts will lead to much more customization for each consumer. Traditional demographic segmentation and targeting will no longer be enough as cutting edge DMOs will focus more and more on **customized targeting and offers.**

## Changing Planning/Booking Trends

- **Shorter booking windows (with lots of shopping around)**

Another continuing trend that can present a challenge to the lodging industry is consumers' short term booking window. As lodging properties have experienced the booking window has decreased significantly. This trend has broad implications for the tourism industry. **A shorter booking window makes it more difficult to gauge future**



**demand and plan accordingly.**<sup>2</sup> Potential may exist in converting day visitors to overnight visitors with appropriate incentives. Additionally, research by the Cornell School of Hotel Administration reveals that consumers do extensive shopping, with over half looking at an average of fifteen different sites before booking<sup>3</sup>.

- **Time poverty/hectic lives = shorter trips**

Time continues to be the new currency due to the hectic nature of consumers' lives, and the impact is seen on vacation and travel. As has been written many times, **vacation trips have become significantly shorter in duration.** Additionally, consumers are looking for hassle-free vacations, placing greater importance on methods of booking and travel to and from destinations.



<sup>2</sup> Vizergy Blog, "Google's Latest Research", <http://ht.ly/auAwq>

<sup>3</sup> Skift.com, Nov 15, 2012, "Who looks at 150 sites before booking a hotel? About 5 percent of travelers, study says" <http://skift.com/2012/11/15/five-percent-of-travelers-will-search-over-150-sites-before-booking-a-hotel-says-study/>

## D. Technology Trends

Table 3 below summarizes key technology trends and their implications.

**Table 3: Technology Trends**

### 1. Fragmentation – Digital users are everywhere, but hard to pin down exactly where

- Consumers are accessing the web through a variety of devices (mobile, tablet, desktop) and operating systems (iOS, Android, etc)<sup>4</sup>
- Along with mobile app and mobile web, this makes it more challenging to identify target audience behavior.
- Multi-screen multitasking (think using a smart phone while watching TV) is no longer unusual consumer behavior.

**Implication – Identifying where a target audience spends time is not as simple as it used to be. Destinations need to recognize consumers as individuals...or “micro-audiences”.**

### 2. It’s all about mobile

- Time spent on the mobile web is growing at 14 times the rate of desktop internet usage<sup>5</sup>.
- Mobile internet now trumps ‘regular’ internet.

**Implication – A mobile marketing strategy is no longer optional for destinations.**

### 3. Content marketing is king

- Marketers are now publishers, using content to drive a variety of interactions throughout (and beyond) the AIDA (Awareness, Interest, Desire, Action) funnel.<sup>6</sup>
- Content includes paid, earned and owned content, as well as images, video and words.

**Implication – It is absolutely critical to have a content marketing strategy to effectively reach passion based target segments.**

### 4. Social driven engagement drives preferences

- User reviews are a key influence in consumer decision making (71% of people say reviews from family members or friends influence purchase decisions)<sup>7</sup>. Look for continued increase and applications in use from many social marketing sources.
- Social influences consumer decisions, as users are exposed to the thoughts, opinions and recommendations of friends, families and influencers – a group of people that is growing wider through social media.<sup>8</sup>
- 47% of social media users engaged in customer service via these channels.<sup>9</sup>

**Implication – Online reputation management and social media monitoring are long term critical elements for tourism.**

### 5. Big Data isn’t just jargon

- Huge amounts of data are now generated with every interaction on every digital platform. This presents a real opportunity for destinations...if harnessed effectively.

**Implication – Destinations should seek to improve how they collect and use customer information to provide a better experience for potential visitors before, during and after their visit.**

<sup>4</sup> eMarketer, Key Digital Trends for 2013,

<http://www.emarketer.com/Webinar.aspx?R=4000061>

<sup>5</sup> Ibid

<sup>6</sup> Ibid

<sup>7</sup> Harris Interactive 2010

<sup>8</sup> Nielsen Social Media Report 2012 <http://blog.nielsen.com/nielsenwire/social/2012/>

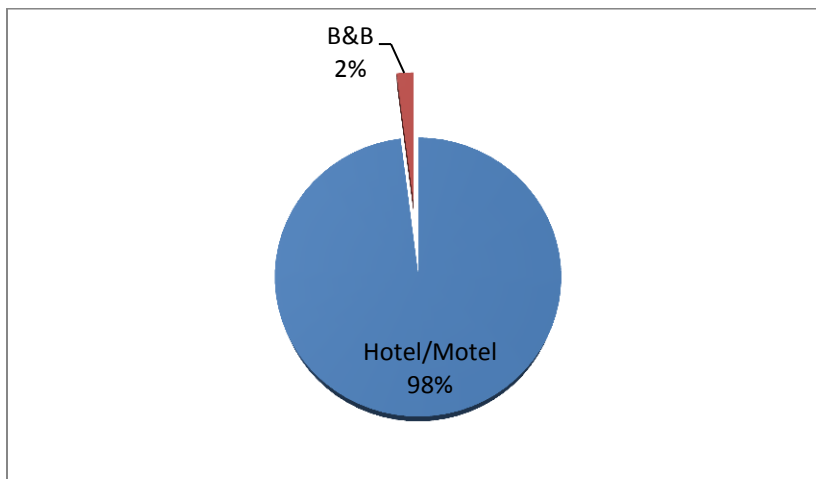
<sup>9</sup> Ibid

## Part 2: The Marketplace

### A. Lodging

The Loudoun County marketplace includes 5,558 lodging rooms with 5,425 being hotel/motel properties and 133 bed and breakfast properties.<sup>10</sup>

Figure 5: Lodging Mix

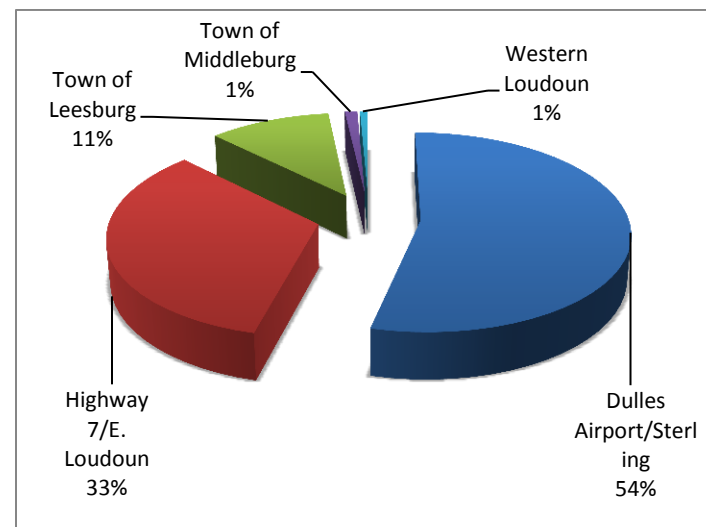


Geographically the highest concentration of lodging units can be found in the Dulles/Sterling area (54%) followed by the Highway 7/E. Loudoun area with 33%.<sup>11</sup>

<sup>10</sup> Visit Loudoun Lodging Analysis

<sup>11</sup> Ibid

Figure 6: Lodging Inventory



Within the hotel segment approximately 26% are full service hotels with meeting space, and 76% are limited and select service hotel/motels.<sup>12</sup>

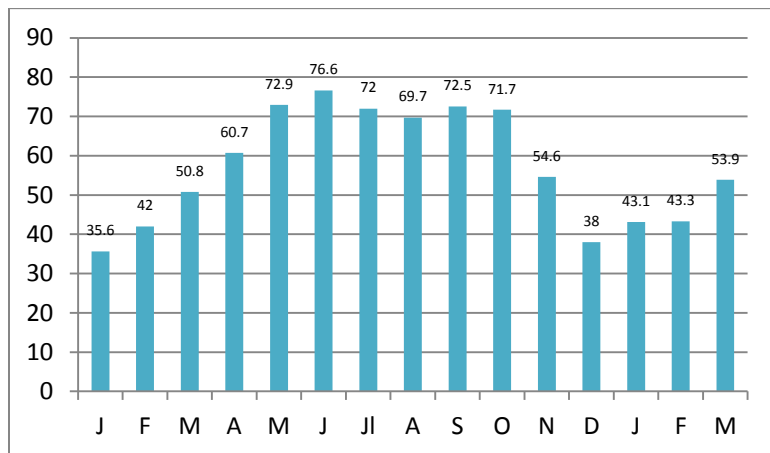
Table 4: Full Service vs. Limited Service

Lodging Type	# of rooms	Percent
Full Service	1,412	26%
Limited and select service	4,103	76%

<sup>12</sup> Visit Loudoun Lodging Analysis

In terms of performance, the Loudoun marketplace experiences a distinct seasonality with the strongest seasons being April through October.<sup>13</sup>

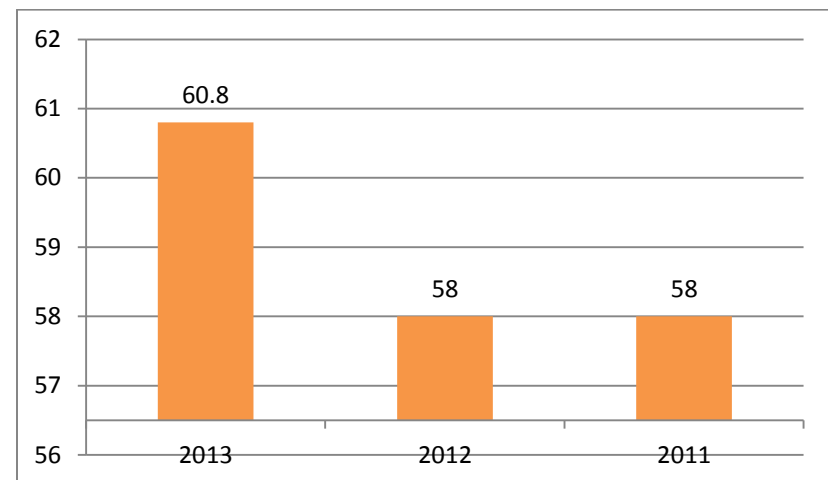
Figure 7: Lodging Seasonality



Source: Smith Travel

Overall demand for Loudoun County has improved. **The running twelve month occupancy rate has increased to 60.8% from 58% over the past two years.**<sup>14</sup>

Figure 8: Lodging Occupancy Trend



Source: Smith Travel

<sup>13</sup> Smith Travel

<sup>14</sup> Ibid



## B. Loudoun County's Product Experience

Loudoun County's prime geographic location and natural surroundings create a highly desirable visitor destination that offers a wide variety of attractions including a growing wine country, youth sports, a unique location for weddings, heritage farmers and farmer's markets, recreation and more. In addition to these primary revenue generators, Loudoun County also promotes a collection of year-round events that celebrate its perfect blend of charm, natural beauty and cultural excitement.

In order to understand the appeal of Loudoun County, following is an overview of its primary tourism assets and revenue generators.

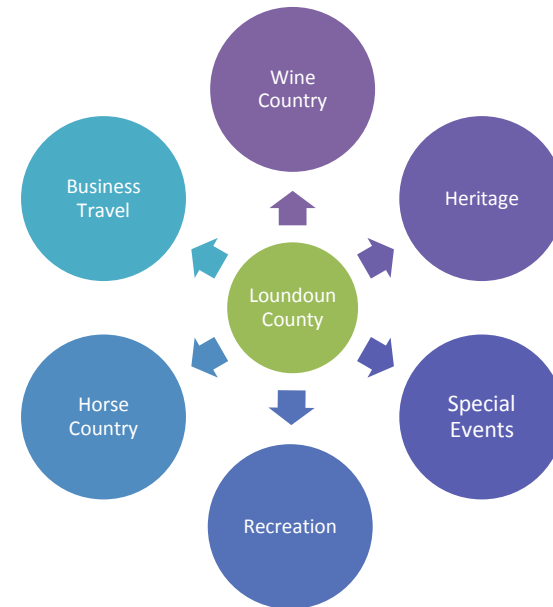
**Table 5: Loudoun County Experiences**

Wine/Beer	Farms and Farmers Markets	Towns/Villages
Wineries	Grandale Restaurant	Towns
Winery events	Great County Farms	Villages
Beer	Patowmack Farm	Communities
	Layng's Flower Farm	
Heritage	Recreation	Special Events
Museums	Golf	Wine
Horse country	Trails	Cultural
Palm Plaza	Municipal facilities	Family
Parks	Paintball	Special interest
Tours	Rock climbing	Weddings
Sites	Ice skating	
Monuments	Appalachian Trail	

## C. Primary Tourism Assets/Revenue Generators

From another perspective it is important to understand the overall regional demand drivers, namely those assets which actually drive overnight consumer demand and visitation to the area. These demand generators include natural assets like the wine country experience; special events that attract visitors and appeal to their interests; and specific 'niche' activities that visitors engage in, ranging from golf to hiking and paintball.

**Figure 9: Regional Demand Drivers**



### 1. Loudoun County Wine Country

Area wineries have helped to put the region on the map as a major wine destination. In fact, Loudoun County promotes itself as Washington D.C.'s Wine Country. Loudoun County vineyards are well known for producing varietals, blends and dessert wines.

### 2. Horse Country

One of the key attributes of Loudoun County is its horse country location that creates a unique ambiance and feel to the region.

### 3. Heritage/Culture

Loudoun County is rich in area history, be its old towns and villages, museums, or historic locations and tours. All offer a peek into a large part of the county's history.

Additionally, the area offers a variety of cultural activities everything from entertainment to festivals to shows and exhibits.

### 4. Recreation

Loudoun County's beautiful landscape and facilities make it an ideal location for youth sand individual sports, which include the following:

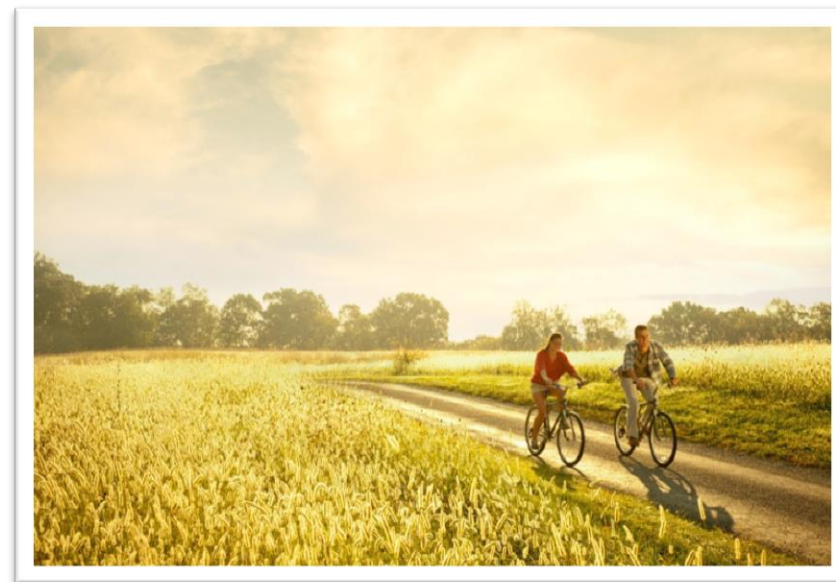
- Youth sports facilities
- Golf
- Trails
- Ice skating
- Rock climbing
- Additional

### 6. Special Events

Loudoun County has an eclectic mix of year-round special events that are used to promote its arts and culture and primary tourism assets. The development of additional signature special events and improved coordination of existing events offer the area a means in which to attract a broader market.

### 7. Business Travel

Loudoun County's great proximity combined with the Fortune 500 companies located in the county, the government contractors with the resulting meetings position the county well for business travel.



## Part 3: Destination Strengths, Weaknesses, Opportunities & Threats

Loudoun County has a range of strengths, weakness, opportunities and threats which are summarized below.

### Destination Strengths

- **Destination Related** – Multi-activity destination, engaged community, location/proximity to population markets, urban/rural ambiance, D.C. wine brand. It's the fastest growing county in the U.S.
- **Funding Related** – Five years funding agreement.
- **Strategic Alliance Related** – Relationship with Virginia Tourism Corporation.

### Destination Weaknesses

- **Infrastructure Related** – Convention, sports facilities, public transportation.
- **Location Related** – Hotels located in east county and wineries location in west county, sprawl-connection to bedroom communities.
- **Experience Related** – Hot humid summers, slushy no snow winters. Lack of major anchor kids activities.
- **Community Related** – Work force related issues, lack of understanding about the value of tourism, bedroom

community to Washington D.C, limited local education about tourism.

- **Marketing Related** – Currently Loudoun is multi-dimension and need to move to iconic positioning.

### Destination Opportunities

- **Natural Resources Related** – Potential opportunity with the Potomac River as a natural asset + related activities.
- **Cultural Related** – Non-chain retail (authenticity), cultural activities, farm to fork dining.
- **Infrastructure Related** – Metro Line for Loudoun County, Dulles airport as an access point, emerging brewery segment.
- **Tourism Assets Related** – Adventure tourism, cultural, historic and natural resources, regional cross-promotion opportunity.

### Destination Threats

- **Economic Related** – National and state related economic performance, federal budget reductions impact travel to the region.
- **Competition Related** – Other competitive areas. Higher T.O.T than Maryland, gambling at National Harbor, cheaper flights in BWI/Reagan. Other wine regions within the regional market.
- **Product/Experience Related** – Congestion/traffic, potential loss of rural farm land which would undermine the rural ambiance.
- **Regulatory**- Statewide T.O.T. increase could impact promotional revenues.

## Loudoun County SWOT

<p><b>WEAKNESSES</b></p> <ul style="list-style-type: none"> <li>• Lack of convention space</li> <li>• Lack of indoor sports facility</li> <li>• Lack of public transportation</li> <li>• Geographic location of hotels (East) with wineries/small towns (West)</li> <li>• Education in backyard – local cable show</li> <li>• “Loudoun” is a challenge</li> <li>• Multidimensional → Move to iconic positioning</li> <li>• Awareness and definition of destination</li> <li>• Depend on government/federal room nights</li> <li>• Work force is an issue → transportation from the western part of the county</li> <li>• Sprawl – connection to bedroom communities</li> <li>• Major anchor children/kids’ activities</li> <li>• Year round destination (November – March?)</li> <li>• Hot and humid summer</li> <li>• Slushy winter</li> <li>• Lack of understanding of the value of tourism</li> <li>• County population - 50% work in DC / 50% work in Loudoun</li> </ul>	<p><b>THREATS</b></p> <ul style="list-style-type: none"> <li>• Economy both national and state level could impact tourism</li> <li>• Competition</li> <li>• Federal budget reductions</li> <li>• BWI / Reagan – cheaper flights in both airports</li> <li>• Loss of rural farm land to development</li> <li>• Congestion</li> <li>• Lack of infrastructure with TOT disadvantage with surrounding counties in Maryland</li> <li>• Gambling at National Harbor</li> <li>• DC – 30 minutes away (during certain time of day and days of the week) – but this is also an opportunity</li> <li>• Retirement – Baby Boomers</li> <li>• Competing wine counties – loss of uniqueness</li> <li>• Statewide T.O.T increase</li> </ul>
<p><b>STRENGTHS</b></p> <ul style="list-style-type: none"> <li>• Multi-activity destination (for adults)</li> <li>• Engaged community</li> <li>• County MOU for funding Visit Loudoun (5 years)</li> <li>• Location/proximity to DC</li> <li>• Established brand – DC’s Wine Country®</li> <li>• New relationship with Virginia Tourism Corporation</li> <li>• Growth/population – new development</li> <li>• Urban/rural</li> <li>• Wealthiest county in US</li> <li>• Fastest growing county in US – goes back and forth with Fairfax (neighboring county)</li> </ul>	<p><b>OPPORTUNITIES</b></p> <ul style="list-style-type: none"> <li>• Potomac River</li> <li>• Build B&amp;Bs and small inn business (specific to Town of Leesburg)</li> <li>• Mom &amp; Pop retail – non-chain</li> <li>• Growing breweries</li> <li>• Cross promotion – focused on specifics</li> <li>• Regional collaboration – Capitol Region USA (international) Northern Virginia Visitor Association (Canada and domestic)</li> <li>• Natural Resources</li> <li>• Historic resources</li> <li>• Cultural Resources</li> <li>• Adventure Tourism <ul style="list-style-type: none"> <li>○ Extreme Sports</li> <li>○ Motorcycle</li> <li>○ Rolling Thunder</li> </ul> </li> <li>• Metro Line coming to Loudoun in 2017/2018</li> <li>• Farm to Fork – what can we do better than everyone else?</li> </ul>



Clearly there are a variety of strategic and tactical opportunities available for Loudoun County. However the board and staff have identified a number of potential obstacles that must be effectively managed for increased success of the destination.

### Obstacles/Limitations

- **Increased tourism funding** – As tourism has become an increasing popular economic development strategy both regionally and nationally it will be ever more important to increase sources of funding to remain competitive.
- **Understating of tourism at the community |government| industry levels** – Key is to effectively educate the local community about the role tourism plays within the county as part of an integrated strategy to provide lifestyle and economic benefits.
- State and local regulations and zoning
- Workforce status
  - Career for some entry level positions
- Cutting through the clutter
- Hard to create a powerful narrative without numbers
- Access – limited ways to connect on surface roads (dirt/gravel/paved)
- Transportation within the County



## Part 4: Vision & Mission

### The Visit Loudoun Vision

Visit Loudoun's vision for tourism in Loudoun County is **to be a must visit destination supported by the community that recognizes the economic and quality of life benefits that come from sharing its home with visitors.** Loudoun seeks to be the preferred East Coast wine experience.

### The Visit Loudoun Mission

The mission of Visit Loudoun is **to generate economic benefits for Loudoun County (revenue, employment and tax receipts) and its jurisdictions through marketing Loudoun as a visitor destination.**

### The Visit Loudoun Brand Promise

Visit Loudoun's brand promise to visitors, constituents and county:

- ❖ Create programs that **sustain the balanced community in both the east and west parts** of the county while maintaining the unique urban and rural assets of the county.
- ❖ **Be research based, thought leading and innovative** in promotions strategies and programs.
- ❖ Define the wine country experience in a way **that is inclusive of all of Loudoun County assets** (ex. equestrian, rural, heritage).
- ❖ Engage all constituencies in an effort **to continually solicit new ideas.**
- ❖ Leverage specific media in an effort **to extend the value of our funding.**
- ❖ **Exceed expectation** through the customer service the organization provides.
- ❖ **Deliver exceptional and high value education** and training programs.
- ❖ Be recognized by our industry peers **by maintaining accreditation through the Destination Marketing Association International (DMAI).**

## Part 5: Visit Loudoun Services

The following are Visit Loudoun's core services:

- Operate a **State Certified Visitor Information Center**.
- Provide ongoing **community relations**.
- **Represent the tourism industry** to policy makers and stakeholders.
- Provide **referral services** to assist other agencies and organizations with tourism related issues.
- **Participate in economic development functions** as they relate to tourism industry development products and services.
- **Recommend funding** for tourism programs.
- **Represent Loudoun County** and its incorporated towns in national, regional statewide tourism initiatives that benefit the area.
- **Implement a destination marketing** program designed to provide a sustainable economic return for invested funds



## Part 6: Organizational Goals

The Visit Loudoun County board reaffirmed the following organizational goals **to guide the strategic planning efforts**. Every year, a one year marketing action plan with program budgets including goals, objectives, programs and measurements will be developed and implemented. The following goals were included:

1. **Communication** – To use a variety of communication tools to engage target segments to effectively deliver the brand promise.
2. **Sales and Market Promotions** – To use an innovative sales approach to generate maximum visitor spending.
3. **Visitor Services** – To serve as the official resource for visitors to enhance their experience, increase spending and create destination ambassadors.
4. **Education and Training** – To foster a culture of continual learning and promote destination support and prosperity.
5. **Product Development** – To be a leader in Loudoun's tourism product development.
6. **Organizational Excellence** – To ensure Visit Loudoun's culture, infrastructure, financial and staffing resources contribute to the organization's success.



## Part 7: Visit Loudoun Strategic Direction

Interviews, reviews of information, stakeholder and board of director input has identified the following core strategic direction elements.

- **Communication and outreach**
- **Tourism product development**
- **Destination sales and marketing promotion**
- **Research, planning and measurement**
- **Industry education and training**
- **Visit Loudoun organizational excellence**
- **Strategic alliances**

The successful implementation of these strategic direction elements will provide Visit Loudoun with a sustainable direction that will allow the region to be as competitive as possible in an effort to increase travel spending, employment and generate location tax revenues for the County and its stakeholders.



## Communication and Outreach

Tourism is a key part of Loudoun County's economic profile. As such everyone is a stakeholder, including local residents, private businesses, government agencies as well as visitors. To ensure long term success all stakeholders need to continually feel their issues and perspectives are understood and that each understands the issues of other stakeholders.

### Key Opportunity

Creating and maintaining positive stakeholder attitudes are critical to the success of Loudoun County and Visit Loudoun's tourism promotion efforts. Currently tourism is perceived as an "other" element within the Loudoun County economic development framework.

Local residents may not have a clear understanding of the benefits of tourism and its economic and sustainable quality of life benefits.

Within the Loudoun County tourism industry communication and outreach it's critical to communicate the benefits and economic impacts of tourism. The challenge often becomes how to do it more effectively given the ongoing contact with the industry.

### Action Steps

1. Develop periodic stakeholder surveys to assess the perception of Visit Loudoun programs and efforts.
2. Develop periodic outreach programs and forums that allow stakeholders to ask questions, voice concerns and make suggestions
3. Provide accurate and consistent information on tourism related issues to all stakeholders through a variety of communication vehicles.
4. Develop and support programs that increase pride and involvement from all stakeholders.
5. Provide support for new and existing activities that are interesting for both residents and visitors that encourage interaction between them.
6. Continually educate policymakers as to the economic and quality of life value that tourism has for Loudoun County.



## Tourism Product Development

The “Tourism Product” includes a number of key components including the physical aspects and emotional elements that combine to provide a unique travel experience.

The physical elements of the tourism product include the natural setting, the infrastructure and super structure of a destination the emotional components of the tourism product includes industry employees, cultural and historical resources and overall destination hospitality. These elements combine to provide an overall tourism experience including everything from events and activities to dining, shopping, etc.

### Key Opportunity

Visit Loudoun has different levels of opportunity to support tourism development within the region. Tourism product development efforts can increase the frequency of visitor trips. It can increase the length of stay as well as attract new segments to the Loudoun County.

With regard to physical product development Visit Loudoun can and should be supportive (where appropriate) of infrastructure that can enhance and improve the local tourism economy. For example, there has been an identified need to support the development of an indoor sports facility to provide sports marketing opportunities to the area. Additionally the minor league ballpark also offers opportunities for tourism development. Where appropriate Visit

Loudoun can and should support these kinds of physical product improvements.

At the same time the emotional components of the destination can continually change and improve. It is the ongoing role of Visit Loudoun to support the tourism product improvements that in the end will provide visitors with a range of experiences that the organization can effectively promote.

### Action Steps

1. Continue to support the development of indoor recreation facilities in an effort to strengthen winter season visitation.
2. Continue to work with the new stadium and its programming in an effort to attract visitors.
3. Continue to support the wine and brewery industries as they develop new product opportunities.
4. Support new recreation programming.
5. Look to develop tourism product experiences that generate ongoing repeat visitors.
6. Continue to support additional full service lodging so as to increase the competitiveness in the group market.
7. Look to develop 3-5 niche opportunities like road biking, motorcycle touring, etc. for potential long-term market development.

## Destination Sales and Marketing Promotion

Destination sales and marketing promotion are at the heart of Visit Loudoun's mission. As such these marketing programs are integral to developing a sustainable tourism economy. Visit Loudoun currently promotes a variety of destination elements including the following:

### Reason for visiting

- Wine tasting and wineries/culinary
- Youth sports
- Special events
- Heritage
- Arts and culture
- Recreation

All of these activities are set within the horse country atmosphere the county offers. In considering target segments it's important to understand Visit Loudoun selects target segments based on those that have the most growth potential as well as expressed need from stakeholders. Target segments including the following:

### Target segments

Primary markets:

1. Leisure – This segment includes visitors from traditional geographic markets including Washington D.C., in-state travel from Virginia, New York, Maryland, New Jersey and Pennsylvania.

The key focus for attracting this segment is wine, brewery, culinary and special events.

2. Sports – This segment is one of the area's strongest group segments, attracting visitors primarily for softball tournaments given Loudoun's forty plus softball fields.
3. Weddings – The wedding segment also is a strong group segment for Loudoun County. The area offers a country feel and ambiance for wedding couples to consider.

Secondary markets:

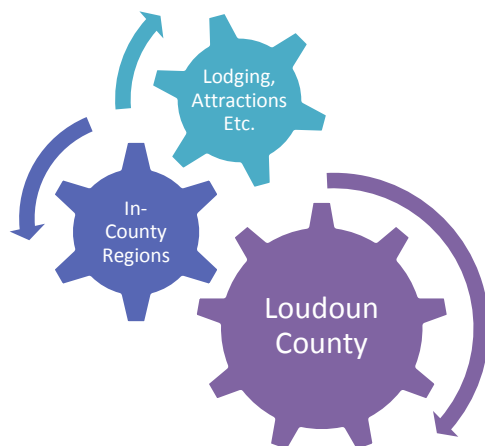
1. Religious – Includes those looking for a retreat-type setting with affordable facilities.
2. Government – Price sensitive segment for meetings, training etc. as an adjunct to area businesses.
3. Corporate – Focused primarily on full services properties.
4. Associations – Association markets targeted to appropriate Loudoun properties.
5. Tour & Travel – Targeting those that don't want to stay in D.C.
6. SMERF – Targeted to appropriate lodging.

## Key Opportunity

There are several key opportunities for Visit Loudoun to consider, including the following:

1. Iconic brand development – Integral to the long term success of Loudoun County is the need to create awareness and interest in the destination through its branding efforts.

These efforts are critical to influencing potential visitors to visit the region. By creating effective branding, consumers will be directed to the website where they can get a fuller picture of what the area has to offer.



2. New market development – Given Loudoun County’s proximate location to Dulles International Airport there is significant opportunity to develop new markets to begin to target key segments from both domestic markets outside of Virginia as well as international markets.
3. Increased technology platform – Given the advances in technology marketing and social media, Visit Loudoun can be a leader in integrating these elements into its marketing and targeting efforts. The capability is there to identify niche segments nationally and provide access through Dulles International Airport.

This approach works well with Visit Loudoun’s electronic way-finding program which uses technology to provide visitor information.

## Action Steps

### Branding

1. Develop an iconic branding to effectively differentiate Loudoun County.
2. Create awareness for Loudoun by effectively positioning the destination as a wine country plus more including all the activities available within the county.

## Markets

1. Broaden Loudoun markets including domestic and international utilizing Dulles International Airport and specific market flights.

## Direct Sales

1. Concentrate direct sales efforts in four key areas including sports, meetings, events and social events (weddings, reunions etc.).
2. Continue to reinforce a strong D.C. connection and encourage pre and post visitation from groups.
3. Identify potential sponsorship opportunities.
4. Integrate the iconic brand into all sales elements.

## Visitor Services

1. Implement a way-finding program to assist in promoting Loudoun County attractions and activities in an effort to extend visitor stays and generate additional revenue.
2. Continually enhance the visitor center in an effort to provide a quality experience and additional length of stay.

## Special Events

1. Work to develop a year-round special events strategy that identifies events for shoulder seasons.
2. Develop a strategy to link events in an effort to create incremental return visits.



## Research, Planning and Measurement

Ongoing destination research, planning and measurement are imperative for the long term competitive advantage of Loudoun County. The ability to be at the front of changing market conditions and communicate those changes to the local tourism industry is key to keeping the Loudoun tourism experience relevant. This information needs to be continually integrated into adaptive marketing plans and strategies.

Likewise the ability to continually improve the organization's measurements and effectiveness over the long term is a necessity, especially to be able to provide specific Return on Investment information to funding organizations.

### Key Opportunity

To provide ongoing information for Visit Loudoun market planning, to provide information for change to the tourism community and to develop state of the art measurement systems to complement specific program measurements.

### Action Steps

1. Continue to implement a strategic approach to research, planning and measurement, always refining marketing efforts.
2. Develop a macro level measurement approach to Visit Loudoun County's programs that will generate a Return on Investment analysis.
3. Continually refine program level measurements to provide as much insight as possible for refining marketing programs.
4. Develop an ongoing rotation of marketing research that includes visitor profile information and out of market perceptions of Loudoun County.
5. Develop a comprehensive system to disperse research in a tailored and targeted way to different constituent groups.

## Industry Education and Training

New technology, including social media applications, are constantly changing and Visit Loudoun can play an important role educating and training the local tourism industry in order to improve coordination and effectiveness with the organization's programs.

### Key Opportunity

To improve the quality of marketing, product development and customer services offered by the Loudoun County Tourism industry.

### Action Steps

1. Maintain education and training standards including regular scheduled, accessible, accessible and affordable educational programming that fits the needs of the local tourism industry.
2. Continually evaluate educational delivery mechanisms including traditional seminar, video etc.
3. Increase training in technology marketing so as to improve the overall competitiveness of the destination. Ongoing topics could include but are not limited to:
  - Tourism product distribution
  - Social marketing
  - TripAdvisor and Yelp strategy
  - Trends in technology marketing
  - Customer service
  - Revenue management
4. Schedule ongoing face to face meetings with Visit Loudoun staff at appropriate meetings.
5. Develop specific training for non-profits (museums, special events, etc.) on how to integrate into the Loudoun County tourism industry.
6. Develop and maintain a Visit Loudoun tool kit to assist in industry training.



## Visit Loudoun Organizational Excellence

The organization needs to continue to strive for organizational excellence setting an example for tourism promotion within the region.

### Key Opportunity

Provide transparent highest standard of operations to instill funding partner and tourism industry confidence.

### Action Steps

1. Continue to integrate best practices throughout the organization.
2. Sustain accreditation to DMAI.
3. Continue to maintain dashboard metrics
4. Be transparent in dealing with all stakeholders.
5. Continue staff development including training, cross training project management and leadership training.
6. Review and maintain all Human Resource policies to match Visit Loudoun culture and legal obligations.
7. Continue to reinforce the value of innovation among the staff.
8. Review outside non-tourism organizations to understand “how they do it”.
9. Periodically visit other destinations to review methods and practices.
10. Expose the staff to key educational elements that support an innovative culture.

## Strategic Alliances

Visit Loudoun continues to build and develop its strategic alliances within the industry. These alliances include those within the region as well as those outside the region.

### Key Opportunity

Key opportunity exists in further leveraging Visit Loudoun's human and financial resources to either gain further reach or improved efficiencies with marketing programs.



### Action Steps

1. Continue to work with key strategic alliances within the tourism industry.
2. Proactively work with other regional tourism destinations to help in implement Visit Loudoun domestic and international marketing programs.
3. Identify potential areas to share costs in an effort to improve efficiencies (ex: joint research, special event strategies, etc.)

## Part 8: Success Factors

The following are key factors for success. They are critical for Visit Loudoun to achieve its strategic direction and further enhance the success of the destination.

### Success Factors:

- **Continue to Work Together**

Loudoun County is a destination that works well together. The bureau has fostered a can do spirit and continues to take on challenging issues. As organizations age this spirit of cooperation can erode if not managed. As such, it's important for the board and staff to continue their approach to work and support the goals of the organization.

- **Act like you belong | move the destination to the next level.**

The growth of Loudoun County as a complete destination has evolved over time as such it is important to envision moving the destination to the next level one that attract both domestic and international destination visitors.

To that end it is important for Visit Loudoun to work to continue to develop the County as complete destination that motivates consumers to visit. The strategic plan and the direction of the board point the way to this success. Loudoun County has emerged as an important player in the wine tourism market, but the effort needs to continue.

- **Political Support**

Visit Loudoun needs to continue to maintain political support for the organization and for tourism as a driver of the local economy. In order to take the destination to the next level it will require continued political support at both the City and County level.

- **Community**

Critical to the destination's success is the continuation of efforts to educate and involve the community in tourism. It is important that the local community understand the importance of tourism in Loudoun County and the industry's role in generating employment and local tax revenue.

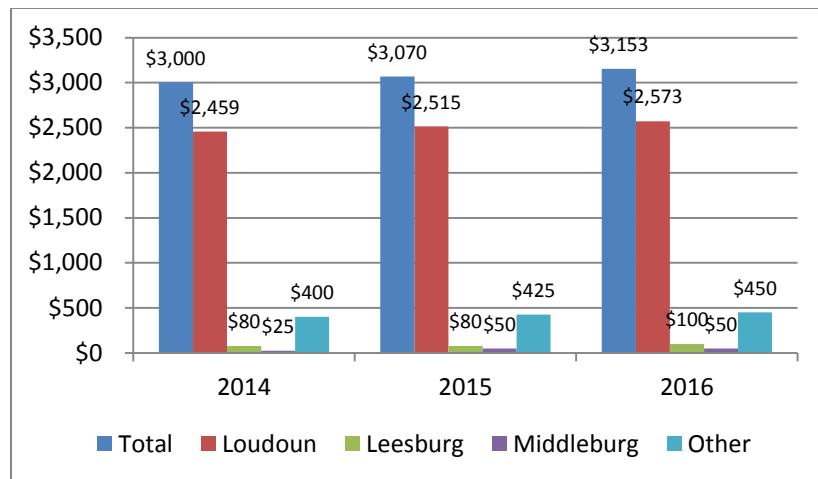
- **Culture of Innovation**

Visit Loudoun must continue to innovate and change to meet the changing dynamics of the industry in order to continually increase the destination competitiveness.

## Part 9: Projected Budget

In an effort to implement the strategic plan and its elements in an effort to make Loudoun County as competitive as possible, Visit Loudoun has developed the following budget projections.

**Figure 10: Visit Loudoun Budget Projection 2014-2016 (000's)**

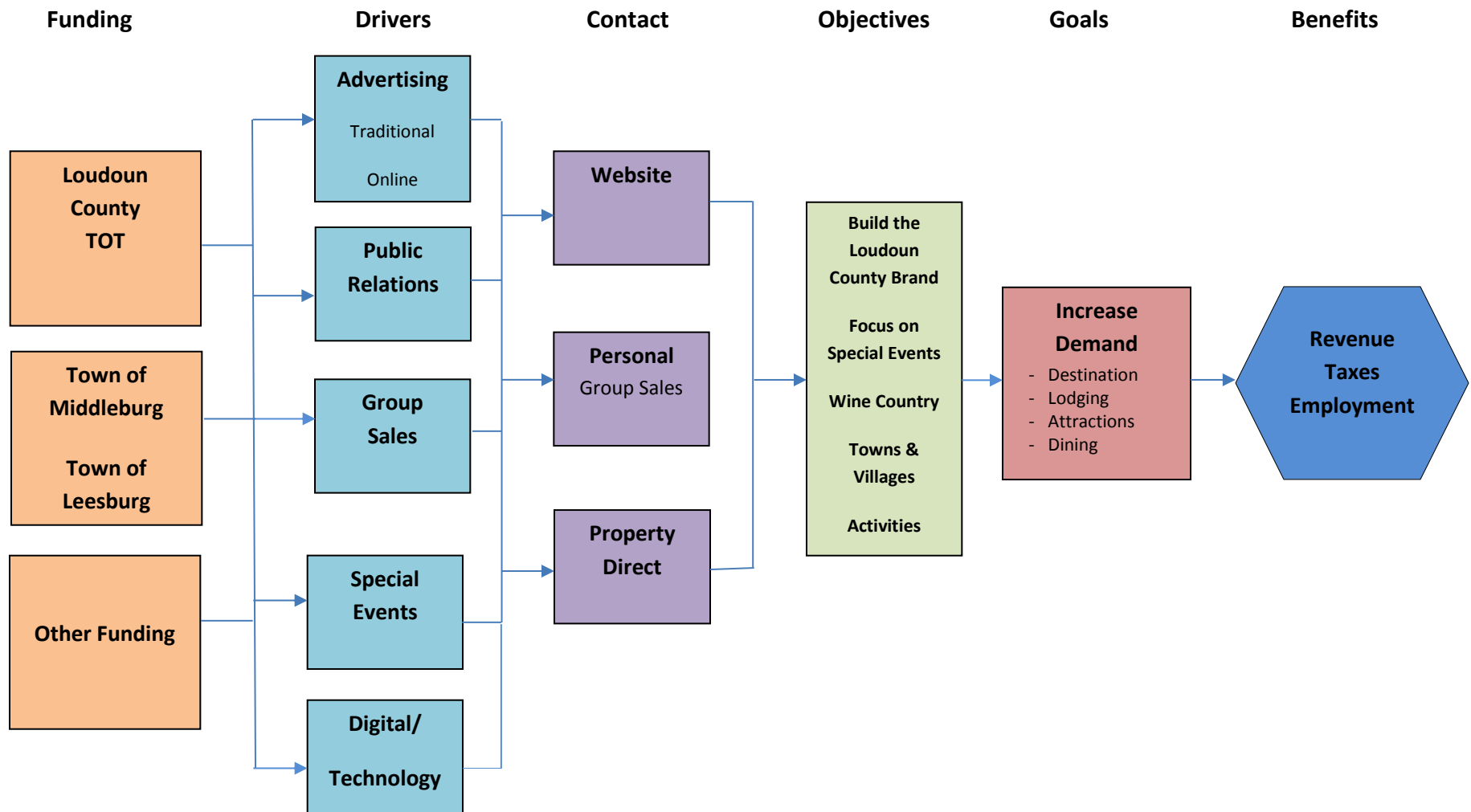


**Budget Notes:**

1. Loudoun County – Proposed based on Smith Travel Research
2. Leesburg – Will request 4100,000 for 2016 and \$2017
3. Middleburg – Preliminary funding discussion
4. Other Funding – Memberships, co-ops, grants, etc.

## Appendix

Loudoun County Destination Model





**The Strategic Marketing Group** is a national tourism, recreation hospitality consulting firm specializing in marketing, strategy and economic analysis.



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