



Brand Study

Report

October 2022



Background

- Visit Loudoun markets Loudoun County, Virginia as a preferred East Coast destination to leisure and group visitors to enhance the local economy and quality of life. It has done so under the *DC's Wine Country* brand since 2008. The brand has been used in marketing that has helped advance the organization's mission.
- As destinations develop and evolve, it is important to evaluate perceptions of the destination in the context of its competitors. Marketing exists within a competitive set and a context that changes over time. Strategic positioning concerns are at the center of any promotional plan. Understanding what appeals most to target audiences, and comparing the relative productivity of various audiences, drives the effectiveness of campaigns and increases the return on investment.

Research Objectives

- This research is designed to address the following informational objectives:
 - Assess the effectiveness of its current brand in existing markets and among leisure, meetings and group travelers
 - Measure awareness of “DC’s Wine Country” and strength of the association of the tagline with Loudoun County; compare to competitor brand associations
 - Gauge how well the current brand communicates brand attributes, creates differentiation and motivates intended actions
 - Evaluate whether Loudoun County has outgrown the link to Washington, DC – is it a helpful geographic anchor or does it mask the destination’s uniqueness?
 - Is Loudoun County’s product still well represented by the “wine country” moniker or is there benefit to redefining the brand mark/tagline?
 - Determine the overall image of Loudoun County from the perspective of current and potential visitors.

Methodology

- SMARInsights conducted an online survey from June 8 to June 17, 2022.
- We surveyed in the markets shown here and the data was weighted by population. Respondents were screened to create a sample of travelers responsible for travel decisions within the age range of 21 to 80.
- A comparative set of national wine regions was selected. These destinations are not necessarily competitors in the sense that they are part of a consideration set competing for the same travelers.
- In this study this comparative set is used to understand the extent to which Loudoun County shares characteristics with destinations that are known primarily for wine-related experiences.

Markets	Sample
DC/Baltimore/ Hagerstown (not Loudoun County)	202
New York City	209
Philadelphia	202
Pittsburgh	200
Richmond and Charlottesville	200
TOTAL	1,013

Insights

Nearly one-third of travelers in key markets are familiar with Loudoun County. This is not far behind Napa/Sonoma.

- Familiarity with Loudoun County is highest in nearby markets. More than half of travelers in Washington, DC and the Richmond/Charlottesville are familiar with what Loudoun County has to offer. Familiarity is less developed in the more distant drive markets of New York City, Philadelphia, and Pittsburgh.
- Charlottesville is Loudoun County's closest competitor. These two Virginia wine regions have similar levels of familiarity in DC, and Charlottesville has higher familiarity in other markets.

Loudoun County's visitation is trending.

- Visitation to Loudoun County within the past three years, from key markets, is similar to Charlottesville and the Finger Lakes and well above Napa/Sonoma, Columbia Valley and Willamette Valley.

Loudoun County has high familiarity as a leisure destination in the Washington, DC area and in the Richmond and Charlottesville markets.

- A majority of consumers in core markets are familiar with what Loudoun County offers for leisure travel.
- One-in-five travelers in the New York City DMA are familiar with Loudoun County.

Insights

Travelers who are familiar with Loudoun County give the destination high ratings for its scenery, wineries, parks and outdoor recreation.

- In fact, Loudoun County ratings on these important attributes generally lead the comparative set of wine regions.
- The most motivating brand position for Loudoun County will emphasize *vibrancy, sophistication, liveliness, modernity, charm, romance and youthfulness*.

The tagline DC's Wine Country is appealing for potential visitors.

- In the markets most familiar with Loudoun County, a majority agree that the tagline is a fitting moniker – and there is very little *disagreement*.

Wineries motivated 30% of trips from key markets.

- Wine visitors engaged in local dining, shopping, breweries, historic sites and other activities at a higher rate that visitors who were motivated by other activities. And, they stayed a half day longer.

Insights

Loudoun County's current brand position associates the destination with key travel motivators.

- Marketing Loudoun County as DC's Wine Country communicates the complex and differentiating product that offers both sophisticated developed amenities and a rural experiences. It helps to identify the destination's geographic location.

A plurality of travelers in each market associates the tagline "DC's Wine Country" with Loudoun County.

- Overall, 41% matched the tagline with Loudoun County.
- The association is strongest in the DC, Richmond and Charlottesville areas.

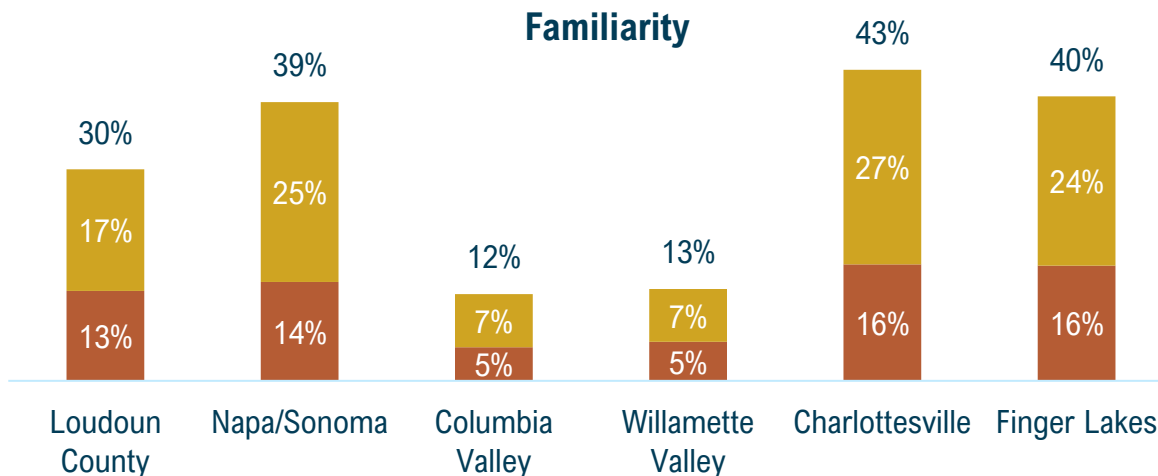


Comparative Set Overview

Familiarity

Nearly one-third of travelers in key markets area are familiar with what Loudoun County has to offer as a destination for a leisure trip. This is not far behind Napa/Sonoma.

- Charlottesville and the Finger Lakes have the highest levels of familiarity in the study area, but Loudoun County has a similar level of travelers who are “very familiar.”
- The Columbia and Willamette Valleys are not well known in these target markets.



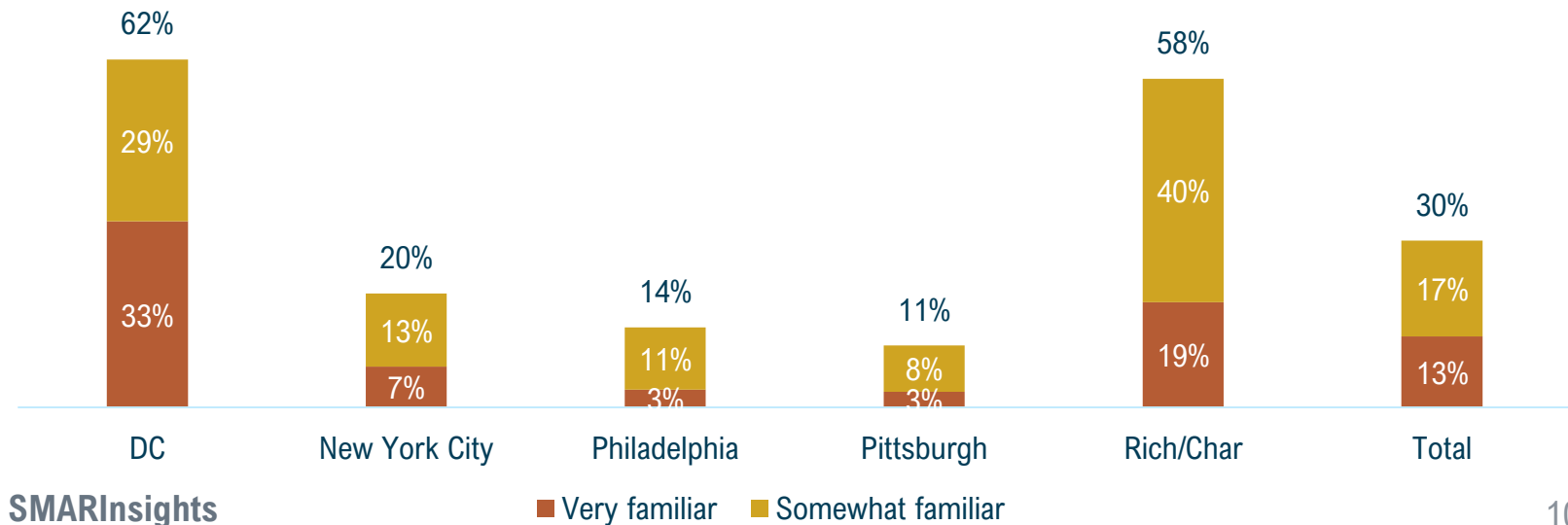
Markets
DC/Baltimore/ Hagerstown (not Loudoun County)
Richmond/ Charlottesville
Philadelphia
Pittsburgh
New York City

Loudoun County Familiarity by Market

Loudoun County has high familiarity as a leisure destination in the Washington, DC area and in the Richmond and Charlottesville markets.

- A majority of consumers in core markets are familiar with what Loudoun County offers for leisure travel.
- One-in-five travelers in the New York City DMA are familiar with Loudoun County.
- Pittsburgh and Philadelphia currently have low levels of familiarity. But, these markets are within a reasonable driving distance and could be developed.

Loudoun County Familiarity by Market

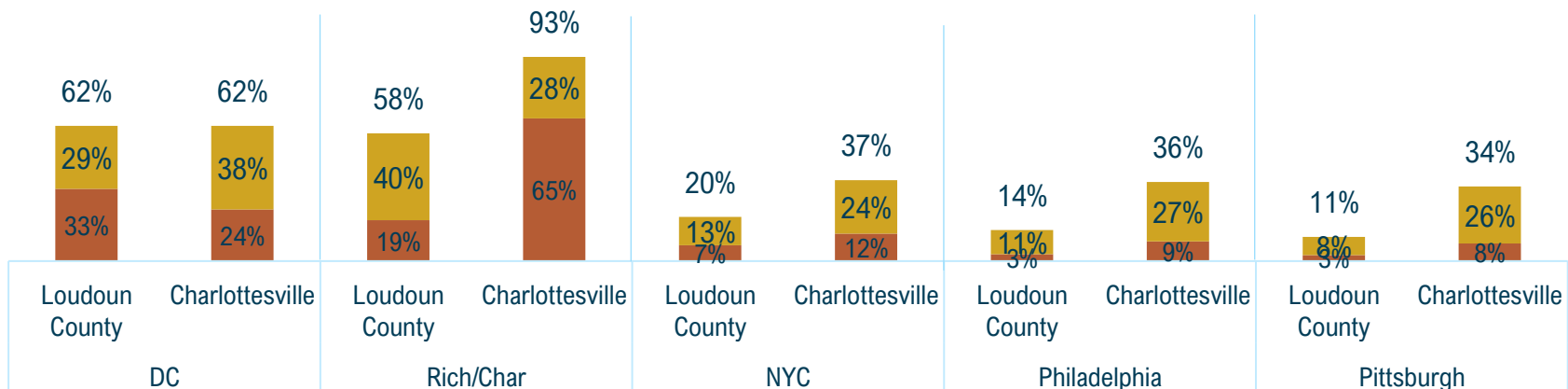


Loudoun County and Charlottesville Familiarity by Market

Familiarity with Charlottesville is equal to Loudoun County in DC, and it is higher in all other markets.

Charlottesville is arguably Loudoun County's most direct competitor. These destinations are the hometown wine regions of core markets.

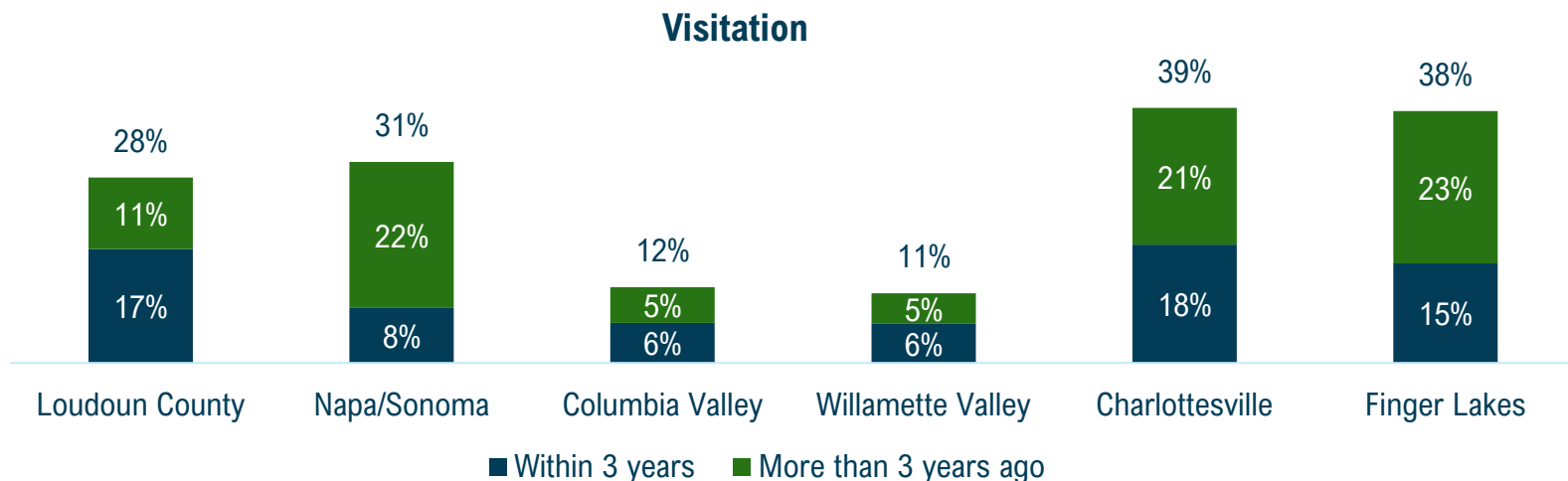
Familiarity by Market
Loudoun County vs. Charlottesville



Visitation

Overall, more than one-fourth of travelers in the study markets have visited Loudoun County.

- Charlottesville and the Finger Lakes have higher past visitation. However, a majority of that visitation happened more than three years ago.
- Loudoun County's visitation is trending. Recent visitation is similar to Charlottesville and the Finger Lakes and well above more distant wine destinations.



Visitation by Market

Loudoun County visitation leads the comparative set in nearby core markets.

- Nearby markets are contributing most of Loudoun County's visitation from this group of markets. Distant drive markets of Philadelphia, Pittsburg and New York City are visiting Napa, Charlottesville and the Finger Lakes. This represents an opportunity for Loudoun County to build familiarization and visitation in these markets.

Visitation by Market

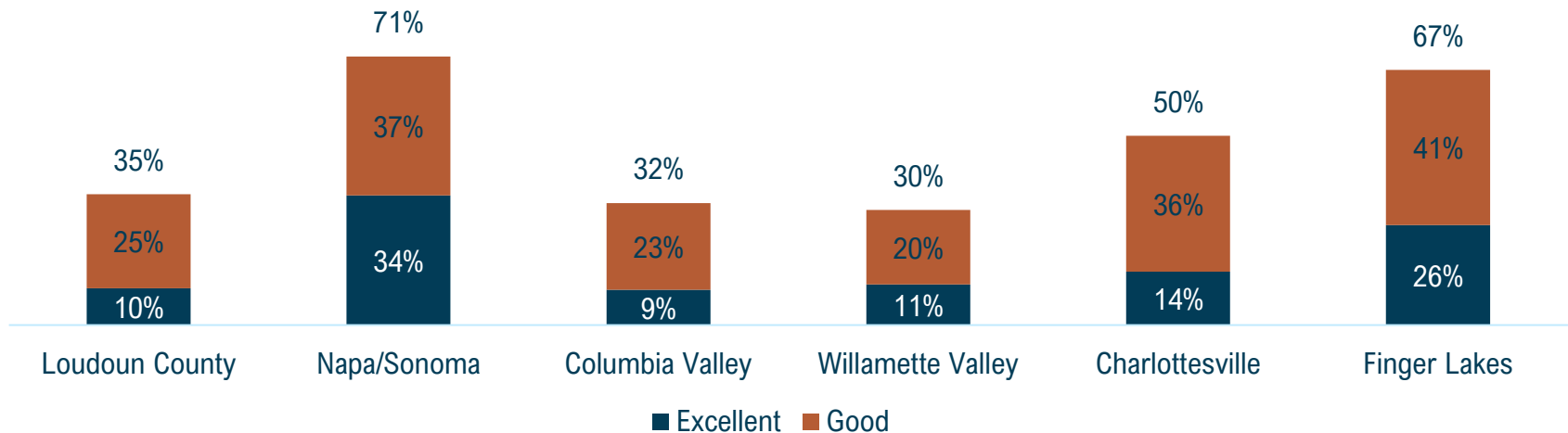


Destination Ratings

As Loudoun County builds awareness of its high-quality destination assets, visitation will follow, and overall ratings will improve.

- Loudoun County has a diverse and appealing destination product. As we will see later in this report, the destination's ratings on key tourism motivators is strong.
- Current ratings, shown here among all travelers in key markets, is a function of familiarity. The next slide demonstrates that ratings are highest in markets that are most familiar with what Loudoun County offers.

Destination Ratings

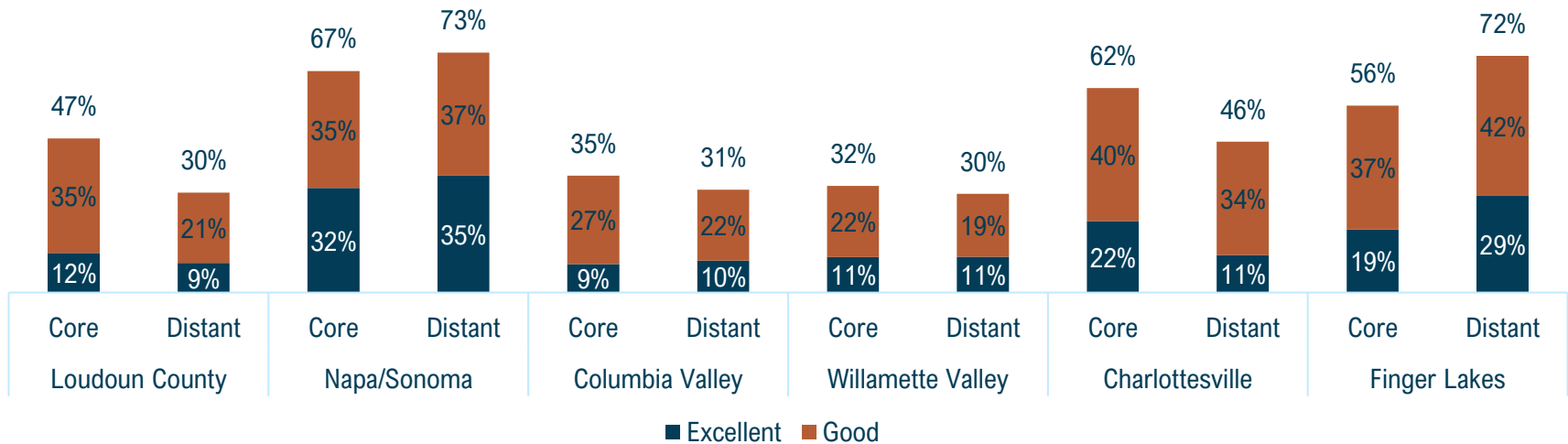


Destination Ratings

Travelers in core markets give Loudoun County higher ratings as a place to visit.

- This is largely a function of familiarity. But even in the Washington, DC market Loudoun County lags behind Napa, Charlottesville and the Finger Lakes.
- In the more distant drive markets of Philadelphia, Pittsburgh and New York, Loudoun County receives ratings similar to the West Coast wine regions of the Columbia and Willamette Valleys.

Destination Ratings by Market

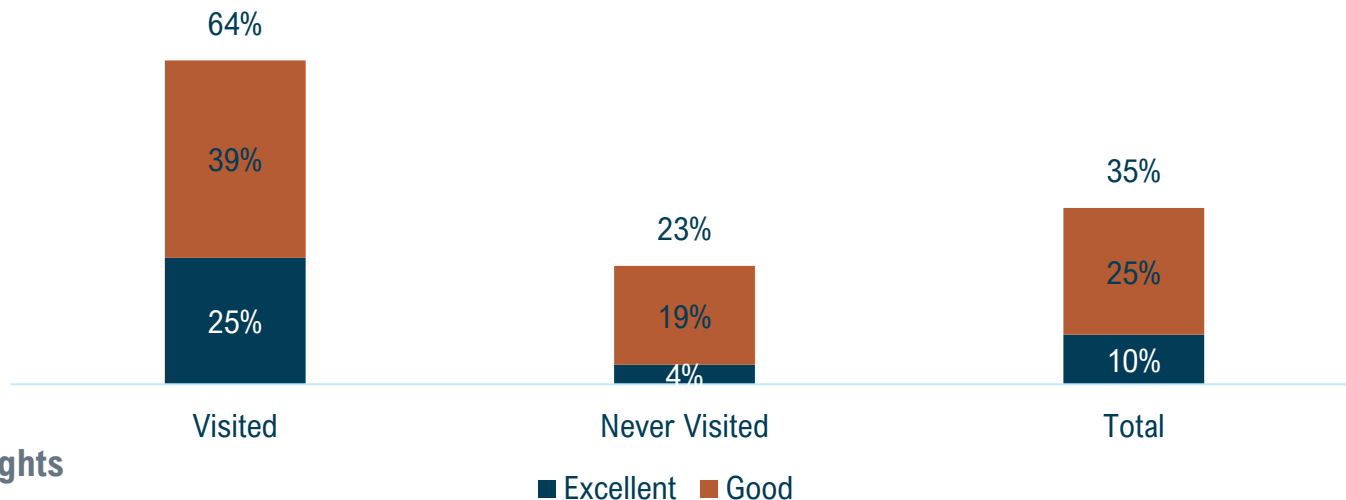


Destination Ratings

Loudoun County receives higher ratings from past visitors.

- Two-thirds of past visitors give Loudoun County positive ratings and one-in-four say the destination is “excellent”
- Loudoun County offers a high-quality visitor experience. This can be overshadowed by casual levels of familiarity among consumers who have formed an impression of Loudoun County. These consumers can be converted through advertising that shows them something surprising and emphasizes motivating attributes.

Destination Ratings by Visitation

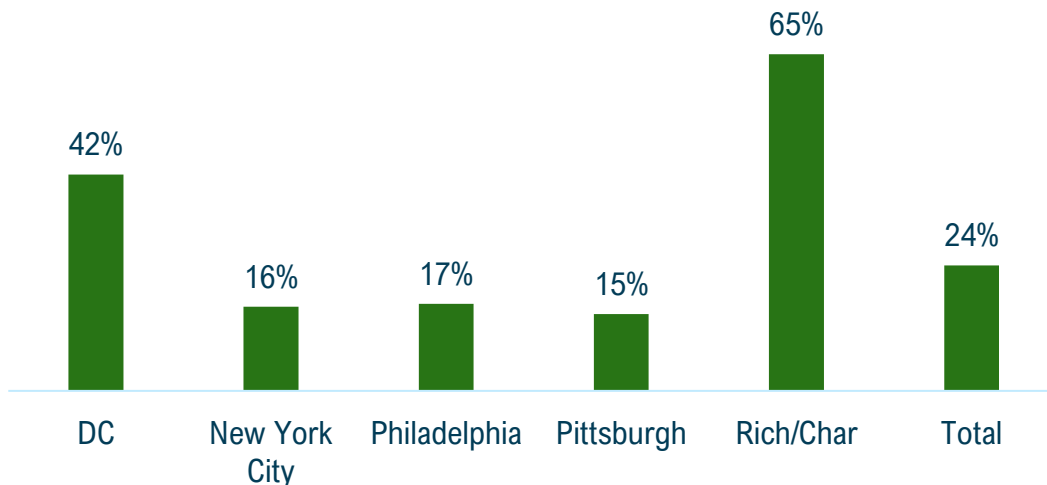


Virginia Wine Visitation

Overall, one-quarter of travelers in the study markets have visited a Virginia winery.

- Winery visitors are more likely to be married, have children in the household, educated, high income and Caucasian.

Visited a Virginia Winery



	Non-Visitor	Visitor
Married	55%	63%
LGBTQ	4%	7%
Income \$100K+	36%	44%
Post-graduate degree	22%	33%
African-American	11%	7%
Asian	11%	7%
American Indian	0%	2%
Caucasian	78%	85%
Children in HH	25%	37%



Comparative Image

Competitive Attribute Ratings

Travelers familiar with each destination rated their level of agreement that Loudoun County and the comparative set offer the experiences shown here. They used a 5-point scale with 5 equal to “strongly agree.” A mean score of 4 or higher indicates excellent destination performance.

Loudoun County performs well for the attributes that are at the center of its brand including beautiful scenery, wineries, parks/trails, outdoor recreation and local dining. It shares top-ranking attributes with other wine regions, legitimizing its position within the wine region comparative set.

Loudoun County’s craft beverage scene is rated higher than the competition.

	Loudoun	Napa	Columbia Valley	Willamette Valley	Charlottesville	Finger Lakes
Beautiful scenery	4.12	4.44	4.12	3.80	4.20	4.15
Wineries	4.07	4.66	3.91	3.68	3.83	3.70
Parks and trails	4.04	3.67	4.27	4.05	3.91	3.86
Outdoor recreation	4.02	3.86	4.28	4.01	3.87	3.84
Great local dining	4.01	4.18	4.01	3.75	3.95	3.38
Farm markets/dining	3.99	3.92	4.02	4.02	3.82	3.58
Breweries	3.93	3.60	3.49	3.73	3.80	3.52
Historic sites	3.91	3.13	3.80	3.67	4.16	3.26
Agritourism	3.89	3.86	3.98	3.70	3.67	3.48
Many places to shop	3.88	3.80	3.83	3.73	3.86	3.37
Cideries/distilleries	3.87	3.64	3.68	3.63	3.69	3.37
Quaint downtown	3.85	3.52	3.82	3.61	3.95	3.35
Equestrian activities	3.81	3.31	3.41	3.57	3.44	3.19
Unique festivals	3.79	3.94	3.84	3.63	3.73	3.33
Live music	3.71	3.78	3.54	3.61	3.60	3.29
Museums/galleries	3.61	3.25	3.33	3.49	3.57	3.13
Family attractions	3.60	3.01	3.18	3.47	3.38	3.14
Nightlife	3.59	3.65	3.55	3.71	3.53	2.92

Competitive Image Rating

Familiar travelers also rated their agreement with a list of descriptions that describe the personality of the destinations.

Loudoun County's strongest rated characteristic is being family-friendly. It also ranks high as a welcoming, charming, active destination, and its acclaimed rating is second to Napa.

Next, we will look at the attributes that can motivate travel and should be the focus of brand strategies.

	Loudoun County	Napa	Columbia Valley	Willamette Valley	Charlottesville	Finger Lakes
family-friendly	4.05	3.44	3.84	3.56	3.83	4.00
welcoming	3.98	3.96	3.80	3.65	3.72	4.03
historic	3.96	3.38	3.67	3.36	4.04	3.54
charming	3.93	4.00	3.79	3.57	3.78	3.85
casual	3.90	3.66	3.77	3.73	3.70	3.81
active	3.88	3.75	3.72	3.68	3.62	3.77
vibrant	3.78	3.86	3.53	3.40	3.54	3.50
lively	3.76	3.80	3.62	3.43	3.47	3.38
modern	3.73	3.74	3.48	3.52	3.33	3.23
sophisticated	3.68	3.93	3.49	3.48	3.41	3.25
romantic	3.64	3.94	3.56	3.35	3.36	3.65
youthful	3.61	3.37	3.43	3.42	3.42	3.24
acclaimed	3.61	4.14	3.47	3.35	3.47	3.52
stunning	3.59	3.90	3.62	3.58	3.36	3.81
eclectic	3.54	3.53	3.47	3.28	3.32	3.30
old-fashioned	3.52	3.04	3.30	3.26	3.61	3.23

Drivers

A simple correlation analysis reveals that the emotional drivers of a motivating position for Loudoun County are *vibrancy, sophistication, liveliness, modern, charming, romantic and youthful*. Specific types of attractions that can drive this desirable position include *great local dining, unique festivals and beautiful scenery*.

These emotional appeals and tangible assets provide a framework for communicating Loudoun County's comprehensive collection of leisure travel product. Of course, all image attributes have a positive correlation with overall rating and uniqueness. But the ones mentioned above are the strongest.

Wineries have a positive correlation but does not rank among the strongest drivers. This exercise suggests that positioning Loudoun County as wine country should be done within the context of the strongest drivers of visitation. Loudoun County has a legitimate claim as a wine destination which differentiates it for destination selection.

	Loudoun County Destination Rating
Vibrant	0.53
Sophisticated	0.53
Lively	0.53
Modern	0.51
Charming	0.51
Romantic	0.51
Great local dining	0.51
Youthful	0.50
Stunning	0.49
Eclectic	0.49
Acclaimed	0.49
Active	0.49
Unique festivals and events	0.48
Welcoming	0.48
Many places to shop	0.47
Historic sites	0.47
Beautiful scenery	0.46
Historic	0.45
Outdoor recreation	0.45
Family-friendly	0.45
Microbreweries and craft breweries	0.45
Museums and art galleries	0.44
Cideries/distilleries	0.44
Parks and trails	0.43
Wineries	0.43
Live music	0.43
Agritourism	0.43
Family attractions	0.43
Nightlife and entertainment options	0.42
Quaint downtown	0.42
Farm markets/dining	0.41
Casual	0.39
Equestrian activities	0.38
Old-fashioned	0.26

Strongest

Average

Below Average



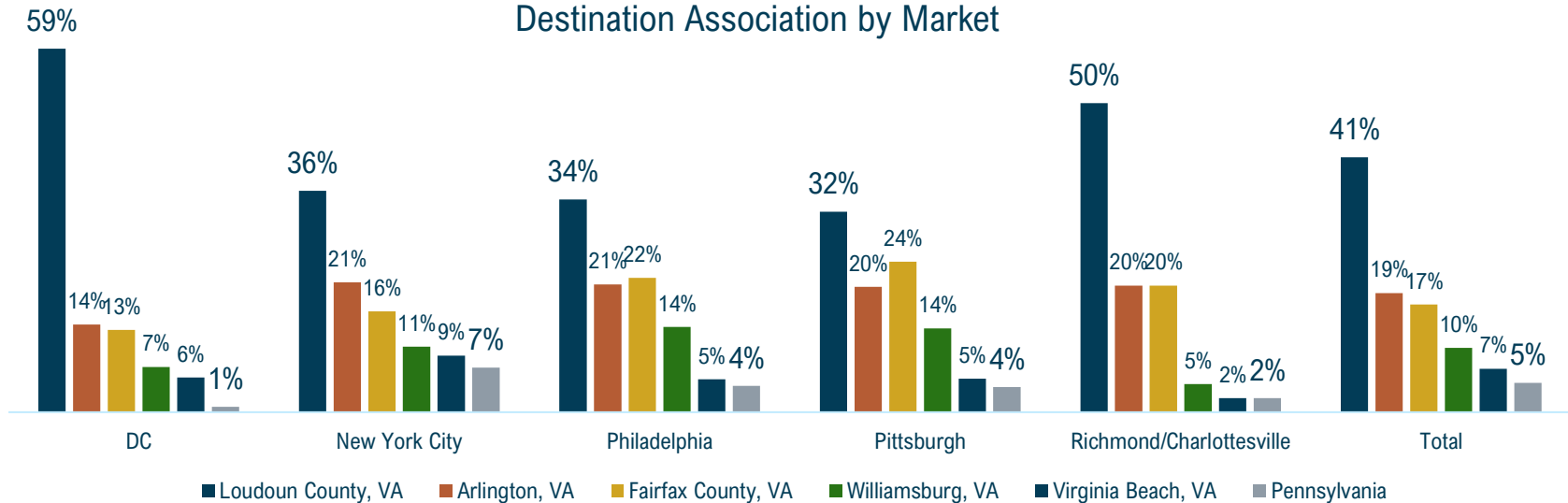
Tagline Evaluation

Tagline

A plurality of travelers in each market associates the tagline “DC’s Wine Country” with Loudoun County.

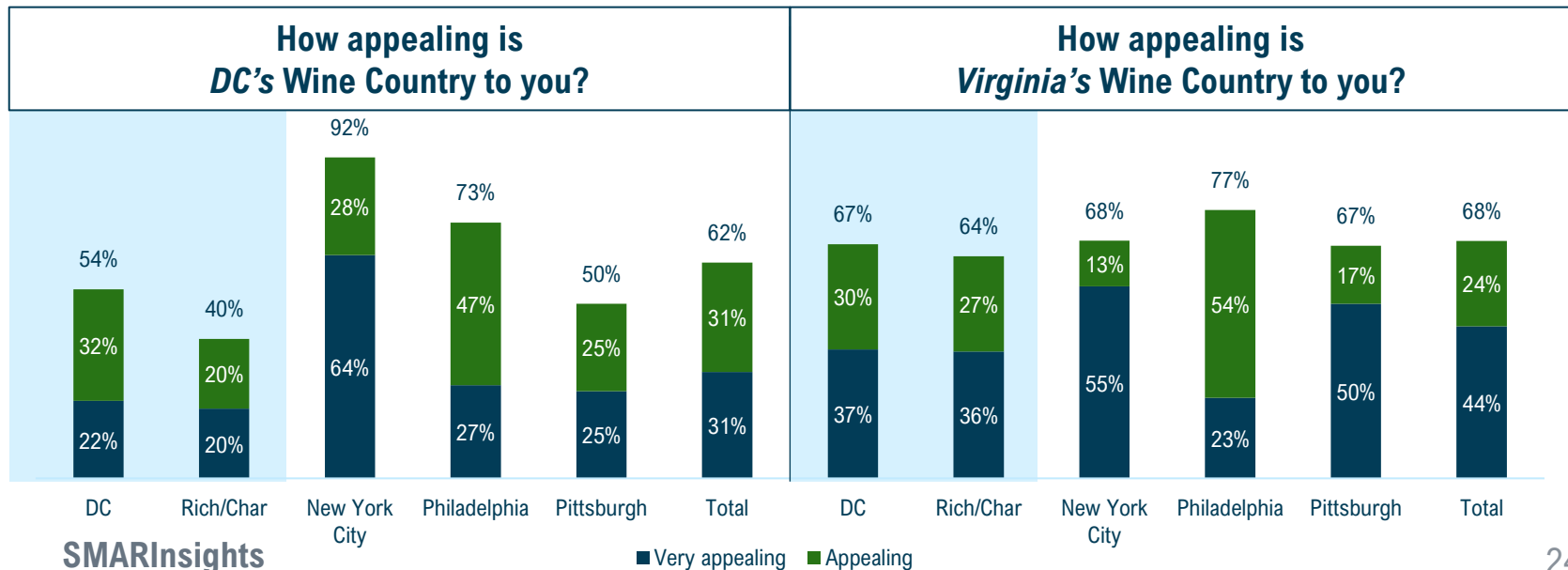
- Overall, 41% matched the tagline with Loudoun County.
- The association is strongest in the DC, Richmond and Charlottesville areas.

DC's Wine Country
Destination Association by Market



Appeal of Taglines

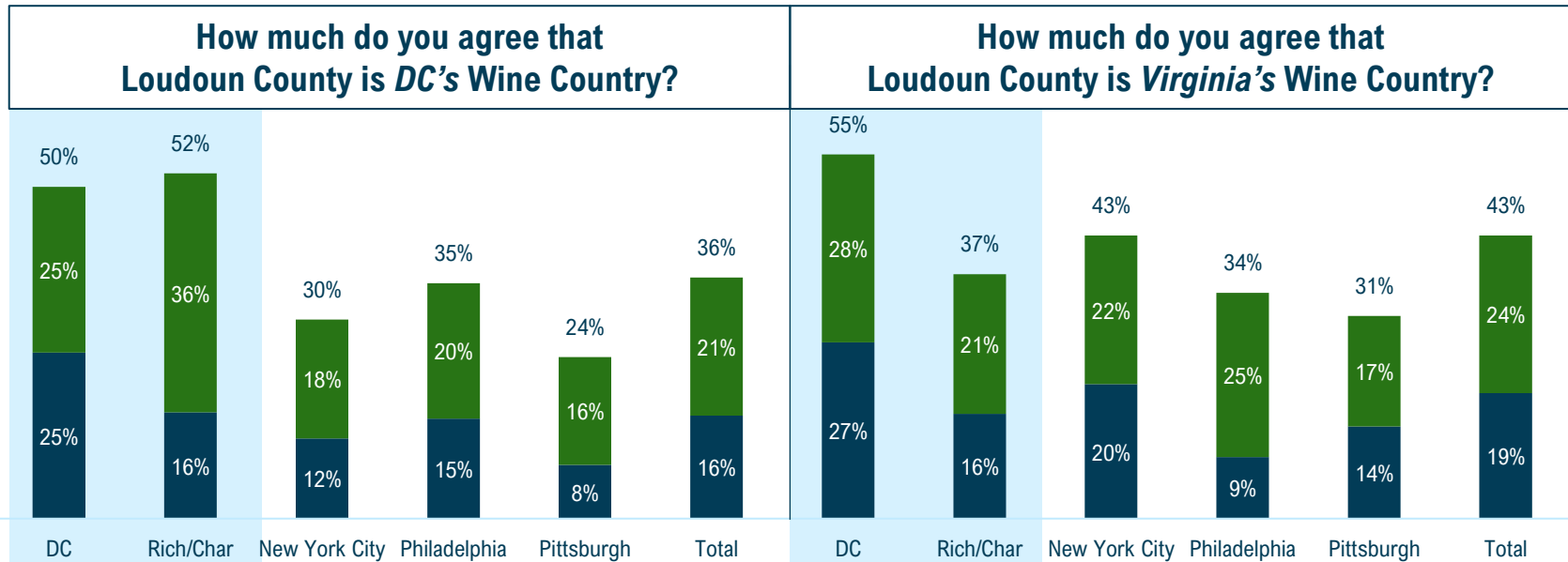
Visit Loudoun is interested in understanding whether the tagline DC's Wine Country is appealing or if an alternate tagline should be considered. An alternate tagline, Virginia's Wine Country was evaluated for comparison. The Virginia version of the tagline carries practical considerations including the presence of another wine region in Virginia. However, the Virginia tagline lacks the functionality of geographically locating Loudoun County for less familiar consumers.



DC vs VA Wine Country

Among travelers familiar with Loudoun County, there is currently slightly more agreement overall that Loudoun County is Virginia's Wine Country vs. DC's Wine Country.

But the moniker DC's Wine Country is more credible in the important markets of Richmond and Charlottesville and there is very little *disagreement* in any market that Loudoun County is DC's Wine Country.

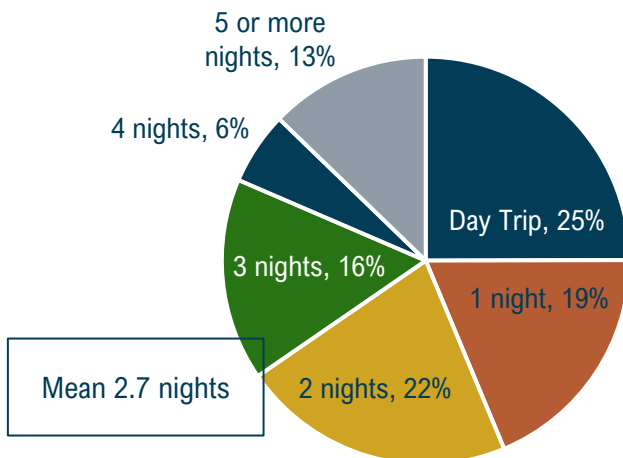




Loudoun County Wine Visitors

Trips

- Survey participants who had visited Loudoun County were asked about a recent trip. This research is not representative of all trips to Loudoun County and should not be used as a visitor profile.
- The data provides insights about the role of wine tourism as an activity and a motivator of trips from the markets in the study.
- Of these trips, 25% were for daytrips. The trips averaged 2.7 nights in duration. The majority were for leisure or vacation.



		Mean Nights
Business	12%	3.83
Leisure/vacation	69%	2.62
Visited friends and family	35%	2.53
Sports	5%	*14.56
Wedding or other special event	11%	2.99

* Small sample

Wine Visitors Activities

Wineries motivated 30% of trips.

- Overall, 41% of visitors went to a winery during their trip. Of these trips, 73% were motivated by the winery experience, for a net of 30% of trips motivated by the winery experience
- Wineries were the top trip motivator, followed by dining at a local restaurant, breweries, and shopping.

Wine visitors engaged in more activities than those who did not visit a winery.

- Visitors who were motivated by wine stayed an average 2.95 nights compared to 2.45 nights for those who were not motivated by wine.

	Visitors who did not experience a winery	Visitors who's trip was motivated by winery
Dined at local restaurant	45%	69%
Shopped	37%	44%
Went to a local brewery	15%	35%
Visited historical sites	24%	34%
Visited a farm or orchard	17%	30%
Visited a park	21%	28%
Spent time on a trail	23%	23%
Visited a museum	7%	21%
Attended an event or festival	11%	14%
Went to a concert	6%	10%
Horseback riding	3%	9%
Went kayaking, canoeing, or rafting	6%	6%
Spa	2%	3%
Golfed	3%	1%

Wine Visitors Demographics

Loudoun County wine visitors have high levels of income and education.

- 89% are college educated and 85% report annual household income above \$75,000.
- They are less likely to have children in the household than visitors who did not visit a winery.

	Visitors who did not experience a winery	Visitors who's trip was motivated by winery
Married	60%	62%
Kids	47%	37%
College graduate+	65%	89%
African-American/Black	11%	6%
Asian	11%	8%
American Indian	0%	2%
Caucasian/White	80%	81%
LGBTQ	0%	4%
Under \$50,000	28%	2%
\$50,000 - \$75,000	11%	15%
\$75,000 - \$100,000	6%	27%
\$100,000+	50%	56%

